



## Deliverable D1.3

# Patterns in Movie Production, Distribution and Consumption



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## **ABBREVIATIONS**

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

CoE Council of Europe

DVD Digital Video Disc / Digital Versatile Disc

EAO European Audiovisual Observatory

EC European Community

EC12 European Community's 12 member states

ECN Europa Cinemas Network

EU European Union

EU27/EU28 European Union, number of member states

FEI Filmed entertainment industry

GB Great Britain

GBO gross box office

HFR High frame rate

ROW Rest of the world

SVOD Subscription Video-on-Demand

UK United Kingdom

USA United States of America

VAF Vlaams Audiovisueel Fonds (Belgium)

VCR Video Cassette Recorder

VHS Video Home System

VOD Video-On-Demand

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*“I think more than writers, the major influences on me have been European movies, and jazz and Abstract Expressionism.”*  
– Don DeLillo

# 1. Introduction: Aim, scope, context and challenges

## 1.1 Aim and scope

In 2005, renowned film scholar Thomas Elsaesser (2005: 13) claimed that “[a]ny book about European cinema should start with the statement that there is no such thing as European cinema, and that yes, European cinema exists, and has existed since the beginning of cinema a little more than a hundred years ago. It depends on where one places oneself, both in time and in space.” In line with his thought, the present report deals with the overarching question whether one can sensibly speak of a (united) European cinema sphere, industry, and market when looking at the production, circulation, and exhibition of European films in Europe.

On a meta-level, the report is concerned with the idea or process of Europeanization (or lack thereof) and how it has impacted European cinema in the past 30 years or so, starting its analysis roughly in the 1990s up until 2020. As such, it touches upon key topics such as European cultural unity versus diversity, cultural proximity, Hollywood dominance, transnationalism, cultural integration, and cultural exchange in general. The report deals with question such as: Is there one single integrated European film industry, or is there a plethora of industries? Were European policymakers successful in stimulating a significant trans-European film production, flow, and circulation? What about the exhibition, the reception or the audience success of these cross-national European films compared to national and non-European productions? Can we still talk about a Hollywood dominance in the film flow and exhibition in cinemas?

**Overall aim.** In order to answer these questions, this report aims at highlighting a series of structural trends in the recent history of European cinema. Using datasets from key film market-related institutions like the *European Audiovisual Observatory*,<sup>1</sup> *Media Salles*<sup>2</sup> and the *International Union of Cinemas*,<sup>3</sup> this report presents a broad, pan-European perspective, complementing research at the level of national cinemas. Over the past few decades, these

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<sup>1</sup> See [www.obs.coe.int/](http://www.obs.coe.int/).

<sup>2</sup> See [www.mediasalles.it](http://www.mediasalles.it).

<sup>3</sup> See [www.unic-cinemas.org](http://www.unic-cinemas.org).

and other institutions produced a wide flood of reports, topical and more general reports, and a multitude of datasets on different aspects of the European film market.

This flow of information, together with the growth of film policy measures since the late 1980s, underlines the symbolic importance of cinema as a significant part of European cultural heritage, as well as it is recognized as a vital part of the continent's cultural and creative industry. It might seem contradictory, but this overwhelming amount of information on the state of European cinema might cause problems for researchers, policymakers, and other stakeholders who wish to have a broader, more longitudinal overview.

This exploratory report is the result of five months of desk research, literature study, and interviews with representatives of these institutions (see Methodological notes). One observation that came out of this work and inspired the authors of this report is that, surprisingly so, almost no research has been done so far that really tries to look for longitudinal trends over the most recent three or four decades of European cinema—at least not in terms of structural pan-European trends.<sup>4</sup> Whereas market reports often have a limited time frame, most scholarly work on recent European cinema often uses a national perspective or tends to underrate structural market trends. The general aim of this report, therefore, is nothing more than just attempting to bring together fact-based findings on a selection of inquiries that deal with trends in cinema admissions and exhibition structures, the evolution of European co-productions versus fully national productions, or the increasing or decreasing popularity of Hollywood films in Europe.

**Time.** The multitude of historical data on European cinema brings forward many questions, firstly, issues on the temporal and spatial confines of this report. Where to start and end? In terms of time, there are several reasons why most of the analyses in this report start in the 1990s. One pragmatic reason is that most of the datasets on which our analyses are based go back to that period. *Media Salles*, for instance, which is best known for its statistics on film exhibition in Europe, was launched in 1991/92 with the support of the European Union's MEDIA program and of the Italian government (Media Salles, 1994; 2011). Probably the most important and powerful source on the issue is the *European Audiovisual Observatory* (hereafter EAO). The EAO was also set up in 1992 and it is linked to the *Council of Europe* in

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<sup>4</sup> Among the few exceptions, we refer to *Revolutionary Road?* by Sophie De Vinck (2011), who in her doctoral dissertation integrated datasets from 1990 to 2008.

Strasbourg. The EAO is a key institution for collecting and analyzing data about the audiovisual industry in Europe, including detailed information on cinema, television, radio, video, and so on. Next to yearbooks (e.g., EAO, 2019a), Focus world reports (e.g., EAO, 2021) or thematic publications (e.g., EAO, 2019b), the EAO also created and released its LUMIERE database in 2000, which compiles data from European film productions dating back to 1996.<sup>5</sup>

Although there are other data on the European film market before 1996,<sup>6</sup> these are often incomplete and, therefore, often unusable or only partially useful for cross-national European comparative analyses. For some of the issues at stake in this report, though, at least where we have usable datasets, we will present longitudinal trends going back to the late 1980s (e.g., on cinema admissions).

The other end of the temporal scope of this report relates to very recent developments, which have been crucial in influencing film market trends. This is particularly true for the COVID-19 pandemic which broke out at the end of 2019 in the People's Republic of China and gradually conquered the world in the subsequent months and years. The pandemic had a tremendous impact on the film industry worldwide. Health safety measures severely hit audiovisual sectors like the film exhibition scene. Cinemas and other venues that publicly screen films were forced to close or take other security measures for their customers. The impact of the lockdown(s) and other measures resulted in dramatically low admission figures for 2020 (and the subsequent period), or a sharp decrease in advertising expenditure. Information from the *International Union of Cinemas* (hereafter UNIC), the European trade association representing cinema operators and their national associations across 38 European territories, counted that in the first half of 2020, Europe's cinema box office saw a 50% decrease (EAO, 2021: 7).

Another monumental political-economic event, which singles out 2020 as an extraordinary year for the European film market was, obviously, Brexit. The fact that the United Kingdom (hereafter UK) as one of the major European film markets quit the European Union (hereafter EU) early 2020, left those examining the EU film scene with questions on how to analyze it and how to detect major longitudinal trends. It is true that the British film industry always had a special status in the EU, for instance for having a special relationship with the USA film industry through big budget blockbuster co-productions, but few will doubt that the 'cinematic

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<sup>5</sup> See [www.lumiere.obs.coe.int](http://www.lumiere.obs.coe.int). See also Lange (2020).

<sup>6</sup> See for instance, Media Salles' survey for its 'historical archive' at the occasion of cinema's centenary, see [www.mediasalles.it/ybkcent/ybk95\\_hi.htm](http://www.mediasalles.it/ybkcent/ybk95_hi.htm).



Brexit' is in some sense or another an impoverishment of the diversity of cinema culture in the EU.

In this report we will not always include the year 2020 in most of the longitudinal analyses—hoping at least that the Brexit/COVID-19 year will have no long-term impact on the development of the European film market. In other parts, of course, the most recent data for the year 2020 will be used, precisely for analyzing the impact of the pandemic in different parts of Europe.

**Spaces, sources, Europe(s).** Another issue in delineating the scope of this report deals with the spatial contours—which is obviously related to what is meant under 'Europe'. One definition refers to the geopolitical dimension, namely Europe as a supranational entity covering a large portion of the European continent. Historically, the most important adventure of political integration of European countries is the complex growth of the *European Community* (hereafter EC) from 12 to 15 member states in the 1980s into the *European Union* (hereafter EU) in 1993. The following years, the EU grew from 15 to 25 member states. In the 2000s, Cyprus and most of the territories or nation-states of the former Communist Bloc joined the Union, with the EU counting 27 members. Finally, in 2013, the EU welcomed the 28<sup>th</sup> with Croatia joining the Union. In 2020, due to Brexit, the EU went back to 27 member states.<sup>7</sup>

This well-known history of recent political integration around the EC and the EU is important because it has a fundamental impact, not only on supranational European films, audiovisual and cultural policies, but also in terms of the institutions watching over, and surveying, the European film market. More importantly for this report, it also had a clear impact on the amount and the quality of the data on the state of the film business in and across the member states. Hence, although we will try to discuss as much as possible longitudinal trends going back to the 1990s for the EU28, this will not always be possible. Due to the lack of precise information, for most of the Eastern and Central European member states, analyses will only be provided for the period from the end of the 1990s onwards.

Another important international political organization that has an important impact on institutional surveys of the European film market, as well as on film and audiovisual policies

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<sup>7</sup> See Appendix 2 and 3 for an overview of the European Union's 12 member states (EC12), and the European Union's 27 and 28 member states (EU27/28).

(i.e., *Eurimages*, see §1.2), is the *Council of Europe* (hereafter CoE). The CoE comprises most of the countries on the European continent, with also many non-EU members among the 47 member states, including Albania, Armenia, Montenegro, Norway, the Russian Federation, Serbia, Switzerland, Ukraine, and Turkey. As the EAO in Strasbourg is supported by the CoE, the observatory looks much further than the EU28. Its spatial scope often comprises rich data on the state of the market in the EU28, added with ten or more non-EU countries, hence enabling it to provide a pan-European comparison.

A similar observation can be made for the second most important source of information, *Media Salles*, which also provides data on non-EU member states. In its yearbooks and other reports, Media Salles often makes a distinction between Western European countries (n=15, including Switzerland), as well as Eastern and Central European countries (n=13), with the latter group often comprising Russia and Turkey.<sup>8</sup>

Another source for some of the analyses of the European cinema-scape, is *Europa Cinemas*, another pan-European organization, which was also launched at the beginning of the 1990s (in 1991) with the support of the EC/EU and the French CNC (*Centre national du cinéma et de l'image animé*). In the field of film policy and film research, Europa Cinemas is often seen as the organization supporting venues with an explicit art house profile, or better: film venues that are willing to screen European movies. The idea behind the Europa Cinema network (hereafter ECN) is that, as we will show in the report, European films have great difficulties travelling across national and language borders. Through its support mechanisms for cinemas screening non-national European films, the Paris-based ECN succeeded in building (according to its website) a network of almost 1,231 cinemas and 3,083 screens in 44 countries, good for some 82 million tickets. It is interesting to notice that ECN also reaches non-EU venues, and that its map of/for European films (and European film culture) exceeds the borders of the continent, with support for cinemas in countries like in Asia, Africa, and the Americas—with examples like venues in Cuba, Morocco, Senegal, Vietnam, and even the United States of America (hereafter USA) receiving some operational and financial support from the ECN.<sup>9</sup>

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<sup>8</sup> See e.g. for the period 2013-19, Media Salles (2020).

<sup>9</sup> It should be noted that many of these Asian, African and American venues are associated with the Europa Cinemas Network under the partnership with the *Institut Français*, what is linked to France's international cultural policy.

When analyzing the total of European film industries, however, it should be taken into account that there is such a thing as the '**Big Five**' which accounts for a great deal of the film production and audiovisual expenditure in Europe. These consist of France, the UK, Italy, Spain, and Germany. In fact, in 2014, Katsarova showed that these 'Big Five' countries accounted for 80% of the film industry in Europe. As a consequence, these large industries enjoy a "*more continuous film sector growth, investment in film projects, movie theatre popularity, and foreign market interest than the rest of Europe*" (Stachowiak & Stryjakiewicz, 2018: 231-232). This by no means implies that the cultural impact of these industries is higher than **smaller European film industries**, nor does it make larger industries culturally more significant compared to smaller European markets. Despite the strong position of these 'Big Five' countries in the overall European film industry, this report will not only focus on large(r) European film industries but aims to zoom out and take into account all markets.

**Focus on cinema in the theatrical environment.** A final decision in delimiting the scope of this report refers to the notion of cinema, or what aspects of it will be looked into. This is closely related to the profound shifts in the production, distribution, exhibition, consumption, and the experience of watching films in the last three or four decades, where this is often referred to as the persistent role of film in a multiscreen environment. In the reference period of this report (1990-2020), one saw how, at least in theory, the post-theatrical life of a film (cf., a fiction film, a documentary) can be extended to releases via video/DVD/Blu-ray rental; video/DVD/Blu-ray sales; pay TV and different types of free linear television; all kinds of digital audiovisual services, subscription video-on-demand (SVOD) and streaming services platforms; and so on. In other words, although films are still watched in cinemas and other spaces with big screens (e.g., during film festivals), consumers now see them more than ever on a multitude of screens—from TV sets, tablets, laptops, smartphones, to other devices (European Commission, 2014; EAO, 2018).

This report will not deal with these post-theatrical windows or with non-theatrical screens. Concentrating on the theatrical film experience, we focus upon questions in relation to longitudinal trends in the cinema or film exhibition market (e.g., venues and screens), on theatrical admission figures and cinema box office results, on issues of the success of films linked to their origin nationality (e.g., theatrical market shares), and on issues around the (co-)production of films for theatrical releases.

Although the average film attendance rate per person in the traditional cinema venue is low (see §3), cinemagoing remains one of the Europeans' leading cultural event activities. We think that a focus on the theatrical context is still important. Not only does audience research underline the continuing appeal and audience preference for the big screen (e.g., European Commission, 2014; Veenstra et al., 2020). The cinema venue also continues to be an important start of, and catalyst for, the movies' commercial performance in their post-theatrical exploitations in subsequent windows. The cinema is the place, as media consultant and analyst Michael Gubbins argues (EYE, 2016: 30), "*where demand for film is created and is then picked up by other channels.*" Although it is true that in recent years the traditional chronology of film releases (with its first screening taking place in cinemas) came severely under pressure – especially in the wake of the COVID measures, the closure of cinemas, and the role of streaming services (e.g., Clark, 2021) – it remains unclear whether the theatrical release will continue to be part of the preferred strategy to strengthen the commercial exploitation and success of films.

This discussion, obviously, is closely related to debates on the survival and eventually the end of the cinema venue. The pessimistic position argues that the avalanche of non-theatrical film offers and viewing facilities via streaming and other services will finally break the traditional film exhibition's business model. Research in Australia, for instance, indicates that there is a slow erosion in the frequency of film-going—a gradual decline that is in contrast to increasing engagement with cinematic content in a non-theatrical environment through SVOD and other digital platforms (Weaving et al., 2019).

The more optimistic position refers to cinema's long history of confronting technological and other challenges; the recent discussion, then, is just another version of the discourse on the death of the cinema and of the theatrical film experience. The history of the cinema venue is also a history of the resilience, resistance and survival of that model—a history which at least goes back to the post-war launch of television. Other arguments in this optimistic scenario on cinema's survival refer to the cinema venue's continuing importance as a strong experiential site, one characterized by the experience of superior sound/image qualities and by a truly deep filmic experience (e.g., Gaudreault et al., 2015; Biltereyst & Meers, 2018). Other arguments pro the survival of the cinematic experience and the space of the cinema theatre relate to the social functions of going to the films (Maltby et al., 2011; Biltereyst et al., 2019). The historical cinema-going practice of going to the films with friends, family or relatives, or of the cinema to meet people and experience films together, some researchers argue (e.g., Grundström, 2018;

Mediavilla Aboulaoula et al., 2021), is still relevant for today's cinema experience—where cinema becomes a space for experiencing films in an offline environment. Or as Grundström (2018: 5) argues: “*due to the instantaneity of living in a digitally networked setting, the space of cinema theatre is used for going offline*”, and “*consequently, the popularity of cinema-going seems to be indirectly reinvented through some of the same technological changes that are challenging it.*” A final argument relates to recent research on the continuing importance of cinemas in small countries like Norway, where, as Gaustad (2019: 81) argued, the leading SVOD services like Netflix and Amazon are “*making cinemas more important*”, as they generate revenues for local films and “*therefore make the suppliers of these films more reliant on theatrical revenues.*”

## 1.2 Context and challenges

**Technocultural, business and consumer behaviour challenges.** When looking at recent trends in the European (and worldwide) film market, one cannot escape the idea that probably no other era in film history has seen so many disruptive changes and challenges. The most obvious one is the technological disruption triggered by digitization—a disruption that transformed the filmed entertainment business model, had a fundamental impact on the way films are made, distributed, exhibited and shown, as well as how it transformed how films are consumed. During the reference period of this report, the European filmed entertainment industry (hereafter FEI) was severely challenged by this amalgamation of technocultural, business and consumer behaviour changes. In the 1980s and 1990s, there was an explosion of commercial linear and other forms of TV exploitation (see Papathanassopoulos et al, 2021), along with the rapid development and dissemination of the VCR and VHS. The latter development allowed consumers to buy or rent films and watch them whenever they wanted (cf. consumer autonomy). This new market created great commercial opportunities as VHS resulted in an important additional source of revenue for the FEI. Simultaneously, however, video rental was often cheaper than a film ticket, already putting pressure on film exhibition in cinemas.

The so-called “aftermarket” of films became even more significant when DVD was introduced in 1996. This event also coincided with an important period of convergence, where previously separate markets and sectors, such as the audiovisual and telecommunications sectors, started merging (De Vinck & Pauwels, 2015). Consequently, new players emerged in the film industry during the 1990s. Think, for instance, of cable companies that were now able to offer

VOD through their services. This brings us to the late 1990s and early 2000s, when digitization started greatly impacting almost all of the key film industrial players, ranging from production to distribution and exhibition companies. On the level of production, digitization has proved to be generally positive, mostly in terms of flexibility, quality, and cost-efficiency. This allowed European players to more easily cooperate (and co-produce) with both European and non-European partners, *“thus diminishing the impact of the fragmentary nature of the European film industries”* (De Vinck & Pauwels, 2015: 107). Next, looking at the distribution phase, it appears that the digitization process could provide novel solutions to the known stalemate of the difficult circulation of non-national European films within Europe. Digitization becomes even more tangible when also considering the level of exhibition.

Meanwhile, during the digital transition, new players started arising. Yet this time, the European film industry had to deal with companies such as Netflix or Hulu which offered their own VOD streaming services, as well as huge American companies such as Amazon, Apple, and Disney which released their own streaming services. In sum, since the 1990s, due to processes of convergence, digitization, and the fragmentation of audiences, *“legacy film producers [did] not only feel the squeeze of increasing competition for revenues but also [saw] their role as facilitators of cultural expression diminishing”* (Murschetz, et al., 2018: 3). Indeed, these tendencies put pressure on the classic release window system. The combination of (1) the multiplication of windows (the markets or media (platforms) of exclusive release of films) as the result of new digital opportunities and (2) the increasingly shorter time frames between the different windows put the traditional European distribution system under considerable pressure. As a consequence, players such as Netflix have mixed up the familiar order of audiovisual media distribution and windowing strategies and have gradually made digital windows the first link in the chain (Evens & Donders, 2018).

In the 2010s, according to the EAO (2021: 51), the number of subscriptions to these SVOD services grew from 0,3 to 140,7 million in EU28 (see Appendix 1) (EAO, 2021a: 44-45). One of the questions raised in this report is whether these new technologies for delivering films to audiences heavily impacted the theatrical market. Over the last few years, the theatrical box office in EU28 remained quite stable (Figure 1), whereas other markets were characterized by major changes (e.g. implosion of the physical video retail market).

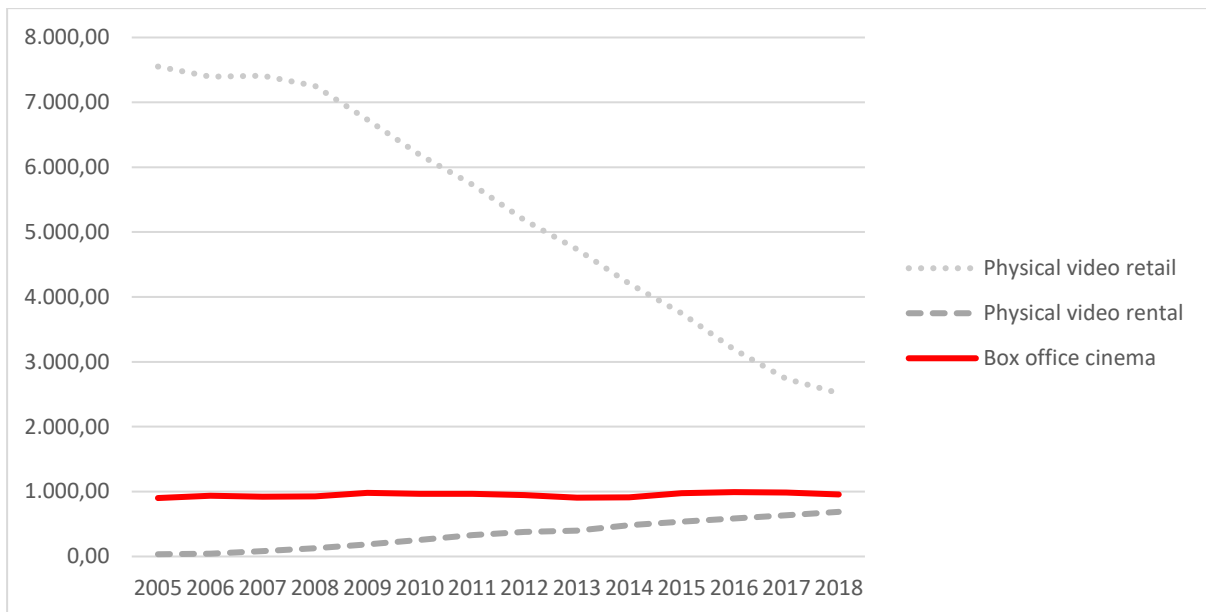


Figure 1: Physical video retail/rental turnover vs. theatrical box office for EU28, 2005-2018 (EAO, in million Euro)

In the last few years, the growth of online streaming services and in Europe most notoriously the arrival of USA streaming platform giants Netflix (in 2012), Amazon Prime (2014) and Disney+ (2019) severely disrupted the European linear television services and wider audiovisual market. The expansion of streaming services seems, at least, to have had a tremendous impact on the direct-to-consumer market of the DVD and Blu-ray. Whereas the physical rental and retail market saw a heavy decline, data from the EAO indicates that the theatrical box office remained relatively stable over the same period for the EU28 (just below one billion Euros).

Although cross-media analyses are not part of this report, it remains necessary to put the economic importance of the theatrical film market in the right perspective. One indicator here is advertising expenditures for different media in EU28, where budgets for advertising in cinemas are relatively marginal compared to the internet, outdoor advertising, television, magazines, and so on. One should, however, note that it remains difficult and problematic to use this indicator for comparing the economic weight of different forms of leisure and media, precisely because of the consumer's greater willingness to pay for the cinema experience (cf. ticket) and the relatively low importance of advertising for film exhibitors.

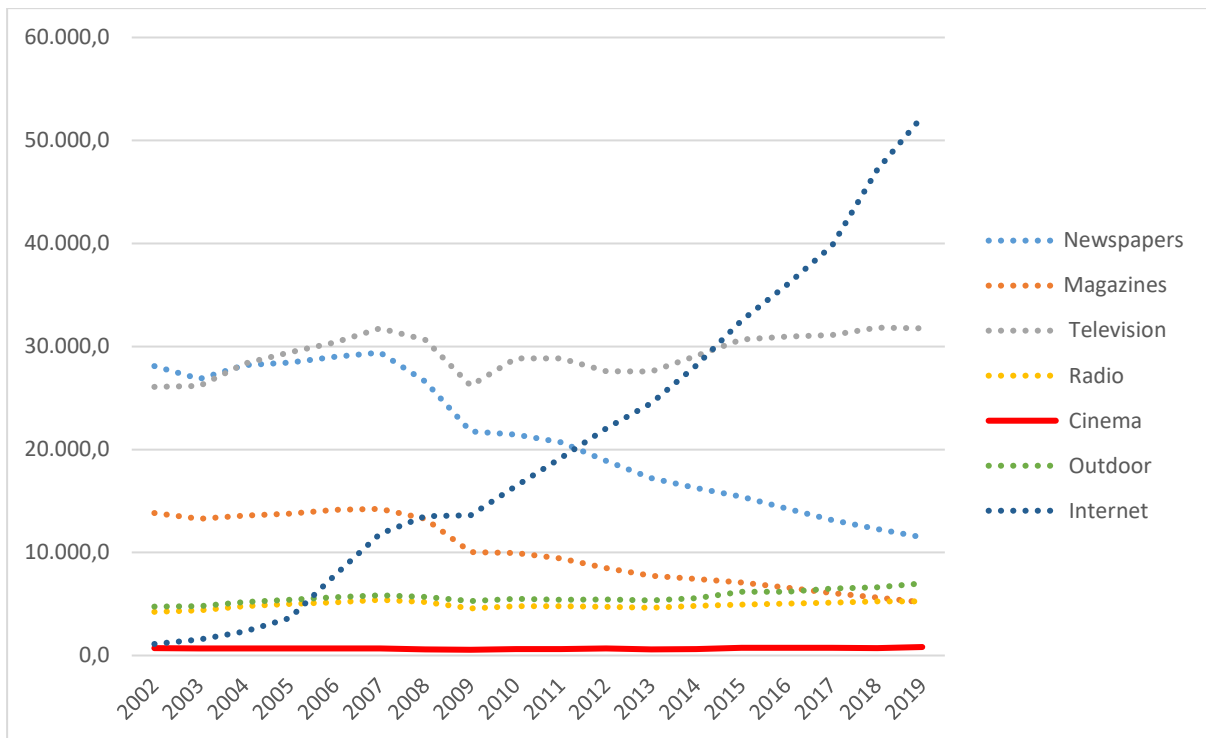


Figure 2: Advertising expenditures by media for EU28, 2002-2019 (EAO)

**Techno-experiential innovations and challenges for the film market.** During the reference period, the whole business around the theatrical film experience also underwent several changes, with one notorious trend obviously being the growth of the multiplex, or the film theatre with multiple screens within a single building, often located outside or in the outskirts of major cities (see §3). This went hand in hand with technological innovations at the level of projection and the wider cinematic experience. Among these techno-experiential innovations, one saw most notoriously in the 2000s the introduction of digital laser projection, the usage of 3D, 4K, high frame rate projection technology (HFR), heightened sound qualities, and so on. In Europe, the process of digital cinema grew rapidly in the 2010s, with more than 90% of the screen projections being digitized and many venues equipped with 3D projection facilities (see §3).

During this period, film exhibitors also boldly developed extra-filmic commercial opportunities by renting spaces for other events like gaming, conferences, and screening material other than the traditional film. Event cinema or alternative content cinema often revolves around livecasts of other cultural events like opera or theatre plays, rock concerts and festivals, one-off TV specials, religious services, and so on. Cinemas heavily invested in marketing, sales and other



commercial strategies like online reservation, new ticketing systems, and so on (see e.g., Dura, 2016).

Though digital cinema screens offer high quality projections and the development of extra-filmic events, the roll out in Europe was fraught with difficulties, especially for smaller, art house cinemas. Special policy measures were taken to help these exhibitors to make this digital turn as well, whereas in some countries like the Netherlands and France, broader policies were made to stimulate this part of the market. One notorious tendency in this direction is the recent return of city-centre art house cinemas (EYE, 2015; Dura, 2016; see further).

European geopolitical integration project	EC 1981 Greece 1986 Portugal Spain	1993 European Union  1995 Austria Finland Sweden	2004 Cyprus, Czechia, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia and Slovenia 2007 Bulgaria, Romania	2013: EU28 Croatia	2020: EU27 minus UK
Policy	EC/EU  European Council 1989 Eurimages	1989 Pilot Phase  1991 MEDIA I 1996 MEDIA II	2001 MEDIA Plus 2007 MEDIA 2007	2014-20 Creative Europe MEDIA	
Technological and market trends	VHS wars  1987 CD Video  Growth commercial TV in Europe	1996 DVD  growth VOD  1999 Pay TV models Napster, online piracy	2006 Blu Ray  digital projection 3D experience  Streaming platforms	2012 Netflix in Europe  2014 Amazon Prime in Europe  2019 Disney +	
Socio-economic trends			2001 Dot-com bubble burst  2008 global financial crisis		2020 COVID-19  2020 Brexit
	1980	1990	2000	2010	2020

Table 1: Selected challenges for the European movie market, overview

**Political-economic challenges and policies.** When interpreting longitudinal trends in the European film market, one obviously needs to take into account major economic and political events like the 2001 dot-com bubble burst, the 2008 global financial crisis and their implications on national economic conditions—issues which had a considerable impact on investments in cultural industries like the FEI. One of the major developments in the European FEI's viability is concerned with initiatives in relation to strengthening film and audiovisual policies, both on a national, regional and even city level (EAO, 2019b), as well as on a pan-European level (e.g., Biltereyst & Pauwels, 2007; De Vinck & Pauwels, 2015).

Before the 1990s, European state aid for film knew different stages: the first steps were the establishment of automatic support mechanisms (1950-1957); next were the selective support mechanisms (1958-1981); eventually there was the introduction of a more extensive support for audiovisual productions (1980s); with, finally, the search for a balanced equilibrium between economic and cultural objectives (Lange & Westcott, 2004).

In general, there are three elements that are central to the European audiovisual policy since the early 1990s: (1) striving for a unification of technical standards; (2) promoting the free movement of audiovisual material through a single market; and (3) promoting European audiovisual productions and collaboration between different European countries (Crusafon, 2015). As a concrete result, in the 1980s and 1990s, two crucial initiatives were born: first, the *MEDIA Programme* with its pilot phase being initiated in 1989 (today integrated under the Creative Europe programme) and *Eurimages* which was also launched in 1989. Whereas the former's purpose is to foster the internal and external circulation of, and European and foreign attendance to, European films, the latter (which operates under the CoE instead of the EU) mainly focuses on supporting European co-productions.

By legitimizing EU action on the cultural level, arguably, the way was paved for a more strongly united European film industry and film culture. However, one might wonder whether this actually effectuated in a growing importance of the idea of a shared heritage and common European audiovisual identity. Several authors (e.g., Pauwels, 1995; Theiler, 1999) noted that the underlying idea of Europeanization as a process that strives for the creation of one overarching, supranational European identity and state, was fully abandoned since the 1990s. In exchange, the idea of Europeanization as a process that strives for the recognition and protection of cultural diversity within the EU was put forward. Hence, cultural Europeanness was more and more understood as explicitly plural and diverse, while it was also increasingly

integrated in an economic-industrial framework. In film industrial terms, this meant that the new policy measures started focusing mainly on defending and protecting the European film industries from great foreign forces (read: Hollywood and to a lesser extent Japan). In other words, as De Vinck (2014: 333) puts it, “[t]he question became one of European culture protection rather than European culture construction.”

This is reflective of how, in the past, European national film industries have made several attempts to create an environment where European films could cross their national borders by, for instance, implementing quotas and tariffs. A well-known example is the idea of “Film Europe” that emerged in the 1920s and 1930s, which described “*the ideal of a vibrant pan-European cinema industry, making international co-productions for a massively enhanced “domestic” market and thereby [being] in a position to challenge American distributors for control of that market*” (Maltby & Higson, 1999: 2). After 1945, the underlying idea behind “Film Europe” was revived by agreeing upon novel co-production treaties. Importantly, these co-production “*agreements were designed to encourage the production of ‘quality films’ [...] [which] would enable them to compete with Hollywood and also, crucially, as a cultural policy to encourage producers to escape the conceptual and mental dominance of the American idea of cinema*” (Spicer, 2019: 57). It should be noted, though, that initiatives like “Film Europe” have never really put the market dominance of American films out of balance. As a consequence, academic, popular, but equally so policy discourses of European cinema often employ Hollywood as the big or significant ‘Other’.

Despite the abovementioned difficulties, these evolutions also provided the EU film sector with new opportunities. What is more, as Drake (2018: 87) wrote, “*market segmentation, windowing and amortisation of costs over time has historically been crucial to making most European films financially viable.*” Moreover, the EU quickly responded to these evolutions by emphasizing the idea of creating a common market where European films could freely circulate, aiming for a single (digital) European market (EC, 2010). Yet, as several experts have noted, the strategy of territoriality should be considered the spine of the financing model behind the European film industry as a whole. Establishing a single (digital) European market could, therefore, result in the downfall of the now blooming European co-production landscape – which could be disastrous for the smaller European film industries that are more dependent on co-productions (Jäckel, 2003). Indeed, these smaller nations “*by definition have very limited domestic markets for all locally produced goods and services – including culture – and so have been forced by the neo-liberal economic and political pressures of globalisation into a greater dependency on*

*external markets*” (Hjort & Petrie, 2007: 15). Apart from their dependency on co-productions and rather limited domestic markets, Raats and Lordache (2020: 4) claim that small(er) European audiovisual industries are also known for their “*limited potential for return on investment, limitations on export due to language and lack of scale, and a limited number of players.*”

When looking at the evolution of European cinema in the past decades, it is obvious that several fundamental changes and challenges have taken place: next to (1) technocultural innovations; (2) the commercial economic transformations in the production, distribution, and exhibition of film; (3) the intensified national, transnational (co-production) and cross-European policies; (4) techno-experiential innovations, or the multiscreen exploitation of films and shifts in audience’s film consuming practices and experiences; (5) the changing role of cinema in the wider film ecology; and finally (6) industrial changes, what Meir (2021: 226-7) calls “*the consolidation of a number of large-scale [European] enterprises that have in various ways vertically and horizontally integrated [...] while in several cases also expanding their operations to include multiple national markets.*”

Despite these significant evolutions in European cinema – and contrary to the many analyses on, for instance, the interwar period (1918-1939) or post-war cinema period (1945-1969) – longitudinal academic, policy, and other industry-oriented studies barely exist for the reference period of this report. The present report, therefore, tries to bring together and construct longitudinal datasets on some of the basic trends in the European film market during the past three or four decades. While it does not aspire to be exhaustive in an analytical and interpretative sense, the report explores European cinema longitudinally, pointing at remarkable trends and hopefully raising questions for further research.

## 2 Production

### 2.1 Production volume

**Increased film production.** One of the key findings on the European film market is the large and growing number of films produced yearly. Indeed, according to data provided by the EAO, more than 27,000 feature films and documentaries were produced in Europe between 1996 and 2019. Moreover, we see that in 1996, a total of 519 films were produced, whereas in 2019,

no less than 1719 films were made, resulting in a booming rise of 231% in 23 years. This increase is particularly remarkable when considering the two preceding decades, i.e., the 1980s and the larger part of the 1990s, which both marked a period of decline (De Vinck, 2011). As such, one could argue that since the end of the 1990s, the European film production sector is in a state of resurrection.

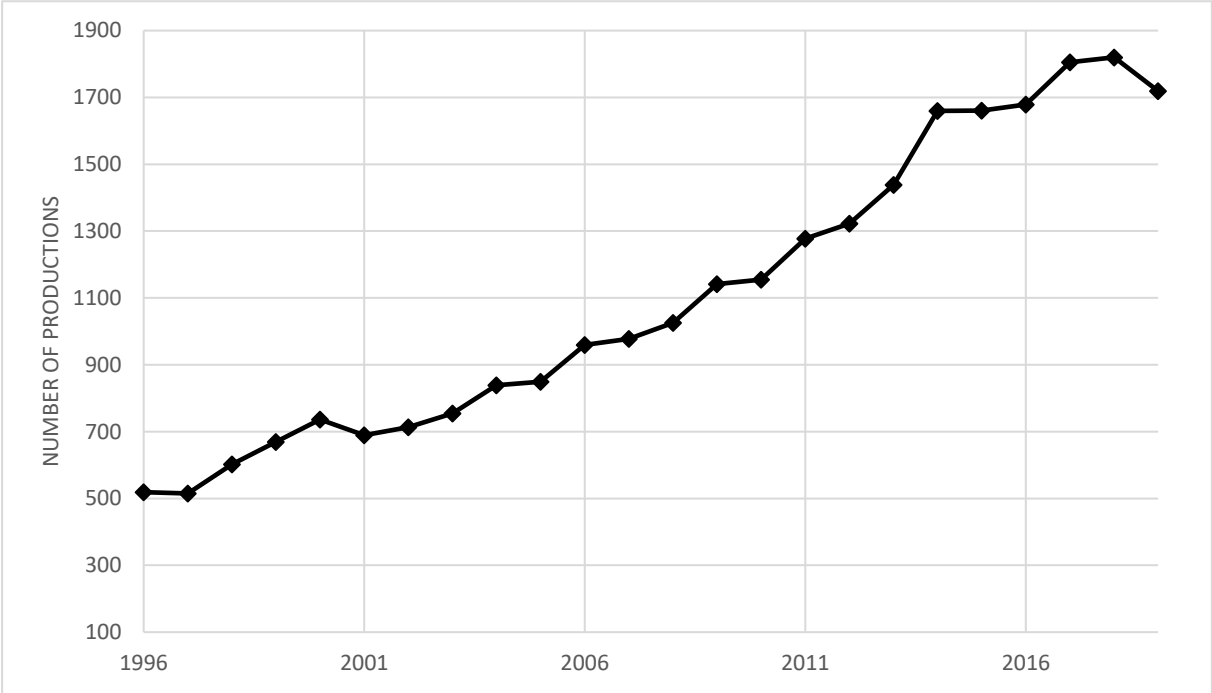


Figure 3: Total amount of produced films in EU28, 1996-2019 (EAO LUMIERE PRO)

**Documentaries vs. fiction.** On an aggregated European level, there is a statistically significant yearly rise in the number of European film productions in the period of 1996-2019. More specifically, on average, the total number of film productions rises with 1,86 film per European country. One part of the explanation for this increase in the number of films produced is the availability of new digital technologies (e.g., on the level of filming, recording, and editing), which facilitate cheaper production models. Data on European film production since 2005 (figures before that year are incomplete, see Figure 4) not surprisingly indicate that especially documentary filmmaking flourished. When comparing between documentaries on the one hand and feature films (fiction) on the other, overall, both have significantly risen in the past two decades. Feature fiction films have clearly increased over this period, where the number in 2005 (n=725) grew to no less than 1119 fiction films in 2019. The production of European documentaries, however, has surged even more, as the number of made documentaries has risen by 423%.

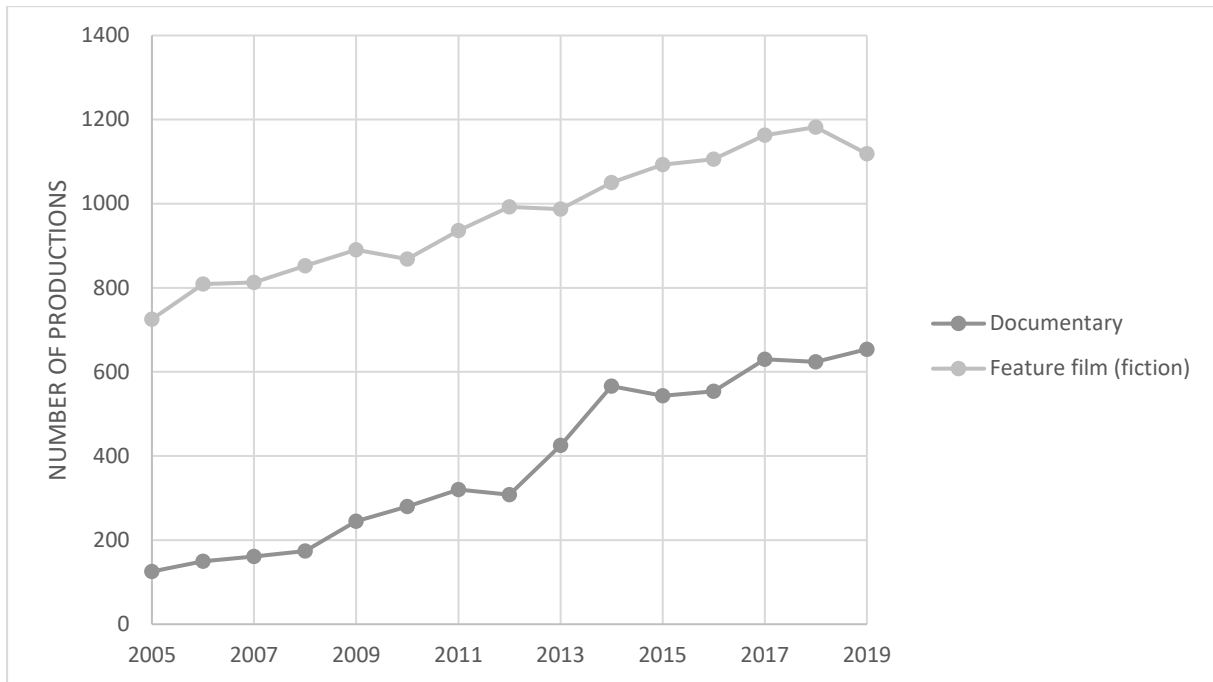


Figure 4: Total amount of produced films in Europe (EU28) according to genre, 2005-2019 (EAO LUMIERE PRO)

**Europe and other major world production centres.** Before focusing on intra-European differences, it is important to zoom-out and to compare the European film production scene with other major world film production centres like the USA, India, China, and Japan. Historically, the USA film production levels, when compared to the European film production sector, have always been more consistent, with a relatively steady climb from the 1970s onwards (De Vinck, 2011). Though one should always beware when blindly comparing film production data between the USA and EU28, at first sight, it is quite striking when juxtaposing the number of films released since mid the 1990s in the USA with those in the European industries.

**European growth vs. stable USA production.** Indeed, in 1996 a total of 735 (MPAA, 2001) feature fiction films were released in the USA (versus 496 in Europe), while in 2019, 814 (MPAA, 2020)<sup>10</sup> fiction films were produced in the USA (compared to 1119 in Europe). Again, the turn of the millennium marked an important moment as in the years 2000 and 2001, the tides started changing and from then on (except for the period of 2005-7), more films were produced in Europe than in the USA. This is why we see a steady climb in the number of

<sup>10</sup> Excluding documentaries, student films, films created for straight-to-DVD or Blu-ray release.

European film productions in the graph above, whereas the amount of American feature films climbs only a little, with ups (from 2005 on) and downs (starting after 1999). The great increase in production volume (not only in Europe, as shown in Figure 5) is often linked with the above-mentioned broader technological evolution that we have experienced in the past two to three decades. Indeed, according to Waldfoegel (2017) and Benner and Waldfoegel (2020), the digitalization process has resulted in two strategies: on the one hand, film industries started focusing more on big-budget blockbuster films while on the other hand, a new lower budget strategy was chosen. Indeed, digitization “*unleashed a large number of very low budget movies that attract little commercial attention (i.e., the ‘long tail’)*” (Waldfoegel, 2020: 1). Put differently, new technologies have made it a lot easier to produce films with smaller budgets. Other reasons are (apart from the more obvious economic growth of most European countries in the past decades) the many pan-European, national, and regional governmental investments in the European film industries (cf. §1) as well as the introduction of several tax-shelter legislations and tax rebates, of which the latter are seen as vital to the competitiveness of film production in Europe (Oxford Economics, 2010; EAO, 2019b).

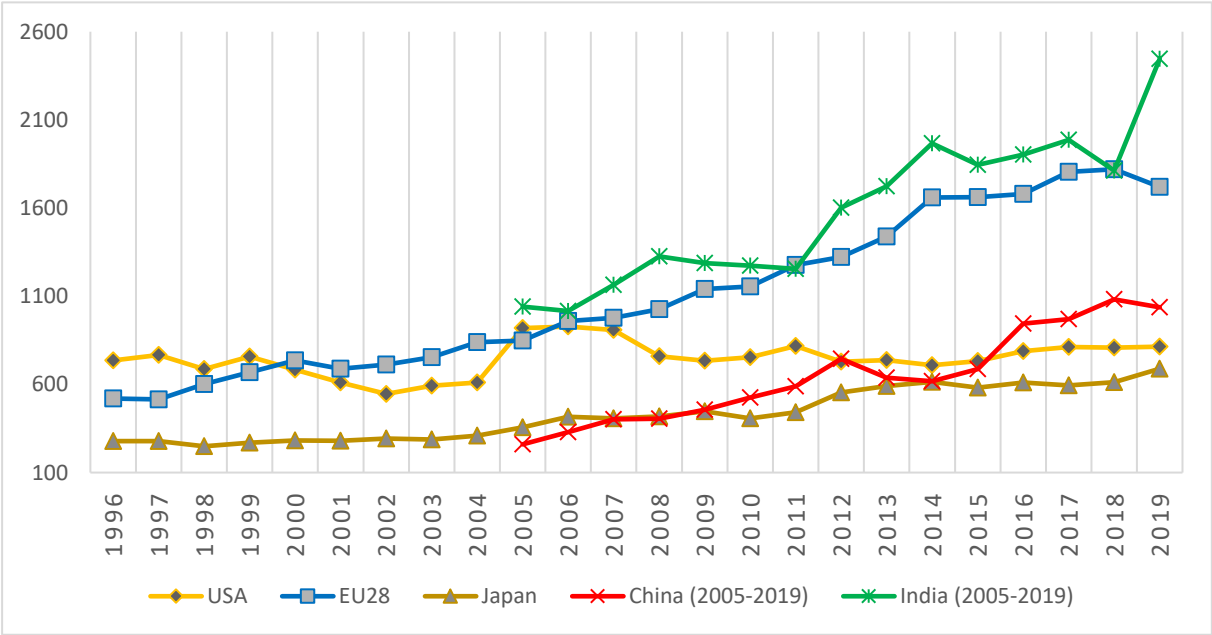


Figure 5: Total amount of released feature films in the USA, Japan, China, and India versus Europe (EU28), 1996-2019 (MPAA for the USA; EAO LUMIERE PRO for EU28; and EAO for Japan, China, and India)

Finally, obviously, there is the major gap in production budgets between the USA and European film industry (see e.g., EAO, 2021: 42-3), as well as the gaps within Europe. As will

be shown below, most of the European film industries still prefer to produce national films with smaller budgets that are aimed at national audiences over co-productions with bigger budgets between several European industries.

As mentioned, the high production volume of the European film sector can be conceived as a strength. One historical observation here is that quite similar tendencies occurred in the 1970s and early 1980s, when after the fall and the dismantling of the classical Hollywood system, the USA film industry decreased its volume and started to develop its blockbuster strategy. In the same period, European film industries saw their production volumes rise, partially due to state support mechanisms. These different strategies, however, did not hinder Hollywood from re-concentrating its attention on promoting and distributing its production more efficiently-leading to a continued dominance of European screens (see §4).

**Fully national vs. majority co-produced.** One might wonder whether Europe's high production levels are mainly the result of either a cooperating sector or rather of different independent European national industries. To investigate the latter, we consider the difference between 100% fully national films on the one hand and co-productions on the other. One key finding here is that the biggest deal of the European film industry's output is derived from its fully national productions: 384 in 1996 and 1300 in 2019. Moreover, in absolute numbers, the increase of fully national productions is significantly bigger when compared to the majority co-productions. This imbalance in terms of co-productions versus national productions has not changed in the three decades under analysis. Indeed, when looking at the share of European fully national film productions (see Figure 6), apart from the drops in 2002, 2004, 2005, and 2016, in the past two decades, the share stayed above 74%.



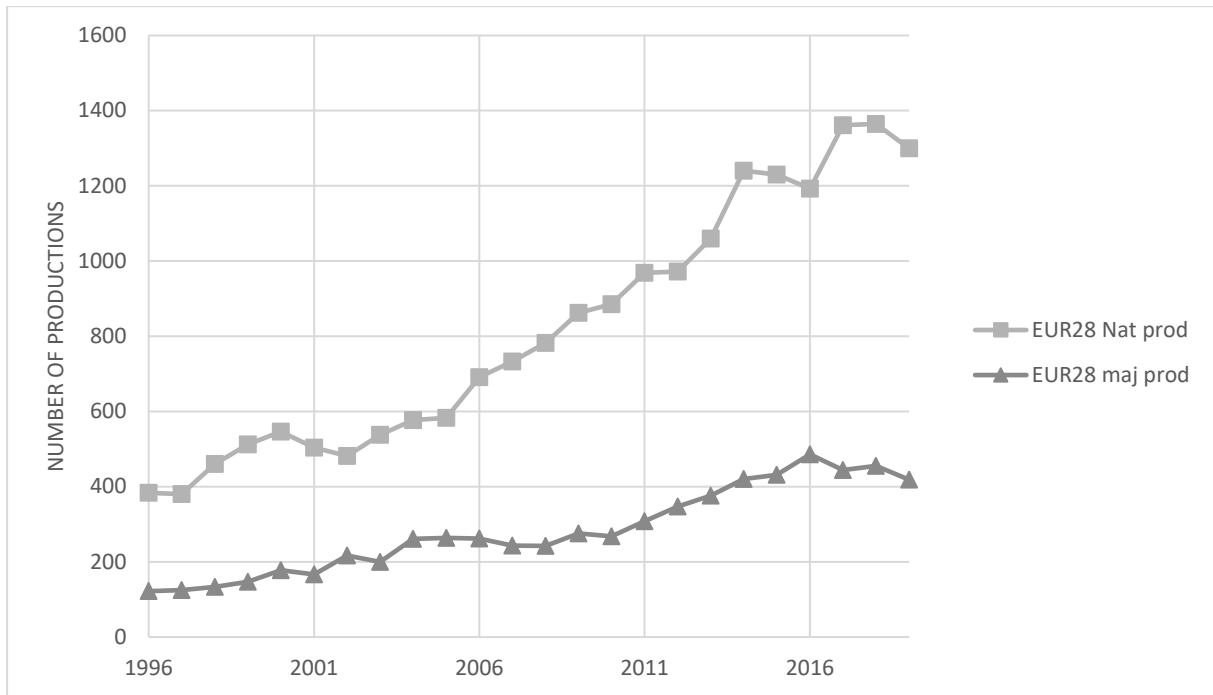


Figure 6: Total number of fully national European films versus European majority co-productions for EU28, 1996-2019 (EAO LUMIERE PRO)



Figure 7: Share of EU28 fully national productions, 1996-2019 (EAO LUMIERE PRO)

Furthermore, more recently (from 2016 on) it appears that European film industries started focusing more on fully national productions (which rose with 9%), whereas European co-productions have dropped with 14%. This stands in great contrast with the first period in our time frame, where between 1996 and 2004, the yearly number of European co-productions doubled. This can be explained by the several (aforementioned) policy measures that were undertaken during this period, coupled with the overall Europositivism that was also reflected in its cultural policies (Mitric, 2018). Whereas between 2004 and 2008, the number of European co-productions stalled, in between 2008 and 2016, the co-production volume grew rapidly again (101%). This jump in European co-productions can only be partially explained by the policy triggers for co-productions. Parc (2020) asserts that there are several other explanations for Europe's leading role in co-producing films such as the close regional integration among some European countries (e.g., Benelux, the Nordic countries, etc.) and the idea that co-productions may be seen as a useful tool to enhance the competitiveness of the European film industry vis-à-vis Hollywood. This reminds of what Hjort dubbed "milieu-building transnationalism" pointing to "*a model of transnational collaboration aimed at jointly developing solutions to particular problems that hamper the development of thriving film milieus*" (Hjort, 2009: 19). This form of transnationalism refers to the development of a transnational model of cooperation that proposes a solution to the obstacles that European productions have to deal with. Therefore, in addition to the policy measures, one should, for instance, consider the many different tax incentives for, e.g., post-production and location shooting have been in place since the year of 2008. These tax schemes, however, require the participation of a local production company, "*which means that hitherto 'offshore productions' have become de-facto co-productions*" (Hammett-Jamart et al., 2018: 4).

**Fragmented film production industry.** Looking at the data, one could argue that despite the policy measures and tax incentive schemes that have been in place from the 1990s onwards (i.e., Eurimages) and that made an effort to increase collaboration between the different European industries, the European film industry can today still be considered as equally fragmented in terms of production as in the 1990s. Nevertheless, the steady increase in European co-productions should not be ignored, and "*[i]n a Europe of many countries, some of them rather small nations, co-production can be a way of enhancing film [...] and television budgets to compete on a global market*" (Hammett-Jamart et al, 2019: vii). Another explanation for the growing number of European co-productions has to do with the fact that "*market participants—distributors, international sellers and television channels—are spoilt for choice, and faced with ultra-competitive marketing*" (Levie, 2018). Because of the latter evolutions,

these market players want to avoid as much risk as possible by only minimally providing financial guarantees. Consequently, producers are increasingly experiencing difficulties to finance their films within their national borders, which means they almost “*have no choice but to go abroad to find sufficient funds for their project, and therefore to co-produce*” (Levie, 2018). Though the data alone cannot tell us whether policy measures or initiatives like Eurimages play a significant role in this upsurge, the extra financial injection that European industries receive when co-producing with other European countries is definitely an extra incentive for intra-European co-productions.

Aside from the latter reservation, because of its fragmented nature, European cinema is, in most cases, nationally produced and defined. Additionally, when considering the most recent period (since 2016), one could argue that the seemingly growing focus on producing fully national productions reminds us of the fact that we might actually not be living in a post-national Europe and world. Indeed, it appears true that, as Higson (2018: 317) argued, “*the nation and national cinema remain central to audience viewing habits, filmic storytelling, film business transactions, policy initiatives and scholarly discourse.*” The growing production volume of national films in Europe can also partially be explained by broader societal and political changes, such as growing nationalist discourses and cultural policies.

**The ‘Big Five’ production countries.** Now that we know that European cinema is still highly fragmented, one might wonder whether it might be, perhaps, more Polish than French or more Spanish than Dutch in terms of its output. Figure 8 shows us the evolution in the total amount of productions per European country that belongs to the top 10 biggest producing countries in the EU. The data sketch a clear picture: between 1996 and 2019, a huge gap has arisen between the five biggest European production countries on the one hand, and the other smaller film industries on the other. These five biggest countries consist of France, the UK, Italy, Spain, and Germany. Indeed, when looking at the share of the ‘Big Five’, our data shows that they account for no less than 60-70% of the total volume of European film production in our reference period. What is more, it appears that, taken together, these five markets also spend around 60-70% of the total amount of direct audiovisual expenditure in Europe (De Vinck, 2014).

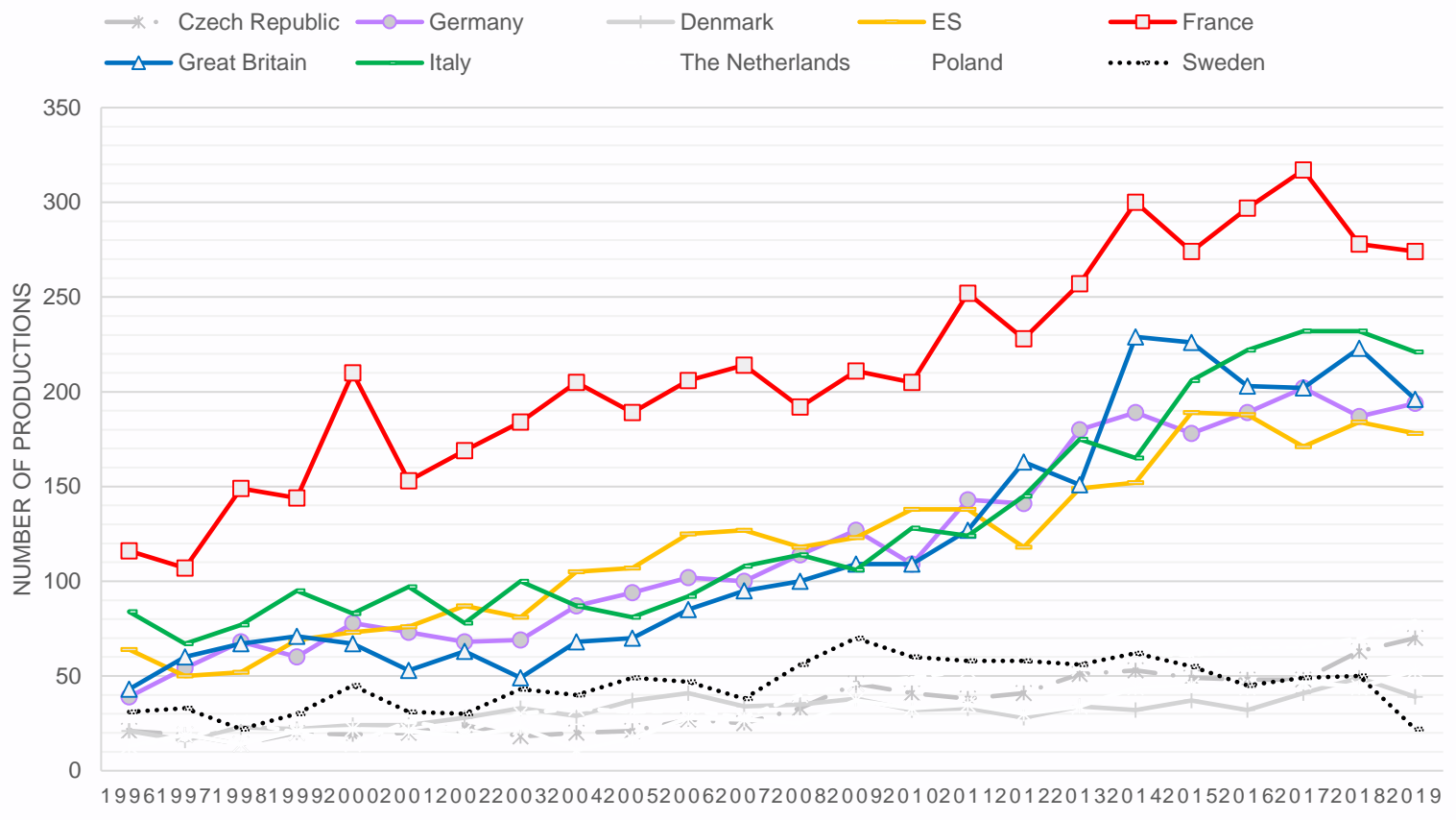
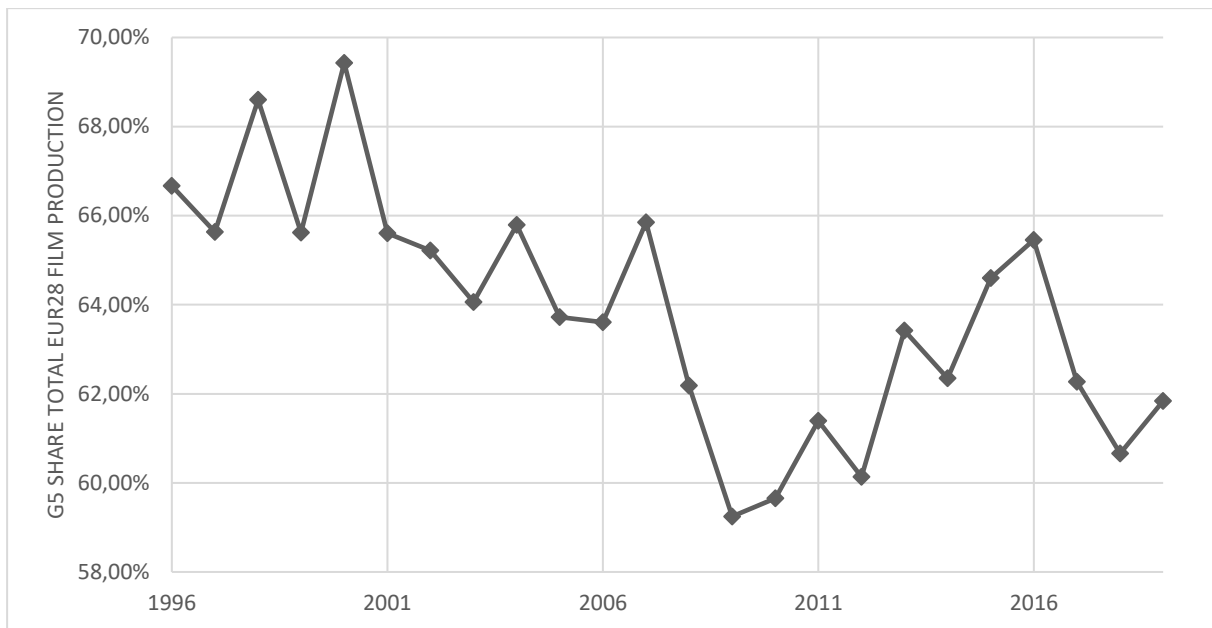


Figure 8: Amount of film productions per country that are part of the 10 biggest production countries, 1996-2019 (EAO LUMIERE PRO)

**France leading European production.** When considered separately, France takes up 19% of the total film production in Europe between 1996 and 2019 whereas Italy and the UK respectively comprise 12% and 11%. Put differently, when making statements about the output of “the” European film industry, it appears that the latter is for a great deal made up of these five largest markets. Additionally, in the period between 1996-2019, European countries with large markets (> 50 mil admissions) grew, on average, with 5,1 more films per year than European film industries with a medium-sized market (10-50 mil admissions)—this while the rise of produced films in European countries with small markets (< 10 mil admissions) is even smaller.



*Figure 9: Share of the production of the 'Big Five' countries on total European film production, 1996-2019 (EAO LUMIERE PRO)*

However, the share of 60-70% has definitely evolved through time as the above chart shows. Whereas in the 1990s, the share of large European film industries amounted to 66%-69%, the proportion started dropping in the first decade of the 2000s. Especially at the end of the second half of the first decade, where we see the share dropping to 59% in 2009. Since then, however, the percentage has steadily climbed to 65% in 2016, after which it started dropping again. Overall, we can contend that there is a statistically significant decline in the share of the 'Big Five' European film markets of the total of European film productions between 1996 and 2019. This signifies that in the past two decades, though the difference in terms of film production between the five biggest film markets and the others remains huge, the gap has slowly but steadily closed, which means that the European film industry is becoming less concentrated in terms of its production.

**The 'Big Five' as co-producers.** In a next step, we looked at whether the five biggest contributors to the European film industry (in terms of output) produce more or less co-productions as well as fully national productions when compared to the other, smaller European markets. The following chart, therefore, shows the 'Big Five' share of the amount of European national productions on the one hand and majority co-productions on the other.

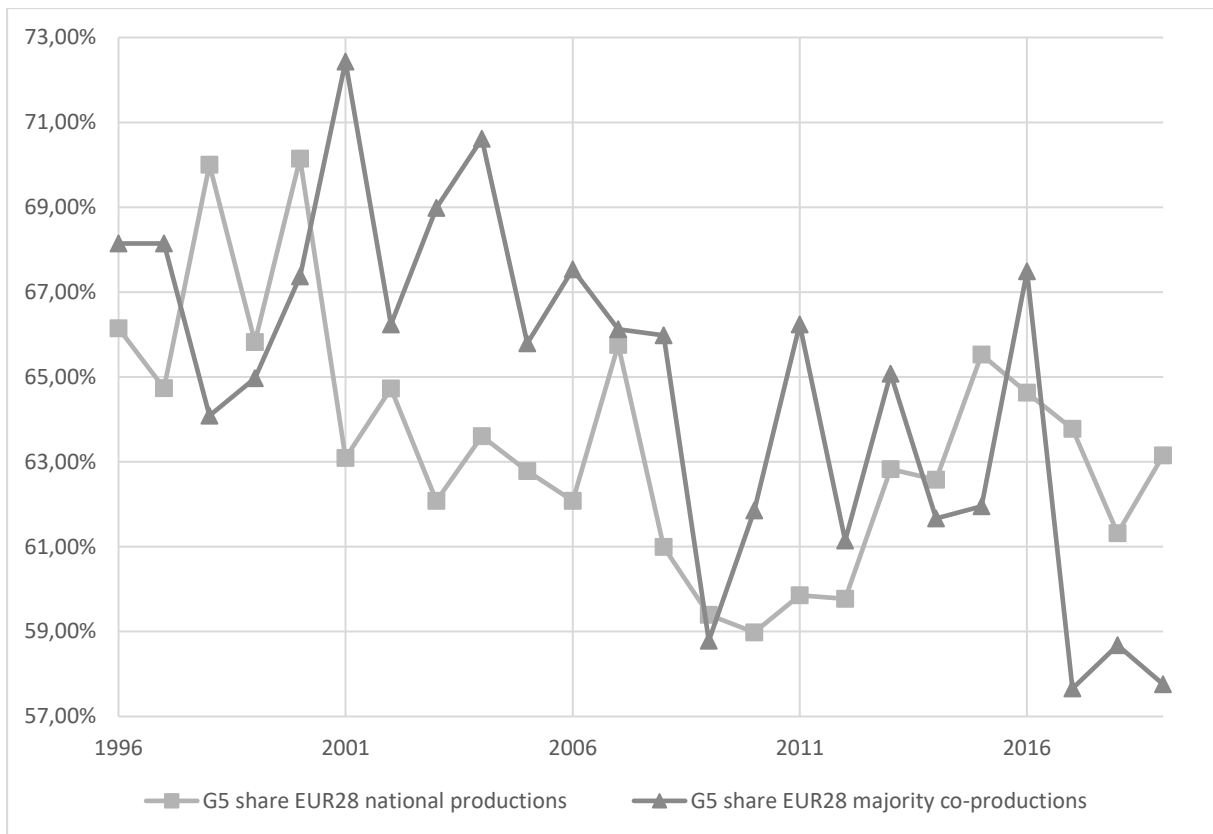


Figure 10: Share of 'Big Five' countries of co-production and national EUR28 movie production, 1996-2019 (EAO LUMIERE PRO)

On average, the five biggest film industries produce slightly more majority co-productions than national productions when compared to small to medium film markets. In other words, the biggest European film markets do not seem to fully focus on national films. They even seem to act as magnets or attraction poles for co-productions with other countries. This means that, though they are less dependent on extra financial injections due to their more financially stable infrastructure and industry, the 'Big Five' European film industries still prefer to co-produce. This never really changed until the year 2017 when the share suddenly drops from 67.49% to 57.66%. This sudden decrease becomes even more remarkable knowing that this drop did not happen in most other European countries that are not part of the 'Big Five'. The above chart also shows that there is a statistically significant downwards trend between 1996 and 2019, meaning that throughout the years, the share of the major film production industries in both co-productions and national productions has declined. On the whole, however, the 'Big Five' markets, at least compared to small to medium film markets, are more active in producing both co-productions as well as fully national films.

## 2.2 Co-producing within and beyond Europe

**Increased number of co-production countries.** To get a better picture of how fragmented the European film industry really is, and whether European film markets distinguish between European co-productions and non-European co-productions, we also looked at the data that tell us who co-produces with whom. Let us, however, first pay attention to the question whether European film industries have opted to co-produce more or rather less with other film industries in the past two decades. Indeed, the following chart shows the evolution of the total amount of (both European and non-European) countries with which European film industries have cooperated in the past two decades. What we see is that the total number of co-production partners of European markets has increased drastically between 1996 and 2019, meaning that in the past 20 years or so, European film markets have progressively looked outside of their national borders for partners to produce films. Indeed, at the start of this period, the European film industries co-produced films with a total of 218 countries, while at the end, this number rose to 671 – an increase of about 208%.

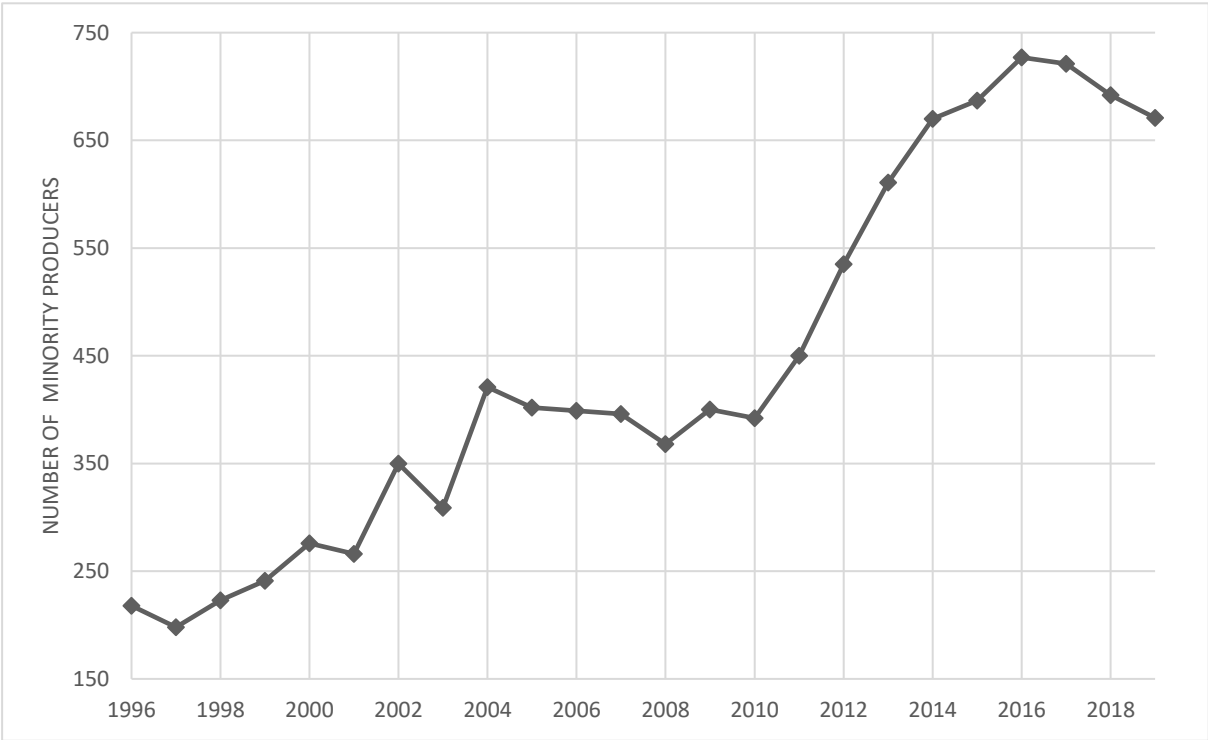


Figure 11: Total number of minority producers of EU28 co-productions, 1996-2019 (EAO LUMIERE PRO)

**Co-production with EU28 and non-EU28 countries.** Taking the cultural (Straubhaar, 1991) and industrial (Cuelenaere et al., 2022) proximity theory into account, one might wonder

whether European markets co-produce more with European partners than with non-European partners. To answer the latter question, the following chart discloses how many of these co-productions were with either European or non-European partners. First of all, it appears that the number of European co-productions with European partners has increased significantly through time. Indeed, from 1996 until 2004, this number increases to 85%, after which it starts dropping until 2010. Since 2010, however, there is a steady increase (77%) in the co-productions between European industries and other European partners. Secondly, the chart also signifies a clear increase in the number of co-productions with non-EU industries. Indeed, between 1996 and 2019, the amount of non-EU28 co-producing partners has exploded with 372%, which is more than double of the increase of European industries co-producing films with other European partners (159%). Nevertheless, the following graph shows that, in absolute numbers, European film industries still co-operate significantly more with other European partners than with non-European partners.

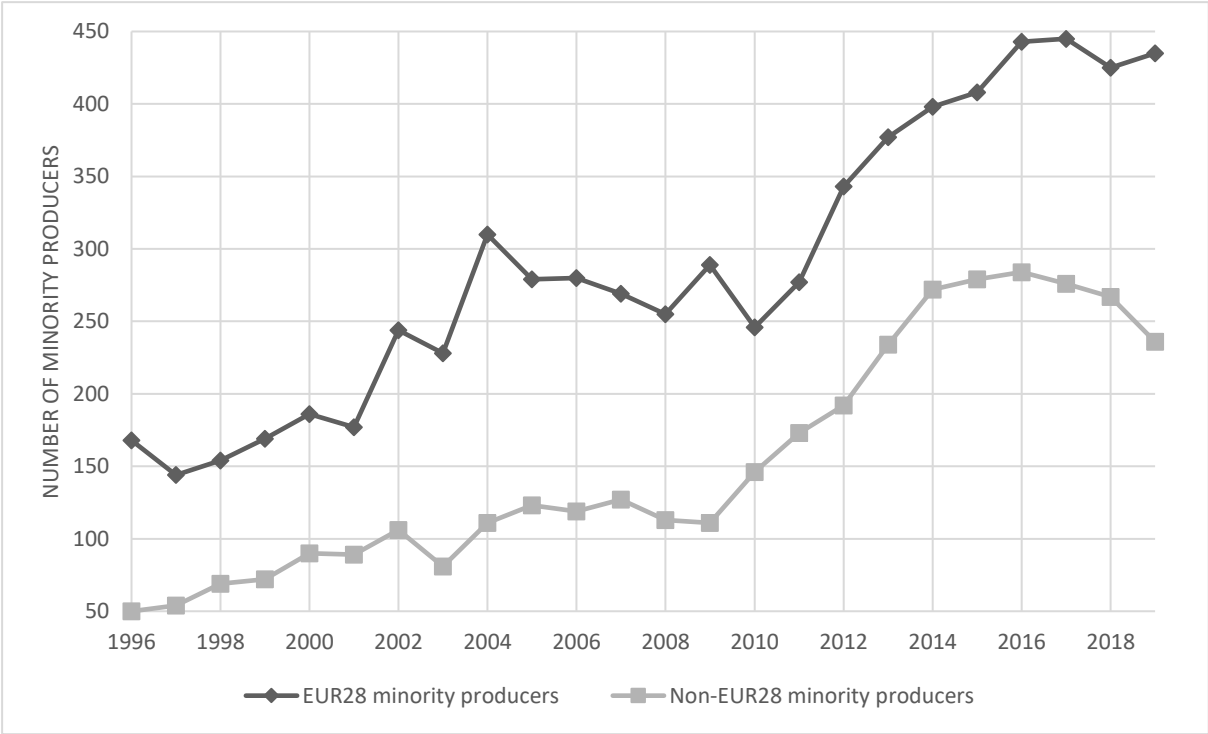


Figure 12: EU28 and non-EU28 minority producers, 1996-2019 (EAO LUMIERE PRO)

One should, however, note that the above charts do not disclose anything about co-productions that were carried out solely with, for instance, non-European partners (i.e., excluding those co-productions with one or more non-European partners as well as with one or more European partners on the other) or European partners. Therefore, to get a fuller picture



and to better understand the European co-production strategies, the graph below analyzes how many of the total number of European co-productions were carried out with either (1) only European partners; (2) only non-European partners; and lastly (3) both European and non-European partners (i.e., mixed co-productions).

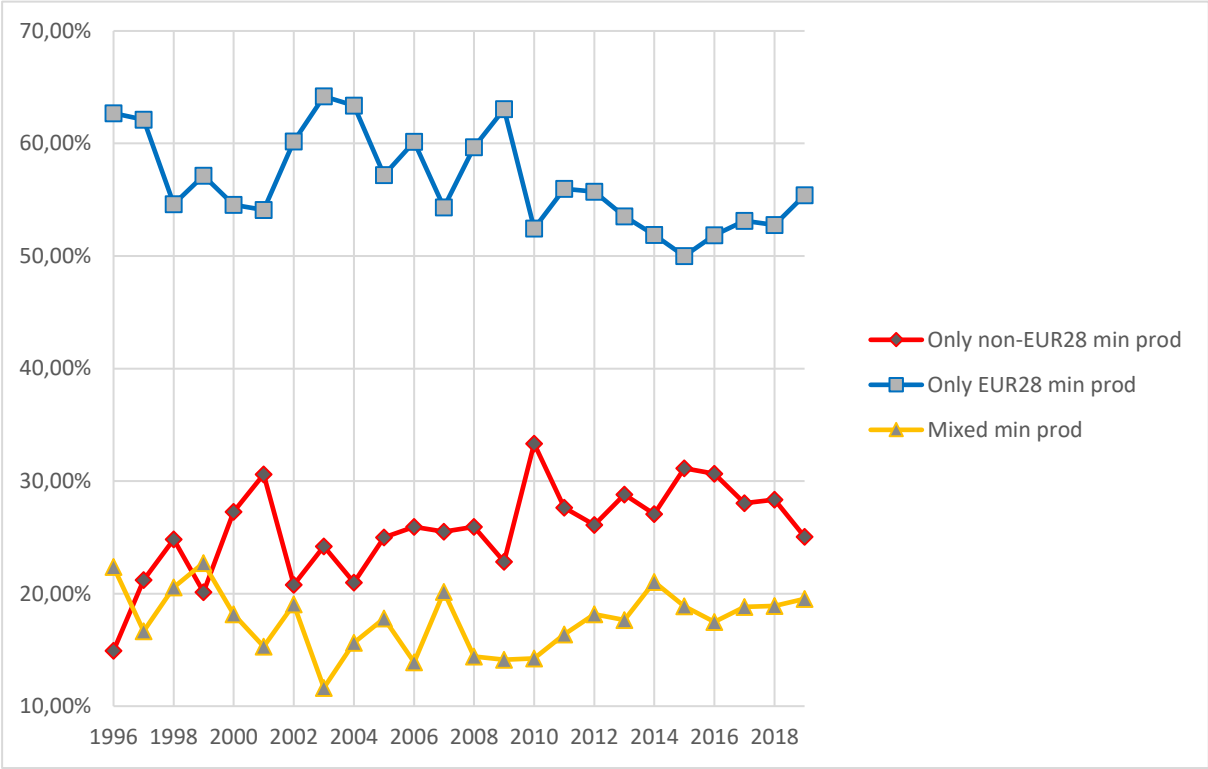


Figure 13: Share of types of EUR28 co-productions on total number of EU28 co-productions, 1996-2019 (EAO LUMIERE PRO)

**Outward look.** First of all, it appears that the biggest share of European co-productions is carried out with only with other European partners (i.e., intra-European co-productions). Nevertheless, this share of intra-European co-productions decreased between 1996 and 2019 with 7.29%. Though the share of European co-productions with only non-European partners (i.e., trans-European co-productions) is, on average, almost twice as low, it has increased over time (10.13%). Finally, the share of mixed co-productions has remained relatively stable in the same period, with a small decrease of 2.85%. The two preceding charts tell us at least three things: (1) first of all, it appears that the European film industries have always preferred (and still prefer) to work with other European markets, confirming the cultural and industrial proximity thesis; (2) nevertheless, the upsurge in co-productions with non-European film markets is significant, which points to another finding; namely that (3) slowly but steadily, European film industries seem to distinguish less and less between European and non-European production

partners. In other words, despite the European policy initiatives that incentivize co-productions between the European member states, European film producers have an increasingly outwards look, far beyond the European borders.

Expanding on the latter, we will now look for specific film industrial ties in Europe with other European and non-European co-production partners on a national level. We will limit the below charts to the top 10 co-producing partners in terms of co-produced film productions. We analyzed the 'Big Five' countries and looked at how many times they (as majority co-producer) co-produced a film with either European or non-European minority co-production partners.

**France leading co-production.** The most frequent cooperation of the Big Five countries within Europe in the period 1996-2019 was between (1) France (as majority co-producer) and Belgium; (2) Italy (as majority co-producer) and France; (3) Spain (as majority co-producer) and France; (4) Germany (as majority co-producer) and France; and finally (5) Great Britain (as majority co-producer) and France. In other words, it appears that (with the exception of (1)) the Big Five countries prefer to cooperate mainly (and mostly) with France (a total of no less than 708 films in the time period). This is illustrative of Vinuela's (2018) statement that "[t]he past decades have brought an increase in the number of French international co-productions, a practice formalised at the aftermath of the Second World War."

There are several other reasons that explain the high amount of co-productions with France: first of all, France is (arguably) the most influential or big-league industry player in the context of Europe due to its largest production volume (cf. above, Figure 8). Second, France is known for its "solid system of public funders and private film companies, including producers, distributors and broadcasters" (Cucco, 2018: 195) which results in strong extra financial injections into the market. Finally, France has the "highest proportion of domestic market share and number of annual spectators per capita" (Cucco, 2018: 195) as well as one of the strongest export positions (Kanzler, 2015) in Europe (Great Britain being the outlier here, cf. below). Taken together, these factors make it highly opportune for co-production partners to cooperate with France as it enables them to (a) produce films with bigger budgets; (b) get access the large French(-language) market; (c) receive the "made in France"-stamp; and (d) work with qualified professional partners (Cucco, 2018).

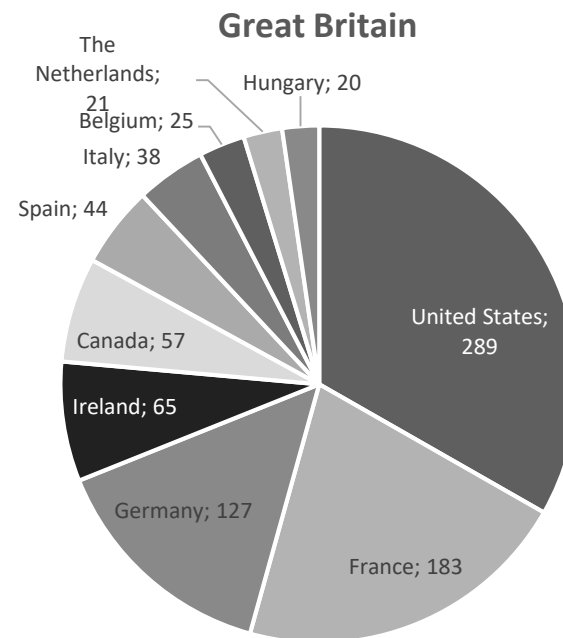
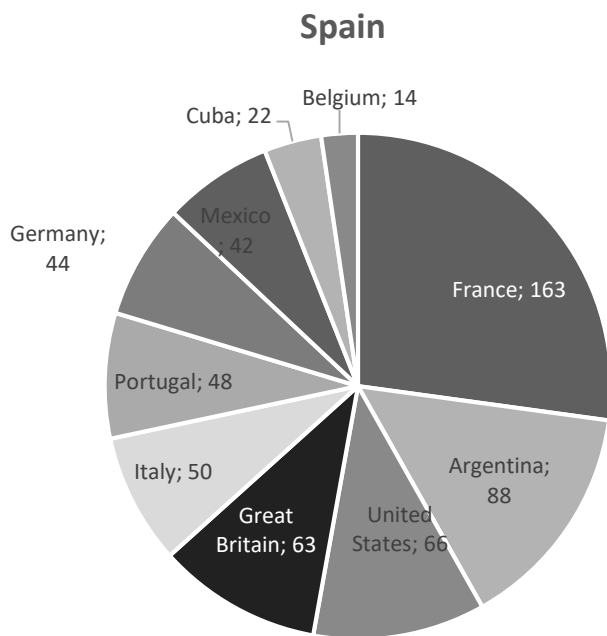
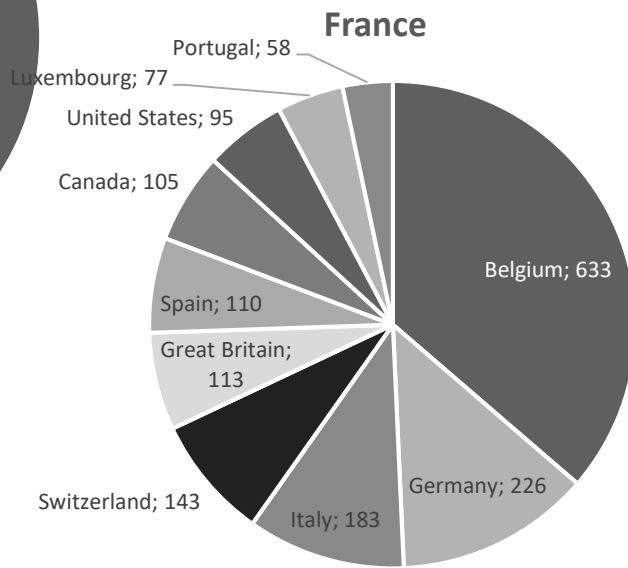
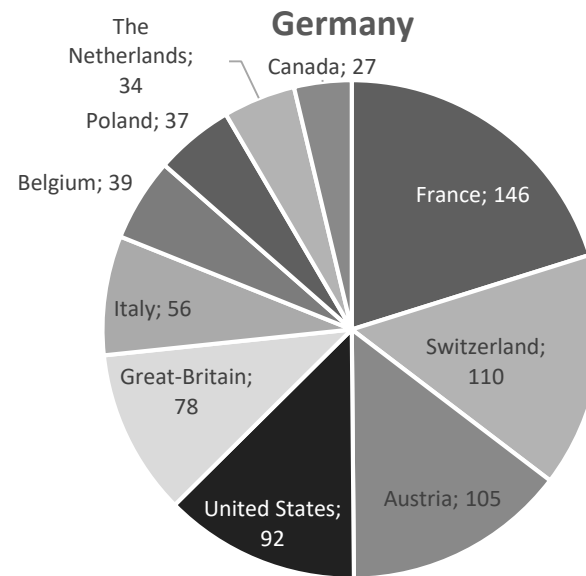
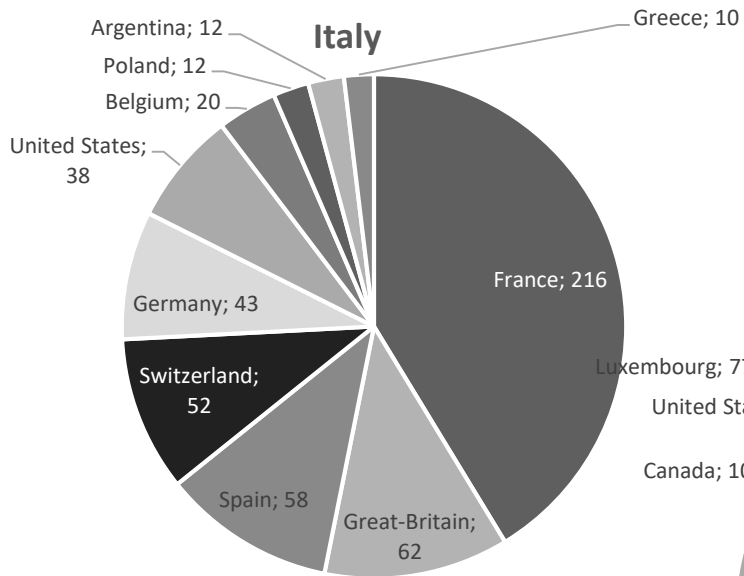


Figure 14: Number of collaborations with other European and non-European film markets for the 'Big Five', 1996-2019 (LUMIERE PRO)

**Opportunistic transnationalism vs. cultural/language proximity.** In short, the specific industrial context and market of France makes it an overall attractive partner to co-produce with, which can be linked to Hjort's (2009) concept of "opportunistic transnationalism". The latter "*involves giving priority to economic issues to the point where monetary factors actually dictate the selection of partners beyond national borders*" (Hjort, 2009: 19), which indirectly makes these co-productions less about creating cultural bonds and more about combining forces. Not only do co-productions allow for the combination of budgets, they also provide the different partners with easier access to, for instance, each other's tax shelter/rebate systems, the financial help of television broadcasters (combining both public and private funding schemes), as well as many other governmental institutions that financially support film productions that, in one way or another, have to be connected to their national industry. Though the opportunistic type of co-productions could also be applied to, for instance, the high amount of collaborations between France (as majority co-producer) and Belgium, there are, obviously, other more culturally and linguistically driven explanations (cf. *infra*).

**'Big Five' co-productions.** Before delving deeper into other types of co-productions, let us first consider the significant amount of 'Big Five' co-productions beyond Europe. The first most frequent interaction that catches the eye is the structural cooperation between (1) Great Britain (as majority co-producer) and the USA. Other notable examples are the many co-productions between, for instance, (2) France (as majority co-producer) and Canada; (3) France (as majority co-producer) and the USA; (4) Germany (as majority co-producer) and the USA; (5) Spain (as majority co-producer) and Argentina; (6) Spain (as majority co-producer) and the USA; and finally (7) Spain (as majority co-producer) and Mexico.

**Globalizing transnationalism.** Analyzing these particular co-productions points towards yet another type or model of industrial collaborations that could be linked to 'globalizing transnationalism' (Hjort, 2009). Illustrative of the latter are the many co-productions between European countries (as majority co-producer) and the USA: think of Great Britain, France, Germany, and Spain. Oftentimes, in these cases, the USA is involved because of its financial power (which allows for ultra-high-budget productions) as well as its "*globalizing strategies [...] [where the European film industries aim] at securing at least transnational, regional audiences and ideally global audiences*" (Hjort, 2010: 50). Actually, one of the main starting points for such co-productions is the "*inadequacy of national sources of film finance*" (Hjort, 2009: 21).

However, co-productions between Great Britain and the USA are not solely financially driven or guided by global distribution opportunities. Indeed, existing literature on content flows and co-production strategies also refers to theories of cultural and industrial proximity (cf. supra), which explain the existence of specific geo-linguistic regions. In short, these theories “*indicate that in a global world, production networks and distribution still follow patterns related to cultural and linguistic proximity*” (Cucco, 2018).

**Affinitive transnationalism.** The existence of such geo-linguistic regions within (but equally so outside) the European film industry can again be linked to yet another type of co-productions, i.e., those that are the result of ‘affinitive transnationalism’ (Hjort, 2009). Examples from within the ‘Big Five’ countries are the high volume of co-productions between (1) France (as major co-producer) on the one hand and Belgium, Switzerland, Canada, as well as Luxembourg on the other; (2) Great Britain (as major co-producer) and both the USA and Ireland; (3) Germany (as major co-producer) and Switzerland, Austria, as well as Belgium; (4) Spain (as major co-producer) and Argentina, Italy, Portugal, Mexico, and Cuba; and finally between (5) Italy (as major co-producer) and France as well as Switzerland. What is more, looking at the data more broadly (beyond the ‘Big Five’ countries), we found indications of the existence of several geo-linguistic regions within Europe: think of (a) a Dutch-speaking region (Belgium and the Netherlands); (b) a German-speaking region (Germany, Austria, Switzerland, and to a lesser extent Belgium); (c) a tight Nordic region (Norway, Denmark, Iceland, and Sweden); (d) a Southern European region (Spain, France, Italy, and Portugal); and (e) several Eastern European regions linked to, for instance, the Baltic states (Estonia, Latvia, and Lithuania), ex-Yugoslavia (Slovenia, Croatia, Bosnia-Herzegovina, Serbia, North Macedonia), etc.

Though further analysis is necessary here, we found evidence that cultural and linguistic proximity (as well as physical closeness or geographical proximity) play a significant role in the decision process when choosing partners to co-produce with. This is in accordance with Hjort’s ‘affinitive transnationalism’ which “*centres on the tendency to communicate with those similar to us, with similarity typically being understood in terms of ethnicity, partially overlapping or mutually intelligible languages, and a history of interaction giving rise to shared core values, common practices, and comparable institutions*” (2010: 17). As Cucco (2018) argued, the affinitive type of collaboration between European countries brings several advantages in terms of cost-efficiency, common industrial structures and practices, as well as institutional contexts. What is probably of even greater significance is that those films that were co-produced

between “countries with cultural-linguistic affinities [have] less difficulty in being perceived as local and familiar to both national audiences” (Cucco, 2018).

In sum, in the period of 1996-2029, the European film market was signified by (1) an overall significant (and still growing) production volume; (2) a clear focus on fully national productions; (3) yet, in accordance with a steadily growing intra-European co-production structure; (4) as well as an increasingly outwards or trans-European look. Now that we have a clear idea of the European film industry’s healthy state in terms of production volume, in the next section, we will analyze the market and distribution penetration of both European and non-European films within Europe.

## 3 Exhibition

### 3.1 Infrastructure

**The end of the cinema as ‘topos’.** The death of the cinema is probably one of the strongest ‘topoi’ in discourses on cinema (e.g., Usai, 2001; Belton, 2014; Gaudreault et al., 2015). This recurrent argument refers to the gradual decline or the predicted end of the cinema as a very particular physical place and experiential space where people meet to watch a film together. This recurrent argument has been particularly strong in the last three decades, precisely because of disruptive technological and other changes in how films circulate and are consumed (§1). If we look at the hard data on the film exhibition sector in Europe and elsewhere, however, one can only conclude that the cinema as a place/space is still very much alive and kicking. Data on the number of venues and screens in the EU28, the European continent and the world indicate how the film exhibition scene is still expanding—in some countries slowly, in other territories quite rapidly. In the recent three decades, film exhibition also went through an intense process of innovation and adaptation—technologically, spatially, and as an experience.

**World markets.** Before turning to Europe, it is useful to put things into a global perspective. According to data from the EAO on the global exhibition market, the number of screens in the world increased from nearly 117000 in 2007 to more than 200000 screens in 2020 (Table 2)—a growth of 72% in thirteen years. Looking at the top 10 world exhibition markets (see Figure 15), it is clear that the most spectacular increase in the number of screens was realized in

China where the exhibition market grew from 3500 to 75581 screens between 2007 and 2020. Other impressive, yet less spectacular growth rates can be observed in Russia (+258%) and Mexico (+92%). The second biggest exhibition scene now is the USA/Canada, where the theatrical exhibition scene, which was often described as one characterized by saturation, grew by 10%. A quite different picture appears for the third largest market in the world, India, where the exhibition sector slowed down (-6,5%) (Dastidar & Elliott, 2020). We will come back to the impact of the COVID-19 pandemic, but one striking tendency for the year 2020 (when cinemas in many territories around the globe were forced to close their doors for periods of time) is that the number of screens did not go down and even increased slightly (3,3%).

	2007	2010	2013	2016	2019	2020	2007-19	2019-20
<b>China</b>	3527	6236	18195	47179	69787	75581	1879%	8,30%
<b>USA &amp; Canada</b>	39974	39547	39765	43531	44283	44111	10,80%	-0,40%
<b>India</b>	10189	10020	11081	9481	9527	8000	-6,50%	-16%
<b>Mexico</b>	3907	5200	5547	7225	7493	7494	91,80%	0%
<b>France</b>	5.315	5.468	5.589	5.842	6.114	6127	15%	0,20%
<b>Russia</b>	1.564	2.389	3.446	4.376	5.597	5337	257,90%	-4,60%
<b>Italy</b>	3.819	3.952	5.132	5.104	5.385	5325	41%	-1,10%
<b>Germany</b>	4.832	4.699	4.610	4.739	4.961	4926	2,70%	-0,70%
<b>UK</b>	3.514	3.671	3.867	4.150	4.480		27,50%	
<b>Spain</b>	4.296	4.080	3.908	3.554	3.695	3701	-14%	0,20%
<b>ROW</b>	35.958	37.689	34241	28747	39632		10,2%	
<b>World</b>	116895	122951	134588	163928	200954	207650	72%	3,30%

Table 2: Number of screens in the top 10 world markets, 2007-20 (EAO Focus 2011, 2016, 2020)

**Six out of ten top national exhibition markets are European.** Another interesting finding, at least from a Eurocentric point of view, is the significant position of the European exhibition market—at least in terms of the number of screens.<sup>11</sup> In fact, in the overview given in Table 2 on the largest national exhibition markets around the world, six out of ten are located in Europe. In line with its huge production volume, the largest film exhibition market in terms of screens is France, where in the period 2007-20 one observes a 15% growth rate. The second and most impressively growing market is Russia, followed by Italy, Germany, the UK and Spain—the latter being the only territory characterized by a decrease in the number of screens (-14%).

<sup>11</sup> In the report we will not expand on the number of sites and cities where movies are shown.

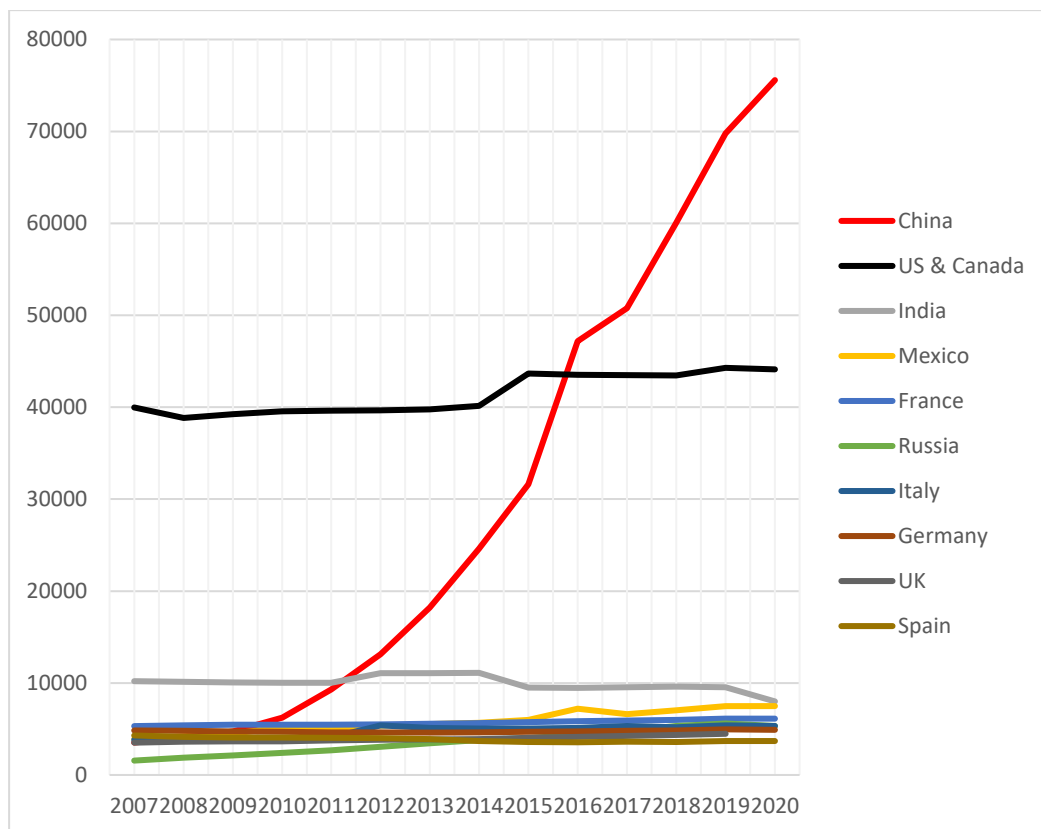


Figure 15: Number of screens for the top 10 markets worldwide, 2007-2020 (EAO Focus 2011, 2016, 2020)

	2001	2007	2013	2019	2001-19 (%)
France	5.242	5.315	5.589	6.114	16,6
Russia	287	1.564	3.446	5.597	1850,2
Italy	3.112	3.819	5.132	5.385	73
Germany	4.792	4.832	4.610	4.961	3,5
Great Britain	3.164	3.514	3.867	4.480	41,6
Spain	3.770	4.296	3.908	3.695	-2
Turkey	889	1.678	2.204	2.850	220,6
Poland	661	1.008	1.259	1.360	105,7
Netherlands	499	696	828	987	97,8
Portugal	460	546	544	583	26,7
<b>EU28</b>	<b>28.171</b>	<b>29.697</b>	<b>31.372</b>	<b>34.181</b>	<b>21,3</b>

Table 3: Number of screens for top 10 European film exhibition markets, 2001-2019 (EAO Focus 2011, 2016, 2020)<sup>12</sup>

**Overall European growth.** The expansion of the European exhibition sector goes back, at least, to the early 2000s, as illustrated by Table 3 and Figure 16. For all of the biggest European

<sup>12</sup> Figure for Russia in 2001 is not available; we used the data for 2002.



film exhibition markets, except Spain, there is a real growth in the absolute number of screens. There are expanding markets in Italy, Great Britain and also in the Netherlands (+98%), where local and other authorities have played an important role in supporting a network of local cinemas in the context of (cultural) city development (EYE, 2015). For the EU28 countries, the average growth rate is 21%, with a total amount of 34,181 screens.

**Major growth mainly in Russia, Turkey and Central/Eastern Europe.** The most impressive progress, however, can be observed outside the EU28, as mentioned most clearly in Russia, that became the second biggest national market in the last two decades. There was also a steep rise in Turkey (+221%), and in some other Eastern and Central European countries like Poland (+106%), Croatia (+30%) or Bulgaria (+19%). Besides the role played by film and cultural policies, improving general economic conditions and the growth of a more affluent middle class, one should also consider the growth margins of these markets. One indicator here is the number of inhabitants per screen, which is still much higher in countries like Romania, Bulgaria, Turkey, Poland, and Russia (e.g., 25.813 inhabitants per screen in 2019). The lowest figures here can be found in most of the Western and Southern European countries, most notably in France (10,961 inhabitants/screen) (Appendix 4).

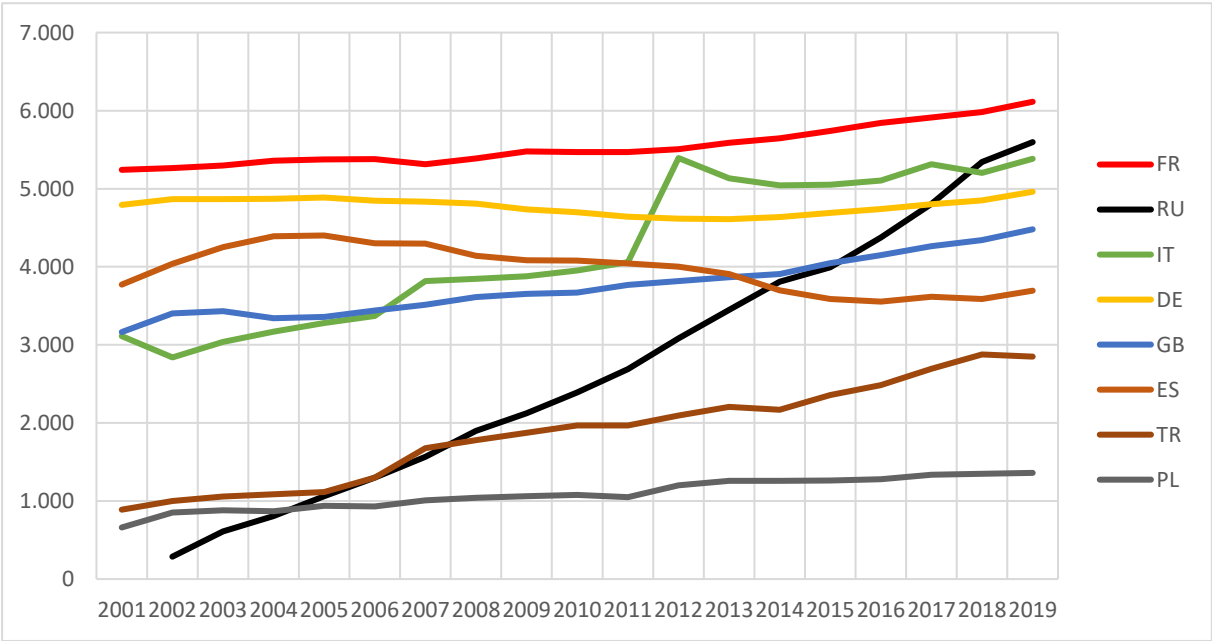


Figure 16: Number of screens for the biggest European film exhibition markets, 2001-2019 (EAO)

**Innovations in and around the venue.** Another general explanation for understanding the continued growth of the exhibition market is related to technological innovations in and around film venues. This report will not expand on this very interesting issue, but in the reference period of this report, major changes occurred around the growth of multiplexes (see e.g., Wutz, 2014: 21-3) and the introduction of digital projection and 3D technologies (e.g., Brunella & Kanzler, 2011). The following graph tries to bring together some of these trends in the new technological innovations within the EU28 film exhibition market, comparing it to the situation in the USA. In the North American market, the penetration rate of digital screens had risen to over 95% by 2016, whereas this went somewhat slower in Europe. By 2019, around 90% of the screens in the EU28 were digitized.

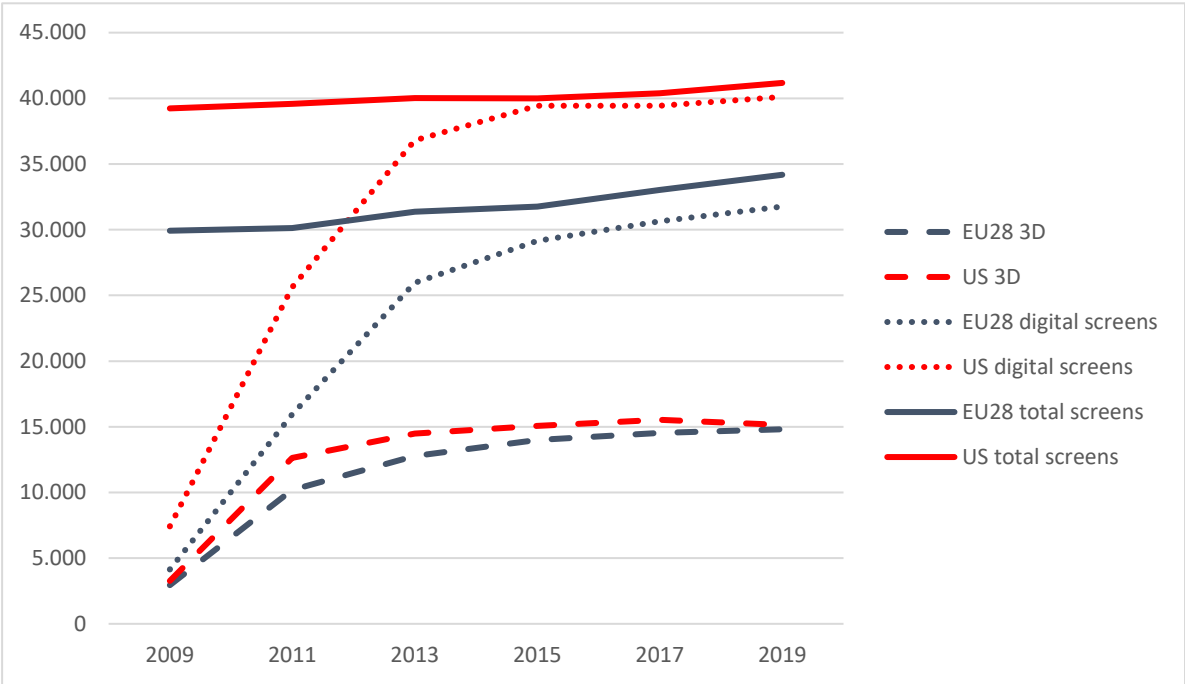


Figure 17: Number of screens, 3D and digital screens in EU28 and the USA, 2002-2019 (EAO)

### 3.2 Admissions

**China’s rise in the world exhibition market.** Before turning to the European film market, it might be good to get a world view of theatrical admission figures. For the period from 2007 onwards, one might think in terms of a relative stability, at least in the period before the pandemic. The world admission figures indicate that the global admissions, or the overall number of sold tickets, fluctuates around 7.1 billion. There was a slow decrease between 2007 (7 billion) and 2013 (6.5 billion), followed by a slow increase or recovery to 7.5 billion tickets sold just before the pandemic. Underneath this relative stability, one can only observe major

changes in the relationship between the biggest national markets around the world. The most obvious growth in world admission figures was realized in China, where cinema attendance grew from 130 million in 2007 to 1.7 billion in 2019.

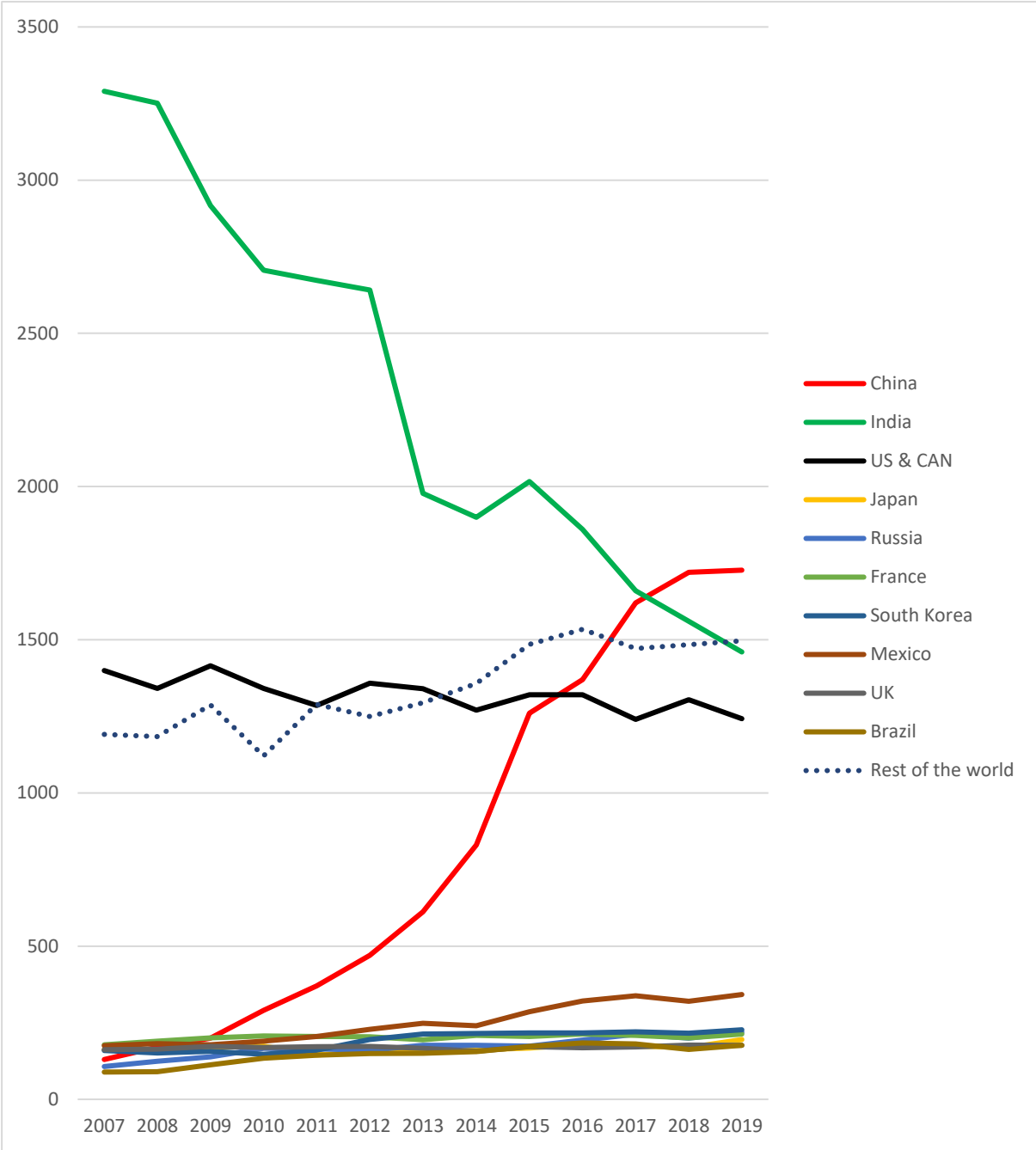


Figure 18: World cinema admission figures (in million) for the biggest national film markets in the world and the rest of the world, 2007-2019 (EAO Focus 2011, 2016, 2020)

**The Big Three in the world: contrasting tendencies.** The Chinese exhibition market now sells nearly one quarter of the tickets in the world (23.1% in 2019), whereas this was only 1.8%

in 2007. Besides the size of China’s population, as well as global economic and demographic changes, this steady rise is also related to the growth of a more affluent Chinese middle class. An inversed tendency can be observed in India, once the biggest film market in terms of films produced and consumed in a public screening environment. Indian cinema admission figures indicate that, whereas in 2007 nearly 3.3 billion tickets were sold, this was only 1.5 billion just before the pandemic (Dastidar & Elliott, 2020). Less dramatic is the slow decrease in the third big national exhibition market (at least in terms of admissions), the North American market constituted of the USA and Canada. The latter market is characterized by a slow decrease in cinema admission (-11%) between 2007 and 2019.

	2007	2010	2013	2016	2019	2020	2007-19	2019-20
<b>China</b>	130	290	612	1370	1727	538	1228%	-69%
<b>India</b>	3290	2706	1978	1860	1460	390	-56%	-73%
<b>US &amp; Canada</b>	1399	1341	1340	1320	1242	237	-11%	-81%
<b>Japan</b>	163	174	156	180	195	106	20%	-46%
<b>Russia</b>	107	166	176	193	219	89	105%	-59%
<b>France</b>	178	207	194	213	213	65	20%	-69%
<b>South Korea</b>	159	147	213	217	227	60	43%	-74%
<b>Mexico</b>	175	190	248	321	342	55	95%	-84%
<b>UK</b>	162	169	166	168	176	44	9%	-75%
<b>Brazil</b>	89	134	150	184	176	39	98%	-78%
<b>ROW</b>	1191	1121	1294	1534	1496	415	26%	-72%
<b>World</b>	7043	6645	6527	7560	7473	2038	6%	-73%

Table 4: Admission (in million) for film exhibition markets in the world, 2007-2020 (EAO)

**Growth in most other major film markets.** In other major film markets, cinema admission figures for this period have also seen quite impressive growth rates, especially in Brazil (98%), Mexico (95%), and South Korea (43%). In Europe, it is Russia where admissions have been growing most spectacularly (100%) in the period between 2007 and 2019. The two other major European countries in the list are France (20%) and the UK (9%), showing a gradual increase as well. Finally, also in other territories, here assembled under ‘Rest of the world’ (ROW), cinema admission figures have been growing by 26%.

**Admissions in the former EC12 countries.** Concentrating on the European exhibition market, it might first be interesting to look at admission figures for a group of countries with data going back to the 1980s. Given the availability of reliable data, we decided to solely analyze the original 12 (mainly Western and Southern European) countries which constituted the European Community in the beginning of the 1990s—the start of our reference period for this report (see Appendix 2). For these EC12 members we can go back to the second half of

the 1980s, and continue the time series to 2019. One overall finding is that admissions did not go down but fluctuated and experienced different waves. For the whole of the EC12, there was a steady decline in the first period, followed by a growth from 1993 onwards with the number of cinema tickets gradually going up from 554 million tickets in 1992 (the lowest in the series) to 894 million in 2001. In the 2000s, in the countries which constituted the ‘old core’ of the EU, admission figures stabilized and even showed a slow decline.

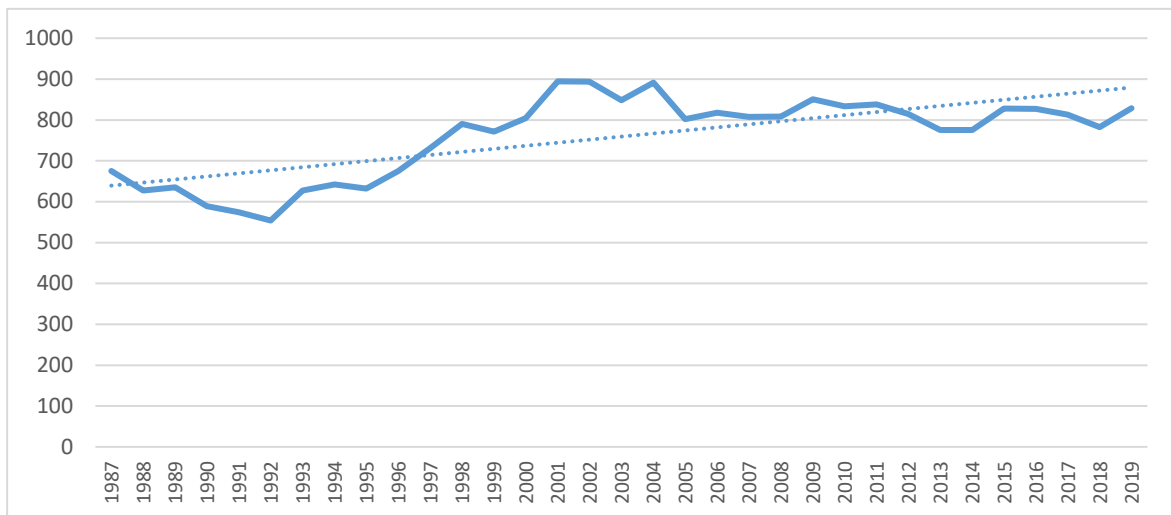


Figure 19: Cinema admission figures (in million) for the (old) EC12 member countries, 1987-2019 (EAO)

**Contrasting trends among the ‘Big Five’ in the EU film market.** Looking closer at the biggest European film markets and the rest of the (former) EC members for the period from 1987 to 2019 (Table 5, Figure 20), several often contrasting trends can be observed. Some of the ‘Big Five’ exhibition markets were clearly more successful in recovering from the global economic crisis in the years after 2008 than others. In France, for instance, the film venues market succeeded to expand in the 2000s, partially also thanks to CNC’s policies to support and promote film exhibition—also explicitly to art-house cinemas.<sup>13</sup> The British market equally shows significantly higher admission figures compared to the end of the 1980s. The overall trend for Spain and Italy for the three decades is one where the overall admission figures stayed more or less at the same level as in the late 1980s. Whereas in Italy cinema admission figures stabilized more or less in the 2000s, during the same period, the Spanish exhibition sector was confronted with a steep decline (-29%). The most dramatic change over the last

<sup>13</sup> See e.g., [https://www.cnc.fr/professionnels/aides-et-financements/cinema/exploitation/aide-selective-a-la-petite-et-moyenne-exploitation\\_1578881](https://www.cnc.fr/professionnels/aides-et-financements/cinema/exploitation/aide-selective-a-la-petite-et-moyenne-exploitation_1578881).

three decades in terms of admissions took place in Germany, where the film market (once the second largest in Europe) lost around one third of its admissions in the 2000s (-33%).

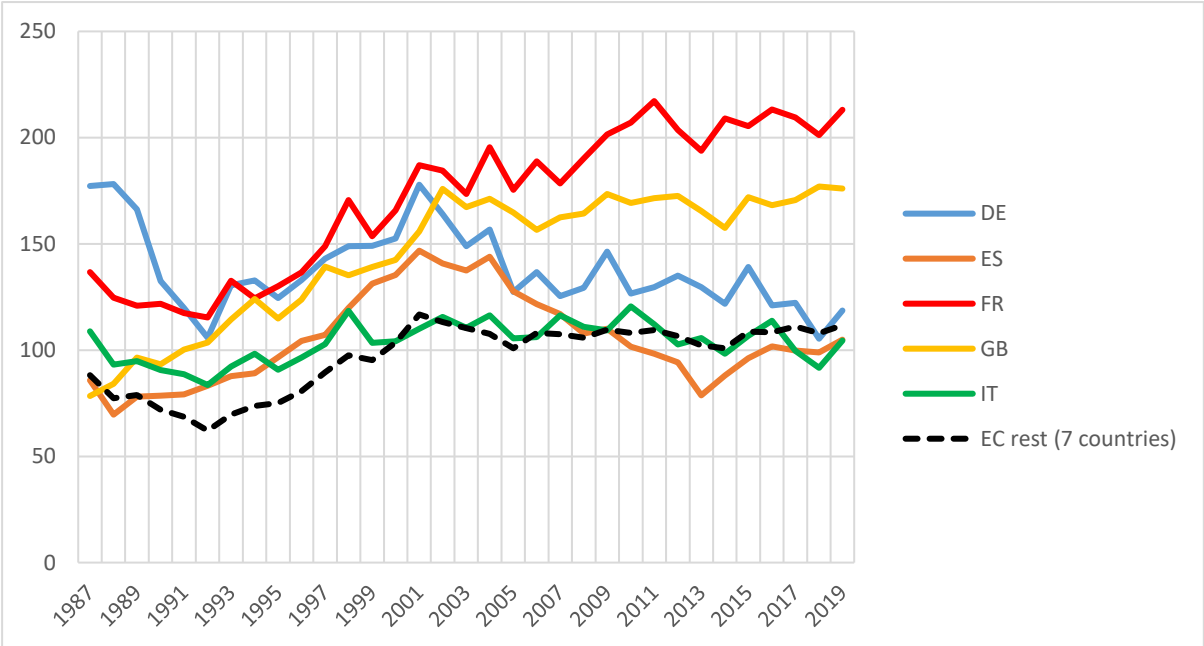


Figure 20: Cinema admissions figures (in million) for the Big Five and the other (old) EC12 member countries, 1987-2019 (EAO)

**Growth in other European territories and Europe passes the USA/Canada.** In 2019, cinema attendance in the 28 EU member states jumped over one billion tickets. According to the EAO (2021: 14), this was the best result since 2004. Concentrating on the EU28 and other European territories, some upcoming markets were brought to the fore. The most impressive growth in the old continent is realized by the Russian exhibition sector. In 2019, it passed France’s leading position; in the last two decades, the Russian exhibition market nearly quadrupled the number of old tickets sold at the cinema. Other markets with strong growth were The Netherlands (+60%), Turkey (+111%), and Poland (131%) (Table 5). When these Central and Eastern European countries are included, Europe’s film exhibition industries now surpass the one in the USA (see Figure 21).

	2001	2006	2011	2016	2019	2001-19
<b>Russia</b>	60,00	91,80	158,77	192,78	219,42	266%
<b>France</b>	187,06	188,79	217,20	213,20	213,02	14%
<b>Great Britain</b>	155,91	156,56	171,56	168,26	176,05	13%
<b>Germany</b>	177,90	136,68	129,58	121,10	118,61	-33%
<b>Spain</b>	146,81	121,65	98,34	101,83	104,89	-29%
<b>Italy</b>	109,97	106,11	112,12	113,83	104,44	-5%
<b>Poland</b>	26,20	32,02	38,72	52,07	60,63	131%

<b>Turkey</b>	28,16	34,86	42,40	58,22	59,42	111%
<b>Netherlands</b>	23,80	23,39	30,43	34,18	38,02	60%
<b>EU28</b>	997,72	934,27	967,96	992,25	1.004,98	0,7%

Table 5: Admission (in million) for top European film exhibition markets, 2001-2019 (EAO)<sup>14</sup>

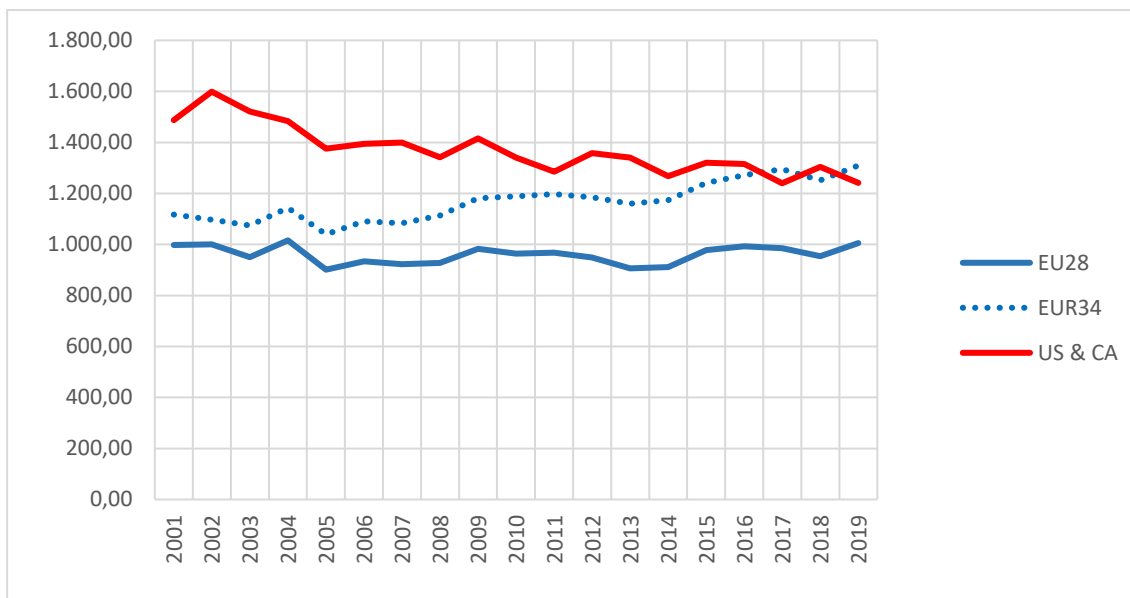


Figure 21: Cinema admission figures for the USA/Canada, Japan, EU28, EU34, 15 2001-2019 (EAO)

Note: EUR34: EU member states with Iceland, Norway, North Macedonia, Romania, Switzerland and Turkey

**Admissions per inhabitant.** A final element in understanding different longitudinal trends in the European film market relates to the intensity of cinemagoing, or the number of admissions per year. These figures are notably low, that is, an average of 1.91 visits to a cinema per inhabitant in EU28 (for the period 2001-19). Visualizing these annual cinemagoing data, Appendix 5 shows how most Western European countries lead this chart—with e.g., France, Great Britain, and Spain showing an average of above 2.5. Additionally, Austria, Belgium, Denmark, Luxembourg, and Ireland have figures above the EU28 level. Most of the Eastern

<sup>14</sup> Figure for Russia in 2001 is not available; we used the data for 2002.

<sup>15</sup> EU34: EU member states with Iceland, Norway, North Macedonia, Rumania, Switzerland and Turkey.

and Central European countries are below that level, this could be interpreted as another indication that these markets might not yet have reached their point of saturation.

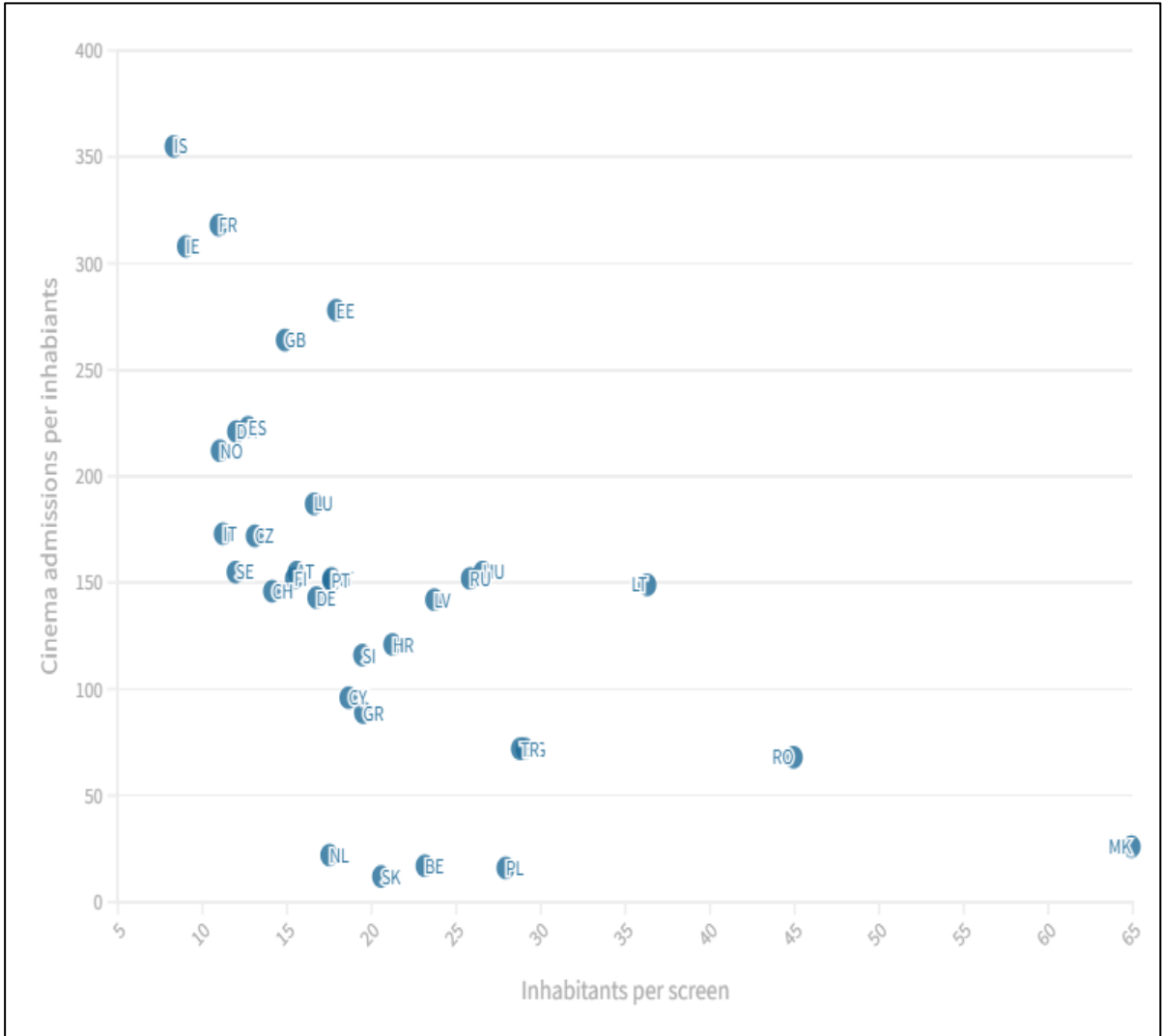


Figure 22: Scattergram for inhabitants per screen vs. cinema admissions per inhabitant, 2019 (EAO)

### 3.3 Box office

**The Big Two of the box office.** A final point in relation to trends in the European film exhibition market deals with its economic value, often indicated as its box office or the sum of all tickets sold.<sup>16</sup> Taking into account the worldwide growth of screens (§3.1) and admissions (§3.2), it will be no surprise that the global box office is also on the rise. Information on the period 2007-

<sup>16</sup> For more detailed information on the evolution in cinema ticket prices in the major cinema markets (Big Five) and on the average price, see figures in Appendix 6.



2019 estimates that the world box office takings went from 26 to 42 billion USD—a growth rate of 62%. The USA and Canada are still by far the biggest market in terms of gross box office (GBO). The North American GBO reached a new high in 2019, just before the pandemic, with a GBO of 11,38 billion USD. Second is China, where the cinema’s box office hit a new all-time record with 9.3 billion USD. Next in line are a mix of big European and Asian countries, the latter being Japan, South Korea and India. The biggest European market is France, followed by the UK and Germany.

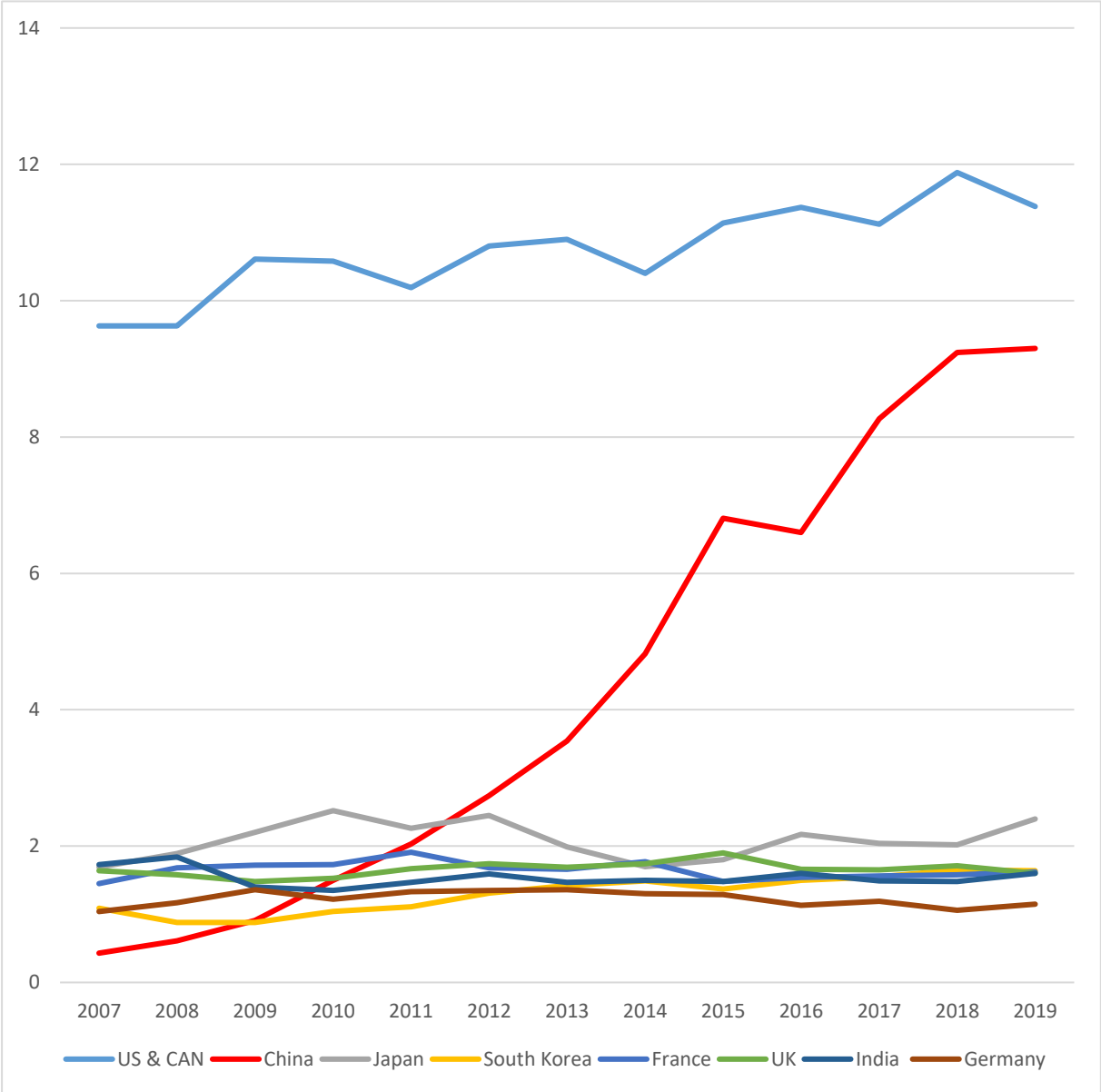


Figure 23: Gross box office (billion USD) in the Top 8 countries (2007-2019) (sources: EAO Focus 2011, 2016, 2020)

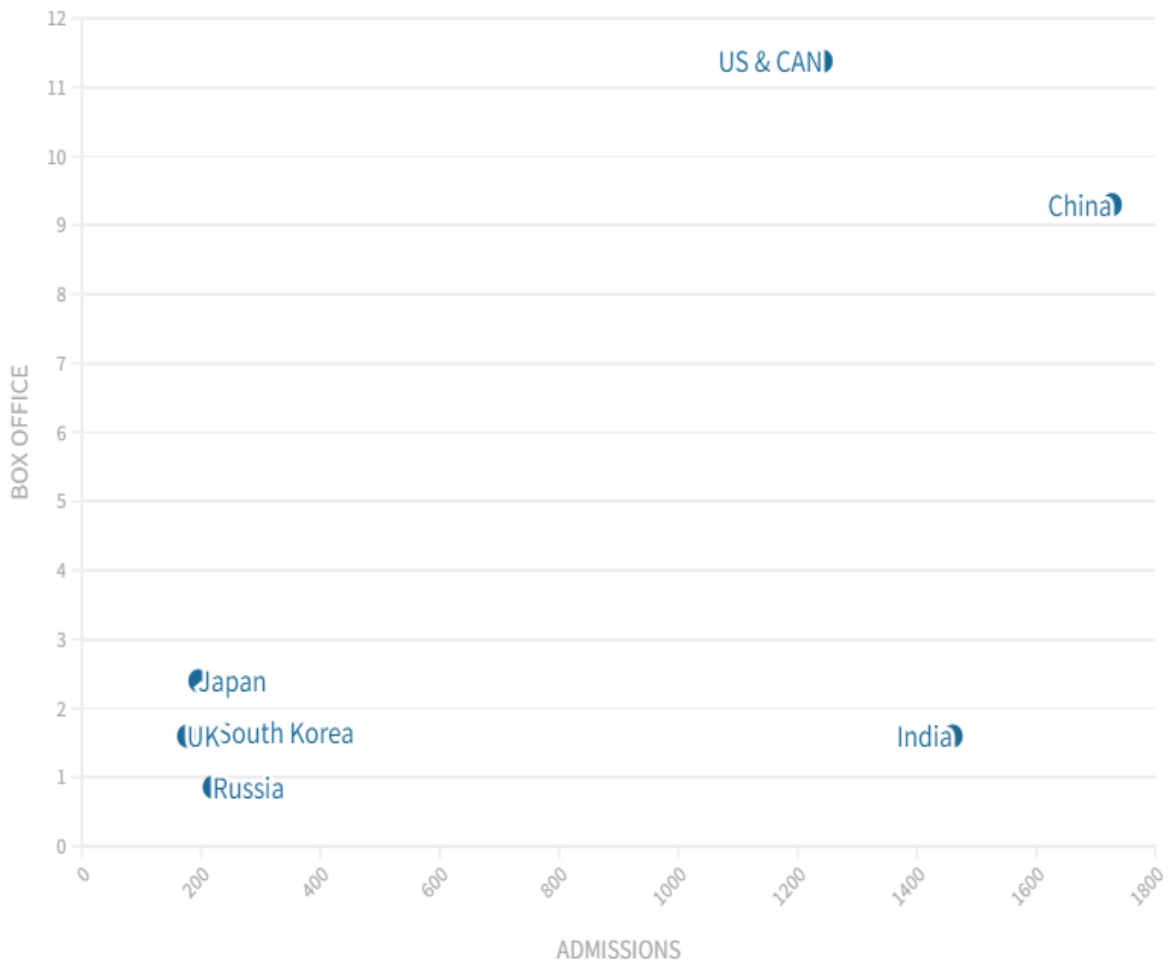


Figure 24: Scattergram for the ten biggest film markets in terms of admissions vs. box office, 2019 (EAO)

**The COVID-19 impact on box office.** The impact of the COVID-19 pandemic on the world film market is probably most visible in the box office results. In 2020, cinemas in large parts of the world were forced to close doors, or they took safety measures by admitting only a restricted number of patrons. The world cinema GBO collapsed and went down from 42.2 to 12 billion dollars, or a slowdown of no less than 71.6%. The Indian and North American markets (USA/Canada) saw decreases of 80%. Similar dramatic figures were also observed in the major European markets France (-69.7%), the UK (-75.6%) and Germany (-68.8%).

	2007	2010	2013	2016	2019	2020	2007-19	2019-20
<b>US &amp; CAN</b>	9,63	10,58	10,9	11,37	11,38	2,22	18,20%	-80%
<b>China</b>	0,43	1,5	3,54	6,6	9,3	2,96	2062,80%	-68,20%
<b>Japan</b>	1,69	2,52	1,99	2,17	2,4	1,34	42%	-44,20%
<b>South Korea</b>	1,09	1,04	1,42	1,5	1,64	0,43	50,50%	-73,80%
<b>France</b>	1,45	1,73	1,66	1,54	1,62	0,49	11,70%	-69,70%
<b>UK</b>	1,64	1,53	1,69	1,66	1,6	0,39	-2,40%	-75,60%
<b>India</b>	1,73	1,35	1,47	1,6	1,6	0,32	-7,50%	-80%
<b>Germany</b>	1,04	1,22	1,36	1,13	1,15	0,36	10,60%	-68,80%
<b>World</b>	26,2	31,6	35,9	39,3	42,2	12	61%	-71,60%

Table 6: World gross box office (billion USD) for the biggest national film markets in the world, 2007-20 (EAO Focus 2011, 2016, 2020)

**Great Britain and France lead the European peloton.** In order to get a longitudinal overview of the trends in European box office results in the different national markets, we selected a series of reliable data for the period 1987-2019. The ‘Big Five’ hegemony is also highly visible here, but some major differences can be observed among them. One is that France and Great Britain clearly take the lead each with a GBO of around 1.4 billion Euros in 2019. The British and French exhibition markets combined equal the twelve countries that were selected for making this longitudinal analysis.<sup>17</sup> The third market in line is the German one. After a gradual growth in the late 1980s and the 1990s, the German GBO fluctuates at around 1 billion. Finally, there are Spain and Italy, whose GBO is estimated to be between 500 and 700 million. Both the Spanish and Italian market are going through a longer-term recovery (EAO, 2021: 27, 29). In recent years, Spain and Italy’s position as respectively the fourth and fifth in the European film exhibition market was joined by Russia. This reconfirms Russia’s rise as a new powerful player in the European film market (Figure 26).

<sup>17</sup> These twelve countries are: Austria, Belgium, Denmark, Finland, Greece, Hungary, Ireland, Luxemburg, the Netherlands, Poland, Portugal, and Sweden.

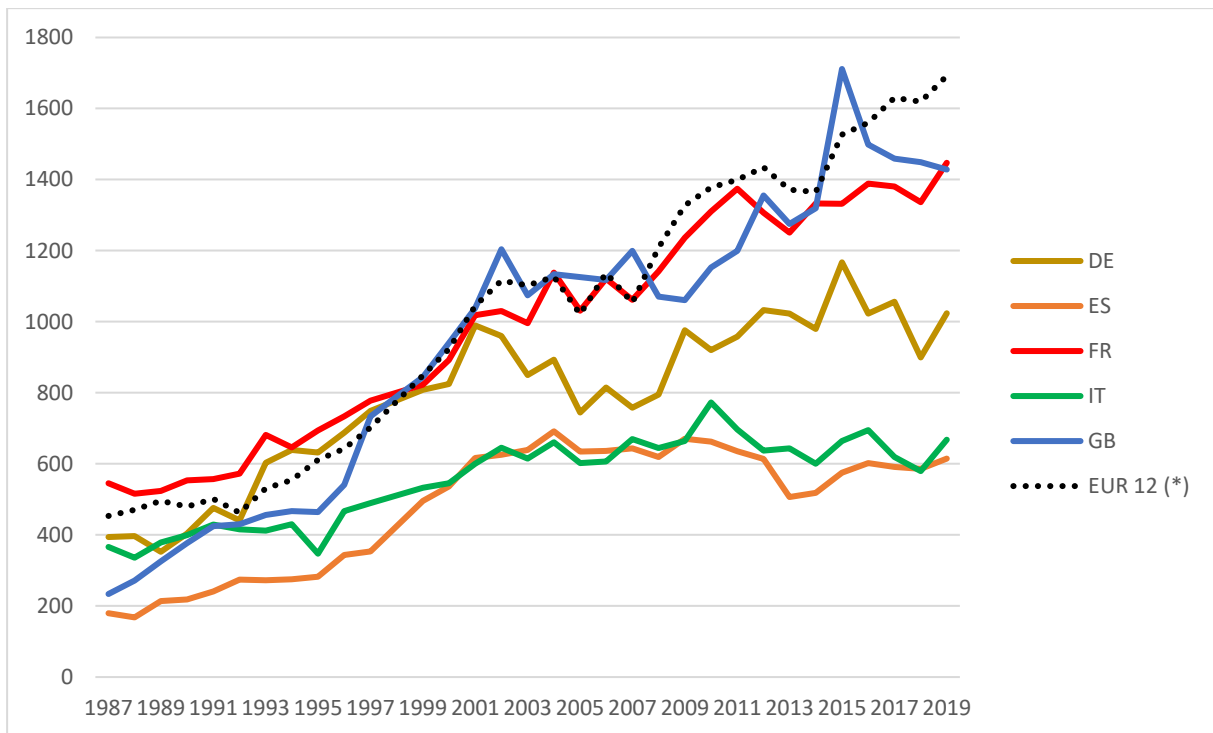


Figure 25: Gross box office (million EUR) in the Big Five countries and 12 other European countries, 1987-2019 (EAO) Note (\*): these other European countries are: Austria, Belgium, Denmark, Finland, Greece, Hungary, Ireland, Luxemburg, the Netherlands, Poland, Portugal, Sweden

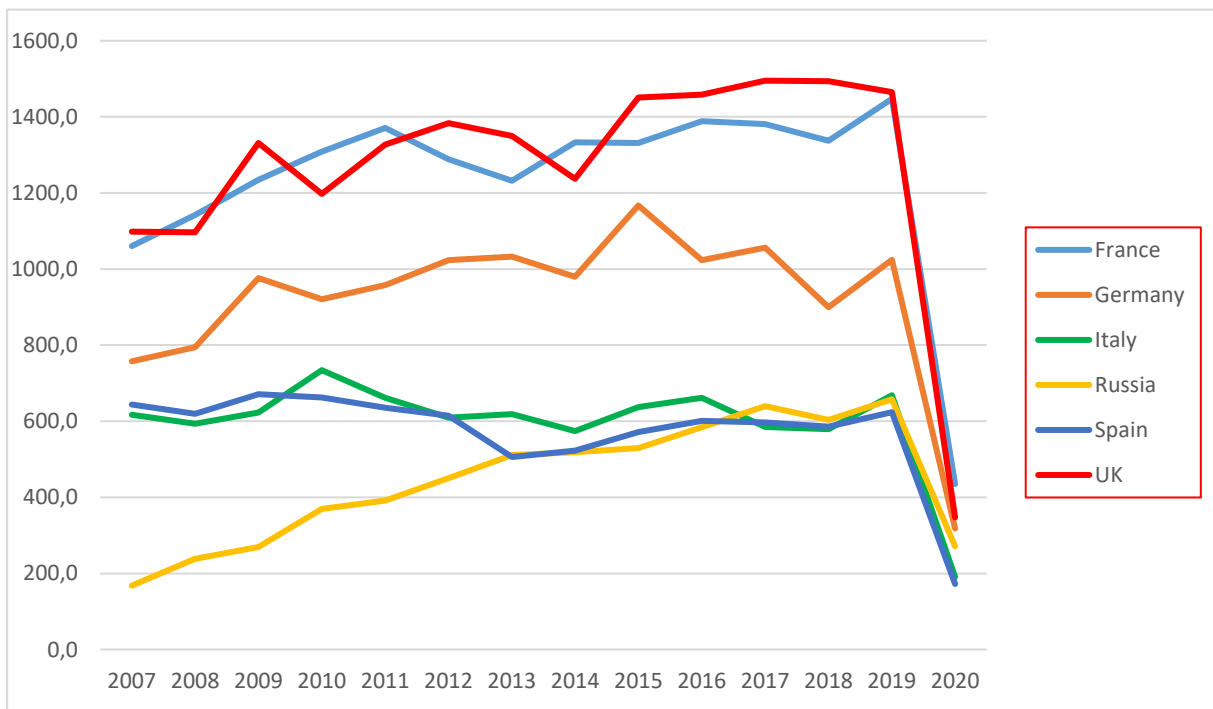


Figure 26: Gross box office (million Euro) in the six biggest European countries, 2007-20 (UNIC)

**Big, major, medium, small.** In order to get an overview of the different national markets, it is useful to map visually them. The scattergram in Figure 27, where we map the national markets according to their location for total admission figures vs. GBO, shows the different clusters. One consists of the biggest markets, that is, those of France and Great Britain. Then follows a group of four other countries that are major markets (Germany, Russia, Italy, and Spain). Next comes a set of medium-sized markets with Poland, Turkey and the Netherlands. Together, these eight countries count for more than 80% of the European GBO (Figure 28). Finally, a wide group of smaller markets can be identified (Figure 29), led by Belgium, Sweden, Denmark, and Switzerland.

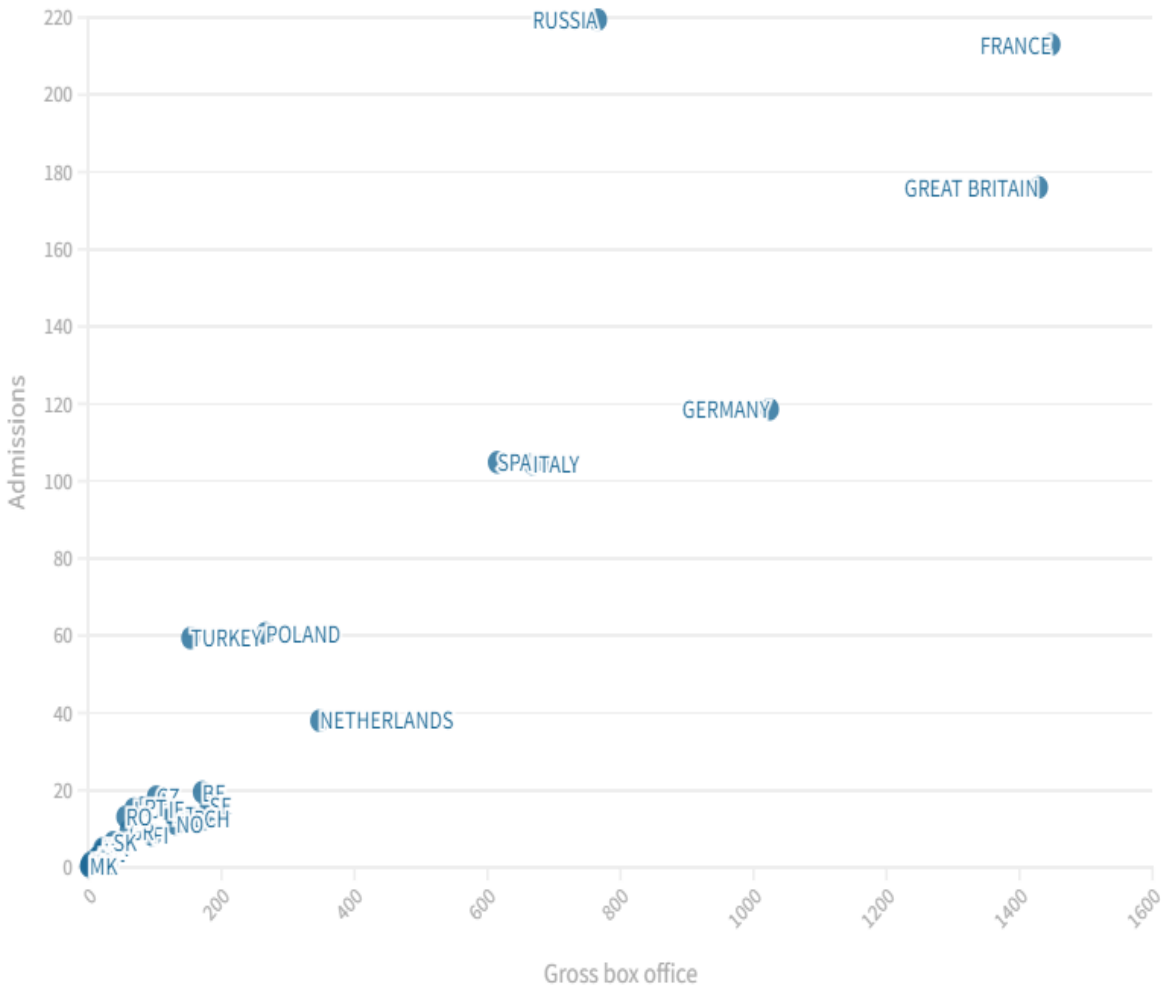


Figure 27: Scattergram for admissions vs. GBO for European countries per screen vs. cinema admissions per inhabitant, 2019 (EAO & UNIC)

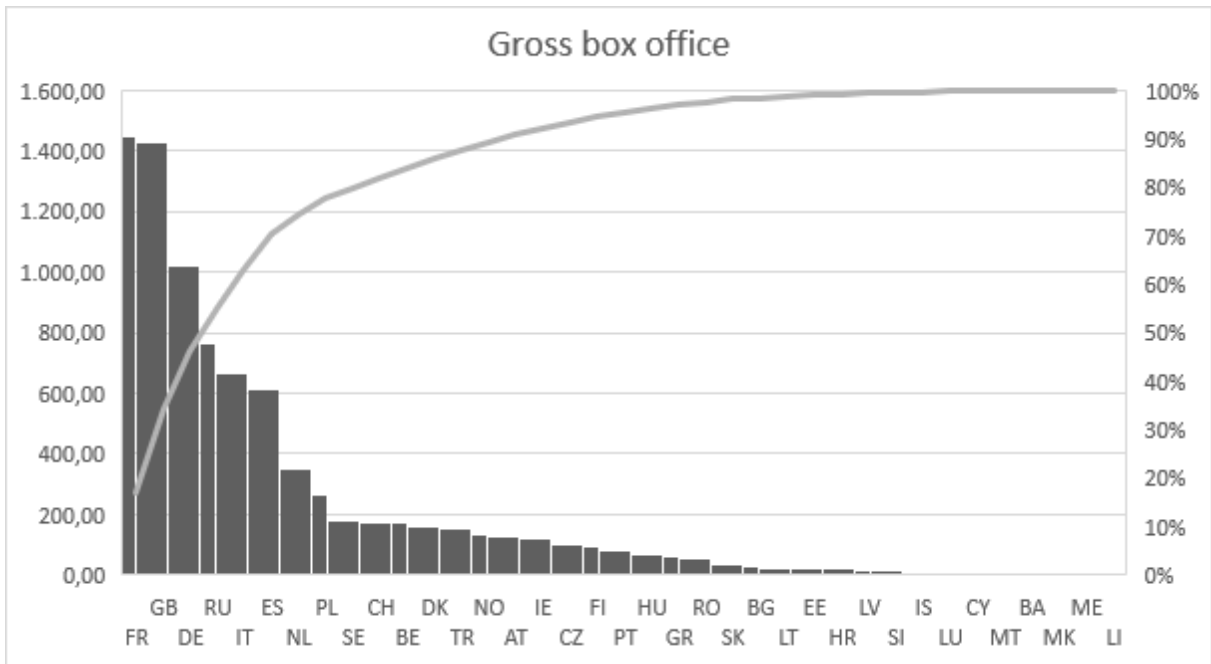


Figure 28: Gross Box Office for 37 European countries, 2019 (EAO)

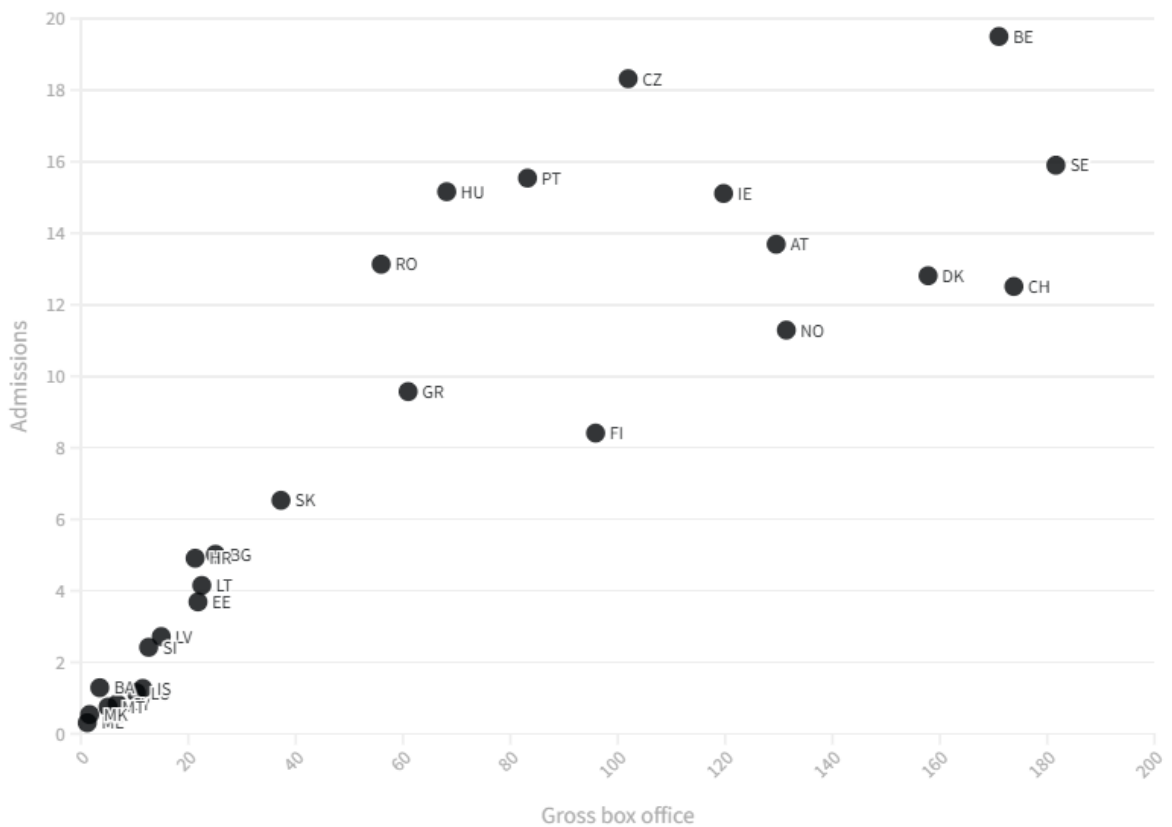


Figure 29: Scattergram for admissions vs. GBO for European countries per screen vs. cinema admissions per inhabitant, 2019; without the major countries (EAO & UNIC)

**USA vs. Europe.** One of the key issues in the next chapter deals with the competition between the USA and the European film industry, more precisely in terms of the circulation of films and, most prominently, Hollywood films' dominance over the European exhibition market (and its GBO). Figure 30 indicates how in the 2000s, the EU28 has seen a slow rise in its box office takings, to over 6.5 billion Euros in 2019. In the period 2008-14, EU28 even seemed to narrow the gap with the USA exhibition market, but ever since the difference between both markets seemed to widen again.

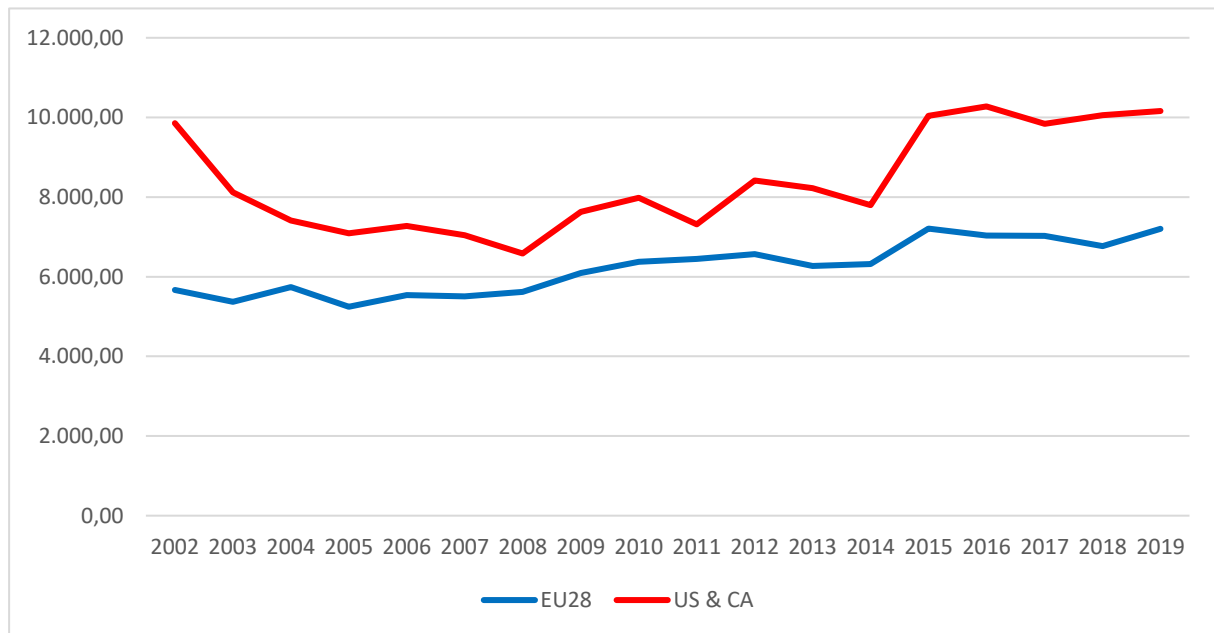


Figure 30: Gross box office (million EUR) in EU28 and USA, 2002-2019 (EAO)

## 4 Film circulation

### 4.1 European films

**Rise in the number of European films shown in the exhibition market.** As shown above, the overall production of European films has drastically increased between 1996 and 2019. Though this is a clear sign of the industry's healthiness, these data do not disclose anything about the European audiences' attitudes or behaviour towards these films. Therefore, the following will consider to what extent these films were actually received by European audiences, compared to, for instance, the popularity of Hollywood films. In a first step, we will look at the circulation of (both national and non-national) European films within Europe. Firstly,

these data confirm the idea that the growth in the production of European films did coincide with a rise in the number of European films that are shown in Europe.

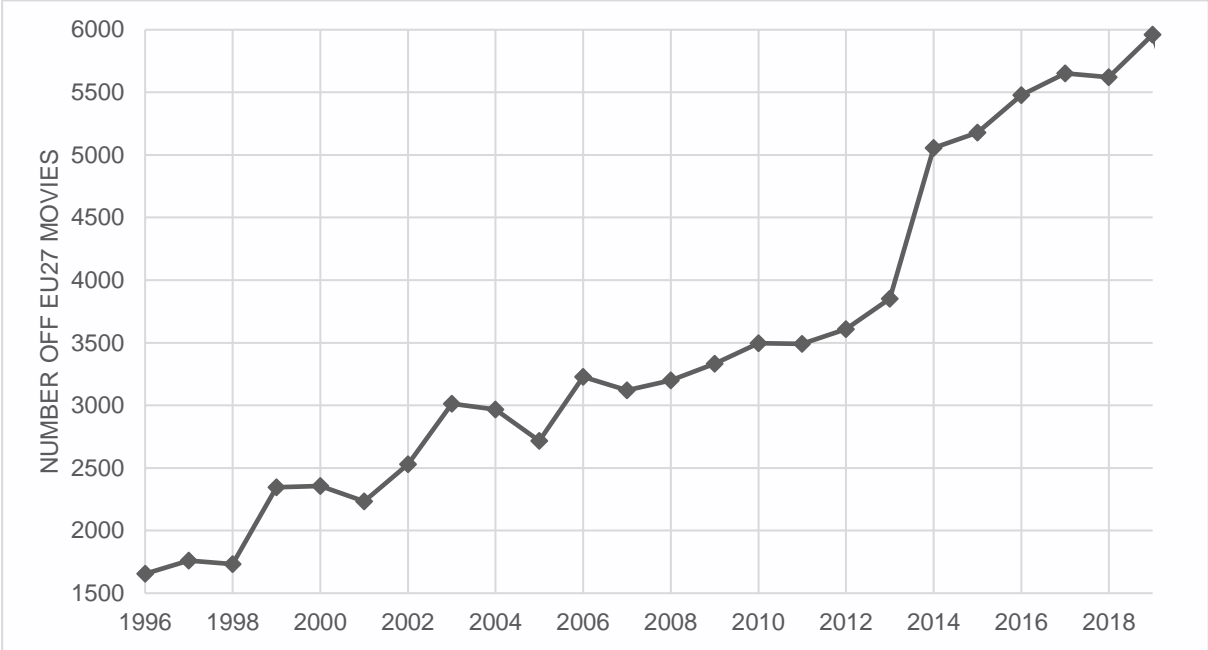


Figure 31: Number of different EU2718 movies shown in EU27, 1996-2019 (EAO LUMIERE PRO)

**Long lifespan.** Secondly, the number of European films shown in Europe in the period 1996-2019 is significantly bigger than the production volume of European films itself during that same period. Indeed, in 2000, for instance, 2356 European films were shown, whereas – taking the production and distribution cycle of European films into account – in 1997 only 515 were produced. The latter can be simply explained by the fact that the lifespan of several European films is longer than a few weeks or months, which results in, for instance, art house cinemas organizing retrospectives or thematic festivals, showing older films. Put differently, the life cycle of European films in European theatres is generally longer than its first theatrical release. The number of European films that are distributed and exhibited does, however, not reveal much about the popularity or success of these films in Europe. For that reason, the following chart looks at the attendance of European audiences for European films.

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<sup>18</sup> In this section of the report, we are talking about EU27 instead of EU28 because the data from cinema admissions in Malta were unavailable. This does not compromise our analyses, as Malta is a very small industry and market, which means that its omission does not skew the results.



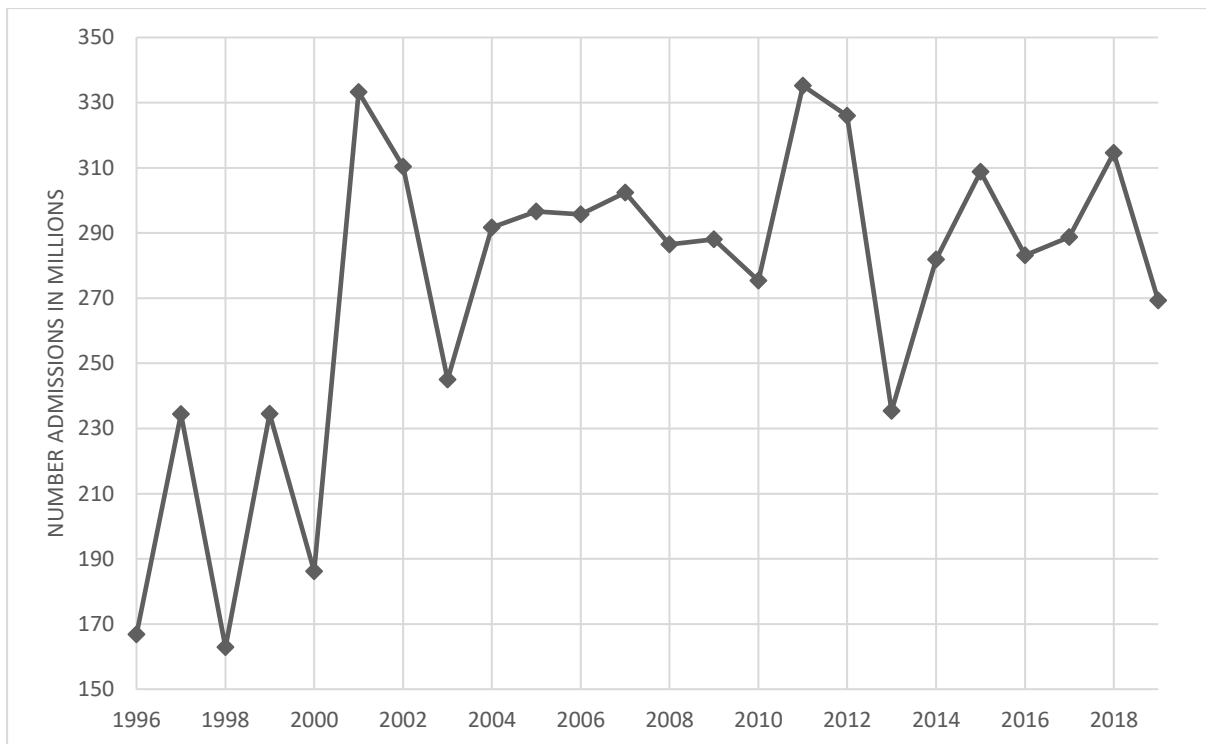


Figure 32: EU27 movie admissions for EU27 produced movies, 1996-2019 (EAO LUMIERE PRO)

**Popularity of European films.** The above graph presents quite an optimistic picture of the popularity of European films within Europe. Whereas in 1996, about 170 million tickets were sold for European films, in 2019, there were about 270 million admissions for European films in Europe, an increase of 59%. When looking more closely, we can see that since the new millennium, admissions for European films started rising significantly. This peak in admissions for European films is mostly due to a spike in admissions for European co-productions as the below chart illustrates.

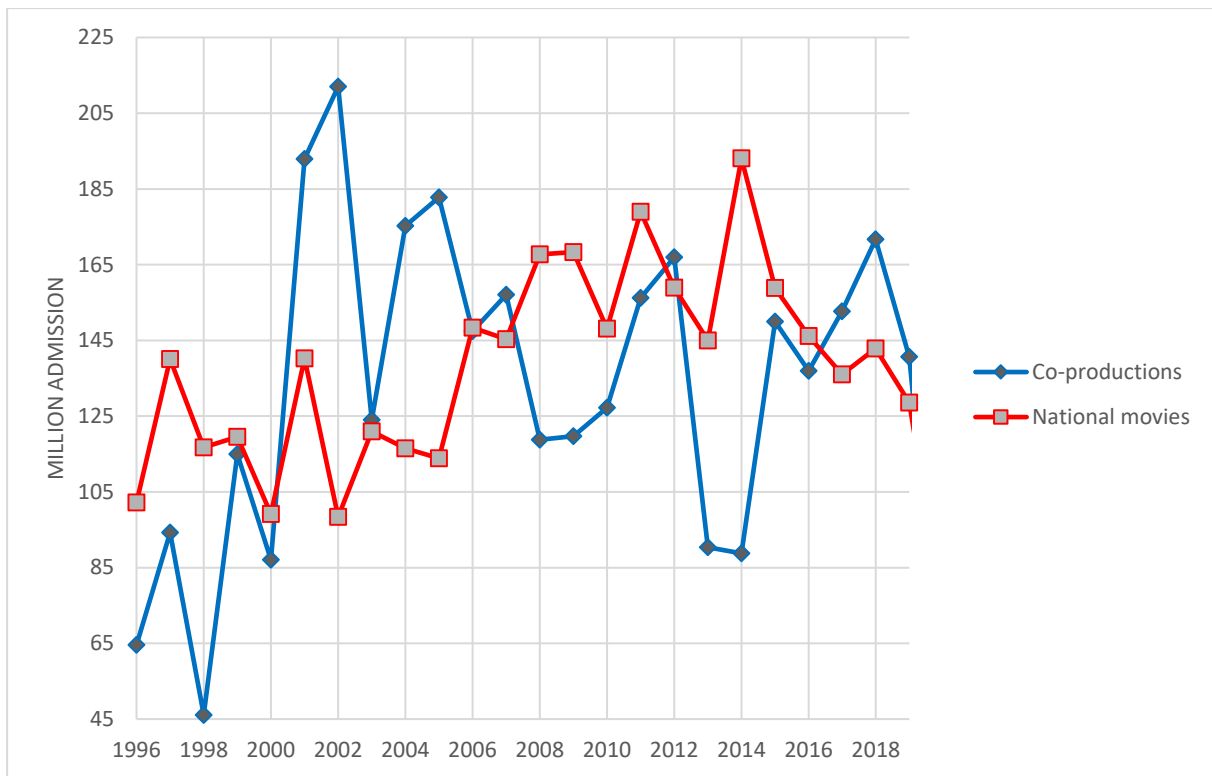


Figure 33: EU27 admissions of EU27 co-productions and EU27 national productions, 1996-2019 (EAO LUMIERE PRO)

**Co-productions vs. national productions: admissions, lifespan, crossing borders.**

Interestingly, the period of 2000-2007 is the only one in the timeframe of 24 years where European co-productions, on average, receive a higher number of admissions than European national film productions. From 2008 until approximately 2016, European national films were more popular in terms of ticket sales than European co-productions. Therefore, it seems that the European national film cultures are “surprisingly resilient in this era of globalized, digital storytelling [while] a surprising amount of national film-making is still enjoyed by national audiences” (Higson, 2018: 306). It should be noted, however, that these fully national productions receive most of their admissions from within their country of production. In other words, most admissions in the European film market for European films go to fully national European films, yet these fully national films do not cross their national borders and are, therefore, only seen by their national audiences. There are several factors that explain this issue, of which (1) linguistic differences (as well as dialects, regiolects and local accents); (2) cultural differences; (3) national borders; (4) different industrial practices; and (5) so-called taste barriers are, arguably, the most significant (Jones, 2017; Higson, 2018).

Simultaneously, the above chart tells us that—despite the pan-European policy measures that have been installed since the 1980s (§1)—in terms of admissions, generally, co-productions still perform slightly less than fully national productions. Indeed, in the period 1996-2020, 51% of all admissions for European films went to fully national films. From 2018, however, the tides started changing again, and European co-productions received more admissions. What is more, when analyzing the relative numbers, in the period 1996-2019, admissions for European co-productions have risen with 117%, while sales for fully national European films have only increased by 26%. Put differently, the admissions for co-productions have clearly been on the rise in the past two decades.

**Non-national European films popular in small film markets.** When we look, more specifically, at some European national market shares for non-national European films,<sup>19</sup> we find some examples that show promising numbers. Think, for instance, of Montenegro, with a market share of 28.6%; Switzerland's share of 27.9%; Luxembourg's share of 23.4%; Austria's share of 21.5%; Belgium's share of 20.7%; Slovakia's share of 19.3%; and Poland's share of 16.2%. These market shares tell us that non-national European films are more popular in small film markets that, on the one hand, have an underdeveloped national film industry, and, on the other, often share a common language with a neighbouring country that has a stronger national film industry (e.g., Austria with Germany; Switzerland, Luxembourg, and Belgium with France, etc). In conclusion, there is still a lot of work to be done if policymakers want to achieve a more integrated, diverse, supranational, or pan-European, or indeed, single market.

**Incoming investment and Hollywood.** Important to mention here is that for these analyses, “GB inc.” and “FR inc.” films (i.e., films produced in Great Britain or in France but which are partially or wholly owned/controlled by a USA production company) were included in the data and were, as such, considered as European films. In fact, “inc” stands for “incoming investment”, which means that an “inc film” is mainly produced by a company that may be registered in a European country but is owned or controlled by a company that is registered elsewhere in the world. Moreover, this “other country” is in most cases the USA, which skews the data as USA produced films generally receive significantly more admissions when compared to European films (cf. below). There is, therefore, a high chance that excluding GB

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<sup>19</sup> The timeframe of these data is 2003-2019, as the data before 2003 are not reliable (EAO).

inc. and FR inc. films from our database would result in an even higher volume of admissions for fully national films compared to European co-productions.

### 4.2 Hollywood vs. European movies

**Penetration of Hollywood films on the market.** To put the above data into greater perspective, we will now analyze the market penetration of Hollywood films in Europe between 1996 and 2019. In line with the lower production volume of Hollywood films (compared to the European output), we found that, overall, fewer Hollywood films are shown in Europe than European films. Though between 1996 and 2019, there is a clear rise in the number of Hollywood productions shown in Europe, yet the increase is less impressive when compared to the rise in European films shown. Actually, when comparing the amount of USA and EU films shown, we can see that in the last 25 years there has been quite a sharp decline in the volume of American-made films compared to the number of EUR27 films. This can be partially explained by the fact that the number of American films shown in Europe has not changed as much as the number of European films produced. To put the above in perspective, in the next graph, we add those films that are produced outside of the EU and the USA (i.e., rest of the world films) to the equation.

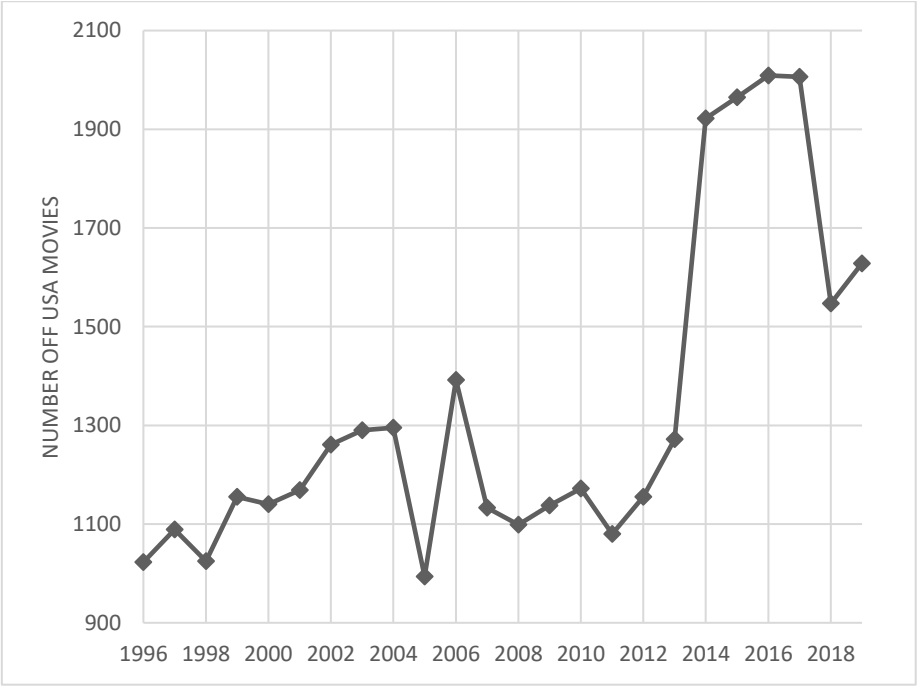


Figure 34: Number of different USA produced movies shown in EU27, 1996-2019 (EAO LUMIERE PRO)

**USA, EU27, and ROW films.** The above chart discloses the percentages of shown films that were produced in (1) the USA; (2) EU27; and in (3) the rest of the world (i.e., ROW). In addition to the above insights, it tells us that the amount of released films that were produced outside of EU27 and the USA is very small, floating between 9% in 1996 and 15% in 2019. Despite the rather marginal status of ROW films, the data show a significant rise of 61.98% in 23 years of the number of ROW films shown. In other words, though the amount of ROW films remains relatively marginal, its popularity has increased slightly in time. In conclusion, there is a clear European dominance in terms of produced and screened films. The next section, however, will draw a different picture as it will consider the tickets sold or admissions for USA, European, and ROW film productions.

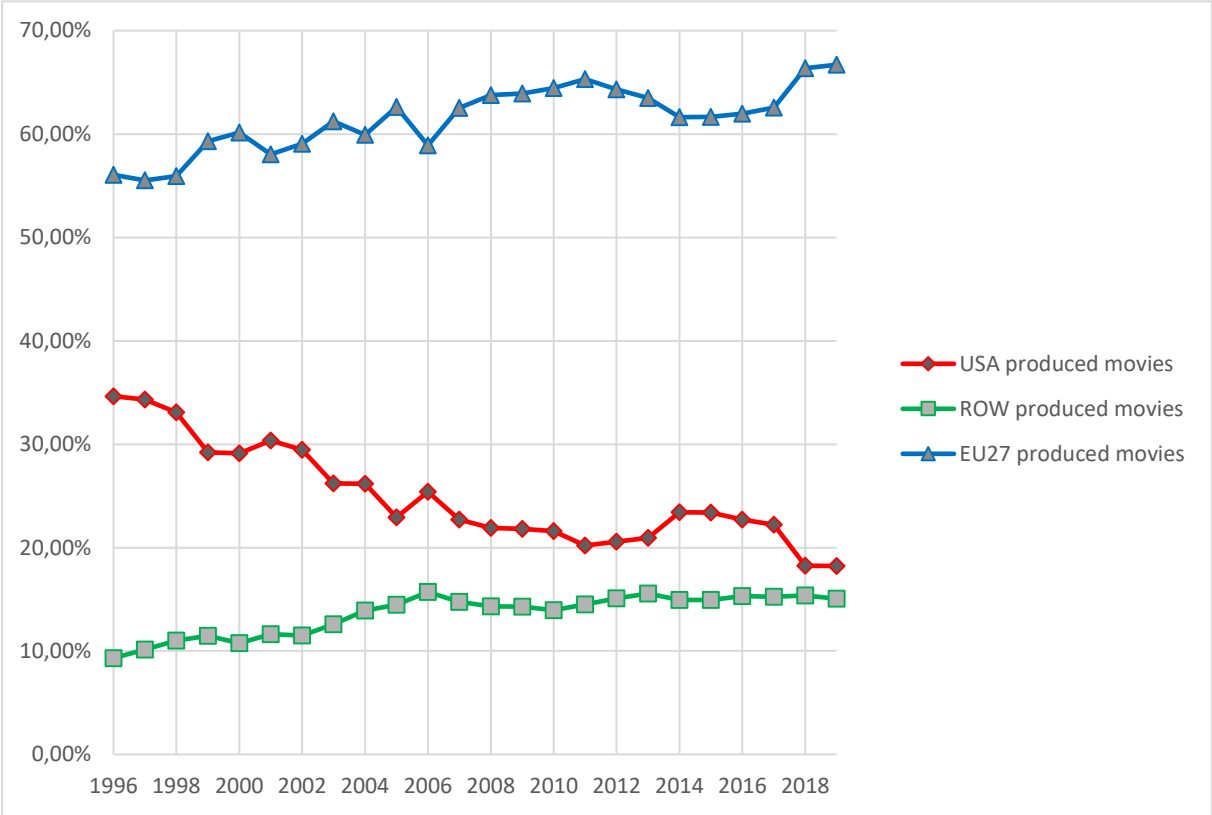


Figure 35: Shown movies in EU27 by type, 1996-2019 (EAO LUMIERE PRO)

**Hollywood dominance.** On average, the European market share for USA productions is no less than 66.42%, whereas the market share for (both national and non-national) European films is only 30.97%. What is more, the above chart teaches us that until the new millennium, USA dominance amounted to more than 70%. Since the year 2000, this number decreases slightly to the level of 60-70%. However, when comparing the share of tickets sold for American films in 1996 with 2019, we only see a decrease of 5.65%. In other words, in terms of

admissions, USA films have remained dominant in the past 30 years, despite the slight downward trend.

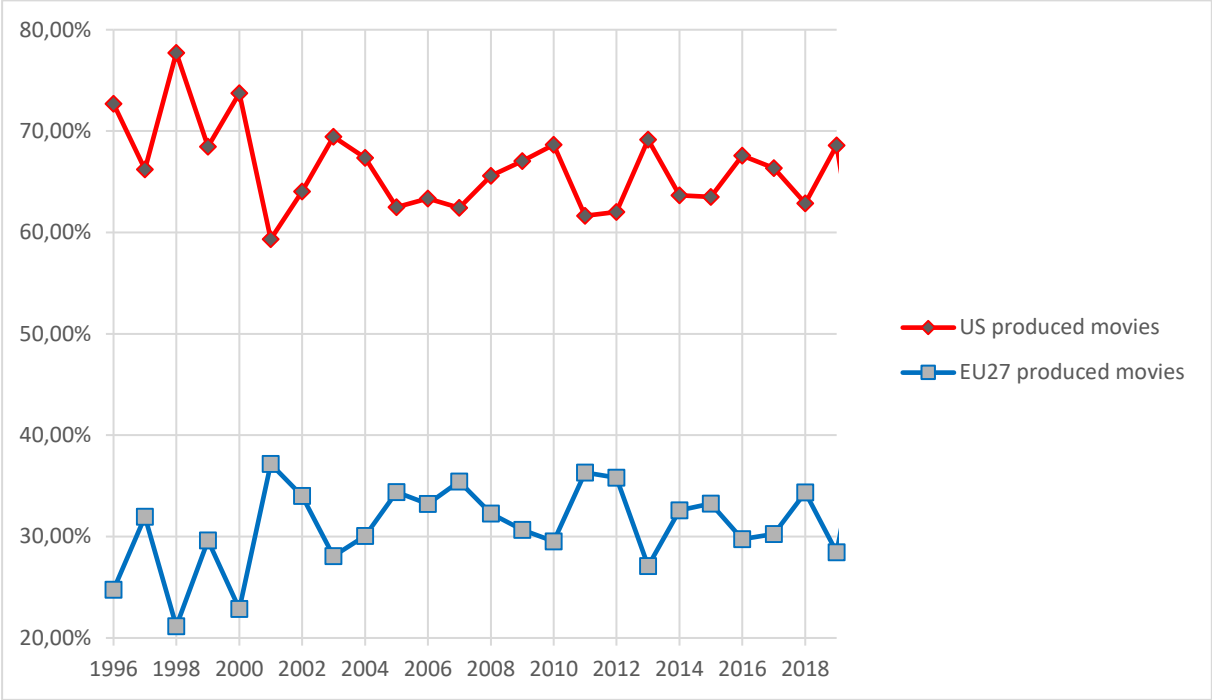


Figure 36: Market shares of total EU27 admissions, 1996-2019 (EAO LUMIERE PRO)

**Language, proximity, production values, budgets, etc.** This Hollywood dominance within Europe (e.g., Mingant, 2007; Wasko, 2003) can be explained by (1) the second language status of English in Europe; (2) the North American culture that feels proximate to Europeans after decades of exposure to Hollywood audiovisual content; (3) the fact that Hollywood films emphasize special effects and overall visual action instead of dialogue (Bondebjerg & Redvall, 2015) – making the films more easily understandable – while (4) deemphasizing cultural specificity and mixing aspects from different national cultures (Crane, 2014); (5) their vast budgets and use of well-known casts; (6) the fact that they can recuperate a great deal of their investments from their large domestic market; (7) their vertically integrated industry – with a coherent and highly effective transnational distribution system covering most of Europe, which is exactly the opposite of Europe’s fragmented distribution landscape (see Jones, 2017).

The share of admissions for European films shows the exact opposite trend: in 1996, about 24% of all admissions in Europe went to European films, while in 2019, the share was roughly 28%, an increase of exactly 14.98% – almost three times as high as the decrease of Hollywood

admissions. In sum, these data teach us that Hollywood dominance in Europe is slightly decreasing while the popularity of European films is increasing.

**Restricting Hollywood down in European markets.** In fact, our data<sup>20</sup> show that some European countries succeed well in keeping the market share for Hollywood films down. The most noticeable examples are (a) France, with, on average, a market share for Hollywood films of “only” 48%; (b) Denmark with 57.1%; (c) Italy with 57.5%; (d) the Czech Republic with 59.2%; (e) Finland with 60.1%; and (f) Poland with 61%. Additionally, the latter countries have significantly higher market shares for fully national films than other European film markets. The European film markets that, conversely, have the highest market shares for USA films are: (1) 86.8% in Cyprus<sup>21</sup>; (2) 86.7% in Romania; (2) 85% in Bulgaria;<sup>22</sup> (3) 83.4% in Malta;<sup>23</sup> (4) 82.2% in Bosnia-Herzegovina;<sup>24</sup> (5) 81% in Slovenia; and (6) 80.9% in Portugal. Unlike the aforementioned countries with lower market shares for USA films (e.g., France and Italy), these latter film markets have underdeveloped national markets and, therefore, low market shares for fully national films. Based on these findings, we can conclude that Hollywood’s dominance is significantly bigger in the smaller European nations that have underdeveloped or weaker national film industries.

When zooming out and looking at the averages, we found that, for the timeframe of 1996-2019, 66% of Europe’s market share went to Hollywood films and 31% to European films. Though Europe’s market share for both national and non-national European films may seem insignificant and weak, when one considers the market share for films that were produced in the rest of the world (i.e., 3%), one could argue that European films are actually quite successful within Europe – in other words, it depends on the perspective one chooses. Indeed, films that were made outside of the USA and Europe are actually very unpopular with European audiences. In this specific case, it is, however, important to acknowledge that, as shown in the afore, very few ROW films are shown in Europe, which for a great deal explains the low market share for ROW films.

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<sup>20</sup> The timeframe of these data is 2003-2019, as the data before 2003 are not reliable (EAO).

<sup>21</sup> Based on data from 2013, 2014, 2016, 2017, 2018, and 2019.

<sup>22</sup> Based on data from the period 2013-2019.

<sup>23</sup> Based on data from the period 2013-2019.

<sup>24</sup> Based on data from the years 2012, 2015, 2016, 2017, 2018, and 2019.

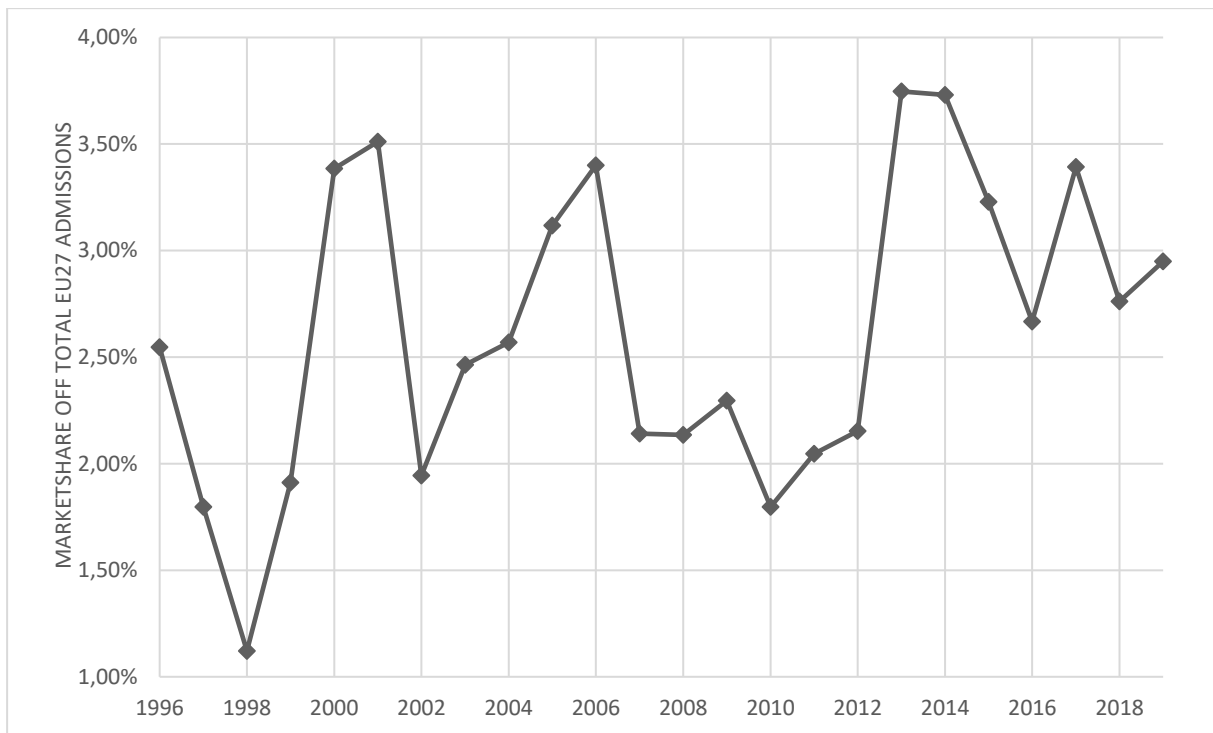


Figure 37: Market share ROW film admissions in EU27, 1996-2019 (EAO LUMIERE PRO)

**ROW films in Europe.** When analyzing the admissions for ROW films, we found that the market share for ROW films lays between 1.12% minimum and 3.75% maximum and does not vary much over time. In other words, the low market share for ROW films in Europe was relatively stable throughout the full period, showing only a small increase. Additionally, a more in-depth analysis of the different European film industries showed that there are two countries that have a significantly higher market share for the rest of the world productions compared to the European average, namely Estonia (4.1%) and Latvia (4%). The main reason for this exception is these countries' relationships and cultural proximity with a stronger developed neighbouring film industry, namely Russia. In conclusion, films that are produced outside of Europe and the USA remain a highly marginal phenomenon in the European film markets.

In sum, our data show that (1) the number of European films that have been theatrically released in Europe grew significantly; (2) this resulted in an increase in sold tickets for European films; (3) this increase can mostly be related to the growing popularity of European co-productions (in terms of admissions); (4) yet, overall, the market share for fully national European films remains significantly higher, compared to admissions for European co-productions – in other words, arguably, nothing truly “European” that resonates with all European audiences has been produced in the past two decades; (5) Hollywood remains



dominant in the European film market (in terms of admissions); (6) even though we can see a slight decrease in our chosen timeframe; and finally that (7) ROW films remain a highly marginal phenomenon in the European cinematic realm. Put differently, if there is one thing that unites European audiences, it is that they all prefer to watch Hollywood films, whereas non-national European and ROW films are more niche. At times, there are fully national films that perform well, yet most of the time, these are only popular within their proper domestic market. Though we cannot (yet) speak of a pan-European market, the situation has definitely not gotten worse and, indeed, progress has been made. Instead of reinforcing the Hollywood versus European cinema binary, it is increasingly clear that, more and more, European films complement the Hollywood dominance. Therefore, “[i]nstead of blaming Hollywood for all that goes wrong in the European film industries, we are better off by accepting that both the mainstream and non-mainstream are essential parts of a diverse film landscape” (De Vinck, 2011: 688).

### 4.3 Art-house cinemas

**Single-screen and other art house/*art et essai* cinemas.** This exploratory longitudinal analysis of the general trends in the circulation of films looked at the general European film market. To conclude this report, we would like to focus shortly on cinemas in the Europa Cinema network (ECN). It would take too much space to fully analyze the ECN’s distinctive role in the European cinemascape and its importance for fostering the distribution and screening of European films in and beyond the continent (see §1.1). Data from the ECN learns that, just before the outbreak of COVID-19, the network supported 1140 cinemas with 2804 screens in 34 countries. Although the ECN in very particular cases also supports multiplexes or major exhibition companies like Kinopolis (e.g., Kinopolis Kirchberg in Luxembourg), most of the members have very distinctive characteristics—mostly referred to as ‘art-house’ (English) or ‘art et essai’ cinemas (French).<sup>25</sup> Venues within the network mainly consist of single-screen cinemas (Figure 38); some of the biggest ECN markets, like Italy and Germany, still have a large network of single-screen venues. Although the majority has more screens (2 to 7), the average screen number within the ECN is 2.5 per venue or location.

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<sup>25</sup> For an overview of the territories and the number of member cinemas in the ECN, see Appendix 7.

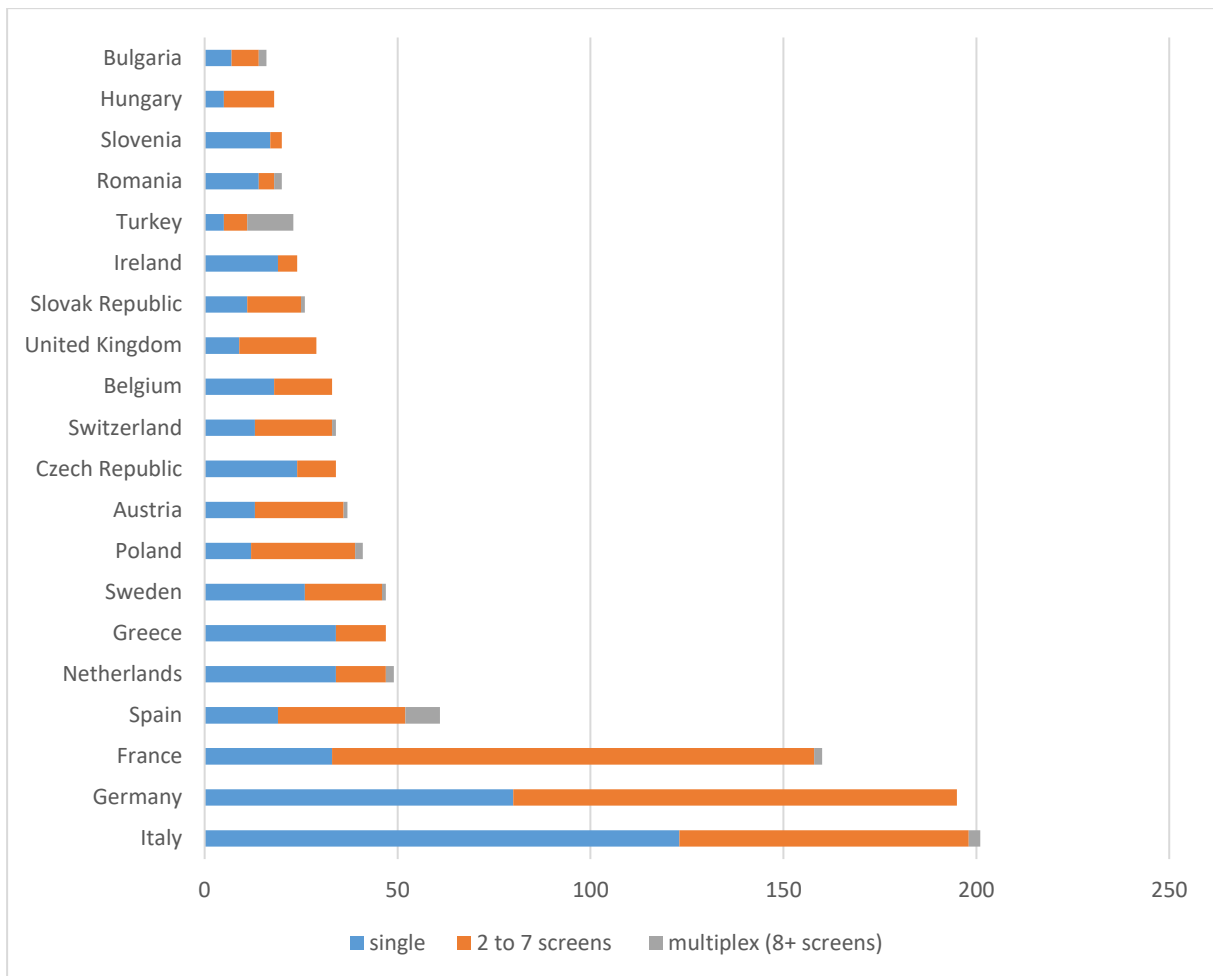


Figure 38: Single- versus multi-screen cinemas within the Europa Cinemas network, 2021 (ECn)

**More European films.** A general finding in relation to the circulation of films in this network is that the ECN members do indeed show more European films and less Hollywood fare. In the period between 2006 and 2019, USA material fluctuated between 41% (in 2010) and 30% (2012), whereas European films dominated with market shares increasing to 64% (in 2008). What is more, the most important part of this European market share goes to non-national European films—especially in smaller film markets. The shares for films from other territories than the USA and Europe (ROW) are mostly below 15%.

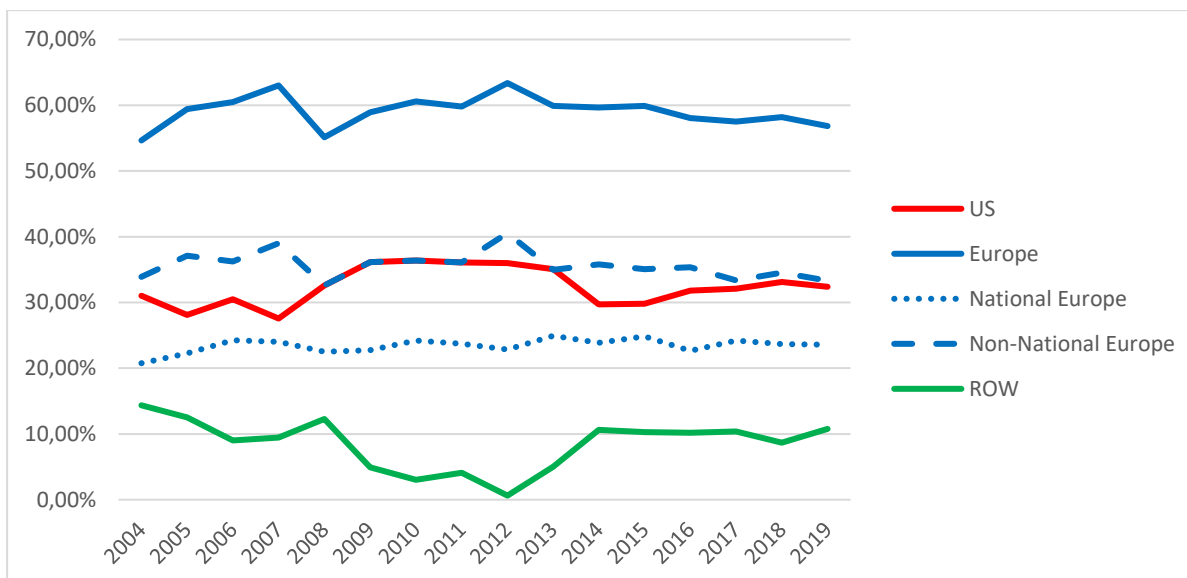


Figure 39: Supply of USA, European and other movies (%) in the Europa Cinemas network, 2006-19 (ECn)

**High European market shares.** Data from the ECN underlines how this higher offer of European films is also translated in high market shares in admissions (Figure 40).

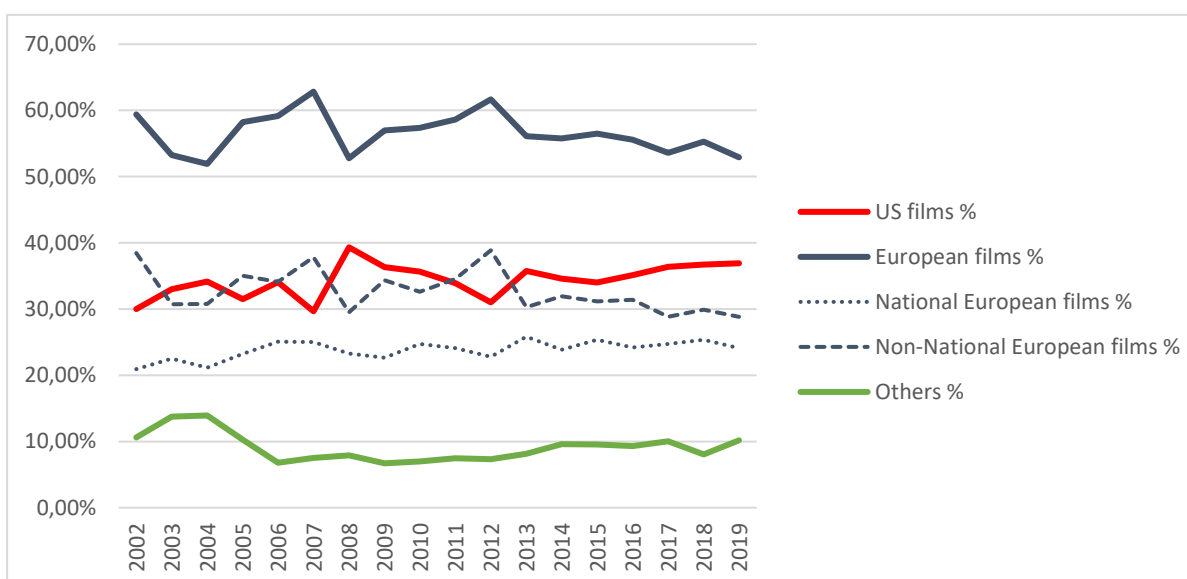


Figure 40: Market shares USA, European and other movies in the Europa Cinemas network, 2002-19 (ECn)

**Popularity of European pictures.** To finalize this report, we reproduce the list of the most popular films in terms of admissions within the Europa Cinemas Network below. This list, or the Top 10 pictures for the period 2009-19, only shows European films (Table 7; see also Appendix 8). Besides issues related to stardom, genres and their ability to cross-national borders, it remains clear that these top films were mostly produced by the industries of the 'Big

Five' European countries. Due to space limitations, we cannot expand on the question of whether this list of most successful films in the European art-house cinema market is fully linked to national and pan-European policies to support the intra-European circulation of European films. It should be noted that the success of European films in art-house cinemas is, for instance, also linked to the different sociodemographic, cultural-economic and taste profile of the audience for this circuit (Duval, 2012). It is clear, however, that this top list completely differs from the one that portrays a more general picture where USA films fully control the European market and are most performant in terms of crossing European borders (see Appendix 9 for top films in the world and in Europe, and for the best performing European films on the old continent).

	<b>Year</b>	<b>Country</b>	<b>Box office</b>	<b>Genre</b>
<i>Intouchables</i>	2012	FR	3.078.364	comedy
<i>The King's Speech</i>	2011	GB	2.864.404	drama biopic
<i>Slumdog Millionaire</i>	2009	GB	2.215.687	drama romance
<i>The Artist</i>	2012	FR	1.597.920	comedy drama
<i>Dolor y Gloria</i>	2019	ES	1.347.179	drama
<i>The Favourite</i>	2019	GB	1.325.215	biopic comedy drama
<i>Qu'est-ce qu'on a fait au Bon Dieu?</i>	2014	FR	1.293.373	comedy
<i>Los abrazos rotos</i>	2009	ES	1.091.339	drama romance thriller
<i>The Iron Lady</i>	2012	GB	1.079.095	biopic drama
<i>Cold War</i>	2018	PL	974.847	drama

*Table 7: Top 10, or the most popular films in the Europa Cinemas network, 2009-19 (ECN)*

## DISCUSSION

**The art of cinema is alive more than ever.** This report aimed at exploring longitudinal trends on some basic categories of the European film industry and market. We explicitly focused on the theatrical cinema model in the sense of an industry aiming at an experience of consuming films in film venues. Given the low average cinema attendance rate in Europe (§3), one could argue that this model of consuming films and (literally) cinemagoing has become a marginal cultural and social phenomenon. In the introduction, we have tried to bring forward different arguments for defending the thesis that this model continues to be relevant – for instance as a first step in launching and attracting attention for new films. We decided not to deal with the variety of other options of consuming the same products or artistic-cultural artifacts (films) today—a variety of other options in terms of the technologies and devices used to see them, or the spatial environment where and how people watch the said films. Research on film audiences, like the one for the European Commission (2014), underlines how lively consuming films is today and how frequently people watch films in multiscreen environments—in cinemas, in festival sites, via streaming services, on linear and other television [sets ?], on laptops and other (very) small screens. Therefore, though our data show that the traditional cinema model might be under pressure, the practice of telling and consuming stories through the art of cinema is alive more than ever.

**The theatrical cinema model is not dead.** This report did not deal with all these other practices of cinema consumption today and instead wanted to focus on the traditional theatrical cinema model. One overall conclusion is that this model is definitely not dead. On the contrary, one might even argue that, as this report also brought forward, there are several arguments indicating how vibrant the European and worldwide cinema is in terms of the still growing film production market; the stabilizing and in some territories expanding film exhibition market; the appearance of territories like Russia, Poland, or Turkey where all indicators underline a growing film production and exhibition market; and so on.

**Continuing questions on the survival of the theatrical cinema model.** Although there were positive trends pointing towards the survival and (in some territories even) expansion of the film exhibition sector, there are clear signs that the traditional exhibition market is strongly under pressure. This is visible in the overall stabilizing admission figures (see Figure 19) and in some markets where admissions and box office results showed a clear downward trend if we look at it from a longitudinal perspective (for instance Spain and Germany; Figures 20, 25,

30). In some European territories, the cinema industry's GBO is clearly not following the general economic trends. Among stakeholders in the European film industry, there is the general concern that filmgoers are gradually losing the habit of (physically) going to the pictures. This concern refers to the increasing numbers of audiences preferring to engage with films through streaming and other digital platforms. These concerns only became stronger during the pandemic when people massively discovered the advantages of consuming films via these platforms.

**The strong growth of European productions, but weakness in crossing (inter)national borders.** Figures on the European film production volume might be misleading: in the reference period, we saw an intense increase in the released European film production (519 in 1996; 1719 in 2019; Figure 5). Although this surely is a strong sign of its economic and artistic vividness, several questions need to be raised. One is about the role played by film policies—regional, national and supranational—and about funding. In this report, we did not deal with these issues (and neither did we deal with production budgets), despite that, in Europe, the film industry heavily relies on direct and indirect public funding (EAO, 2021a: 8). This is quite different from the USA, where we saw that there was a stabilizing feature film production volume since 2005, but also how Hollywood continues to dominate the European exhibition market. One of the key problems of European cinema remains (like it was in the beginning of the reference period of this report) that notwithstanding a growing production, European films perform badly in other non-national markets, and they are not often exported beyond European borders.

**Dependency on USA blockbusters.** The dominance of Hollywood films is often seen in terms of a threat or as a conflict between the USA and European film production. For other parts of the European film industries and their stakeholders (e.g., audiences), Hollywood films play a different role. This is most clearly visible in the exhibition sector where admission figures and GBO results are quite volatile and very much dependent on the supply of a series of highly successful films. In its most recent Focus on world film market trends, the EAO (2021a: 14) argued that *“the surge in EU admissions was almost entirely driven by the comparatively strong performance of US blockbusters as admissions to European films and European films produced in Europe with incoming US investment (EUR inc) actually declined.”* The fact that market shares for USA films continue to be (very) high (particularly in small production countries) is certainly a problem for European cinema industries and for EU film/media/cultural

policies. This does not directly imply that this is also necessarily a threat to the European cinema exhibition scene and to the traditional theatrical cinema model.

Finally, we want to repeat that this report only tried to bring together some basic longitudinal data and that we refrained from interpreting the described trends at length. Therefore, it calls for more research in order to understand what happened in the last three decades of Europe's cinema history. What about the effectiveness of film policies? What about the impact of new technologies, new actors in the field and new business models like streaming services on the production, circulation, exhibition and consumption of (European) films? What about the films that succeed to travel across national borders and beyond Europe? What about new narrative strategies and aesthetic changes due to these new environments? What about audiences their experiences of cinema in and beyond the theatrical film environment today?

## METHODOLOGICAL NOTES

This section provides some additional short methodological notes, especially on how the authors of this report tried to construct longitudinal datasets in relation to some of the basic trends in the European film market. The report relies on desk research by (1) gathering literature and data on the European film market; (2) compiling longitudinal datasets, mostly from major pan-European institutions; and (3) conducting interviews with representatives of those institutions.

As this research didn't entail the collection of original data, the authors completely rely on existing datasets. Pan-European institutions like the EAO, Media Salles, UNIC and the ECN provide data on various categories of the film market. These include figures on ticket sales and other data on admission; on the cinema infrastructure (e.g., number of screens and film venues); or on the performance of films on the market (e.g., market shares for European films). For some of these categories, we dispose of overlapping datasets. This is an advantage, but it also forces researchers to take into account the different provenances of the data and the data collection methodologies used by these original data providers. This is, for instance, the case for data on film production and on how a 'feature film' or the 'nationality' of films were defined.<sup>26</sup> Pan-European film market data institutions like the EAO or Media Salles sometimes use different sources, including national or regional film funds (e.g., the Czech Film Fund or the Flemish Film Fund), ministries of culture or media (e.g., Ministero della Cultura in Italy), film festival (e.g., the Sarajevo Film Festival), or data which are provided by industry-related organizations (e.g., UNIC relies on data coming from its members, which are national exhibitors' associations in 37 territories).

As the different pan-European institutions sometimes use other original data providers, the quality of their compiled datasets sometimes differs. In some cases, it should also be taken into account that the figures can be indicative. Given the differences in the data collection methodologies, we decided not to mix up data coming from these pan-European institutions. Besides the focus on the theatrical cinema environment in Europe of the last three decades (see §1 for the scope of the report), we additionally decided to concentrate mainly on feature

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<sup>26</sup> The EAO data for film production in Belgium is the sum of films reported by the French-language *Communauté française Wallonie-Bruxelles* (CFWB) and Dutch-language *Vlaams Audiovisueel Fonds* (VAF). CFWB counts films certified, whereas VAF counts only feature films released which received public support.



films and documentaries. It should, therefore, be noted that among others, short films or concert recordings were not included in the analysis.

**Datasets.** The following pan-European institutions provided data, or we collected data which were made available (e.g. on their websites, yearbooks) by these institutions:

### **1. Datasets provided by the EAO**

- Period: mostly 2001-19
- Description/contents include:
  - FILM-ADM Cinema Admissions
  - FILM-INFR Cinema infrastructure
  - FILM-MS Admissions market share by origin
  - FILM-PRI Average cinema ticket price
  - FILM-PROD Number of theatrical feature films produced in Europe
  - MAR-AD Advertising expenditures by media
  - VIDEO-REV Physical video revenues turnover, 2005-18

### **2. EAO Yearbooks**

- Period: 1996-97-98, 2000
- Description/contents include:
  - FILM-ADM Cinema Admissions
  - FILM-INFR Cinema infrastructure
  - FILM-MS Admissions market share by origin
  - FILM-PRI Average cinema ticket price
  - FILM-PROD Number of theatrical feature films produced in Europe

### **3. EAO LUMIERE PRO**

- Period: 1996-today
- Description/contents:
  - Online database (for definitions on year of production, country of production,..., see the methodological section on <http://lumiere.obs.coe.int>)
  - Only films with a theatrical release
  - Data on: original title/International titles, director (incl. gender), countries of origin / region of origin, genre (Fiction / Documentary / Animation), type

(100% national / co-production), production year, theatrical release data (e.g. annual admissions, release data).

#### **4. UNIC**

- Period: 2010- (varia)
- Data collection based on UNIC's yearbooks on film exhibition
- Description/contents include:
  - Admissions
  - Box office
  - Market share local films %
  - Digitization
  - Screen density (per inhabitant)
  - Top 5 films

#### **5. EUROPA CINEMAS (ECN)**

- Period: 1993-2019 (varia)
- Data collection based on ECN website ([www.europa-cinemas.org/en/search-film](http://www.europa-cinemas.org/en/search-film))  
+ data provided by ECN
- Description/contents include:
  - Market shares
  - Total admissions
  - Screens
  - Cities
  - ...

#### **6. MEDIA SALLES**

- Period: varia
- Data collection based on Media Salles' website ([www.mediasalles.it](http://www.mediasalles.it))
- Description/contents: data include:
  - Market shares
  - Total admissions
  - Number of screens
  - Number of cinemas
  - Gross box office revenues in Euro and in national currency
  - Admissions
  - Annual frequency per capita
  - Cinema expenditure per capita
  - Average ticket prices in Euro and in national currency

- Adjusted average ticket prices
- ...

**Interviews.** During the search for data and the compilation of longitudinal datasets, several key representatives of the main data providing institutions were interviewed by one of the report's authors. These interviews focused on methodological aspects of the available data. The following representatives were part of the interviews:

### 1. EAO

online and mails with:

- Gilles Fontaine, Head of the Department for Market Information
- Martin Kanzler, Deputy Head of Department for Market Information/Film Analyst

### 2. Europa Cinemas network

online, mails and interview at ECn's headquarters in Paris:

- Claude-Eric Poiroux, general director
- Fatima Djoumer, head foreign relations
- Jacques Balducci, executive coordinator
- Nicolas Edmery, research & statistics experts

### 3. Media Salles

mails and interview at headquarters in Milan:

- Elisabetta Brunella, secretary-general
- Silvia Mancini, researcher

### 4. UNIC

online and mails:

- Guillaume Branders, senior industry relations manager

**Division of labour.** This report is a collaborative effort with various authors and contributors. Work on this report started early June 2021 and a draft version was delivered in December, 2021. This is the division of labour:

- Literature review: Daniel Biltereyst (DB) and Eduard Cuelenaere (EC)
- Contacts and search for data with European institutions and data-providers: DB
- Interviews: DB (and for one online meeting Andrea Miconi)
- Statistical and econometric analysis: Thomas Van den Heede (TVdH)

- Construction longitudinal datasets: DB, EC, TVdH and Femke De Sutter
- Analysis datasets: DB, EC, TVdH
- Report and analysis datasets for chapters:
  - Ch 1: DB (lead) and EC
  - Ch 2: EC (lead) and DB
  - Ch 3: DB
  - Ch 4: EC (§4.1, §4.2) and DB (§4.3)
  - Discussion: DB
  - Methodological notes & References: DB and EC

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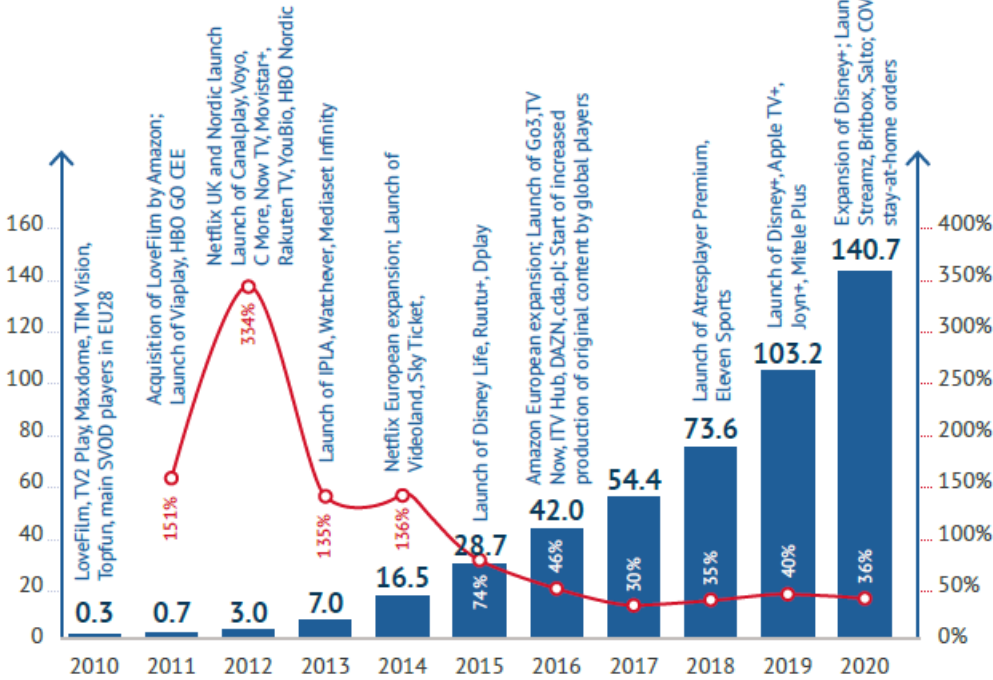
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# APPENDICES

## Appendix 1. EU28 subscriptions to OTT SVOD (EAO, 2021a: 51)

### EU28 subscriptions to OTT SVOD

(2010-2020 – in million subscriptions and % of subscriptions; YoY growth)



Source: Ampere Analysis

Not all SVOD services have been taken into account, only a selection, to show the most impactful

## Appendix 2. Member states in the EC12 (early 1990s)

### EC12

1. Belgium

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2. Denmark

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3. France

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4. Germany

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5. Greece

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6. Ireland

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7. Italy

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8. Luxembourg

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9. Netherlands

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10. Portugal

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11. Spain

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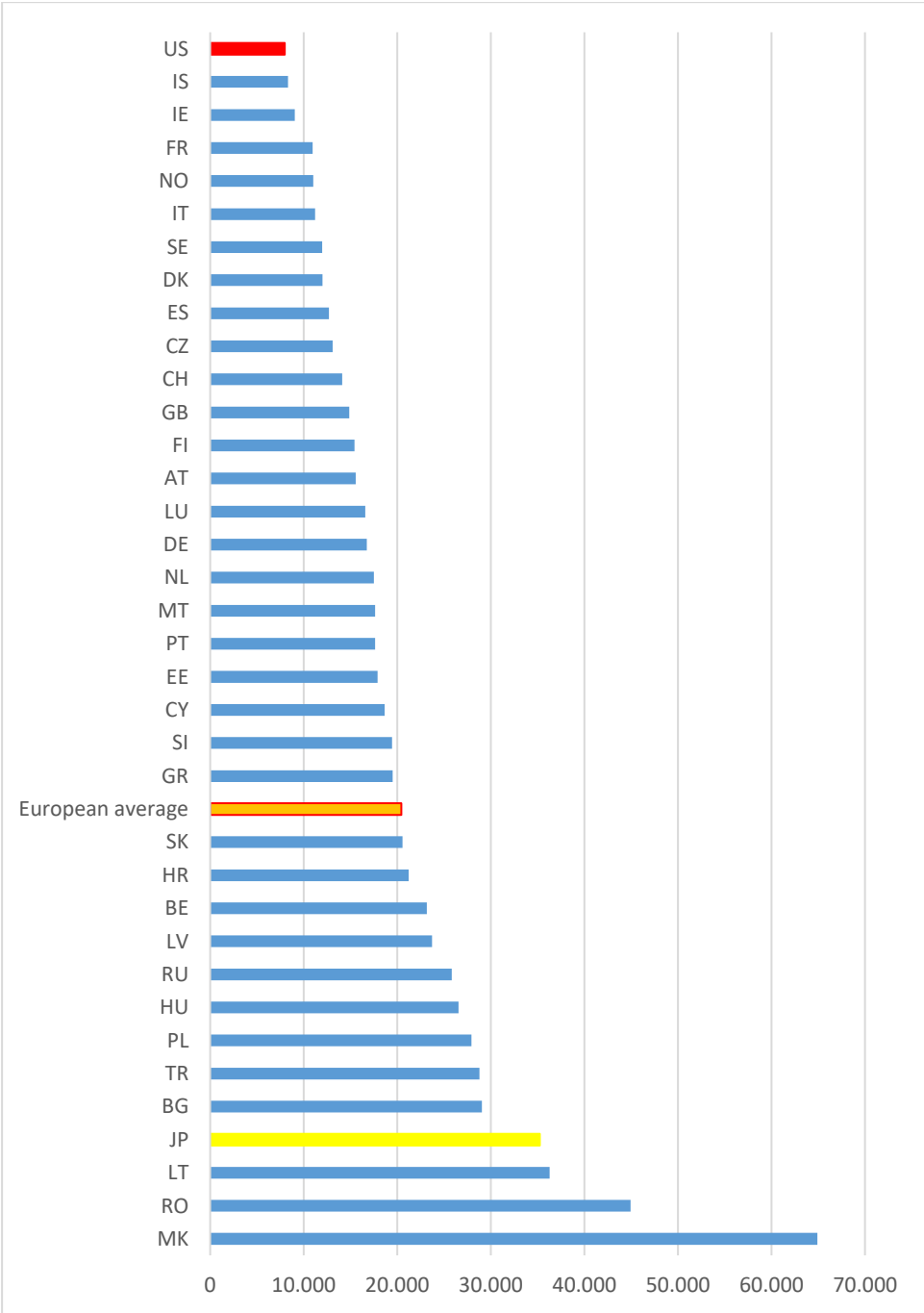
12. United Kingdom

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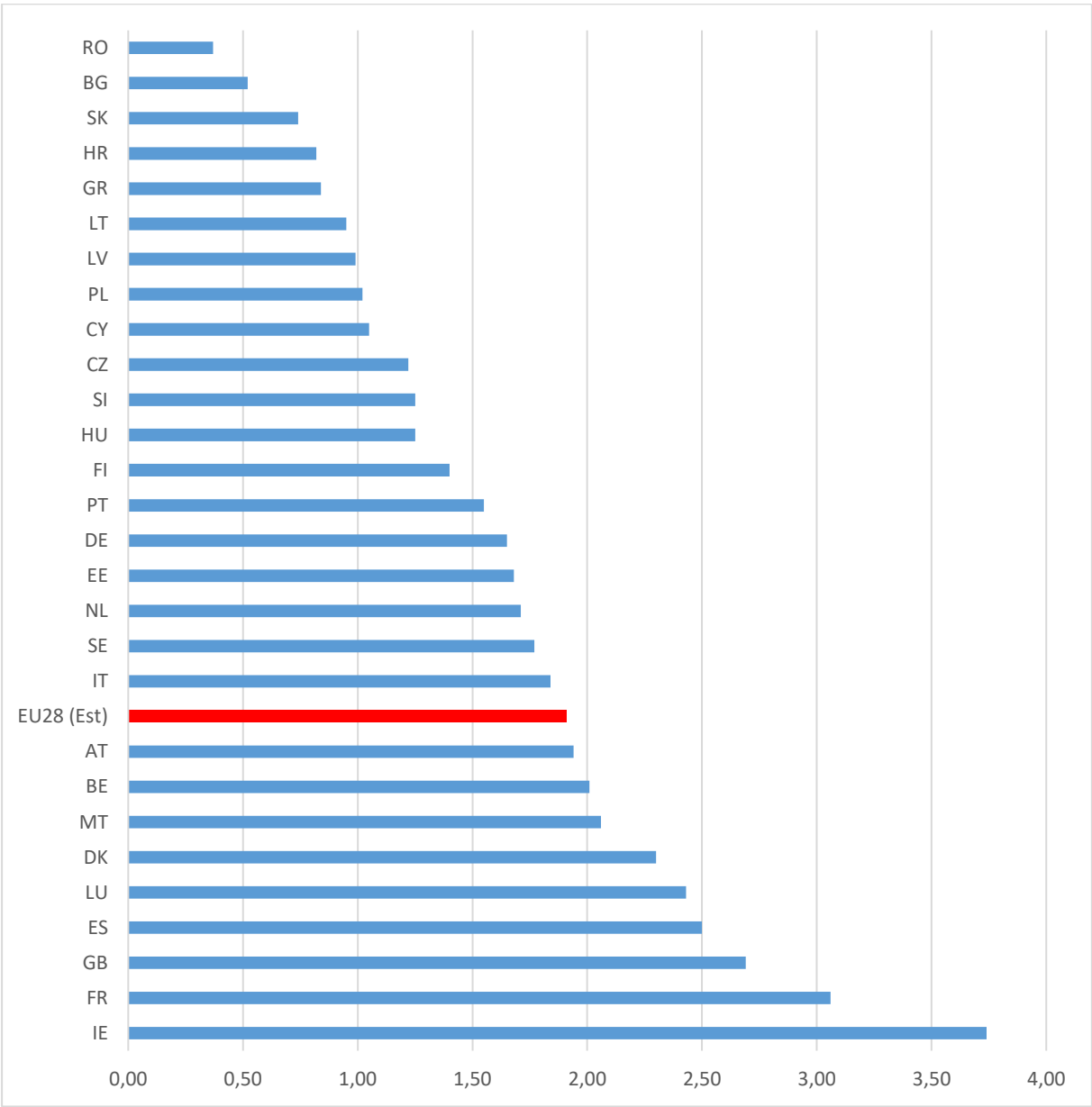
### Appendix 3. Member states in the EU28 (and EU27)

<b>EU28 (EU27)</b>	<b>Member of EU in</b>
1. Austria	1993
2. Belgium	1993
3. Bulgaria	2007
4. Croatia	2014
5. Cyprus	2004
6. Czech Republic	2004
7. Denmark	1993
8. Estonia	2004
9. Finland	1993
10. France	1993
11. Germany	1993
12. Greece	1993
13. Hungary	2004
14. Ireland	1993
15. Italy	1993
16. Latvia	2004
17. Lithuania	2004
18. Luxembourg	1993
19. Malta	2004
20. Netherlands	1993
21. Poland	2004
22. Portugal	1993
23. Romania	2007
24. Slovakia	2004
25. Slovenia	2004
26. Spain	1993
27. Sweden	1993
28. United Kingdom	1993-2020

**Appendix 4. Number of inhabitants per screen (2019, EAO)**



**Appendix 5. Cinema admissions: admissions per inhabitant per year, average for 2001-19**



**Appendix 6. Ticket prices in EU28 and in the Big Five**

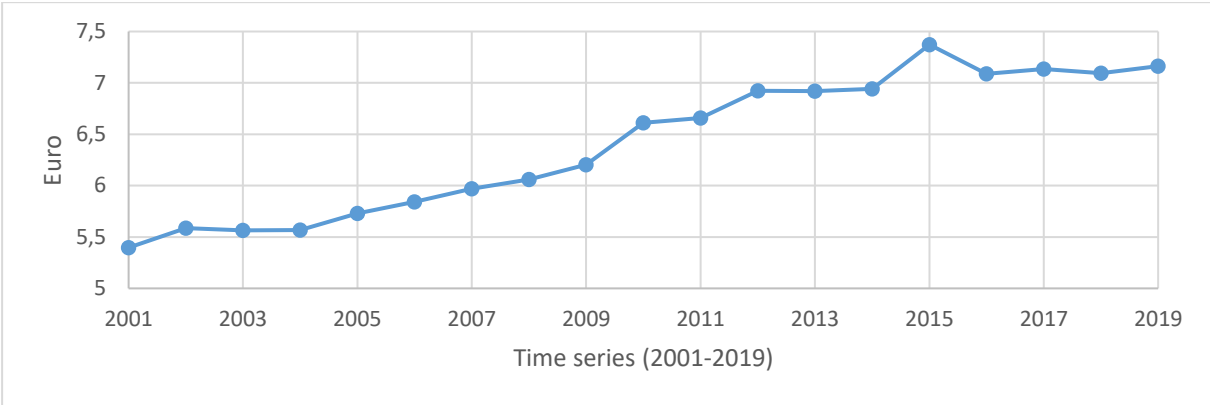


Figure: Average cinema ticket price for EU28, 2001-19 (EAO)

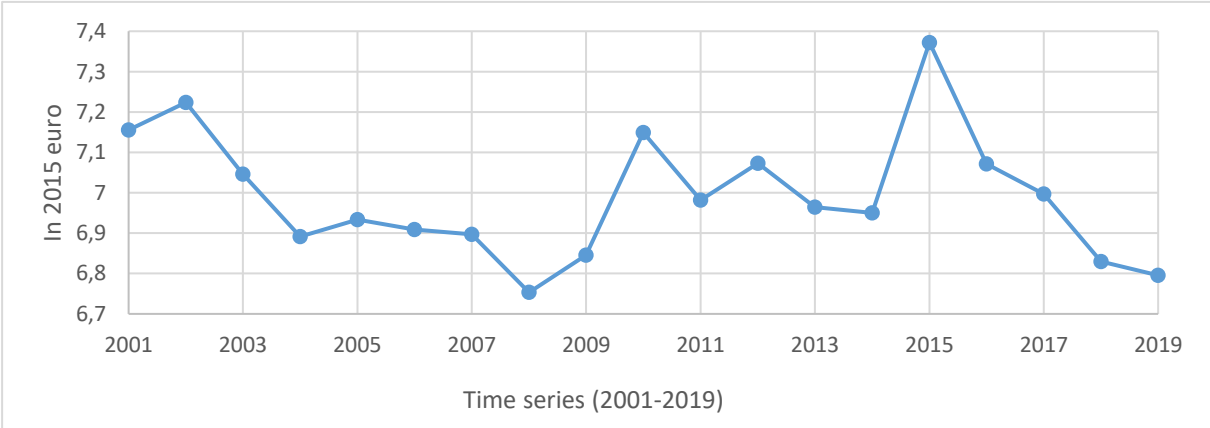


Figure: Average cinema ticket price for EU28, 2001-19, adjusted to 2015 price (EAO)



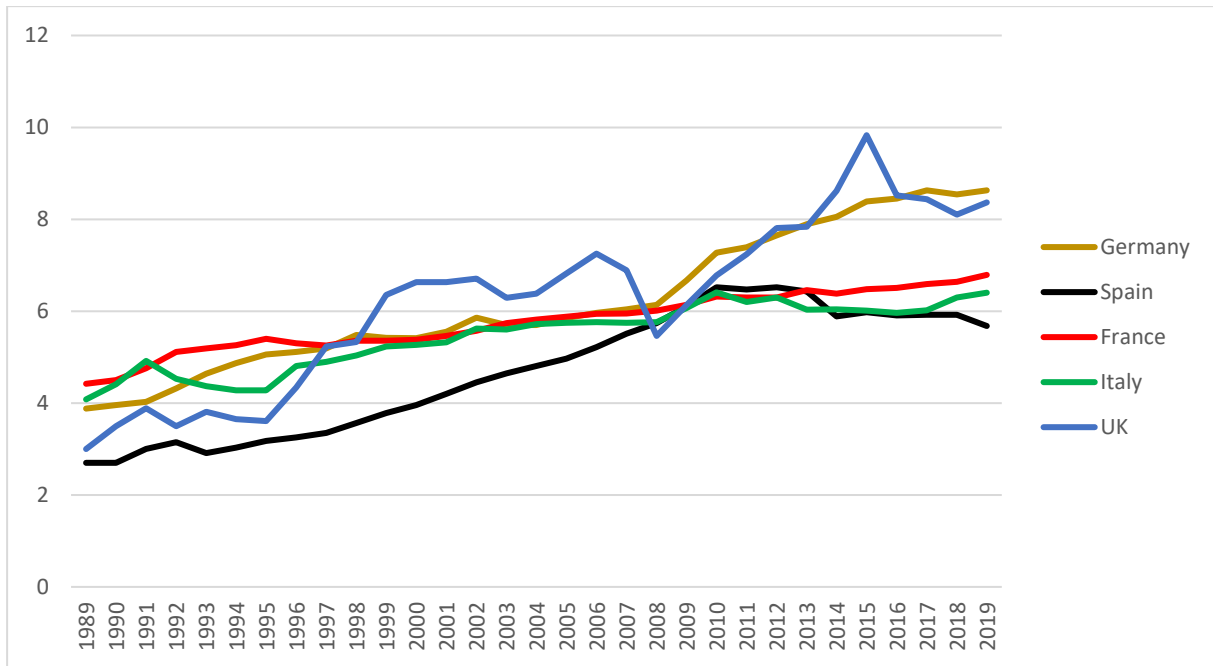
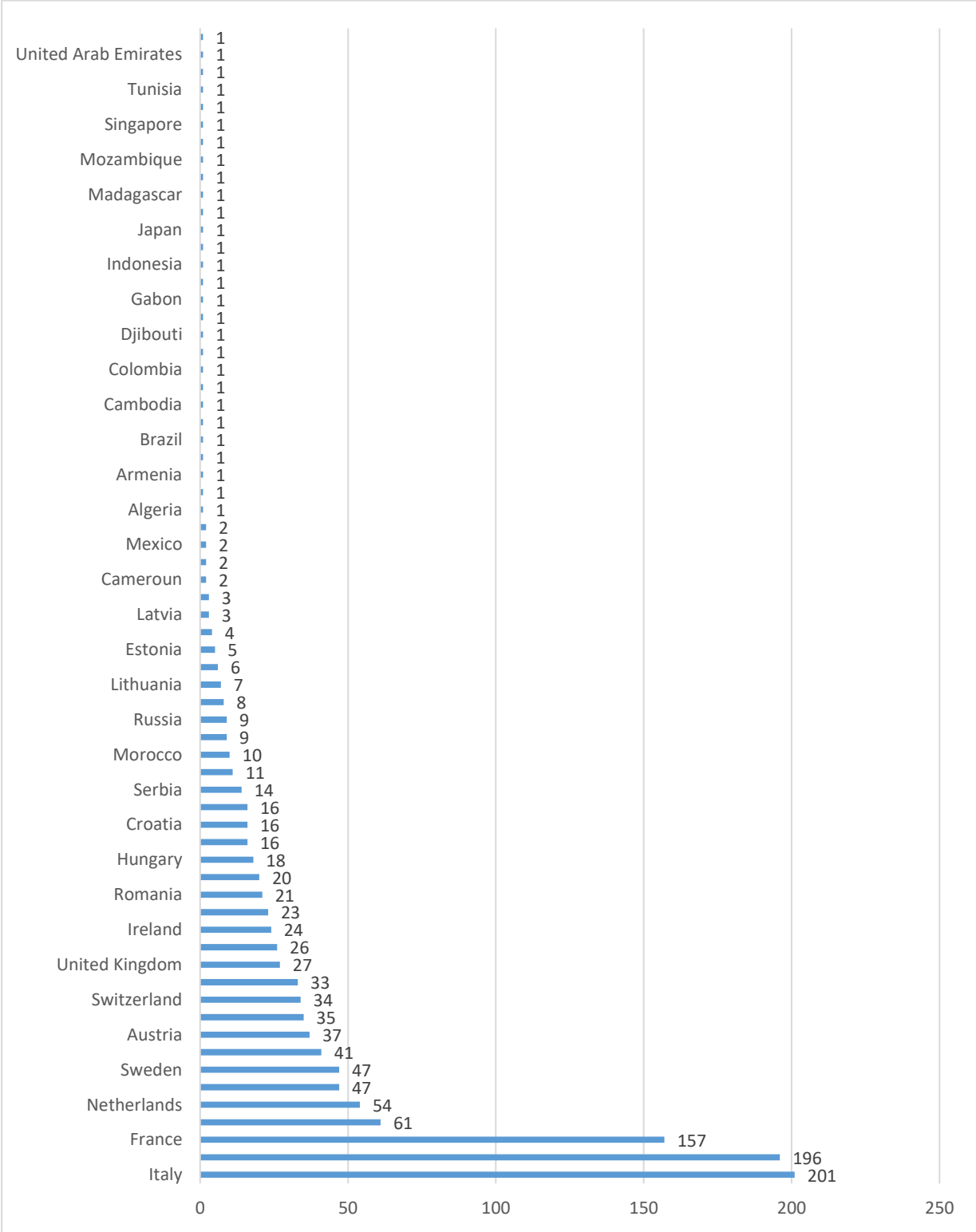


Figure: Average cinema ticket price for the Big Five markets in EU28, 1989-2019 (Media Salles)

**Appendix 7. Number of member cinemas supported by Europa Cinemas per country (december 2021) (ECN)**



## Appendix 8. Top 5 films and their admissions in the Europa Cinemas network, 2009-19 (ECN)

<b>2019</b>	<b>4.460.103</b>
Dolor y Gloria (ES)	1.347.179
The Favourite (GB)	1.325.215
Downton Abbey (GB)	714.509
Qu'est-ce qu'on a encore fait au Bon Dieu ? (FR)	540.854
Yesterday (GB)	532.346
<b>2018</b>	<b>3.937.225</b>
Zimna wojna (PL)	974.847
Darkest Hour (GB)	921.342
Chiamami col tuo nome (IT)	846.531
Todos lo saben (ES)	616.281
The Children Act (GB)	578.224
<b>2017</b>	<b>2.722.799</b>
The Square (SE)	818.308
Victoria and Abdul (GB)	546.452
Toivon tuolla puolen (FI)	518.550
Loving Vincent (PL)	449.791
Toni Erdmann (DE)	389.698
<b>2016</b>	<b>3.954.566</b>
I, Daniel Blake (GB)	964.900
Toni Erdmann (DE)	926.648
Julieta (ES)	820.081
The Danish Girl (GB)	717.533
Florence Foster Jenkins (GB)	525.404
<b>2015</b>	<b>3.418.366</b>
Youth - La giovinezza (IT)	849.316
La Famille Bélier (FR)	740.743
The Theory of Everything (GB)	627.638
Amy (GB)	622.363
Timbuktu (FR)	578.306
<b>2014</b>	<b>3.906.274</b>
Qu'est-ce qu'on a fait au Bon Dieu? (FR)	1.293.373
Philomena (GB)	898.455
Hundraåringen som klev ut genom fönstret och försvann (SE)	615.224
Ida (PL)	583.493
Mr. Turner (GB)	515.729
<b>2013</b>	<b>3.494.660</b>
La Grande Bellezza (IT)	762.883
Hannah Arendt (DE)	716.695
Quartet (GB)	715.304
La vie d'Adèle (FR)	690.186

Night train to Lisbon (EU)	609.592
<b>2012</b>	<b>7.567.032</b>
Intouchables (FR)	3.078.364
The Artist (FR)	1.597.920
The Iron Lady (GB)	1.079.095
The Best Exotic Marigold Hotel (GB)	911.714
Amour (FR)	899.939
<b>2011</b>	<b>6.058.476</b>
The King's Speech (GB)	2.864.404
Habemus Papam (IT)	852.410
Carnage (FR)	806.795
La piel que habito (ES)	790.922
Melancholia (DK)	743.945
<b>2010</b>	<b>4.265.153</b>
Soul Kitchen (DE)	952.625
Le concert (FR)	921.089
Des hommes et des dieux (FR)	861.686
The Ghost Writer (FR)	827.081
You Will Meet a Tall Dark Stranger (GB)	702.672
<b>2009</b>	<b>5.784.827</b>
Slumdog Millionaire (GB)	2.215.687
Los abrazos rotos (ES)	1.091.339
The Reader (GB)	969.542
Das weisse Band (AT)	853.248
Coco avant Chanel (FR)	655.011

## Appendix 9. Top 20 films by GBO worldwide, 2019 (EAO, 2021a: 13; 20)

### Top 25 films by admissions in the European Union | 2019 *prov.*

Original title	Country of origin	Director	Admissions <i>prov.</i>
1 The Lion King	US/GB	Jon Favreau	48 674 126
2 Avengers: Endgame	US	Anthony Russo, Joe Russo	41 037 910
3 Joker	US	Todd Phillips	34 644 144
4 Frozen 2	US	Chris Buck, Jennifer Lee	31 644 426
5 Toy Story 4	US	Josh Cooley	22 451 398
6 Star Wars: Episode IX - The Rise of Skywalker	US	J.J. Abrams	22 145 204
7 Aladdin	US	Guy Ritchie	20 194 060
8 Captain Marvel	US	Anna Boden, Ryan Fleck	18 106 274
9 Spider-Man: Far from Home	US	Jon Watts	17 744 592
10 Once Upon a Time... in Hollywood	US/CN/GB	Quentin Tarantino	14 897 988
11 How to Train Your Dragon: The Hidden World	US/JP	Dean DeBlois	14 828 172
12 The Secret Life of Pets 2	US/FR/JP	Chris Renaud, J. del Val	13 879 303
13 Dumbo	US/GB/AU/CA	Tim Burton	12 971 056
14 Fast & Furious Presents: Hobbs & Shaw	US/JP	David Leitch	12 667 189
15 Jumanji: The Next Level	US	Jake Kasdan	12 610 461
16 Maleficent: Mistress of Evil	US/GB/CA	Joachim Rønning	12 037 512
17 It Chapter Two	US/CA	Andy Muschietti	11 198 719
18 Green Book <sup>(1)</sup>	US/CN	Peter Farrelly	10 765 619
19 Qu'est-ce qu'on a encore fait au bon Dieu? <sup>(2)</sup>	FR	Philippe de Chauveron	9 289 517
20 Pokémon Detective Pikachu	US/JP	Rob Letterman	8 771 594
21 Ralph Breaks the Internet <sup>(3)</sup>	US	Phil Johnston, Rich Moore	8 534 332
22 Bohemian Rhapsody <sup>(4)</sup>	GB INC/US	Bryan Singer	7 993 022
23 Downton Abbey	GB/US	Michael Engler	7 897 935
24 Alita: Battle Angel	US/CA/JP	Robert Rodriguez	6 710 571
25 Abominable	US/CN/JP	Jill Culton, Todd Wilderman	6 619 513

(1) 227 464 admissions in the EU in 2018.

(2) 4 535 admissions in the EU in 2018.

Source: OBS/LUMIERE

(3) 4 423 255 admissions in the EU in 2018.

(4) 26 891 839 admissions in the EU in 2018.

### Top 20 films by gross box office worldwide | 2019

In USD million. GBO for 2019 only. Does not include carryovers.

Original title	Country of origin	Studio	North American box office	Inter-national box office	Global box office
1 Avengers: Endgame	US	Walt Disney	858.37	1 939.56	2 797.93
2 The Lion King	US/GB	Walt Disney	543.64	1 113.42	1 657.06
3 Frozen 2 <sup>(1)</sup>	US	Walt Disney	430.14	815.60	1 245.74
4 Spider-Man: Far From Home	US	Sony Pictures	390.53	741.46	1 131.99
5 Captain Marvel	US	Walt Disney	426.83	702.88	1 129.71
6 Toy Story 4	US	Walt Disney	434.04	640.07	1 074.11
7 Joker <sup>(1)</sup>	US	Warner Bros.	333.77	732.48	1 066.25
8 Aladdin	US	Walt Disney	355.56	695.46	1 051.02
9 Star Wars: Episode IX - The Rise of... <sup>(1)</sup>	US	Walt Disney	390.71	396.30	787.01
10 Fast & Furious Presents: Hobbs & Shaw	US/JP	Universal	173.96	586.62	760.58
11 Ne Zha <sup>(1)(2)</sup>	CN	Coco Cartoon	3.70	724.18	727.88
12 The Wandering Earth <sup>(2)</sup>	CN	CFGC	4.96	684.17	689.13
13 How to Train Your Dragon: The Hidden...	US/JP	Universal	160.80	361.25	522.05
14 Jumanji: The Next Level <sup>(1)</sup>	US	Sony Pictures	192.09	321.18	513.28
15 Maleficent: Mistress of Evil <sup>(1)</sup>	US/GB/CA	Walt Disney	113.29	377.91	491.20
16 It Chapter Two	US/CA	Warner Bros.	211.59	261.36	472.95
17 The Secret Life of Pets 2	US/FR/JP	Universal	157.95	275.64	433.59
18 Pokémon Detective Pikachu	US/JP	Warner Bros.	144.11	288.90	433.01
19 My People, My Country <sup>(1)(2)</sup>	CN	Bona Film/Alibaba	2.36	412.74	415.10
20 The Captain <sup>(1)(2)</sup>	CN	Bona Film/Alibaba	0.71	404.34	405.05

(1) Still grossing in 2020.

(2) Unofficial cumulated BO.

Sources: Variety, Comscore, OBS

## Top 25 European films (including EUR inc) by admissions in the European Union | 2019 *prov.*

Original title	Country of origin	Director	Admissions <sup>prov.</sup>
1 Qu'est-ce qu'on a encore fait au bon Dieu? <sup>(1)</sup>	FR	Philippe de Chauveron	9 289 517
2 Bohemian Rhapsody <sup>(2)</sup>	GB INC/US	Bryan Singer	7 993 022
3 Downton Abbey	GB/US	Michael Engler	7 897 935
4 Rocketman	GB INC/US	Dexter Fletcher	6 464 821
5 The Favourite <sup>(3)</sup>	GB INC/US/IE	Yorgos Lanthimos	5 186 255
6 Yesterday	GB/US/RU/JP	Danny Boyle	5 102 595
7 Das perfekte Geheimnis	DE	Bora Dagtekin	5 100 778
8 Mia et le lion blanc <sup>(4)</sup>	FR/DE/ZA	Gilles de Maistre	3 917 941
9 A Shaun the Sheep Movie: Farmageddon	GB/US/FR	Will Becher, Richard Phelan	3 531 230
10 The Queen's Corgi	BE/US	V. Kesteloot, Ben Stassen	3 455 329
11 Dolor y gloria (Pain and Glory)	ES/FR	Pedro Almodóvar	3 232 763
12 Der Junge muss an die frische Luft (All...)	DE	Caroline Link	3 107 758
13 Nous finirons ensemble (Little White Lies 2)	FR/BE	Guillaume Canet	3 028 452
14 Mary Queen of Scots	GB INC/US	Josie Rourke	2 550 082
15 Padre no hay más que uno (Father There...)	ES	Santiago Segura	2 387 973
16 Hors normes (The Specials)	FR/BE	O. Nakache, Eric Toledano	2 314 606
17 Cold Pursuit	GB/US/FR/CN/NO/CA	Hans Petter Moland	2 216 644
18 Stan & Ollie	GB/CA/US	Jon S. Baird	2 211 015
19 Il primo Natale (Once Upon A Time...)	IT	Ficarra, Picone	2 073 499
20 J'accuse (AN Officer And A Spy)	FR/IT	Roman Polanski	2 006 916
21 Au nom de la terre (In The Name Of The...)	FR/BE	Edouard Bergeon	1 996 417
22 Lo dejo cuando quiera (I Can Quit Quit...)	ES	Carlos Therón	1 839 605
23 La vie scolaire (School Life)	FR	M. Idir, Grand Corps Malade	1 826 080
24 Mientras dure la guerra (While At War)	ES/AR	Alejandro Amenábar	1 806 816
25 Les misérables	FR	Ladj Ly	1 780 627

(1) 4 535 admissions in the EU in 2018.

(2) 4 423 255 admissions in the EU in 2018.

Source: OBS/LUMIERE

(3) 3 724 admissions in the EU in 2018.

(4) 22 527 admissions in the EU in 2018.

## Get in touch

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