An analysis of European box office structure 2010 - 2022

with a special focus on 2022

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Martin Kanzler

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KEY FINDINGS

KEY FINDINGS – COMPOSITION OF EUROPEAN BOX OFFICE IN 2022

- **Fewer than 100 films sold more than one million tickets across Europe**

  Among the 12 000 films registered as on release in 2022 fewer than 100 managed to sell more than one million tickets in the 27 territories included in this analysis.

- **European films dominate the offering, US films dominate the box office**

  The European market is characterised by a large number of European films which accounted for 68% (over 8 100 films) of the total film offering in the 27 European sample markets in 2022. A total of 19% (2 265 films) of the films on release in Europe in 2022 originated from the US and 1 500 films (13%) from other parts of the world.

  The composition is almost reversed when it comes to the distribution of total admissions. US films cumulatively accounted for 63% of total European admissions in 2022, far ahead of European films (30%), EUR inc[1] films (4%) and films from other parts of the world (3%), as illustrated in Figure 2.

- **Low-grossing films[2] account for 96% of films on release; blockbusters stand out in terms of admissions share**

  Viewed from a film type angle, the film offering in Europe is characterised by an overwhelming offer of low-grossing films. In 2022 a staggering 96% of films on release in Europe fell into the low-grossing category, with European low-grossing films alone accounting for 68% of all films on release. This compares to a total of 350 films qualifying as mid-tier films in at least one of the 27 European sample markets, representing 3%, 115 high-grossing films (1%) and only 56 blockbuster films (0.5%).

  The breakdown of total admissions on the other hand reveals a comparatively balanced distribution of admissions among the four film types with only blockbusters standing out as the single most important film type in terms of ticket sales. In 2022, blockbusters cumulatively accounted for 38% of total cinema tickets sold in Europe, while the remaining admissions came almost equally from mid-tier films (22%), high-grossing films (21%) and low-grossing films (19%).

[1] European films produced with incoming investment from US studios.
[2] For the purposes of this report films have been categorised – based on the number of tickets sold per year – as one of the four following film types: blockbusters, high-grossing films, mid-tier films or low-grossing films.

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- **US blockbusters stand out as single most important driver of admissions in Europe**

  When further detailing the analysis by separating the four film types according to their region of origin, one can distinguish – in terms of admissions share – three different clusters of film types:

  - US blockbusters stand out as the single most important film category capturing 32% of all the cinema tickets sold in Europe in 2022.
  - A second group consisting of US high-grossing films, US mid-tier films, European low-grossing films and European mid-tier films, all of which accounted for 9% to 14% of total admissions.
  - Finally a third group of films, comprising European blockbusters, US low-grossing films, EUR inc films, European high-grossing films, as well as films from other parts of the world, all of which accounted for 3% to 6% of total admissions respectively.

- **Significantly different box office composition among individual European markets**

  The composition of box office structures in terms of admissions differs widely between countries, even in countries of comparable size, illustrating the diversity of the European theatrical landscape. For instance in the UK and Ireland US blockbusters – also due their shared language - took 51% of total admissions, while in France they only accounted for 31%.

- **European box office in 2022 exceptionally reliant on US blockbusters**

  While 2022 was in line with the long-term average composition of films on release, there has been a slight shift in film supply with low-grossing films from Europe as well as other parts of the world representing a higher share of the film offering while there were proportionally fewer US films – with the exception of US blockbusters – on offer.

  The shift was more pronounced when it comes to admissions, where the data suggest that the European box office in 2022 was exceptionally dependent on US blockbusters which accounted for 32% of total admissions in 2022 compared to an average share of 24% between 2010 and 2019, while other US films, in particular US high-grossing and US mid-tier films, contributed a comparatively low share to total admissions.

  European films, on the other hand, took a different direction, with European low-grossing and mid-tier films becoming the two most important film types in terms of their cumulative contributions to total admissions, while the share of European blockbusters and high-grossing films was well below the long-term average, as there were fewer European blockbusters and high-grossing films on release in 2022.

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KEY FINDINGS – CONCENTRATION OF EUROPEAN BOX OFFICE

- **Europe: diverse film offering with highly concentrated admissions**

  The European theatrical market is a highly diverse market in terms of film offering and a highly concentrated market in terms of admissions. In 2022, it took only 156 films – out of almost 12 000 films registered as on release – to generate 80% of cumulative admissions.

- **Concentration focused on top 20 films**

  In 2022 the concentration of admissions focused on only very few top-performing titles rather than on a wider set of strongly performing films. The top 10 films accounted for 34% of total admissions and the top 20 titles cumulatively accounted for 48% of all cinema tickets sold in 2022.

- **Concentration of top films significantly higher in 2022 than in past decade**

  The 2022 concentration levels are by far the highest registered in any year over the past decade. This is partly due to the fact that the level of - particularly US - titles with high potential was lower in 2022 when compared to pre-COVID times. Concentration of admissions for both the top 10 (34%) as well as the top 20 (48%) titles were 9 and 11 percentage points higher than the pre-pandemic long-term average share of 24% and 36%, respectively. This increase in concentration could – albeit to a lesser extent – already be observed in 2019.

- **Concentration differs significantly between individual markets**

  The concentration of admissions among top films differs widely between individual markets, ranging e.g. from the top 10 films accounting for 48% of total admissions in Turkey in 2022 compared to only 25% in France. Similarly, it took only 37 films in Denmark to generate 80% of total admissions in 2022, compared to 181 films in France.

  Concentration levels in all markets were higher in 2022 when compared to e.g. 2018 which represents a fairly average year in terms of admissions concentration.

KEY FINDINGS – TRENDS OVER TIME

- **Growing importance of blockbusters and – more recently – low-grossing films in terms of admissions; decreasing importance of high-grossing and mid-tier films**

  Low-grossing films were the only film type which registered a consistent, albeit small, increase in cumulative admissions over the past decade. Cumulative admissions to blockbusters fluctuated more widely but were higher in the second half of the past decade than in the first half. In contrast, admissions to high-grossing films and mid-tier films never systematically grew above their 2010 levels and have been showing a

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somewhat declining trend since 2016 and 2017 respectively. Admissions to all film types plummeted in 2022 when compared to 2019, with the drops for blockbusters and high-grossing films more pronounced than for mid-tier and low-grossing films. This is also due to the fact that during the COVID years US blockbuster releases were postponed by one or two years, whereas the release of low-grossing and mid-tier films, especially European, continued as soon as cinemas reopened.

As a result, the admissions share of blockbusters increased slightly towards the end of the decade, while the role of mid-tier and high-grossing films has somewhat decreased over the past decade. The role of low-grossing films has been comparatively stable over the past decade but was significantly more pronounced in 2022.

- **Increasing US dominance in the blockbuster category**

  While there are far fewer US blockbusters than European blockbusters, the former are clearly more successful in generating admissions and travel – as blockbusters – across Europe. This is illustrated by the fact that a European blockbuster qualifies as a blockbuster only in 1.1. European markets on average, while a US blockbuster does so in 6.7 European markets. This is mostly due to the fact that US blockbusters are often based on internationally known franchises or 'brands' whereas European blockbusters are often based on local content.

  A moderately growing number of US blockbusters managed to increase admissions in the second half of the past decade, while European blockbusters did not manage to grow their admissions and dropped to a record low in 2022, as admissions to US blockbusters fell back to the levels registered in the first half of the last decade.

  As a result, the share of US blockbusters, which generally accounted for 60% to 74% of total blockbuster admissions between 2010 and 2018, increased significantly to 81% and 84% in 2019 and 2022, respectively, as both the number of European blockbusters and the admissions they generated declined in a comparatively more pronounced manner in these two years, while .

- **Decreasing number of US mid-tier films causes admissions to mid-tier films to decline**

  Mirroring the decline in the number of US mid-tier films on release, admissions to US mid-tier films have been decreasing slightly over the past decade while admissions to European mid-tier films have slightly increased, keeping cumulative admissions to mid-tier films comparatively stable until 2018. However, in 2019 the decline in admissions to US mid-tier films started to accelerate and cumulative admissions dropped to the two lowest levels in the past decade.

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KEY FINDINGS REGARDING EUROPEAN FILMS

- **Number of European films increases, admissions remain stable as importance of European low-grossing films grows**

  In absolute terms, the number of European films and film occurrences has been steadily increasing over the past decade, driven primarily by an increase in the number of European low-grossing films. The number of European blockbusters on the other hand decreased in 2019 and particularly 2022, when compared to the years 2013 to 2018.

  Admissions to European films, on the other hand, have remained comparatively stable, increasing only slightly in the second half of the decade. The only two film categories which registered a steady increase in admissions over the past decade were European low-grossing films and – to a lesser extent – European mid-tier films.

  Admissions to European blockbusters on the other hand fluctuated between years and dropped sharply in 2019 and 2022. Admissions to European high-grossing films tended to be higher during the first half of the decade when compared to the second half and dropped sharply in 2022.

- **Almost 70% of admissions to European films stem from low-grossing and mid-tier films**

  The admissions share of European blockbusters and high-grossing in 2022, on the other hand, dropped sharply in comparison to the long-term average (from 30% to 18% and from 20% to 14%, respectively). The share of low-grossing and mid-tier films, on the other hand, increased dramatically (from 25% to 36% and from 25% to 32%, respectively). As a result, almost 70% of cumulative admissions to European films in 2022 stemmed from low-grossing and mid-tier films, compared to an average 50% during the period 2010 to 2019.

- **75% of admissions to European films generated in national markets**

  A total of 75% of cumulative admissions to European films were generated in their home markets, and 25% in other – non-national – European markets. This breakdown of admissions into national and non-national admissions differs significantly between the different film types. While almost all admissions to European films qualifying as blockbusters or high-grossing films were generated in their home markets (93% and 95% respectively), almost half of the cumulative admissions to European low-grossing films were generated on non-national markets.

- **European blockbusters do not travel – as blockbusters**

  Generally speaking, European films mostly qualify as blockbusters or high-grossing films only in their national home market and do not travel – at least as blockbusters or high-grossing films – to other European markets as they are often based on local content. This is illustrated by the average occurrences per film. On average, European films qualify as blockbusters in only 1.1 European markets. This compares to an average occurrence of European high-grossing films of 1.2, mid-tier films of 1.5 and low-grossing films of 1.9 markets.

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KEY FINDINGS REGARDING US FILMS

- **Increasing focus of US films on blockbuster category**

  Blockbusters were the only film type (among US films) which registered an increase in admissions over the past decade, despite the number of US blockbusters stagnating or even declining. In contrast, cumulative admissions to US low-grossing films remained comparatively stable, and admissions to both US high-grossing as well as US mid-tier films have been declining to a certain extent over the past decade.

  As a result, the breakdown of US admissions by film type has changed, particularly in 2019 and 2022, with US blockbusters accounting for 50% of total admissions to US films, compared to an average of 'only' 37% between 2010 and 2018. In contrast, the share of all other US film types was noticeably lower. indicating an even stronger focus of US studios on promoting a limited number of potential blockbuster films.

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PRINCIPALES CONSTATATIONS

PRINCIPALES CONSTATATIONS – COMPOSITION DU BOX-OFFICE EUROPÉEN EN 2022

- **Moins de 100 films ont vendu plus d'un million de billets en Europe**

  Parmi les 12 000 films sortis en salles en 2022, moins de 100 ont vendu plus d'un million de billets dans les 27 territoires couverts par cette analyse.

- **Les films européens dominent l'offre, les films américains dominent le box-office**

  Le marché européen se caractérise par la forte présence des films européens qui représentent 68 % (soit plus de 8 100 films) de l'offre totale de films dans les 27 marchés européens de l'échantillon en 2022. Les films américains représentent 19 % de l'offre totale (soit 2 265 films) et les films originaires d'autres régions du monde 13 % de l'offre (soit 1 500 films).

  Pour ce qui est de la fréquentation des salles, les chiffres sont pratiquement inversés. Les films américains représentent au total 63 % des entrées en Europe en 2022, loin devant les films européens (30 %), les films EUR inc (4 %) et les films d'autres régions du monde (3 %), comme le montre le graphique 2.

- **Les films à faible audience[3] représentent 96 % des films sortis en salles ; les superproductions captent la majeure partie de la fréquentation**

  Si l'on considère les différentes catégories de films, l'offre de films en Europe se caractérise par une très forte prédominance des films à faible audience. En 2022, 96 % des films sortis en Europe entrent dans la catégorie des films à faible audience, les films européens classés dans cette catégorie représentant à eux seuls 68 % de l'ensemble des films sortis en salles. À titre de comparaison, 350 films sont des films à audience moyenne sur au moins un des 27 marchés européens de l'échantillon, soit 3 % de l'offre totale, 115 films sont des films à forte audience (1 %) et seulement 56 films sont des superproductions (0,5 %).

  La ventilation de la fréquentation totale révèle en revanche une répartition relativement équilibrée des entrées entre les quatre catégories de films, les superproductions se distinguant toutefois comme étant celle qui vend le plus de billets. En 2022, les superproductions représentent 38 % du total des billets vendus en Europe, tandis que le reste de la fréquentation est réparti à parts presque égales entre les films à audience moyenne (22 %), les films à forte audience (21 %) et les films à faible audience (19 %).

[3] Pour les besoins de ce rapport, les films ont été classés – en fonction du nombre de billets vendus sur une année – dans l'une des quatre catégories suivantes : superproductions, films à forte audience, films à audience moyenne et films à faible audience.

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- **Les superproductions américaines sont le principal moteur de la fréquentation en Europe**

  Si l'on approfondit l'analyse en séparant les quatre catégories de films en fonction de leur région d'origine, on peut distinguer – pour ce qui est de la part des entrées – trois groupes :

  … Les superproductions américaines se distinguent en étant la catégorie de films la plus importante et captent 32 % de l'ensemble des billets de cinéma vendus en Europe en 2022.

  … Le deuxième groupe est composé des films américains à forte audience, des films américains à audience moyenne, des films européens à faible audience et des films européens à audience moyenne, qui représentent tous entre 9 % et 14 % du total des entrées.

  … Enfin, le troisième groupe comprend les superproductions européennes, les films américains à faible audience, les films produits en Europe avec des capitaux étrangers, les films européens à forte audience, ainsi que les films provenant d'autres régions du monde, qui représentent tous entre 3 % et 6 % du total des entrées.

- **Une composition du box-office très différente d'un marché européen à l'autre**

  La composition des structures du box-office pour ce qui est de la fréquentation diffère fortement d'un pays à l'autre, même dans des pays de taille comparable, ce qui illustre la diversité du paysage européen des salles de cinémas. Par exemple, au Royaume-Uni et en Irlande, les superproductions américaines – notamment en raison de leur langue commune – représentent 51 % du total des entrées, mais seulement 31 % en France.

- **Un box-office européen exceptionnellement dépendant des superproductions américaines en 2022**

  Si la composition de l'offre de films sortis en salles en 2022 est conforme à la moyenne de long terme, elle évolue légèrement : la part des films à faible audience en provenance d'Europe et d'autres régions du monde est plus importante, tandis que les films américains – à l'exception des superproductions américaines – sont proportionnellement moins nombreux à l'affiche.

  Le changement est plus prononcé pour ce qui est de la fréquentation. En effet, les données indiquent qu'en 2022, le box-office européen a été exceptionnellement dépendant des superproductions américaines qui représentent 32 % des entrées totales, à comparer à une part moyenne de 24 % entre 2010 et 2019, tandis que les autres films américains, en particulier ceux à forte audience et ceux à audience moyenne, captent une part relativement faible du nombre total des entrées.

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Les films européens, quant à eux, ont pris une direction différente. Les films européens à audience moyenne et à faible audience deviennent les deux catégories de films les plus importantes pour ce qui est de la contribution cumulée à la fréquentation totale, tandis que la part des superproductions et des films à forte audience européens est nettement inférieure à la moyenne à long terme, étant donné qu'ils ont été moins nombreux à sortir en salles en 2022.

PRINCIPALES CONSTATATIONS – CONCENTRATION DU BOX-OFFICE EUROPÉEN

- **Europe : une offre de films diversifiée et une forte concentration des entrées**

  Le marché européen des salles est un marché très diversifié pour ce qui est de l'offre de films et très concentré pour ce qui est des entrées. En 2022, 156 films – sur près de 12 000 sortis en salles – ont généré 80 % du total des entrées.

- **Les films du top 20 concentrent les entrées**

  En 2022, la concentration des entrées s'est faite sur quelques titres ayant enregistré une très forte fréquentation plutôt que sur un ensemble plus large de films ayant généré une forte fréquentation. Les 10 premiers films représentent 34 % des entrées totales et les 20 premiers titres cumulent 48 % de l'ensemble des billets de cinéma vendus en 2022.

- **La concentration des films les plus populaires est nettement plus élevée en 2022 qu'au cours de la dernière décennie**

  Les niveaux de concentration de 2022 sont de loin les plus élevés jamais enregistrés au cours de la dernière décennie. Cela s'explique en partie par le fait que le nombre de titres à fort potentiel, notamment américains, a été inférieur en 2022 à ce qu'il était avant la pandémie de Covid-19. La concentration des entrées pour les 10 titres les plus populaires (34 %) et les 20 titres les plus populaires (48 %) est supérieure de 9 et 11 points de pourcentage à la moyenne à long terme avant la pandémie qui s'établit respectivement à 24 % et à 36 %. Cette augmentation de la concentration est déjà observable en 2019, bien que dans une moindre mesure.

- **La concentration diffère sensiblement d'un marché à l'autre**

  La concentration des entrées des films les plus populaires varie considérablement d'un marché à l'autre, les 10 films les plus populaires représentant par exemple 48 % du total des entrées en Turquie en 2022, contre seulement 25 % en France. De même, 80 % du total des entrées ont été générés par 37 films au Danemark, et par 181 films en France.

  Les niveaux de concentration sur l'ensemble des marchés sont plus élevés en 2022 que, par exemple, en 2018, année relativement moyenne pour ce qui est de la concentration des entrées.

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PRINCIPALES CONSTATATIONS – TENDANCES AU FIL DU TEMPS

- **Fréquentation en hausse pour les superproductions et, plus récemment, les films à faible audience ; fréquentation en baisse pour les films à forte audience et à audience moyenne**

  Les films à faible audience sont les seuls à avoir vu leurs entrées cumulées augmenter de façon constante, quoique limitée, au cours de la dernière décennie. Les entrées cumulées des superproductions ont fluctué plus largement, et elles ont été plus élevées dans la seconde moitié de la dernière décennie que dans la première. En revanche, les entrées des films à forte audience et des films à audience moyenne n'ont jamais réellement dépassé leurs niveaux de 2010 et affichent une tendance légèrement à la baisse depuis respectivement 2016 et 2017. Dans l'ensemble, la fréquentation des salles a chuté en 2022 par rapport à 2019, les superproductions et les films à forte audience ayant enregistré une baisse plus marquée que les films à audience moyenne et à faible audience. Cela s'explique également par le fait que, pendant la pandémie de Covid-19, les sorties des superproductions américaines ont été reportées d'un ou deux ans, alors que celles des films à faible audience et à audience moyenne, notamment européens, ont repris dès la réouverture des cinémas.

  En conséquence, la part des entrées des superproductions a légèrement augmenté vers la fin de la décennie, tandis que celle des films à audience moyenne et à forte audience a quelque peu diminué au cours de la dernière décennie. La part des films à faible audience est restée relativement stable au cours de la dernière décennie, bien que nettement plus importante en 2022.

- **Renforcement de la domination des États-Unis dans la catégorie des superproductions**

  Si le nombre de superproductions américaines est nettement inférieur à celui des superproductions européennes, les premières réussissent manifestement mieux à générer un grand nombre d'entrées dans toute l'Europe. En effet, on constate qu'en moyenne, une superproduction européenne n'est qualifiée de superproduction que sur 1,1 marché européen, contre 6,7 marchés européens pour une superproduction américaine. Cela est principalement dû au fait que les superproductions américaines sont souvent basées sur des franchises ou des « marques » connues dans le monde entier, alors que les superproductions européennes reposent souvent sur un contenu local.

  Les superproductions américaines ont été légèrement plus nombreuses à générer davantage d'entrées au cours de la seconde moitié de la dernière décennie, contrairement aux superproductions européennes dont la fréquentation n'a pas augmenté et qui ont enregistré un plus bas historique en 2022, alors que les entrées des superproductions américaines sont retombées aux niveaux relevés au cours de la première moitié de la dernière décennie.

  En conséquence, la part des superproductions américaines, qui représentaient généralement entre 60 % et 74 % du total des entrées entre 2010 et 2018, a augmenté de manière significative pour atteindre 81 % et 84 % respectivement en 2019 et en 2022, car le nombre de superproductions européennes et les entrées qu'elles ont

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générées ont diminué de manière comparativement plus prononcée au cours de ces deux années.

- **Baisse de la fréquentation des films à audience moyenne due à la diminution du nombre de films américains à audience moyenne**

  À l'instar de la baisse du nombre de films américains à audience moyenne sortis en salles, les entrées réalisées par ces films ont légèrement diminué au cours de la dernière décennie tandis que les entrées des films européens à audience moyenne ont légèrement augmenté, ce qui a maintenu les entrées cumulées des films à audience moyenne à un niveau relativement stable jusqu'en 2018. Cependant, en 2019, la diminution des entrées des films américains à audience moyenne a commencé à s'accélérer et les entrées cumulées ont atteint leurs deux plus bas niveaux de la dernière décennie.

PRINCIPALES CONSTATATIONS CONCERNANT LES FILMS EUROPÉENS

- **Augmentation du nombre de films européens, stabilité des entrées et accroissement de l'importance des films européens à faible audience**

  En valeur absolue, le nombre de films et d'occurrences de films européens a augmenté régulièrement au cours de la dernière décennie, principalement en raison de l'augmentation du nombre de films européens à faible audience. En revanche, le nombre de superproductions européennes a diminué en 2019 et surtout en 2022, par rapport aux années 2013 à 2018.

  Les entrées enregistrées par les films européens quant à elles sont restées relativement stables, n'augmentant que légèrement au cours de la seconde moitié de la décennie. Les deux seules catégories de films à avoir vu leurs entrées augmenter en continu au cours de la dernière décennie sont les films européens à faible audience et, dans une moindre mesure, les films européens à audience moyenne.

  En revanche, les entrées des superproductions européennes ont fluctué d'une année à l'autre et ont fortement chuté en 2019 et 2022. Les entrées des films européens à forte audience ont généralement été plus élevées pendant la première moitié de la décennie que pendant la seconde et ont fortement chuté en 2022.

- **Près de 70 % des entrées des films européens sont générées par les films à faible audience et les films à audience moyenne**

  La part des entrées des superproductions et des films à forte audience européens a fortement diminué en 2022 par rapport à la moyenne à long terme (respectivement de 30 % à 18 % et de 20 % à 14 %). La part des films à faible audience et des films à audience moyenne, par contre, a augmenté de façon spectaculaire (respectivement de 25 % à 36 % et de 25 % à 32 %). En conséquence, près de 70 % des entrées cumulées des films européens en 2022 ont été générées par les films à faible audience et les films à audience moyenne, contre 50 % en moyenne au cours de la période 2010 à 2019.

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- **75 % des entrées des films européens sont réalisées sur les marchés nationaux**

  Au total, 75 % des entrées cumulées des films européens sont réalisées sur leur marché d'origine, et 25 % sur d'autres marchés européens non nationaux. Cette répartition de la fréquentation entre entrées nationales et non nationales diffère sensiblement selon les différentes catégories de films. Alors que la quasi-totalité des entrées réalisées par les films européens considérés comme des superproductions ou des films à forte audience sont générées sur leur marché national (respectivement 93 % et 95 %), près de la moitié des entrées cumulées réalisées par les films européens à faible audience sont enregistrées sur des marchés non nationaux.

- **Les superproductions européennes ne connaissent pas le succès à l'étranger**

  D'une manière générale, les films européens n'entrent dans la catégorie des superproductions ou des films à forte audience que sur leur marché national et ne connaissent pas le succès – du moins en tant que superproductions ou films à forte audience – sur d'autres marchés européens, car ils sont souvent basés sur un contenu local. C'est ce que montre l'occurrence moyenne par film. En moyenne, les films européens ne sont considérés comme des superproductions que sur 1,1 marché européen. En Europe, l'occurrence moyenne des films à forte audience est de 1,2, celle des films à audience moyenne de 1,5 et celle des films à faible audience de 1,9.

PRINCIPALES CONSTATATIONS CONCERNANT LES FILMS AMÉRICAINS

- **Les films américains se concentrent de plus en plus sur la catégorie des superproductions**

  Les superproductions sont la seule catégorie de films (parmi les films américains) à avoir vu leurs entrées augmenter au cours de la dernière décennie, alors que leur nombre a stagné, voire diminué. En revanche, les entrées cumulées des films américains à faible audience sont restées relativement stables, et celles des films américains à forte audience ainsi que des films américains à audience moyenne ont quelque peu diminué au cours de la dernière décennie.

  En conséquence, la répartition des entrées des films américains par catégorie de films a changé, en particulier en 2019 et 2022, les superproductions américaines représentant 50 % du total des entrées des films américains, contre une moyenne de « seulement » 37 % entre 2010 et 2018. En revanche, la part de toutes les autres catégories de films américains a nettement diminué, ce qui indique que les studios américains mettent de plus en plus l'accent sur la promotion d'un nombre limité de potentielles superproductions.

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WICHTIGSTE EINBLICKE

WICHTIGSTE EINBLICKE – ZUSAMMENSETZUNG DER EUROPÄISCHEN EINSPIELERGEBNISSE IM JAHR 2022

- **Weniger als 100 Filme fanden europaweit mehr als 1 Million Kinozuschauer**

  Von den 12 000 Filmen, für die 2022 in den 27 untersuchten Gebieten eine Kinoauswertung registriert war, brachten es weniger als 100 auf mehr als 1 Million verkaufte Tickets.

- **Europäische Filme dominieren das Angebot, US-Filme die Kinokassen**

  Der europäische Markt zeichnet sich durch eine große Anzahl europäischer Filme aus. Sie kamen 2022 in den untersuchten 27 europäischen Märkten auf einen Anteil am gesamten Filmangebot von 68 % (über 8 100 Filme). Insgesamt 19 % (2 265 Filme) der Filme, die 2022 in Europa im Kino liefen, stammen aus den USA, 13 % (1 500 Filme) aus anderen Teilen der Welt.

  Beinahe umgekehrt verhält es sich bei der Verteilung der Besucherzahlen. Auf US-Filme entfielen 2022 insgesamt 63 % der europäischen Kinobesuche, weit vor europäischen Filmen (30 %), EUR-inc-Filmen (d. h. in Europa mit Investitionen von US-Studios produzierten Filmen – 4 %) und Filmen aus anderen Teilen der Welt (3 %), wie in Abbildung 2 dargestellt.

- **Filme mit niedrigem Einspielergebnis[4] machen 96 % der im Kino laufenden Filme aus; Blockbuster stechen bei Besucherzahlen hervor**

  Das Filmangebot in Europa ist durch ein überwältigendes Angebot an Filmen mit niedrigem Einspielergebnis gekennzeichnet. Im Jahr 2022 fielen nicht weniger als 96 % der Filme, die in Europa im Kino liefen, in die Kategorie der Filme mit niedrigem Einspielergebnis, wobei allein die europäischen Filme mit niedrigem Einspielergebnis 68 % aller im Kino laufenden Filme ausmachten. Dagegen wurden insgesamt 350 Filme (3 %) in mindestens einem der untersuchten 27 europäischen Märkte als Filme mit mittlerem Einspielergebnis eingestuft, 115 Filme (1 %) als Filme mit hohem Einspielergebnis und nur 56 Filme (0,5 %) als Blockbuster.

  Die Aufschlüsselung nach Gesamtbesucherzahlen zeigt dagegen eine vergleichsweise ausgewogene Verteilung der Besucherzahlen auf die vier Kategorien: Hier stechen nur die Blockbuster als wichtigste Einzelkategorie hervor. Im Jahr 2022 entfielen 38 % aller in Europa verkauften Kinotickets auf Blockbuster, während sich die übrigen fast

[4] Für die Zwecke dieses Berichts wurden die Filme nach Anzahl der jährlich verkauften Tickets in eine der folgenden vier Kategorien eingeteilt: Blockbuster, Filme mit hohem Einspielergebnis, Filme mit mittlerem Einspielergebnis und Filme mit niedrigem Einspielergebnis.

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gleichmäßig auf Filme mit mittlerem (22 %), hohem (21 %) und niedrigem (19 %) Einspielergebnis verteilten.

- **US-Blockbuster sind Hauptmotor für Kinobesuche in Europa**

  Vertieft man die Analyse weiter, indem man die vier Filmkategorien nach Herkunftsregion aufschlüsselt, lassen sich – gemessen am Anteil der Besucher – drei Gruppen unterscheiden:

  … Die wichtigste Gruppe sind US-Blockbuster, für die 2022 in Europa 32 % aller Kinotickets verkauft wurden.

  … Eine zweite Gruppe besteht aus US-Filmen mit hohem Einspielergebnis, US-Filmen mit mittlerem Einspielergebnis, europäischen Filmen mit niedrigem Einspielergebnis und europäischen Filmen mit mittlerem Einspielergebnis, die alle auf einen Anteil zwischen 9 % und 14 % kamen.

  … In eine dritte Gruppe schließlich fallen europäische Blockbuster, US-Filme mit niedrigem Einspielergebnis, EUR-inc-Filme, europäische Filme mit hohem Einspielergebnis sowie Filme aus anderen Teilen der Welt, die jeweils auf 3 % bis 6 % der Gesamtbesucherzahl kamen.

- **Sehr unterschiedliche Zusammensetzung der Einspielergebnisse in den einzelnen europäischen Märkten**

  Die Aufteilung der Besucherzahlen ist von Land zu Land sehr unterschiedlich, selbst in Ländern mit vergleichbarer Größe, was die Vielfalt der europäischen Kinolandschaft verdeutlicht. Im Vereinigten Königreich und in Irland beispielsweise machten US-Blockbuster – auch aufgrund der gemeinsamen Sprache – 51 % der Gesamtbesucherzahl aus, in Frankreich dagegen nur 31 %.

- **Europäische Einspielergebnisse 2022 außergewöhnlich stark von US-Blockbustern abhängig**

  Hinsichtlich der Zusammensetzung der im Kino laufenden Filme entsprach das Jahr 2022 dem langjährigen Durchschnitt, wobei es beim Filmangebot eine leichte Verschiebung gab: Der Anteil der Filme mit niedrigem Einspielergebnis aus Europa und anderen Teilen der Welt war höher, der Anteil der US-Filme – außer US-Blockbustern – dagegen niedriger.

  Deutlicher war die Verschiebung bei den Besucherzahlen: Die Daten deuten darauf hin, dass die europäischen Einspielergebnisse 2022 außergewöhnlich stark von US-Blockbustern abhängig waren. Sie hatten 2022 einen Anteil von 32 % an den Gesamtbesucherzahlen, verglichen mit einem durchschnittlichen Anteil von 24 % zwischen 2010 und 2019, während andere US-Filme, insbesondere solche mit hohem und mittlerem Einspielergebnis, einen vergleichsweise geringen Anteil an den Gesamtbesucherzahlen hatten.

  Europäische Filme hingegen entwickelten sich in eine andere Richtung: Europäische Filme mit niedrigem und mittlerem Einspielergebnis wurden mit ihrem kumulativen Beitrag zu den Gesamtbesucherzahlen zu den beiden wichtigsten Kategorien, während

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der Anteil von europäischen Blockbustern und Filmen mit hohem Einspielergebnis deutlich unter dem langfristigen Durchschnitt lag, da 2022 weniger europäische Blockbuster und Filme mit hohem Einspielergebnis im Kino liefen.

WICHTIGSTE EINBLICKE – KONZENTRATION DER EUROPÄISCHEN EINSPIELERGEBNISSE

- **Europa: vielfältiges Filmangebot mit stark konzentrierten Besucherzahlen**

  Der europäische Kinomarkt ist ein Markt mit sehr vielfältigem Filmangebot, aber stark konzentrierten Besucherzahlen. Im Jahr 2022 brauchte es nur 156 Filme – von fast 12 000, für die eine Kinoauswertung registriert war – um 80 % der kumulierten Besucherzahlen zu erreichen.

- **Konzentration vor allem bei den 20 erfolgreichsten Filmen**

  Im Jahr 2022 betraf die Konzentration der Besucherzahlen vor allem einige wenige Titel mit Spitzenergebnissen, nicht einen größeren Kreis von Filmen mit guten Ergebnissen. Auf die 10 erfolgreichsten Filme entfielen 34 % und auf die 20 erfolgreichsten Filme insgesamt 48 % aller im Jahr 2022 verkauften Kinotickets.

- **Konzentration der erfolgreichsten Filme 2022 deutlich stärker als in den letzten zehn Jahren**

  Die Konzentrationen des Jahres 2022 sind die mit Abstand höchsten, die in den letzten zehn Jahren registriert wurden. Dies ist zum Teil darauf zurückzuführen, dass die Zahl der – insbesondere US-amerikanischen – Titel mit hohem Potenzial 2022 niedriger war als in der Zeit vor COVID. Sowohl bei den erfolgreichsten 10 (34 %) als auch bei den erfolgreichsten 20 Titeln (48 %) lag die Konzentration der Besucherzahlen um 9 bzw. 11 Prozentpunkte über dem langfristigen Durchschnitt von 24 % bzw. 36 % aus der Zeit vor der Pandemie. Dieser Konzentrationsanstieg war – wenn auch in geringerem Ausmaß – bereits 2019 zu beobachten.

- **Konzentration in den einzelnen Märkten sehr unterschiedlich**

  Die Konzentration der Besucherzahlen auf die erfolgreichsten Filme ist in den einzelnen Märkten sehr unterschiedlich. So kamen die 10 erfolgreichsten Filme 2022 in der Türkei auf einen Besucheranteil von 48 %, in Frankreich nur auf 25 %. Und in Dänemark lockten 2022 nur 37 Filme 80 % aller Besucher, in Frankreich dagegen 181 Filme.

  Europaweit war der Konzentrationsgrad 2022 höher als etwa in dem in dieser Hinsicht recht durchschnittlichen Jahr 2018.

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WICHTIGSTE EINBLICKE – TRENDS IM ZEITVERLAUF

- **Bedeutung von Blockbustern und – zuletzt auch – Filmen mit niedrigem Einspielergebnis für Besucherzahlen wächst; Bedeutung von Filmen mit hohem und mittlerem Einspielergebnis sinkt**

  Filme mit niedrigem Einspielergebnis waren die einzige Kategorie, die in den letzten zehn Jahren eine zwar geringe, aber stetige Zunahme der kumulierten Besucherzahlen verzeichnete. Bei Blockbustern schwankten die kumulierten Besucherzahlen stärker, waren aber in der zweiten Hälfte der letzten zehn Jahre höher als in der ersten. Die Besucherzahlen für Filme mit hohem und mittlerem Einspielergebnis sind dagegen nie systematisch über das Niveau von 2010 hinausgekommen und zeigen seit 2016 bzw. 2017 einen leicht rückläufigen Trend. Im Vergleich zu 2019 sind die Besucherzahlen 2022 für alle Kategorien stark zurückgegangen – bei Blockbustern und Filmen mit hohem Einspielergebnis stärker als bei Filmen mit mittlerem und niedrigem Einspielergebnis. Dies ist auch darauf zurückzuführen, dass während der COVID-Jahre der Kinostart von US-Blockbustern um ein oder zwei Jahre verschoben wurde, während die Kinostarts von – insbesondere europäischen – Filmen mit niedrigem und mittlerem Einspielergebnis wieder anliefen, sobald die Kinos wieder öffneten.

  Dadurch hat der Anteil der Blockbuster an den Besucherzahlen gegen Ende der zehn Jahre leicht zugenommen, während der Anteil der Filme mit mittlerem und hohem Einspielergebnis in den letzten zehn Jahren etwas abgenommen hat. Der Anteil von Filmen mit niedrigem Einspielergebnis war in den letzten zehn Jahren vergleichsweise stabil, aber im Jahr 2022 deutlich höher.

- **Zunehmende US-Dominanz in der Kategorie Blockbuster**

  US-Blockbuster sind zwar weitaus weniger zahlreich als europäische Blockbuster, aber sie sind bei den Besucherzahlen eindeutig erfolgreicher und werden jeweils in mehreren europäischen Ländern zu Blockbustern. Dies wird durch die Tatsache verdeutlicht, dass ein europäischer Blockbuster im Durchschnitt nur in 1,1, ein US-Blockbuster dagegen in 6,7 europäischen Märkten zum Blockbuster wird. Dies ist vor allem darauf zurückzuführen, dass US-Blockbuster oft auf international bekannten Franchises oder „Marken“ basieren, europäische Blockbuster dagegen auf lokalen Inhalten.

  Eine moderat wachsende Zahl von US-Blockbustern konnte in der zweiten Hälfte der letzten zehn Jahre die Besucherzahlen steigern, während die europäischen Blockbuster dies nicht konnten und im Jahr 2022 auf ein Rekordtief fielen, als die Besucherzahlen für US-Blockbuster auf das Niveau der ersten Hälfte der letzten zehn Jahre zurückfielen.

  Daher stieg der Anteil der US-Blockbuster, auf die zwischen 2010 und 2018 im Allgemeinen 60 % bis 74 % der gesamten Blockbuster-Besucherzahlen entfielen, in den Jahren 2019 und 2022 deutlich auf 81 % bzw. 84 % an, weil sowohl die Zahl der europäischen Blockbuster als auch deren Besucherzahlen in diesen beiden Jahren vergleichsweise stärker sanken.

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- **Sinkende Anzahl von US-Filmen mit mittlerem Einspielergebnis führt zu Rückgang der Besucherzahlen bei Filmen mit mittlerem Einspielergebnis**

  Analog zum Rückgang der Zahl der im Kino laufenden US-Filme mit mittlerem Einspielergebnis sind auch die Besucherzahlen für US-Filme mit mittlerem Einspielergebnis in den letzten zehn Jahren leicht zurückgegangen, während die Besucherzahlen für europäische Filme mit mittlerem Einspielergebnis leicht gestiegen sind, sodass die kumulierten Besucherzahlen für Filme mit mittlerem Einspielergebnis bis 2018 vergleichsweise stabil geblieben sind. Im Jahr 2019 beschleunigte sich jedoch der Rückgang der Besucherzahlen für US-Filme mit mittlerem Einspielergebnis, und die kumulierten Besucherzahlen fielen auf die beiden niedrigsten Werte der letzten zehn Jahre.

WICHTIGSTE EINBLICKE ZU EUROPÄISCHEN FILMEN

- **Zahl europäischer Filme steigt, Besucherzahlen bleiben stabil und Bedeutung europäischer Filme mit niedrigem Einspielergebnis nimmt zu**

  Absolut betrachtet hat die Zahl der europäischen Filme und der Länderstarts (Occurrences[5]) in den letzten zehn Jahren stetig zugenommen, allen voran die Zahl europäischer Filme mit niedrigem Einspielergebnis. Andererseits ist die Zahl der europäischen Blockbuster 2019 und besonders 2022 im Vergleich zu den Jahren 2013 bis 2018 zurückgegangen.

  Die Besucherzahlen für europäische Filme sind dagegen vergleichsweise stabil geblieben und nur in der zweiten Hälfte der letzten zehn Jahre leicht gestiegen. Die einzigen beiden Filmkategorien, die in den letzten zehn Jahren einen stetigen Anstieg der Besucherzahlen verzeichneten, waren europäische Filme mit niedrigem und – in geringerem Ausmaß – mittlerem Einspielergebnis.

  Die Besucherzahlen für europäische Blockbuster schwankten dagegen von Jahr zu Jahr und gingen 2019 und 2022 stark zurück. Die Besucherzahlen für europäische Filme mit hohem Einspielergebnis waren in der ersten Hälfte der letzten zehn Jahre tendenziell höher als in der zweiten und gingen im Jahr 2022 stark zurück.

- **Fast 70 % der Besucherzahlen für europäische Filme entfallen auf Filme mit niedrigem und mittlerem Einspielergebnis**

  Der Anteil von europäischen Blockbustern und Filmen mit hohem Einspielergebnis an den Besucherzahlen fiel 2022 im Vergleich zum langjährigen Durchschnitt stark ab (von 30 % auf 18 % bzw. von 20 % auf 14 %). Der Anteil der Filme mit niedrigem und mittlerem Einspielergebnis dagegen stieg drastisch (von 25 % auf 36 % bzw. von 25 % auf 32 %). Dadurch entfielen 2022 fast 70 % der kumulierten Besucherzahlen für europäische Filme auf Filme mit niedrigem und mittlerem Einspielergebnis, verglichen mit durchschnittlich 50 % im Zeitraum 2010 bis 2019.

[5] Siehe Definition auf Seite 22.

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- **75 % der Besucherzahlen für europäische Filme entfallen auf deren Heimatmärkte**

  Insgesamt entfallen 75 % der kumulierten Besucherzahlen für europäische Filme auf deren Heimatmärkte und 25 % auf andere – ausländische – europäische Märkte. Diese Aufteilung der Besucherzahlen nach In- und Ausland unterscheidet sich zwischen den einzelnen Kategorien erheblich. Während fast alle Kinobesuche für europäische Filme, die als Blockbuster oder Filme mit hohem Einspielergebnis eingestuft sind, im Inland erfolgten (93 % bzw. 95 %), entfiel bei europäischen Filmen mit niedrigem Einspielergebnis fast die Hälfte der kumulierten Besucherzahlen auf ausländischen Märkte.

- **Europäische Blockbuster werden im Ausland keine Blockbuster**

  Grundsätzlich werden europäische Filme meist nur im Heimatmarkt zu Blockbustern oder Filmen mit hohem Einspielergebnis, im europäischen Ausland dagegen nicht, weil sie oft auf lokalen Inhalten basieren. Dies zeigt sich an der durchschnittlichen Zahl der Länderstarts (Occurrences) pro Film. Im Durchschnitt werden europäische Filme nur in 1,1 europäischen Märkten zum Blockbuster. Demgegenüber kommen Filme mit hohem Einspielergebnis durchschnittlich auf 1,2, Filme mit mittlerem Einspielergebnis auf 1,5 und Filme mit niedrigem Einspielergebnis auf 1,9 Länderstarts.

WICHTIGSTE EINBLICKE ZU US-FILMEN

- **Zunehmender Fokus von US-Filmen auf Blockbuster-Kategorie**

  Blockbuster waren die einzige Kategorie (unter US-Filmen), die in den letzten zehn Jahren einen Anstieg der Besucherzahlen verzeichnete, obwohl die Zahl der US-Blockbuster stagnierte oder sogar zurückging. Im Gegensatz dazu waren die kumulierten Besucherzahlen für US-Filme mit niedrigem Einspielergebnis in den letzten zehn Jahren vergleichsweise stabil und für US-Filme mit hohem und mittlerem Einspielergebnis leicht rückläufig.

  Daher hat sich die Verteilung der US-Besucherzahlen zwischen den Kategorien verändert, vor allem in den Jahren 2019 und 2022, als 50 % der Gesamtbesucherzahlen für US-Filme auf US-Blockbuster entfielen, während es zwischen 2010 und 2018 im Durchschnitt „nur“ 37 % waren. Der Anteil aller anderen US-Kategorien war dagegen deutlich geringer, was darauf hindeutet, dass die US-Studios noch stärker darauf setzen, für eine begrenzte Anzahl potenzieller Blockbuster zu werben.

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1 METHODOLOGICAL REMARKS

1.1. Purpose of the analysis & research questions

Since the reopening of cinemas and lifting of COVID-related restrictive measures, many explanations were proposed as to why theatrical markets in Europe had not been recovering as quickly as hoped for by the industry. Among the reasons most frequently cited was a lack of US blockbusters and a decline in US mid-tier films which – according to this narrative – were no longer released in cinemas but went directly to streaming platforms.

Such explanations undoubtedly are consistent with common sense and were often backed by anecdotal quantitative evidence linked to the success – or lack thereof – of individual films. But how many US blockbusters and mid-tier films were there really on release in Europe in 2022 and how much lower was that number when compared to the past decade? How important are US blockbusters and mid-tier films for the European box office markets, i.e. which share of admissions is generated by these films? Has their importance increased or decreased over time, or is there no discernible pattern in the first place?

These are some of the questions that this report is aiming to answer. It will do so by **analysing the composition of the European box office in terms of four film types**, **namely blockbusters, high-grossing films, mid-tier films and low-grossing films** and **three key indicators, namely the number of films, film occurrences and admissions.**

The report also analyses **2022 figures in the context of the past decade** and doesn't just compare the *recovery rate* in relation to the three years preceding the pandemic, i.e. 2017 to 2019.

Hence this report will address the following **three main research questions**:

1. **How did the composition of box office in terms of film types look in Europe** and in individual European markets in 2022? Were there significant differences among individual markets or are box office structures similar in markets of comparable size?
2. **How has box office structure developed over the past decade** and how does the long-term perspective compare to the situation after the pandemic?
3. **How concentrated were theatrical markets** in Europe in 2022 and has concentration changed?

As a prerequisite to answering the above questions it was necessary to set meaningful definitions for what constitutes a blockbuster, a high-grossing, a mid-tier or a low-grossing film – which can be considered a research question in its own right.

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1.2. Key parameters of the analysis

Key indicators

The analysis is based on the following **three key indicators**:

1. Number of films on release
2. Film occurrences
3. Annual admissions

Each of these indicators can be measured **in absolute values as well as in terms of percentage share** of the respective aggregate total values.

Data for the three indicators will be **aggregated** – where meaningful – **at different levels**. Apart from the aggregation of total figures at pan-European level as well as for individual markets, data will be aggregated for films grouped by region of origin as well as by film type, or both. The aggregation of data on a market cluster level, grouping markets of similar size, was also carried out during the analysis, but results showed that the average results of these market clusters did not provide any meaningful insights, as differences among individual markets within the same market clusters were too pronounced.

Data scope

In principle the dataset covers all **feature films on release**, i.e. having at least one commercial theatrical screening in one of the markets covered. This includes holdovers, re-releases, retrospectives, paid festival screenings etc. Alternative content screenings and short film compilations are not taken included in the data scope.

The analysis is based on data regarding **annual admissions to individual films** on release in any European market for the years 2010 to 2019 and 2022. See section 1.3 for further details on the data sample behind the analysis.

Time scope

The report focuses on the situation in 2022 but puts it in the long-term context of the past decade, i.e. the years 2010 to 2019. The years 2020 and 2021 are considered exceptional years which were so heavily influenced by COVID-related measures that they do not provide any insights with regard to the situation before and after the pandemic and hence need to be ignored for the purposes of this report. While still impacted by certain aftereffects of the pandemic, 2022 can, in contrast, be considered the first 'normal' year after the pandemic.[6]

Time series can be presented in absolute figures or, when needed, in an indexed manner to allow the possibility of comparing the development of indicators on different scales.

[6] A year without any significant measures restricting access to cinemas.

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Geographical scope

In principle, the analysis aims to cover all European markets, that is all member states of the Council of Europe. However, LUMIERE coverage rates vary among markets and from one year to the next. In order to ensure comparability over time, the data sample only includes the following **27 European markets** for which there is a sufficiently high coverage rate for all the years ranging from 2010 to 2022. See section 1.4 for further details.

Table 1. Sample markets grouped by market clusters

Annual admissions bandwidths for market clusters	Sample markets falling into market clusters
(> 150 mio)	FR, GB & IE
(90 to 120 mio)	DE, IT, ES
(50 to 70 mio)	TR, PL
(30 to 40 mio)	NL
(8 to 20 mio)	AT, BE, CH, CZ, DK, FI, GR, HU, NO, PT, RO, SE
(2 to 7 mio)	BG, EE, HR, LT, LV, SI, SK

Source: European Audiovisual Observatory (EAO)

1.3. Key definitions and assumptions

Key indicators

The analysis is based on the following three key indicators:

	Key indicator	Definition
1	**Number of films ON RELEASE (not first releases)**	Due to the lack of comprehensive and consistent data on release dates the identification of first releases for such a big data set and particularly across European markets is an extremely time consuming task which was beyond the scope of this report. **For pragmatic reasons** the analysis therefore uses the **number of films ON RELEASE**, which refers to the number of (unique) film titles for which **at least one commercial theatrical screening in any of the European sample territories** was registered in LUMIERE in any given year. This includes holdovers, re-releases, retrospectives, paid festival screenings etc. The number of films hence refers to unique film titles and is not linked to their occurrences, i.e. in how many markets they are on release. To illustrate, the film *Avatar* was released in practically all European markets while the Polish film *Furioza* was only released in one market. Both films count as one film for this indicator. Given the fact the the **same film can fall into the blockbuster category in one market, into the high-grossing film category in another** and – two years later – perhaps even count as a low-grossing film, the number of films understood as truly unique titles can only be roughly estimated and a certain amount of double counting cannot be avoided. For calculating percentage share, the 'artificial' sum of subcategories has been used.

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	Key indicator	Definition
2	**Occurences**	Film occurrences **refer to the number of territories a film has been released in in any given year.** With this indicator, the release of *Avatar* in all 27 sample markets would, for instance, count as 27 occurrences, while the release of *Furioza* in its home market would be counted as only one occurrence. Occurrences within film types are not linked to individual titles, i.e. the film *Avatar* may fall into the blockbuster category in 22 of its release markets but fall into the high-grossing category in five other markets. It would then count as 22 blockbuster occurrences and five occurrences of a high-grossing film.
3	**Admissions**	Admissions are defined as the **number of paid cinema tickets** sold for an individual film in a specific territory in a specific year, as registered in the LUMIERE databases

Each of these indicators can be measured in absolute values as well as percentage share of the respective aggregate total values. Key indicators will be calculated for the total number of films as well as for sub-groups linked to "film types" and "region of origin" as defined below.

Categorisation of film types based on admissions

For the purpose of this report, the box office composition is analysed in terms of the following **four film types**:

1. Blockbusters
2. High-grossing films
3. Mid-tier films
4. Low-grossing films

To the best knowledge of the Observatory there are **no established and commonly agreed benchmarks** as to what constitutes e.g. a blockbuster or a mid-tier film across the individual European markets. The terms seem to be used in a vague manner that is sufficiently clear for industry stakeholders to assume that they are talking about the same thing. There seems to be no apparent need on the industry side to define these film types in a very clear manner. Nevertheless, there is an interest in understanding the role that these different film types play in the European theatrical sector. In order to produce any kind of related insights which are based on actual figures and quantitative analysis, it is necessary to define the above-mentioned film types in a concise and measurable manner.

For feasibility reasons films are allocated to one of these four film types **exclusively on the basis of the number of admissions** they generate within a specific calendar in a specific market. Evidently, the corresponding admission benchmarks for each film type need to be adjusted to the market size that they are applied to. For instance, while a film needs to sell more than three million tickets in France or the UK to be considered a blockbuster in that market, it 'only' takes 100 000 admissions to count as a blockbuster in e.g. Slovakia or Estonia.

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In the context of this report, which aims at analysing the development of box office composition over time, the bandwidths are **based on pre-pandemic admission benchmarks,** so as to have a reference value that applies to the beginning of the time period analysed. Table 2 below shows the **admissions benchmarks applied in the context of this report**.

These benchmarks are based on an initial Observatory analysis of admissions to a few sample films representing – from a common sense point of view – the four film types. The resulting provisional benchmarks were then shared with trade associations representing European exhibitors, distributors and sales agents, who were asked to provide feedback with regard to the plausibility of the proposed benchmarks. The feedback provided to the Observatory largely confirmed the proposed benchmarks but also indicated a need to adjust a limited number of admission benchmarks and market clusters, which have been taken into consideration for the final benchmark definitions as presented above.

So while efforts have been made to make the benchmarks applied in this report as meaningful as possible with respect to market realities, it has to be kept in mind that **definitions of what constitutes e.g. a blockbuster are ultimately subjective,** may differ between stakeholders as well as between countries even of the same size, and will develop over time.[7] While hopefully of wider interest, the **benchmarks applied in this analysis do not necessarily have any relevance outside of the scope of this report.**

Table 2. Definition of film types based on admissions – by market size

Very small markets with annual admissions of generally less than 2 million, including Bosnia-Herzegovina, Cyprus, Iceland, Georgia, Luxembourg, Montenegro, North Macedonia and Malta, have not been included in the analysis due to insufficient data coverage.

Annual admissions bandwidths for market clusters	Markets falling into market clusters	Blockbuster films	High-grossing films	Mid-tier films	Low-grossing films
(> 150 mio)	FR, GB&IE	> 3 mio	[1 mio - 3 mio]	[300' - 1.5 mio]	< 300'
(90 to 120 mio)	DE, IT, ES	> 1.7 mio	[800' – 1.8 mio]	[250' – 800']	< 250'
(50 to 70 mio)	TR, PL	> 950'	[400' -950']	[150' – 400']	> 150'
(30 to 40 mio)	NL	> 500'	[200' – 500']	[100' – 200']	< 100'
(8 to 20 mio)	AT, BE, CH, CZ, DK, FI, GR, HU, NO, PT, RO, SE	> 270'	[130' – 270']	[35' – 130']	< 35'
(2 to 7 mio)	BG, EE, HR, LT, LV, SI, SK	> 100'	[50' – 100']	[20' – 50']	< 20'

Source: European Audiovisual Observatory (EAO)

[7] Admission benchmarks for all film types should arguably be lower for the years 2020 to 2022 – when overall box office was significantly lower than in the preceding decade.

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Definition of *regions of origin* of a film

For the purpose of this report, the box office composition is also analysed **in terms of the origin of films,** more specifically the region of origin.

Each film is allocated a unique country of origin within the LUMIERE database. This country of origin corresponds to the country of the producer(s) of the film. In the case of international co-productions the film is assigned to the country which provides the majority share of production financing. While this report does not analyse the origin of films based on individual countries of origin, it groups films by using the following four regions of origin as defined in Table 3.

Table 3. Definition of regions of origin of films

	Region of origin	Definition
1	**European films**	European films are all films considered to be of European origin, i.e. produced and majority financed by producer(s) and/or financier(s) located in Europe. In the context of this report all member states of the Council of Europe are considered to be European states.
2	**EUR INC films**	European incoming investment (EUR INC) films are defined as films which are (i) (co-)produced by a European-based production company (or special purpose vehicle) and (ii) are substantially backed by a major US studio (e.g., in terms of financing or distribution), and (iii) have a strong cultural "European" character (referring of course to the country of production rather than Europe as a whole). Some stakeholders consider EUR INC films as European films while others consider them to be US films. Because of their untypically high box office potential they would distort admission and global circulation statistics for 'typical' European films. In the context of this report they are hence generally considered as a category sui generis.
3	**US films**	US films are all films considered to be of US origin, i.e. produced and majority-financed by producer(s) and/or financier(s) located in the US.
4	**Other films**	Other films are all films produced and majority-financed outside Europe and the US.

Source: European Audiovisual Observatory (EAO)

National admissions

When analysing the role of European films in the composition of box office markets in Europe, it is of interest to distinguish between national and non-national admissions, which is done in some portions of this report. In the context of this report, national admissions are defined as admissions generated in the national home market of the film, i.e. in its country of origin. In contrast, non-national admissions refer to cinema tickets sold outside their country of origin. In the case of international co-productions, only admissions generated in the majority co-producing country (the main country of origin) are considered to be national admissions, while admissions generated in minority co-producing countries are counted as non-national admissions.

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1.4. The data sample

Admissions data analysed in this report comes from the European Audiovisual Observatory's **LUMIERE database** which tracks annual admissions to feature films and other theatrical content released in any European market. The database is available free of charge and can be found under the following link: https://lumiere.obs.coe.int/.

The data are collated from a wide variety of sources, including national film agencies and statistics offices, inter-industry bodies, distributors' and exhibitors' associations, the trade press and a small number of private tracking bodies. This is supplemented and completed by data from the European Union's MEDIA Programme, on the basis of declarations made by distributors to its Automatic Distribution Support scheme. The data in this report are based on a **data extraction of LUMIERE data as of 31 May 2023.**

Table 4. Data sample film coverage – Number of films (as of May 2023)

Market size	Nr	Country	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
(> 150 mio)	1	FR	759	839	791	936	938	962	987	908	1 085	3 095	1 996	3 022	813
	2	GB & IE	697	622	722	761	2 551	2 687	2 842	2 810	2 743	3 013	1 863	1 790	2 834
(90 to 120 mio)	3	DE	545	551	598	652	2 362	2 444	2 373	2 375	2 410	2 496	2 027	1 699	2 335
	4	ES	1 302	1 237	1 234	1 463	1 473	1 740	1 663	1 901	1 859	1 803	1 635	2 026	598
	5	IT	831	727	906	1 110	1 196	1 260	1 400	1 620	1 767	1 910	1 222	1 353	2 032
(50 to 70 mio)	6	PL	418	459	474	507	547	556	586	566	615	473	169	2 170	294
	7	TR	382	429	491	498	564	522	526	532	639	634	336	284	638
(30 to 40 mio)	8	NL	1 277	1 329	1 113	1 201	1 133	562	1 187	1 165	1 276	1 314	1 133	848	1 349
(8 to 20 mio)	9	AT	504	511	514	510	534	567	575	517	519	547	310	293	410
	10	BE	604	609	606	398	536	318	956	991	946	910	644	591	1 025
	11	CH	1 571	1 559	1 676	1 671	1 643	1 642	1 834	1 900	2 046	2 040	2 177	2 221	2 054
	12	CZ	1 049	1 117	1 124	1 227	1 076	1 179	1 251	1 221	1 278	1 391	1 110	1 088	1 314
	13	DK	642	287	246	260	260	287	314	302	305	278	160	204	260
	14	FI	375	408	329	337	338	328	328	361	385	488	488	451	573
	15	GR	328	361	303	329	351	406	415	403	418	371	192	178	274
	16	HU	256	273	288	302	555	553	615	786	741	980	616	678	884
	17	NO	589	538	483	483	496	595	586	661	841	1 337	814	1 148	1 492
	18	PT	636	789	816	956	995	1 030	868	998	951	1 031	752	715	1 004
	19	RO	404	133	398	411	416	412	448	390	438	436	267	395	1 071
	20	SE	640	636	536	574	537	881	868	303	303	633	632	634	627
(2 to 7 mio)	21	BG	188	276	280	283	312	318	332	349	289	279	169	208	222
	22	EE	301	351	396	376	351	377	376	358	406	319	366	299	349
	23	HR	54	223	185	247	226	250	248	242	239	235	179	242	297
	24	LT	247	300	43	304	267	290	297	311	356	383	271	250	340
	25	LV	294	390	479	13	517	233	304	294	345	320	246	190	362
	26	SI	385	383	399	442	430	505	475	478	497	470	292	320	388
	27	SK	464	257	611	566	609	607	735	717	800	742	603	629	840
(< 2 mio)	28	BA	-	149	-	-	19	201	218	234	223	239	154	228	218
	29	CY	23	6	5	4	153	18	148	139	140	133	58	69	115
	30	GE	-	-	-	-	-	-	193	-	-	-	-	-	-
	31	IS	12	13	30	7	161	196	199	196	197	220	156	152	151
	32	LI	13	13	17		-	-	-	-	-	-	-	-	-
	33	LU	97	121	110	76	104	112	104	516	576	630	458	541	727
	34	ME	-	-	-	177	182	163	194	18	265	276	148		193
	35	MK	-	-	80	-	221	23	3	260	280	499	163	210	263
TOTAL EUROPE			15 887	15 896	16 283	17 081	22 053	22 224	24 448	24 822	26 178	29 925	21 806	25 126	26 346

Source: European Audiovisual Observatory (EAO) / LUMIERE

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LUMIERE film coverage rates vary among markets and from one year to the next, which can distort the direct comparability of statistical indicators. While differences in film coverage rate changes generally do not matter in terms of admissions coverage, they do have a large impact on counting the number of individual films.

Annual LUMIERE **coverage rates in terms of admissions generally range between 91% and 100%** for any of the 27 European markets covered in this report. In contrast it is **not possible to estimate LUMIERE coverage rates in terms of number of films on release** as in many countries there are no official figures on this indicator.

However, LUMIERE film coverage increased significantly from 2014 onwards when compared to the years 2010 to 2013. Any increase in the number of films on release in 2014 is assumed to be mostly linked to this increase in coverage.

As mentioned above, the dataset includes **feature films on release**, including holdovers, re-releases, retrospectives, paid festival screenings etc. Alternative content screenings and short film compilations are, however, not taken into account.

In order to maximise comparability over time, the data sample used in this report includes only those **27 European markets**[8] for which there is a sufficiently high coverage rate in terms of number of films for all the years ranging from 2010 to 2022, as illustrated in Table 4. Cumulatively these 27 markets account for about 99% of estimated total admissions.

1.5. Methodological caveats

As mentioned above, the analysis of the composition of Europen theatrical markets in terms of film types is based on a number of methodological assumptions and choices, the limitations of which need to be kept in mind when interpreting the results of this report. In order to have them all in one place, the main methodological caveats are once more summarised in this section.

- **Analysis pursues a *market angle* rather than a *film angle***

The purpose of this report is to analyse the composition of the European box office market as well as in individual European countries. The same film can hence fall into into the blockbuster category in one market, into the high-grossing film category in another and – two years later – perhaps even count as a low-grossing film in yet another market.

In contrast, this report does not provide any analysis from a *film perspective*, which would require the allocation of a single category for each film and then analyse its distribution across the various European markets. In other words, this report aims to analyse the contribution of the various film types in generating total admissions rather than to analyse the *success* of films.

[8] Actually 28 markets, as the UK and Ireland are cumulatively counted as one market for analysis purposes.

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- **Categorisation of film types is subjective**

While efforts have been made to make the benchmarks applied in this report as meaningful as possible, it has to be kept in mind that definitions of what constitutes a certain film type, e.g. a blockbuster, are ultimately subjective and may differ between stakeholders as well as between countries even of the same size. They can furthermore change over time. While hopefully of wider interest, the benchmarks applied in this analysis do not claim to have any relevance outside of the scope of this report.

- **Analysis is based on number of films on release, not first releases**

Given the fact that first releases are estimated to generally account for around 98% of total annual admissions, it would actually be more meaningful to base this analysis on the much smaller sub-sample of first releases as it would make changes in the – comparatively small - number of blockbusters, high-grossing or even mid-tier films more visible. Calculating the share of a comparatively low number of e.g. blockbusters in relation to the thousands of films on release naturally will not reflect a decrease of e.g. 10 blockbusters.

However, as explained above, it was technically not possible to reliably identify first releases for such a big data set and the analysis had to be based on films registered to be on release for pragmatic reasons. The overall composition of the European box office in terms of film offering does hence not reflect changes in the comparatively low number of blockbusters, high-grossing and even mid-tier films. To allow insights into the development of these film types, all key indicators are presented for each film type separately, both in absolute terms as well as in percentage share.

- **LUMIERE coverage rate in terms of admissions is high, while coverage rate in terms of films on release cannot be established with certainty**

Annual LUMIERE coverage rates in terms of admissions generally range between 91% and 100% for any of the 27 European markets covered in this report. Any breakdowns of admissions can hence be considered as very reliable.

In contrast it is not possible to estimate LUMIERE coverage rates in terms of number of films on release as in many countries there are no official figures on this indicator. We have to assume that the actual number of films on release, i.e. films with at least one screening in any of the 27 markets covered, can actually be significantly higher than the number of films registered to be on release in LUMIERE.

- **Any country related data have to be considered estimates and may differ from official figures from national sources**

Any country related data presented in this report, e.g. the country rankings by concentration levels, have to be considered as Observatory estimates based on LUMIERE data. Because of differences in methodology and / or data coverage figures presented in this report may therefore differ from official figures published by national data providers like national film agencies. Please refer to national film agencies for accurate official figures for any specific market.

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- **Coverage jumps in LUMIERE impact number of low-grossing films**

LUMIERE coverage rates vary among markets and from one year to the next. This can distort the direct comparability of statistical indicators. While differences in coverage rate changes generally do not matter in terms of admissions coverage, they do have a big impact on counting of the number of individual films and occurrences. Coverage rates in terms of number of films covered in LUMIERE are significantly higher from 2014 onwards when compared to the years 2010 to 2013. Any increase in the number of films on release as well as occurrences in 2014 is assumed to be linked primarily to this increase in coverage. This is particularly true for the number of low-grossing films. In contrast, the time series should be fairly consistent with regard to blockbusters, high-grossing films and mid-tier films.

- **Double counting of number of films across sub-categories**

The indicator *number of films*, which in principle refers to the number of (unique) film titles on release, has to be understood as a rough estimate, as a certain amount of double counting cannot be avoided. This is due to the fact that the same film can fall into the blockbuster category in one market, into the high-grossing film category in another and perhaps even count as a low-grossing film two years later. The sum of the number of films falling into the various sub-categories hence does not equal the total number of unique films when calculated for the entire sample without any breakdown by film type or origin. For calculating percentage shares, the 'artificial' sum of subcategories has been used.

- **Only admissions in majority-coproducing countries count as national admissions**

In the case of international co-productions, only admissions generated in the majority co-producing country (the main country of origin) are considered to be national admissions, while admissions generated in minority co-producing countries are counted as non-national admissions. This approach somewhat understates the number of non-national admissions, if one were to treat admissions in all co-producing markets as national admissions.

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2 SNAPSHOT OF EUROPEAN BOX OFFICE COMPOSITION IN 2022

2.1. Europe at a glance – the big picture

2.1.1. Diverse film offering with few films selling more than a million tickets

The European theatrical market is a highly diverse market in terms of film offering, as it is characterised by a very large number of films on release. However, there is a high concentration of admissions among the top films.[9]

In 2022, almost **12 000 films were registered as being on release** in at least one of the 27 territories included in this analysis. However, 95% of these films sold fewer than 100 000 tickets across all of Europe during the year. And over 8 100 films out of these 12 000 films sold even fewer than 1 000 tickets, as illustrated in Figure 1. On the other hand, **fewer than 100 films managed to sell more than one million tickets** in all of Europe in 2022.

The situation in 2022 was assumed to be still affected by the aftermath of the COVID pandemic, as the number of films with low admissions was slightly lower during the past decade and the number of films selling more than a million tickets was almost twice as high at an annual average of 169 films between 2010 and 2019.

The picture looks very different when it comes to the corresponding breakdown of admissions**.** The **97 films selling more than one million tickets** in 2022 cumulatively **accounted for 74% of the estimated total of 674 million admissions** generated in the 27 European sample territories that year, while the 11 400 films selling fewer than 100 000 tickets cumulatively accounted for merely 7% of total admissions.

Figure 1 also illustrates the dominating importance of the very limited number of films selling more than 10 million tickets at the European box office. In 2022 only 13 films managed to do so, but cumulatively they accounted for 51% of total admissions in Europe. And this share was even higher in the past decade, accounting for 54% on average.

[9] See chapter 4 for further details on concentration metrics.

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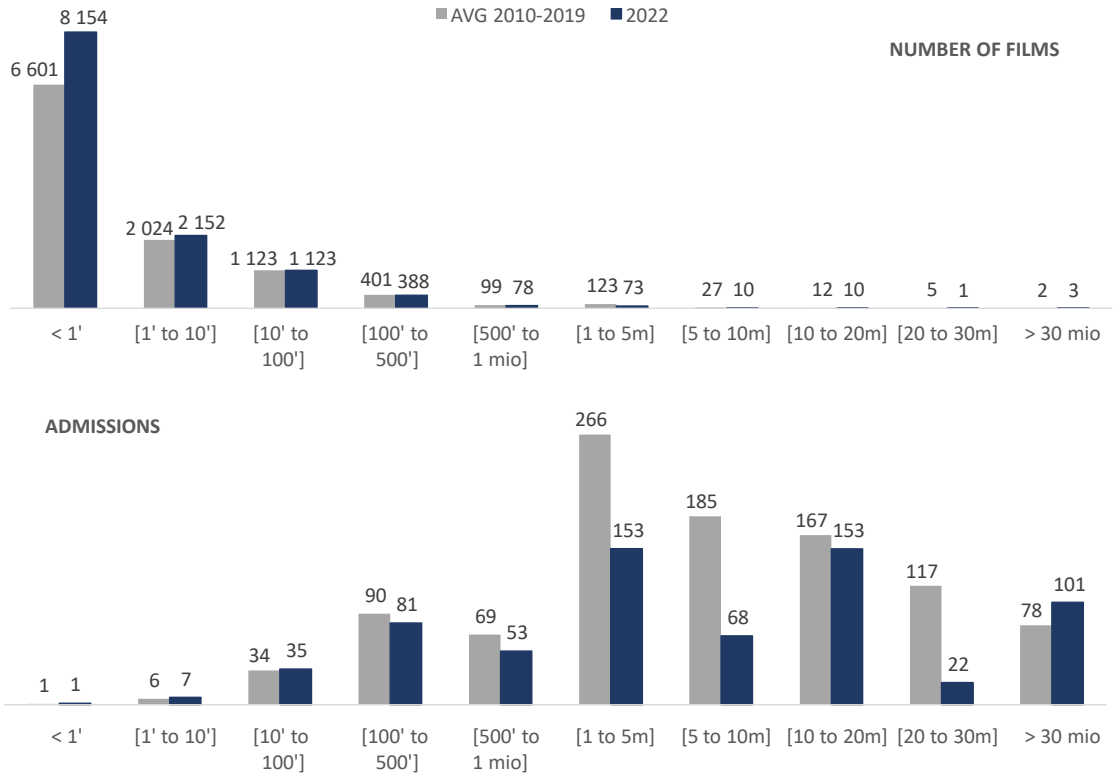
Figure 1. Nr of films and admissions by admissions bandwidth – 2022 vs AVG 2010-2019
Estimated breakdown of cumulative annual number of films on releases as well as admissions by films falling into various admission bandwidths.



Source: : European Audiovisual Observatory / LUMIERE

2.1.2. European films dominate offering, US films dominate admissions

Breakdown of European film offering and admissions by film origin

In terms of the origin of films, the European market is characterised by a large number of European films which accounted for 68% (over 8 100 films) of the total film offering in the 27 European sample markets in 2022. A total of 19% (2 265 films) of the films on release in Europe in 2022 originated from the US and 1500 films (13%) from other parts of the world.

The composition is almost reversed when it comes to the distribution of total admissions. US films cumulatively accounted for 63% of total European admissions in 2022, far ahead of European films (30%), EUR INC films (4%) and films from other parts of the world (3%), as illustrated in Figure 2.

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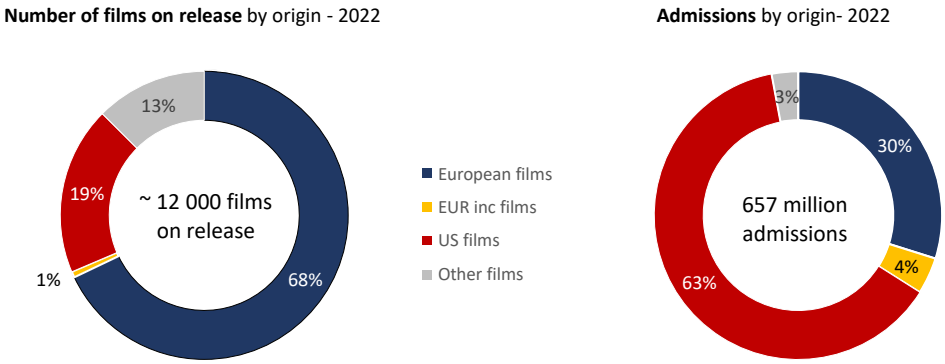
Figure 2. Breakdown of European film offering and admissions by film origin – 2022
In 27 European sample markets, representing 99% of estimated total European admissions in 2022



Source: European Audiovisual Observatory (EAO)

A closer look at national and non-national admissions to European films

A closer look at admissions to European films reveals that three out of four tickets sold to European films in 2022 were sold in their national markets. In other words, **75% of the cumulative admissions to European films were generated in their home markets, and 25% in other – non-national – European markets.**

As illustrated in Figure 3 this breakdown of admissions into national and non-national admissions differs significantly between the different film types. While almost all admissions to European films qualifying as blockbusters or high-grossing films were generated in their home markets (93% and 95% respectively), almost half of the cumulative admissions to European low-grossing films were generated in non-national markets.

The interpretation of this figure may be that when European blockbusters, high-grossing and – to a slightly lower extent – mid-tier films travel to other European markets, they often do so by falling into the low-grossing category in those other markets. An alternative reason may be that many European films that fall into the low-grossing category in fact travel better than European blockbusters, like big national comedies, which often are only released in their home markets due to their specific appeal to national audiences.

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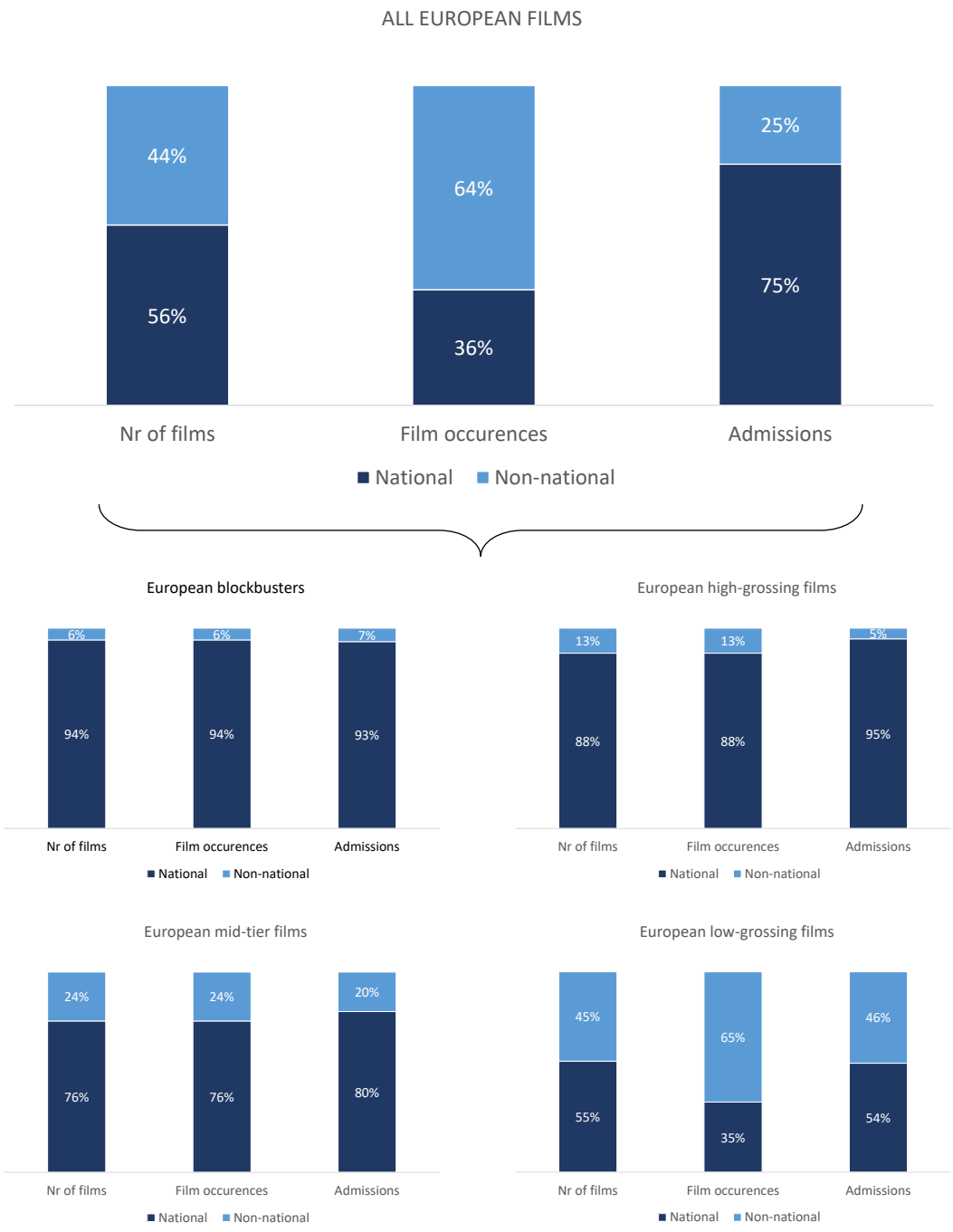
Figure 3. Breakdown of European indicators by national and non-national components
In 27 European sample markets, representing 99% of estimated total European admissions in 2022



Source: European Audiovisual Observatory (EAO) / LUMIERE

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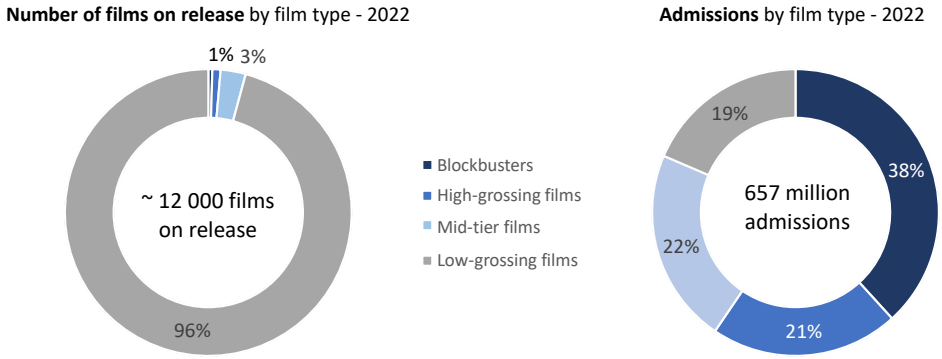
2.1.3. Low-grossing films dominate offering, blockbusters lead admissions

Breakdown of European film offering and admissions by film type

In terms of **number of films**, the film offering in Europe is characterised by an **overwhelming offer of low-grossing films**. In 2022 a staggering 11 860 films – 96% of films on release in the 27 European sample markets – fell into the low-grossing category. Evidently a lot of films in this category are one-off films screenings e.g. as part of a retrospective or event screenings, holdovers or festival screenings. By contrast, one can assume that the categories of mid-tier, high-grossing and blockbuster include only films with a proper commercial release in 2022 or late 2021. In 2020 a total of 350 films on release qualified as mid-tier films in at least one of the 27 European sample markets, representing 3% of the total film offering in Europe. This compares to 115 high-grossing films (1%) and only 56 blockbuster films (0.5%).

The **breakdown of total admissions** on the other hand reveals a fairly balanced distribution of admissions among the four film types, with only **blockbusters standing out** as the single most important film type in terms of ticket sales. In 2022, blockbusters cumulatively accounted for 38% of total cinema tickets sold in Europe, while the remaining admissions came, almost equally, from mid-tier films (22%), high-grossing films (21%) and low-grossing films (19%).

Figure 4. Breakdown of European film offering and admissions by film type – 2022
In the 27 European sample markets, representing 99% of estimated total European admissions in 2022



Source: European Audiovisual Observatory (EAO)

A closer look at film types by origin

When further detailing the analysis by separating the four film types according to their region of origin, one can distinguish – **in terms of admissions share** – **three different clusters of film types**.

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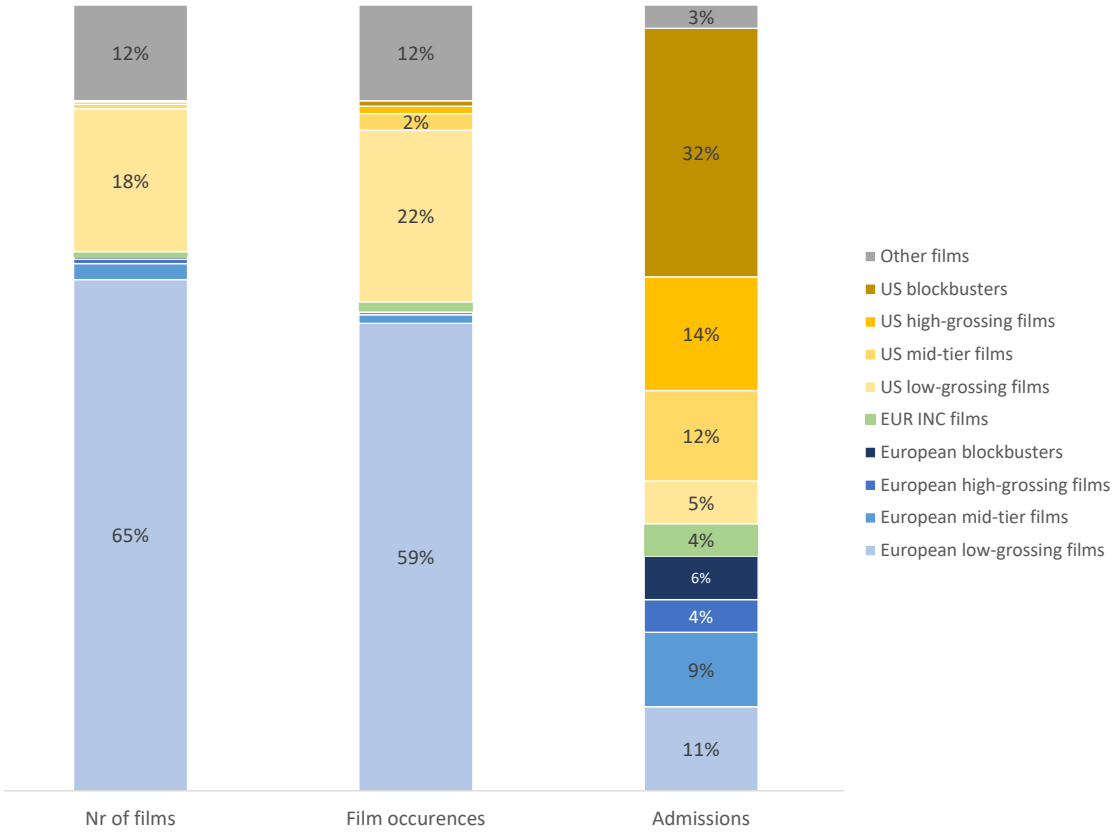
US blockbusters stand out as the single most important film category, capturing 32% of all the cinema tickets sold in Europe in 2022, as illustrated in Figure 5.

Then there is a second group of film types which accounted for 9% to 14% of total admissions respectively. This group consists of US high-grossing films (14%), US mid-tier films (12%), European low-grossing films (11%) and European mid-tier films (9%).

Finally the third group of film types accounted for 3% to 6% of total admissions respectively. This group consists of European blockbusters (6%), US low-grossing films (5%), EUR INC investment films (4%) and European high-grossing films (4%), as well as films from other parts of the world (3%).

Figure 5. Composition of European box office market by film types and origin – 2022
Estimated; refers to the 27 European sample markets



Source: European Audiovisual Observatory (EAO)

In terms of film offering, measured both as number of films on release as well as occurrences, European low-grossing films clearly stood out as the single most important film type, accounting for 65% of the estimated number of films on release and 59% of film occurrences across the 27 European sample markets.

As mentioned above, European low-grossing films cumulatively accounted for 11% of total admissions, which is evidently small in comparison to their share in terms of films on

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release and occurrences, but makes them – on a cumulative level – the most important sub-category of European films in terms of admissions, and the fourth largest sub-category overall, bested only by US blockbusters, US high-grossing films and US mid-tier films.

Only two other types represent a two-digit share in the film offering in Europe, namely US low-grossing films (18% of films and 22% of occurrences) and low-grossing films from other parts of the world (12% of films as well as occurrences).

Table 5 summarises the breakdown of the European box-office market in 2022 measured in terms of the three key indicators, number of films on release, occurrences and admissions, by the different film types linked to their origin.

Table 5. Composition of European box office market by film types and origin – 2022

Estimated; refers to the 27 European sample markets

	Nr of films	% share	Film occurences	% share	Admissions	% share
Σ European films	**8 145**	**68%**	**15 076**	**61%**	**201**	**30%**
- European blockbusters	*34*	*0%*	*34*	*0%*	*37*	*6%*
- European high-grossing films	*71*	*1%*	*72*	*0%*	*28*	*4%*
- European mid-tier films	*252*	*2%*	*270*	*1%*	*64*	*9%*
- European low-grossing films	*8 032*	*65%*	*14 652*	*59%*	*72*	*11%*
Σ EUR INC films	**80**	**1%**	**295**	**1%**	**28**	**4%**
- EUR INC blockbusters	*1*	*0%*	*7*	*0%*	*8*	*1%*
- EUR INC high-grossing films	*5*	*0%*	*21*	*0%*	*15*	*2%*
- EUR INC mid-tier films	*3*	*0%*	*25*	*0%*	*3*	*0%*
- EUR INC low-grossing films	*78*	*1%*	*242*	*1%*	*2*	*0%*
Σ US films	**2 265**	**19%**	**6 305**	**26%**	**425**	**63%**
- US blockbusters	*21*	*0%*	*167*	*1%*	*213*	*32%*
- US high-grossing films	*37*	*0%*	*239*	*1%*	*98*	*14%*
- US mid-tier films	*71*	*1%*	*520*	*2%*	*78*	*12%*
- US low-grossing films	*2 248*	*18%*	*5 379*	*22%*	*37*	*5%*
Σ Other films	**1 502**	**13%**	**3 003**	**12%**	**20**	**3%**
- Other blockbusters	*0*	*0%*	*0*	*0%*	*0*	*0%*
- Other high-grossing films	*2*	*0%*	*2*	*0%*	*2*	*0%*
- Other mid-tier films	*14*	*0%*	*22*	*0%*	*3*	*1%*
- Other low-grossing films	*1 500*	*12%*	*2 979*	*12%*	*14*	*2%*
Total films *	**11 992**	**100%**	**24 679**	**100%**	**675**	**100%**

* Total films does not correspond to the sum of the number of films and occurences, as the same film may fall into different categories. It is a rough estimation. For calculating the percentage shares the calculated total, i.e. the sum of the subcategories, has been used.

Source: European Audiovisual Observatory (EAO)

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2.2. Comparison across individual markets

The following chapter presents a comparison of box office structures among individual European markets. When comparing markets it is important to keep in mind that the **admission benchmarks** applied in this report **to define the four film types ultimately** are **subjective** and their meaningfulness may differ between individual markets. In addition LUMIERE data coverage may not be fully comprehensive for individual markets and / or years. The **analysis** in this report is meant to be **merely indicative and figures have to be considered as estimates.** Please refer to national sources for official figures.

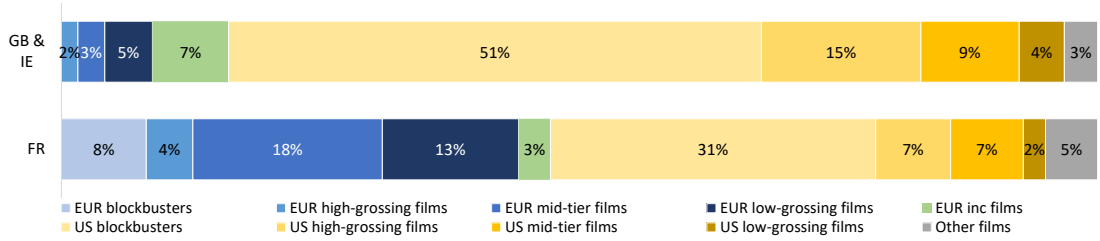
The comparison is furthermore based on 2022 admissions and as such represents only a **snapshot of the situation in 2022**. It is important to bear in mind that the composition in individual markets can differ quite significantly from one year to the next due to e.g. the exceptional success of a few blockbuster titles.

The **composition of box office** – in terms of admissions – **differs widely among countries** and the breakdown of admissions by film types in individual European markets can be quite different from the aggregate pan-European figures presented in the previous chapter.

The data also show significant differences in the composition of total admissions among countries of comparable market size. It can hence be concluded that the **market size per se is not linked to a certain box office composition,** which would be typical for that market cluster. Hence, an aggregation of data based on market clusters does not provide any meaningful insights and the breakdown of admissions will be shown for individual markets, albeit grouped within their corresponding market clusters.

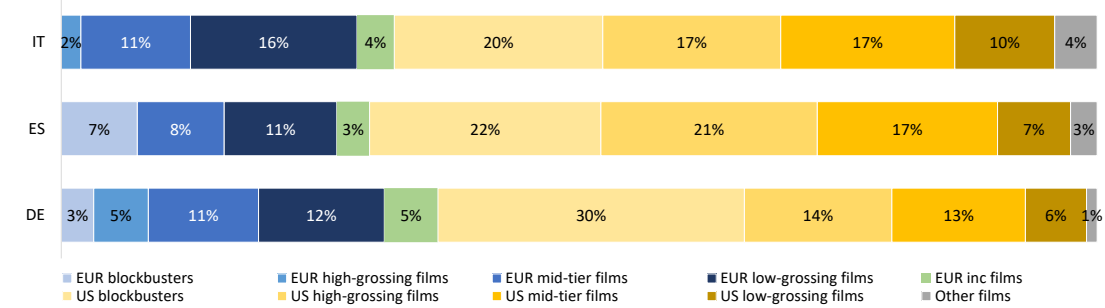
Breakdown of admissions in individual markets (grouped by market clusters)

Figure 6. Breakdown of admissions by film types (est) – 2022 : Markets with > 150 mio adm



Source: European Audiovisual Observatory (EAO) / LUMIERE

Figure 7. Breakdown of admissions by film types (est) – 2022: Markets with 90 to 120 mio adm



Source: European Audiovisual Observatory (EAO) / LUMIERE

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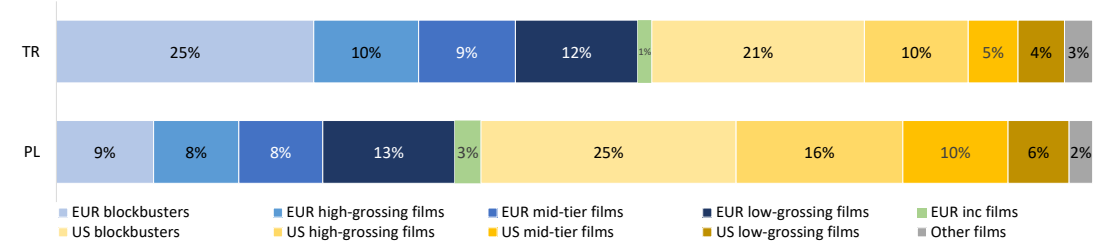
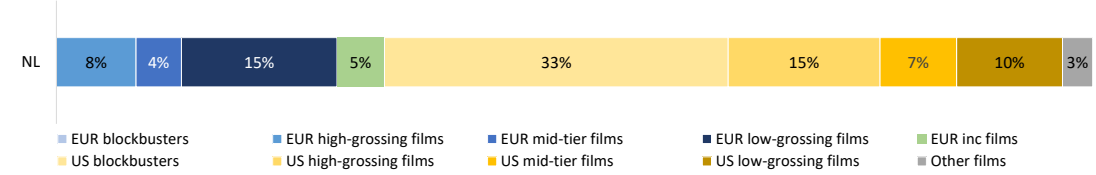
Figure 8. Breakdown of admissions by film types (est) – 2022: Markets with 50 to 70 mio adm



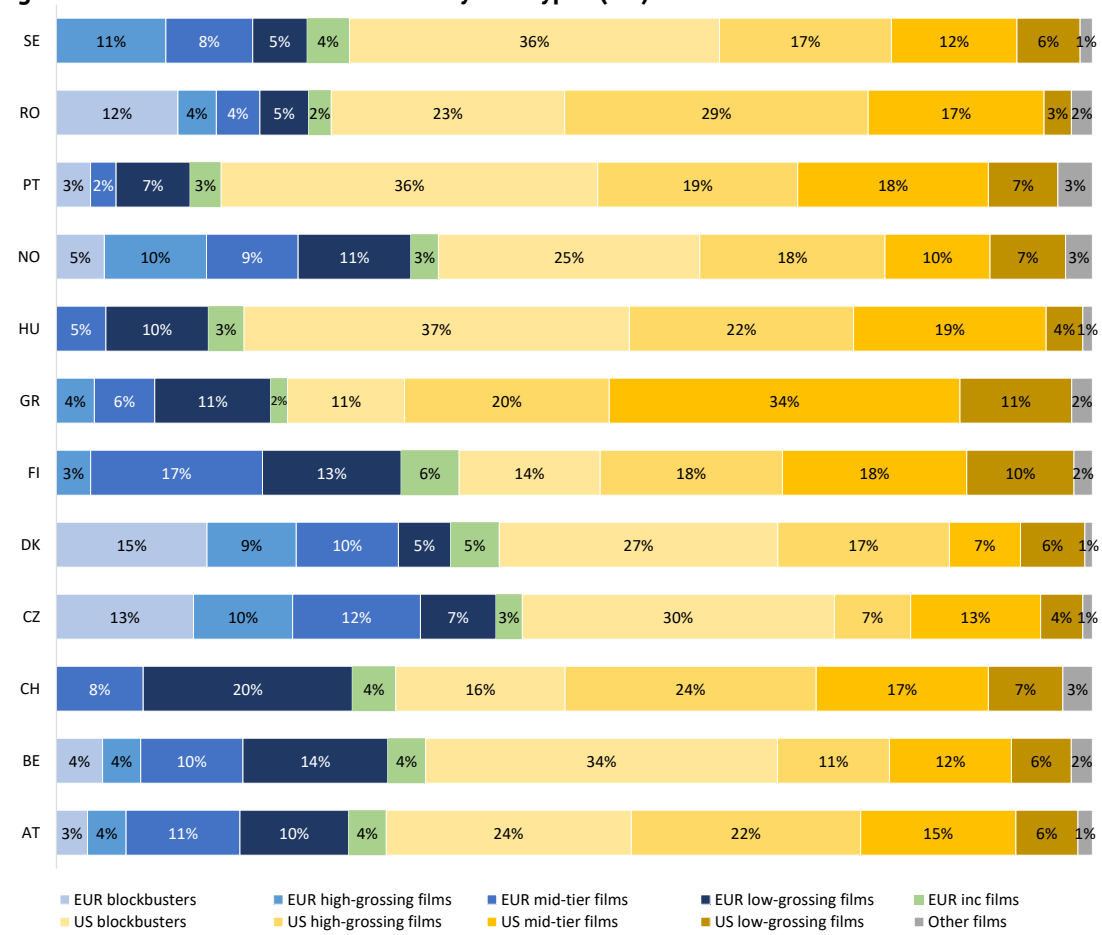
Source: European Audiovisual Observatory (EAO) / LUMIERE

Figure 9. Breakdown of admissions by film types (est) – 2022: Markets with 30 to 40 mio adm



Source: European Audiovisual Observatory (EAO) / LUMIERE

Figure 10. Breakdown of admissions by film types (est) – 2022: Markets with 8 to 20 mio adm



Source: European Audiovisual Observatory (EAO) / LUMIERE

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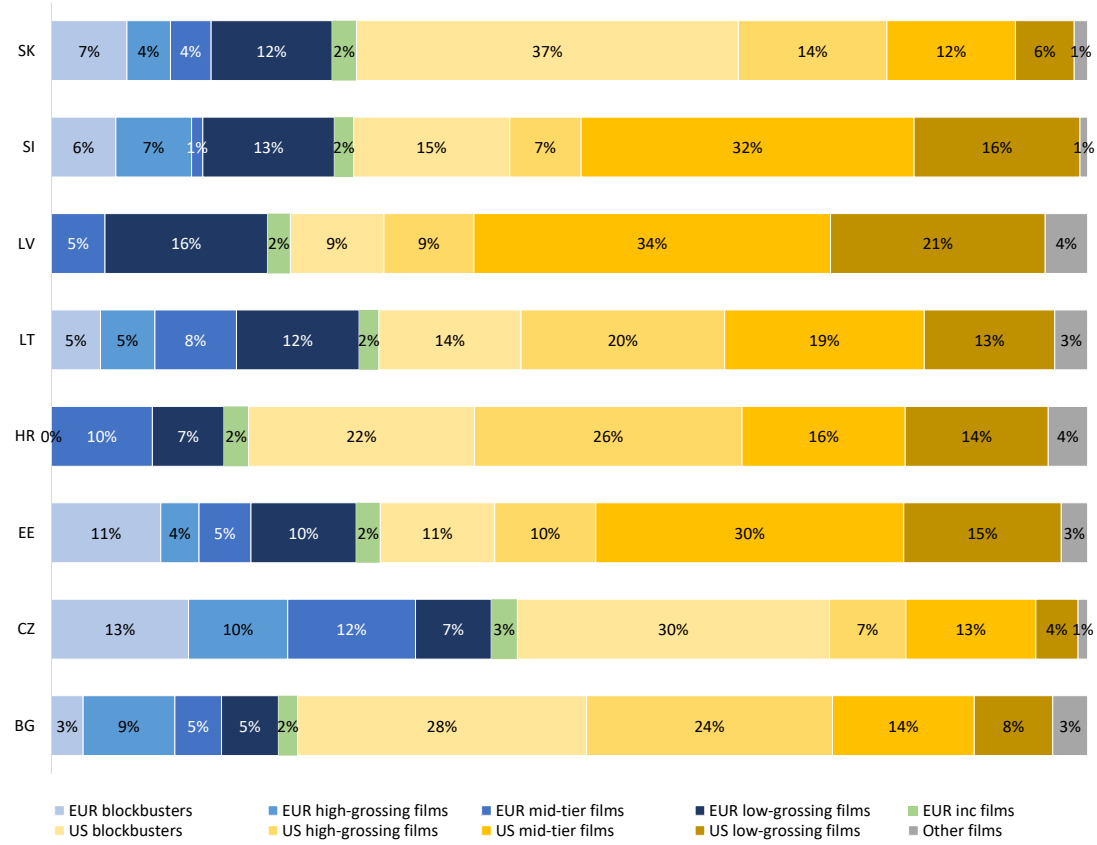
Figure 11. Breakdown of admissions by film types (est) – 2022: Markets with 2 to 7 mio adm



Source: European Audiovisual Observatory (EAO) / LUMIERE

Market rankings by origin and film types

In order to facilitate comparison between countries with regard to the importance of different film types or films of different origin, the following section shows selected market rankings based on the admissions share of different film types and films of different origin in 2022.

The following rankings – along with corresponding data on complementary film categories – are shown:

- Markets ranked by importance of European films (Figure 12)
- Markets ranked by importance of blockbusters (Figure 13)
- Markets ranked by importance of US blockbusters (Figure 14)
- Markets ranked by importance of European blockbusters (Figure 15)
- Markets ranked by share of national admissions (Figure 16)

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Figure 12 shows, for instance, that the Turkish, French and Czech cinema markets rely more heavily on European films (including national films), with European films accounting for 56%, 44% and 42% of total admissions in 2022, than e.g. the UK/ Ireland and Portugal, where European films accounted for only 9% and 13%, respectively. Conversely, the latter markets are highly dependent on the success of US films which accounted for 81% of total admissions in both of these markets.

Figure 12. Market rankings by importance of films from different origins – 2022

Estimated admissions share; markets ranked by share of European films

Rank	Country	Adm share of **European films**	Rank	Country	Adm share of **EUR INC films**	Rank	Country	Adm share of **US films**	Rank	Country	Adm share of **other films**
1	TR	56%	1	GB & IE	7%	1	HU	81%	1	FR	5%
2	FR	44%	2	FI	6%	2	PT	81%	2	IT	4%
3	CZ	42%	3	DE	5%	3	GB & IE	81%	3	LV	4%
4	PL	38%	4	DK	5%	4	HR	77%	4	HR	4%
5	DK	38%	5	NL	5%	5	GR	76%	5	BG	3%
6	NO	34%	6	CH	4%	6	BG	73%	6	PT	3%
7	FI	33%		Europe	4%	7	LV	73%	7	GB & IE	3%
8	BE	32%	7	SE	4%	8	RO	71%	8	LT	3%
9	DE	31%	8	BE	4%	9	SE	71%		Europe	3%
	Europe	30%	9	AT	4%	10	SI	70%	9	NL	3%
10	LT	30%	10	IT	4%	11	SK	69%	10	CH	3%
11	EE	29%	11	HU	3%	12	ES	68%	11	TR	3%
12	CH	29%	12	ES	3%	13	AT	67%	12	NO	3%
13	IT	29%	13	FR	3%	14	EE	66%	13	ES	3%
14	AT	28%	14	PT	3%	15	NL	65%	14	EE	3%
15	SI	27%	15	NO	3%	16	LT	65%	15	PL	2%
16	SK	27%	16	CZ	3%	17	CH	64%	16	BE	2%
17	NL	27%	17	PL	3%	18	IT	64%	17	RO	2%
18	ES	27%	18	HR	2%		Europe	63%	18	GR	2%
19	RO	24%	19	SK	2%	19	DE	63%	19	FI	2%
20	SE	24%	20	EE	2%	20	BE	62%	20	AT	1%
21	BG	22%	21	LV	2%	21	NO	61%	21	SK	1%
22	LV	21%	22	RO	2%	22	FI	59%	22	SE	1%
23	GR	21%	23	LT	2%	23	PL	57%	23	DE	1%
24	HR	17%	24	BG	2%	24	DK	57%	24	HU	1%
25	HU	15%	25	SI	2%	25	CZ	54%	25	CZ	1%
26	PT	13%	26	GR	2%	26	FR	48%	26	SI	1%
27	GB & IE	9%	27	TR	1%	27	TR	40%	27	DK	1%

Source: European Audiovisual Observatory (EAO) / LUMIERE

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Figure 13 shows, for instance, that blockbusters are significantly more important in the UK & Ireland as well as Turkey (where they accounted for 55% and 47% of total admissions in 2022), than e.g. in Latvia or Greece where they contributed only 11% of total admissions – as mid-tier films and low-grossing films contributed the largest shares to total admissions.

Figure 13. Market rankings by importance of film types – 2022
Estimated admissions share; markets ranked by share of blockbusters

Rank	Country	Share of block-busters	Rank	Country	Share of high-grossing films	Rank	Country	Share of mid-tier films	Rank	Country	Share of low-grosssing films
1	GB & IE	55%	1	BG	35%	1	GR	41%	1	LV	38%
2	TR	47%	2	NO	34%	2	LV	41%	2	SI	30%
3	SK	44%	3	RO	33%	3	EE	37%	3	CH	30%
4	CZ	43%	4	SE	30%	4	FI	35%	4	NL	28%
5	PT	42%	5	CH	29%	5	SI	33%	5	IT	27%
6	DK	41%	6	HR	27%	6	AT	29%	6	EE	27%
7	FR	41%	7	PL	27%	7	IT	28%	7	GR	27%
8	BE	38%	8	LT	27%	8	HR	28%	8	FI	27%
9	HU	37%	9	DK	26%	9	LT	27%	9	LT	25%
	Europe	37%	10	AT	26%	10	ES	27%	10	BE	25%
10	SE	36%	11	NL	25%	11	CZ	26%	11	HR	23%
11	RO	34%	12	HU	24%	12	FR	26%	12	NO	22%
12	PL	34%	13	GR	23%	13	DE	25%	13	ES	20%
13	NL	33%	14	TR	23%	14	HU	25%	14	PL	20%
14	DE	33%	15	FI	22%	15	CH	25%		Europe	20%
15	BG	31%	16	DE	21%	16	RO	23%	15	SK	19%
16	NO	30%	17	ES	21%		Europe	22%	16	AT	19%
17	ES	30%	18	SK	21%	17	SE	22%	17	DE	19%
18	AT	27%	19	PT	19%	18	BE	22%	18	TR	18%
19	IT	23%	20	IT	19%	19	PT	21%	19	FR	18%
20	HR	22%		Europe	19%	20	NO	20%	20	BG	16%
21	EE	22%	21	BE	17%	21	BG	19%	21	PT	15%
22	SI	21%	22	GB & IE	17%	22	PL	19%	22	HU	15%
23	LT	21%	23	CZ	17%	23	DK	18%	23	SE	14%
24	CH	16%	24	SI	16%	24	SK	17%	24	DK	13%
25	FI	16%	25	EE	15%	25	TR	16%	25	CZ	12%
26	GR	11%	26	FR	14%	26	GB & IE	14%	26	RO	10%
27	LV	11%	27	LV	9%	27	NL	13%	27	GB & IE	10%

Source: European Audiovisual Observatory (EAO) / LUMIERE

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Figure 14 shows, for instance, that in 2022 US blockbusters were uniquely important for the UK & Ireland markets as they accounted for 51% of total admissions compared to e.g. 31% in France and 24% in Austria. US mid-tier films were most important in Lativa, Greece, Slovenia and Estonia where they contributed between 30% and 34% of total admissions.

Figure 14. Market rankings by importance of US film types – 2022
Estimated admissions share; markets ranked by share of US blockbusters

Rank	Country	Share of US block-busters	Rank	Country	Share of US high-grossing films	Rank	Country	Share of US mid-tier films	Rank	Country	Share of US low-grosssing films
1	GB & IE	51%	1	RO	29%	1	LV	34%	1	LV	21%
2	HU	37%	2	HR	26%	2	GR	34%	2	SI	16%
3	SK	37%	3	CH	24%	3	SI	32%	3	EE	15%
4	PT	36%	4	BG	24%	4	EE	30%	4	HR	14%
5	SE	36%	5	AT	22%	5	LT	19%	5	LT	13%
6	BE	34%	6	HU	22%	6	HU	19%	6	GR	11%
7	NL	33%	7	ES	21%	7	PT	18%	7	FI	10%
	Europe	32%	8	GR	20%	8	FI	18%	8	NL	10%
8	FR	31%	9	LT	20%	9	ES	17%	9	IT	10%
9	CZ	30%	10	PT	19%	10	RO	17%	10	BG	8%
10	DE	30%	11	NO	18%	11	IT	17%	11	NO	7%
11	BG	28%	12	FI	18%	12	CH	17%	12	CH	7%
12	DK	27%	13	IT	17%	13	HR	16%	13	ES	7%
13	NO	25%	14	SE	17%	14	AT	15%	14	PT	7%
14	PL	25%	15	DK	17%	15	BG	14%	15	DK	6%
15	AT	24%	16	PL	16%	16	DE	13%	16	SE	6%
16	RO	23%	17	GB & IE	15%	17	CZ	13%	17	AT	6%
17	ES	22%	18	NL	15%	18	SK	12%	18	DE	6%
18	HR	22%		Europe	14%	19	SE	12%	19	PL	6%
19	TR	21%	19	SK	14%	20	BE	12%	20	BE	6%
20	IT	20%	20	DE	14%		Europe	12%	21	SK	6%
21	CH	16%	21	BE	11%	21	PL	10%		Europe	5%
22	SI	15%	22	TR	10%	22	NO	10%	22	TR	4%
23	LT	14%	23	EE	10%	23	GB & IE	9%	23	GB & IE	4%
24	FI	14%	24	LV	9%	24	NL	7%	24	CZ	4%
25	GR	11%	25	CZ	7%	25	FR	7%	25	HU	4%
26	EE	11%	26	FR	7%	26	DK	7%	26	RO	3%
27	LV	9%	27	SI	7%	27	TR	5%	27	FR	2%

Source: European Audiovisual Observatory (EAO) / LUMIERE

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Figure 15 shows, for instance, that in 2022, European blockbusters were exceptionally important for the Turkish market where local blockbusters took 25% of total admissions. Mostly national European blockbusters also took an above-average share in Denmark, the Czech Republic, Romania and Estonia, accounting for between 11% and 15% of total admissions. In contrast, European low-grossing films stood out in Switzerland, where they accounted for 20% of total admissions while in the majority of European markets they accounted for 10% to 13%.

Figure 15. Market rankings by importance of Europen film types – 2022

Estimated admissions share; markets ranked by share of European blockbusters

Rank	Country	Share of EUR block-busters	Rank	Country	Share of EUR high-grossing films	Rank	Country	Share of EUR mid-tier films	Rank	Country	Share of EUR low-grosssing films
1	TR	25%	1	SE	11%	1	FR	18%	1	CH	20%
2	DK	15%	2	TR	10%	2	FI	17%	2	IT	16%
3	CZ	13%	3	NO	10%	3	CZ	12%	3	LV	16%
4	RO	12%	4	CZ	10%	4	AT	11%	4	NL	15%
5	EE	11%	5	BG	9%	5	DE	11%	5	BE	14%
6	PL	9%	6	DK	9%	6	IT	11%	6	FI	13%
7	FR	8%	7	PL	8%	7	DK	10%	7	FR	13%
8	ES	7%	8	NL	8%	8	BE	10%	8	PL	13%
9	SK	7%	9	SI	7%	9	HR	10%	9	SI	13%
10	SI	6%	10	DE	5%		Europe	9%	10	DE	12%
	Europe	6%	11	LT	5%	10	TR	9%	11	LT	12%
11	LT	5%	12	FR	4%	11	NO	9%	12	TR	12%
12	NO	5%	13	SK	4%	12	ES	8%	13	SK	12%
13	BE	4%		Europe	4%	13	CH	8%	14	GR	11%
14	PT	3%	14	AT	4%	14	SE	8%	15	NO	11%
15	DE	3%	15	RO	4%	15	PL	8%	16	ES	11%
16	BG	3%	16	EE	4%	16	LT	8%		Europe	11%
17	AT	3%	17	BE	4%	17	GR	6%	17	AT	10%
18	LV	0%	18	GR	4%	18	LV	5%	18	EE	10%
19	CH	0%	19	FI	3%	19	EE	5%	19	HU	10%
20	NL	0%	20	IT	2%	20	HU	5%	20	CZ	7%
21	IT	0%	21	GB & IE	2%	21	BG	5%	21	PT	7%
22	GR	0%	22	ES	0%	22	NL	4%	22	HR	7%
23	FI	0%	23	PT	0%	23	RO	4%	23	BG	5%
24	HR	0%	24	LV	0%	24	SK	4%	24	SE	5%
25	HU	0%	25	CH	0%	25	GB & IE	3%	25	DK	5%
26	SE	0%	26	HR	0%	26	PT	2%	26	RO	5%
27	GB & IE	0%	27	HU	0%	27	SI	1%	27	GB & IE	5%

Source: European Audiovisual Observatory (EAO) / LUMIERE

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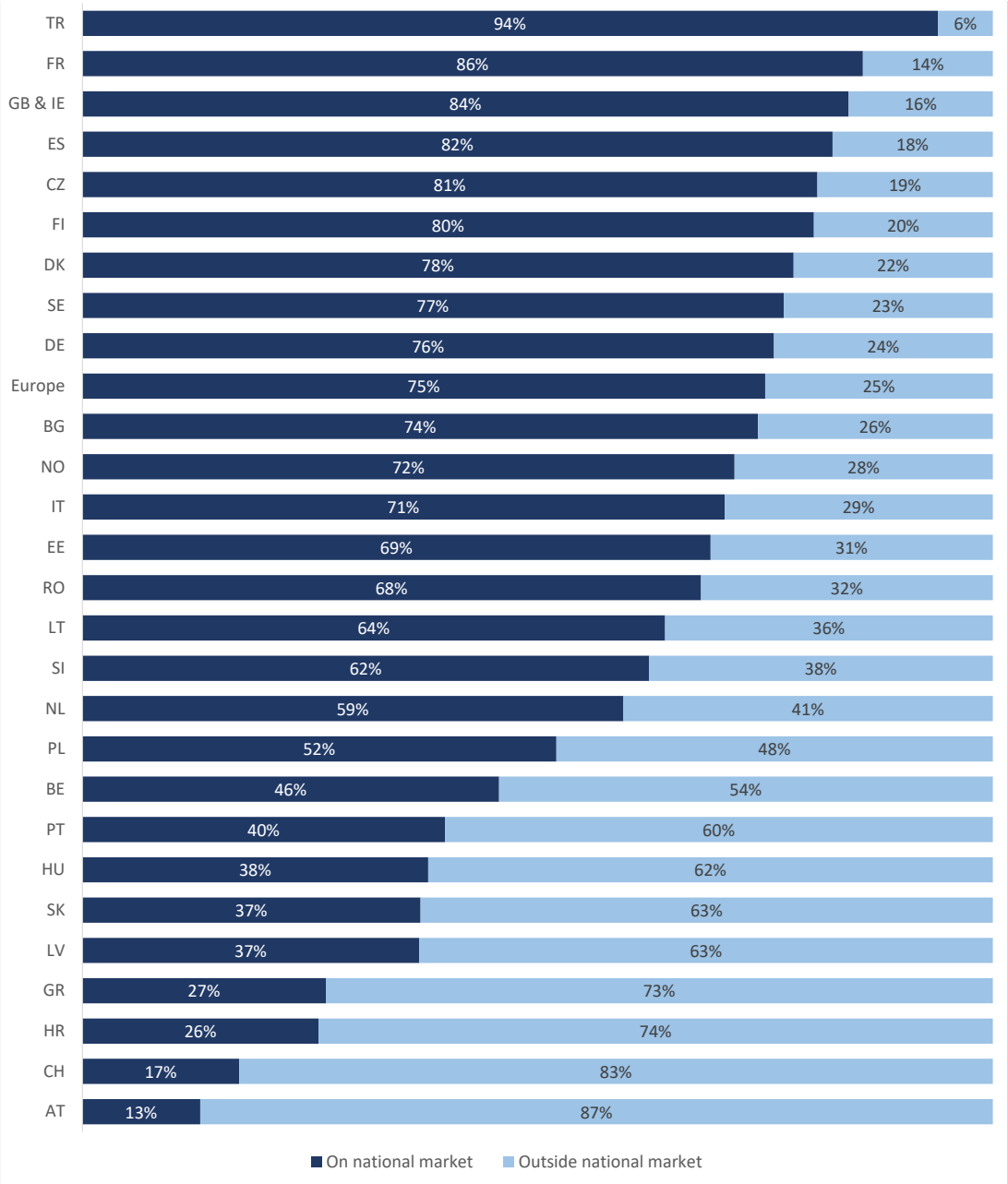
Figure 16 shows the breakdown of admissions to European films into national and non-national admissions in the individual European markets in 2022. The data show significant differences among European markets. While in some markets, e.g. Turkey, France or the UK & Ireland, 95% to 84% of admissions to European films were generated exclusively by national films, in other – smaller and mid-sized – markets e.g. Austria, Switzerland, Croatia or Greece, the majority of European admissions came from non-national films.

Figure 16. Market rankings by share of national admissions to European films – 2022

Estimated breakdown of admissions to European films into national and non-national admissions; markets ranked by share of national admissions



Source: European Audiovisual Observatory (EAO) / LUMIERE

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2.3. Comparison to 10-year average

How does the pan-European **box office composition in 2022** compare to the situation observed in the past decade? The data shows the box office composition – on the pan-European level –measured in terms of the percentage share of the individual film types for the three key indicators – has not changed significantly in terms of film offering but it does differ somewhat in the composition of admissions.

Table 6. Composition of European box office market – 2022 vs AVG 2010-2019

In % share of total

	Nr of films			Occurences			Admissions		
	2022	Avg 2010-2019	*Deviation*	2022	Avg 2010-2019	*Deviation*	2022	Avg 2010-2019	*Deviation*
European blockbusters	0%	1%	*0%*	0%	0%	*0%*	6%	9%	*-3%*
European high-grossing films	1%	1%	*0%*	0%	0%	*0%*	4%	6%	*-2%*
European mid-tier films	2%	3%	*-1%*	1%	1%	*0%*	9%	7%	*2%*
European low-grossing films	65%	64%	*1%*	59%	53%	*6%*	11%	7%	*3%*
EUR inc blockbusters	0%	0%	*0%*	0%	0%	*0%*	1%	3%	*-2%*
EUR inc high-grossing films	0%	0%	*0%*	0%	0%	*0%*	2%	1%	*1%*
EUR inc mid-tier films	0%	0%	*0%*	0%	0%	*0%*	0%	1%	*0%*
EUR inc low-grossing films	1%	1%	*0%*	1%	1%	*0%*	0%	0%	*0%*
US blockbusters	0%	0%	*0%*	1%	1%	*0%*	32%	24%	*7%*
US high-grossing films	0%	1%	*0%*	1%	2%	*-1%*	14%	18%	*-4%*
US mid-tier films	1%	1%	*-1%*	2%	4%	*-2%*	12%	15%	*-4%*
US low-grossing films	18%	18%	*0%*	22%	25%	*-3%*	5%	6%	*-1%*
Other blockbusters	0%	0%	*0%*	0%	0%	*0%*	0%	0%	*0%*
Other high-grossing films	0%	0%	*0%*	0%	0%	*0%*	0%	0%	*0%*
Other mid-tier films	0%	0%	*0%*	0%	0%	*0%*	1%	1%	*0%*
Other low-grossing films	12%	10%	*2%*	12%	10%	*2%*	2%	1%	*1%*

Source: European Audiovisual Observatory (EAO) / LUMIERE

In terms of **number of films** on release, 2022 was more or less in line with the long-term average, with only marginal deviations observed. The share of European and other low-grossing films was 1 and 2 percentage points higher than the average of the past decade, while the share of European and US mid-tier films was slightly lower.

In terms of **occurrences**, two differences stand out. On the one hand the share of European low-grossing films and other low-grossing films was comparatively high (6 and 2 percentage points higher), while the share of US low-grossing (-3 percentage points), US mid-tier films (-2) and US high-grossing films (-1) was lower than the long-term average.

When it comes to **admissions share**, the **deviations were more pronounced**. Particularly the increased share of US blockbusters, which was 7 percentage points above the average, stands out, while the admissions share of US high-grossing and US mid-tier films was 4 percentage points lower. In contrast, the share of European blockbusters and high-grossing

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films was lower in 2022 while the share of European mid-tier and low-grossing films was higher.

In conclusion, **while 2022 was perfectly in line with the long-term average composition of films on release**, there has been a **slight shift in occurrences** with European and other low-grossing films representing a higher share of the film offering, and there were proportionally fewer occurrences of all US films types, other than US blockbusters.

That shift was more pronounced when it comes to the breakdown of admissions, where the data suggest that the **European box office in 2022 was exceptionally dependent on US blockbusters,** which accounted for 32% of total admissions in 2022 compared to an average share of 24% between 2010 and 2019, while other types of US film, in particular US high-grossing and US mid-tier films had less occurrences and contributed a comparatively low share to total admissions.

European films, on the other hand, took a different direction, with European low-grossing and mid-tier films becoming the two most important film types in terms of their cumulative contributions to total admissions, while the share of European blockbusters and high-grossing films was well below the long-term average.

Evidently, the situation may differ significantly in individual countries but it is beyond the scope of this report to look into the situation of all the 27 individual sample markets. The year-by-year development of the individual film types will be analysed in further detail in chapter 4.

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3 SNAPSHOT OF ADMISSIONS CONCENTRATION IN EUROPE IN 2022

3.1. Europe – the big picture

Another aspect related to the composition of the European box office concerns its concentration levels with regard to the distribution of the vast majority of admissions to a comparatively limited number of films.

Concentration can be measured in a variety of ways. This report will use the following two different approaches to illustrate concentration levels:

1. Cumulative percentage admissions share of top 10/20/50/100 films
2. Number of films which cumulatively account for 80% of total admissions

3.1.1. Admissions share of top films

Considering the large number of films on release in Europe, admissions are highly concentrated, with the **top 10 films** – out of almost 12 000 films registered as being on release **– accounting for 34% of total admissions in 2022**. In other words, more than three out of 10 cinema tickets were sold to a screening of only 10 films. And every second ticket was captured by one of the **top 20 titles**, which cumulatively **accounted for 48% of all cinema tickets sold in 2022**.

This is **by far the highest concentration of admissions** for both the top 10 as well as the top 20 titles **registered in any year over the past decade**. It is 9 and 11 percentage points higher than the pre-pandemic long-term average share of 24% and 36%, respectively, as illustrated in Figure 17.

The top 50 films accounted for 63% and the top 100 films for 74% of total admissions in 2022. This compares to an average share of 56% for the top 50 films and 71% for the top 100 films.

The admissions share of top 100 films in 2022 was hence only 4 percentage points above the average share of the past decade, compared to an 11 percentage point increase in the share of the top 20 films. This clearly indicates that in 2022 the concentration of admissions focused on only a few top-performing films rather than on a wider set of strongly performing films. This development – albeit to a lesser extent – could already be observed in 2019.

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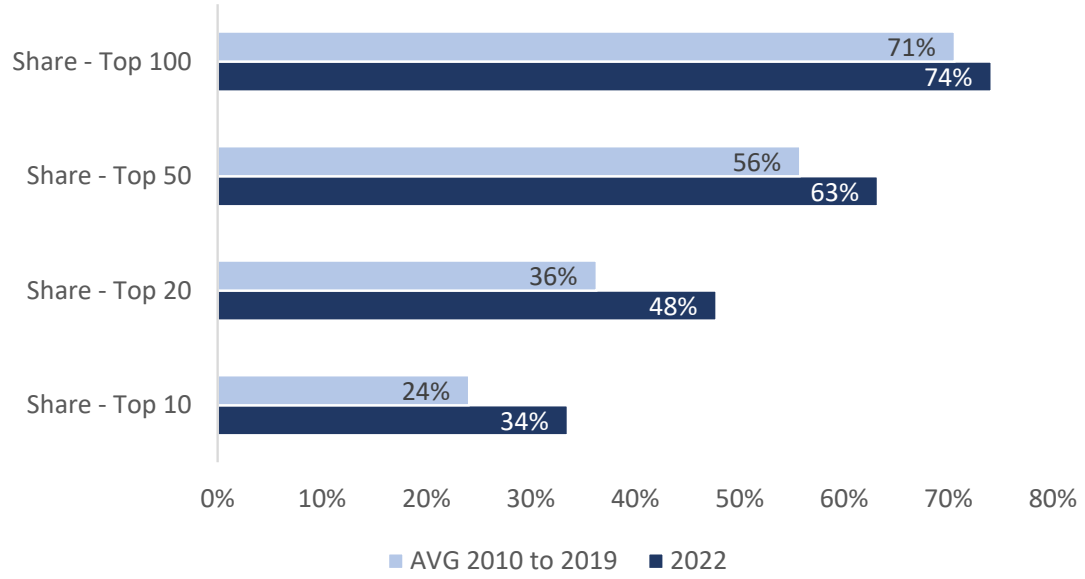
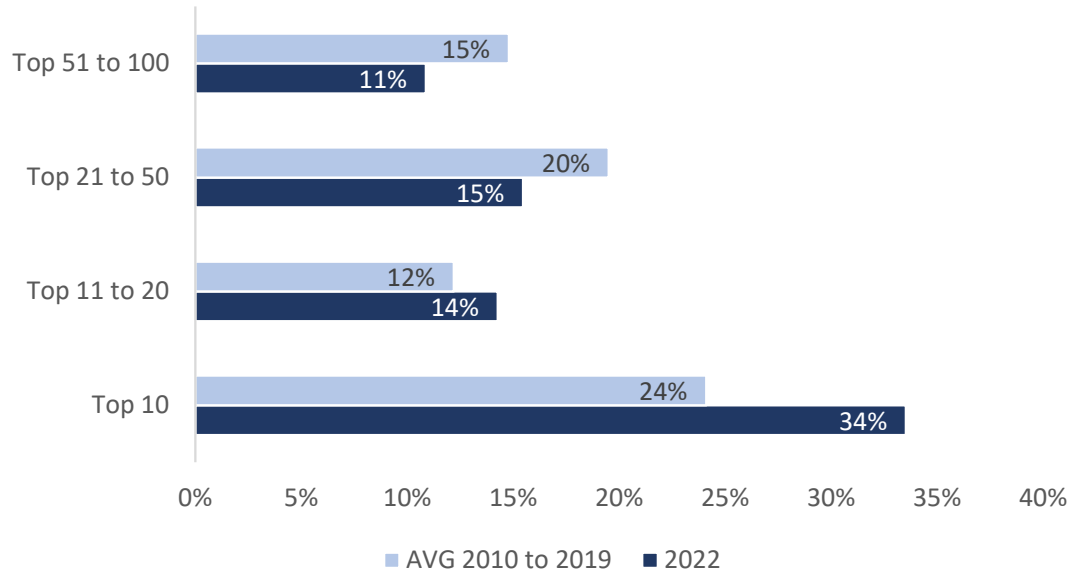
Figure 17. Admissions share of top films – 2022 vs AVG 2010-2019
Estimated % share of total admissions



Source: : European Audiovisual Observatory / LUMIERE

This increased concentration among a few top films is even more clearly illustrated in Figure 18 which shows the cumulative admissions share of the four different brackets of top 100 films separately. The data show that it was primarily the top 10 films which increased their share in total admissions in 2022, while the share of films ranking between 21 and 50 and 51 and 100 was actually well below the long-term average.

Figure 18. Admissions share of top films by brackets – 2022 vs AVG 2010-2019
Estimated % share of total admissions



Source: : European Audiovisual Observatory / LUMIERE

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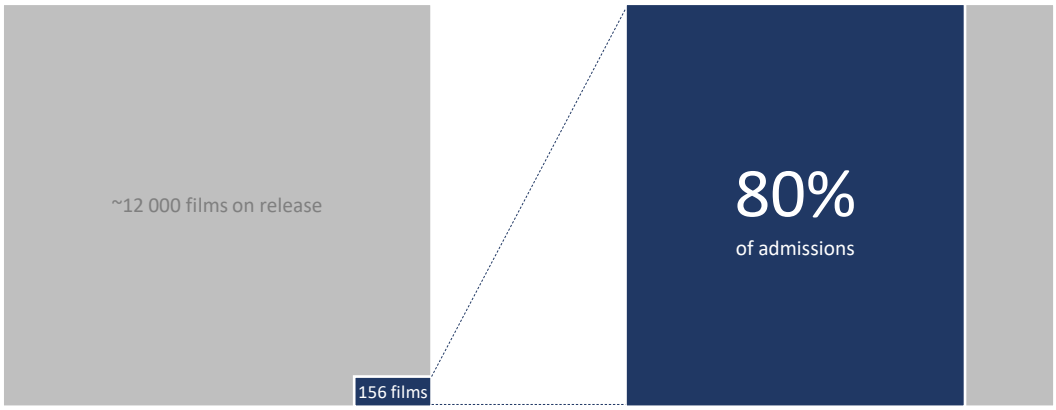
3.1.2. Nr of films generating 80%

Another way to look at concentration is to look at how many films it takes to generate 80% of total admissions. In 2022, it took only 156 films – out of almost 12 000 films registered as being on release – to generate 80% of cumulative admissions.

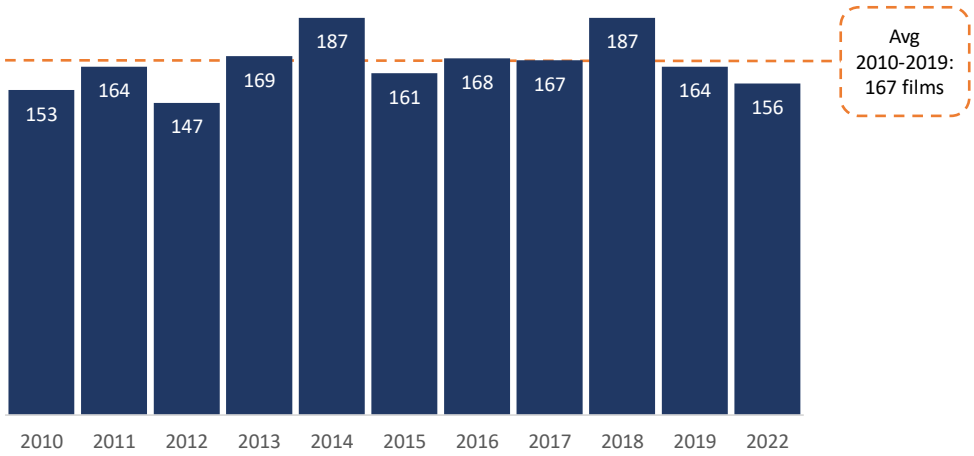
Figure 19. Number of films generating 80% of total admissions in Europe – 2022
Estimated; Europe refers to the 27 markets covered in this report



Source: European Audiovisual Observatory / LUMIERE

When looking at the development over time, one can see that this indicator generally ranged between 160 and 170 films, but fluctuated between individual years. The number of films accounting for 80% was comparatively low (higher concentration) in 2010, 2012 and 2022 and comparatively high (lower concentration) in 2014 and 2018.

Figure 20. Number of films generating 80% of annual admissions in Europe – 2010-2022
Estimated; Europe refers to the 27 markets covered in this report



Source: European Audiovisual Observatory / LUMIERE

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3.2. Comparison of concentration across individual markets

Comparison in terms of share of top films

The **concentration of admissions among top films differs widely between individual markets** as illustrated in Table 7 which shows the share of the top 10, 20, 50 and top 100 films in 2022 for the 27 European markets covered in this report. Please note, that the figures below represent estimated figures based on LUMIERE data. LUMIERE data coverage may not be fully comprehensive for individual markets and / or years. The **analysis** in this report is meant to be **merely indicative and figures have to be considered as estimates.** Please refer to national sources for official figures.

Table 7. Share of top films by country – 2022 vs 2018

Ranked by estimated share of top 10 films in 2022

Rank	Country	Market cluster	Share Top 10 - 2022	*Share Top 10 - 2018*	Share Top 50 - 2022	*Share Top 20 - 2018*	Share Top 50 - 2022	*Share Top 10 - 2018*	Share Top 100 - 2022	*Share Top 100 - 2018*
1	TR	[50 to 70 mio]	**48%**	*40%*	**63%**	*56%*	**84%**	*77%*	**93%**	*90%*
2	GB&IE	> 150 mio	**43%**	*35%*	**64%**	*51%*	**85%**	*75%*	**93%**	*90%*
3	SI	[2 to 7 mio]	**43%**	*35%*	**61%**	*50%*	**84%**	*71%*	**93%**	*87%*
4	PT	[8 to 20 mio]	**42%**	*28%*	**62%**	*46%*	**82%**	*71%*	**92%**	*87%*
5	DK	[8 to 20 mio]	**41%**	*31%*	**61%**	*51%*	**88%**	*78%*	**97%**	*93%*
6	NO	[8 to 20 mio]	**40%**	*34%*	**59%**	*54%*	**80%**	*77%*	**91%**	*90%*
7	HU	[8 to 20 mio]	**40%**	*28%*	**59%**	*44%*	**81%**	*70%*	**94%**	*88%*
8	SK	[2 to 7 mio]	**39%**	*33%*	**59%**	*49%*	**82%**	*71%*	**93%**	*88%*
9	GR	[8 to 20 mio]	**39%**	*24%*	**56%**	*39%*	**80%**	*67%*	**93%**	*84%*
10	CZ	[8 to 20 mio]	**39%**	*31%*	**56%**	*49%*	**79%**	*73%*	**93%**	*88%*
11	RO	[8 to 20 mio]	**39%**	*28%*	**58%**	*43%*	**85%**	*71%*	**97%**	*92%*
12	SE	[8 to 20 mio]	**37%**	*32%*	**56%**	*51%*	**78%**	*80%*	**88%**	*93%*
13	EE	[2 to 7 mio]	**37%**	*28%*	**56%**	*44%*	**81%**	*67%*	**93%**	*83%*
14	AT	[8 to 20 mio]	**36%**	*26%*	**54%**	*40%*	**76%**	*64%*	**91%**	*84%*
15	LT	[2 to 7 mio]	**36%**	*32%*	**52%**	*47%*	**78%**	*70%*	**93%**	*85%*
16	PL	[50 to 70 mio]	**36%**	*31%*	**53%**	*47%*	**72%**	*72%*	**85%**	*87%*
17	BG	[2 to 7 mio]	**36%**	*26%*	**56%**	*43%*	**83%**	*72%*	**97%**	*94%*
18	DE	[90 to 120 mio]	**36%**	*25%*	**52%**	*39%*	**73%**	*65%*	**87%**	*83%*
19	ES	[90 to 120 mio]	**35%**	*28%*	**53%**	*43%*	**74%**	*70%*	**85%**	*87%*
20	FI	[8 to 20 mio]	**35%**	*30%*	**53%**	*47%*	**79%**	*75%*	**93%**	*92%*
21	CH	[8 to 20 mio]	**35%**	*23%*	**50%**	*38%*	**69%**	*61%*	**82%**	*77%*
22	IT	[90 to 120 mio]	**34%**	*23%*	**47%**	*37%*	**68%**	*59%*	**81%**	*78%*
23	HR	[8 to 20 mio]	**34%**	*26%*	**51%**	*43%*	**79%**	*71%*	**94%**	*91%*
24	LV	[2 to 7 mio]	**33%**	*29%*	**50%**	*47%*	**76%**	*73%*	**91%**	*88%*
25	BE	[8 to 20 mio]	**31%**	*23%*	**47%**	*38%*	**67%**	*64%*	**78%**	*83%*
26	NL	[30 to 40 mio]	**31%**	*23%*	**48%**	*36%*	**68%**	*60%*	**83%**	*79%*
27	FR	> 150 mio	**25%**	*23%*	**39%**	*37%*	**56%**	*58%*	**70%**	*74%*
	Average		**37%**	*29%*	**55%**	*45%*	**77%**	*70%*	**90%**	*86%*
	Median		**36%**	*28%*	**56%**	*44%*	**79%**	*71%*	**93%**	*87%*

Source: : European Audiovisual Observatory / LUMIERE

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Turkey was the country with the highest concentration of admissions, with the top 10 films accounting for 48% of total admissions in 2022. It was followed by the UK & Ireland (43%) and Slovenia (43%). On the other end of the spectrum the top 10 films accounted for only 25% of total admissions in France, which turned out to be the market with the lowest concentration in all of Europe. The average admissions share of top 10 films in European markets in 2022 amounted to 37%.

The cumulative share of the top 20 films ranged from 64% in the UK & Ireland to 39% in France, with an average share of about 55%. This compares to the cumulative share of the top 50 films ranging from 88% in Denmark to 56% in France, with an average share of about 77%.

Finally, the top 100 films captured on average 90% of total admissions in any individual market, with the concentration highest in Denmark, Romania and Bulgaria where the top 100 films accounted for 97% of total admissions and lowest in France where the top 100 films accounted for only 70% of total admissions in 2022.

Evidently **concentration levels can vary significantly in any market from one year to the next, depending on the existence of a few breakout successes**. In order to put 2022 levels in context, they are compared to levels in 2018, which represents a fairly average year in terms of admission concentration at the pan-European level. It is beyond the scope of this report to analyse concentration levels for all the 27 markets for every year since 2010.

The comparison between 2022 and 2018 levels clearly shows that **concentration levels were exceptionally high in 2022** when compared to the past decade. For instance, the average admissions share of top 10 films in European markets in 2022 amounted to 37%, compared to an average share of 29% in 2018. Similarly, the average share of the top 20 films in 2022 (55%) was 10 percentage points above the 2018 average value of 45%. The average share of the top 50 films was 7 percentage points higher (77% vs 70%), while the average share of the top 100 films was only 4 percentage points higher (90% vs 86%).

Comparison in terms of number of films generating 80%

Similar differences among countries can be observed when comparing the number of films it takes to generate 80% of a country´s total admissions as illustrated in Table 8. While it took only 37 films in Denmark and 40 films in the UK & Ireland as well as Slovenia to sell 80% of total tickets in their respective markets in 2022, it took 118 films in Belgium and even 181 in France.

A comparison with 2018 confirms the exceptionally high concentration levels in 2022, as in 2018 the lowest number of films to generate 80% of total admissions was registered in Austria with 51 films (compared to 40 in 2022) and the European average was 77 films, compared to 63 in 2022.

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Table 8. Nr of films generating 80% of admissions by country – 2022

Nr	Country	Market Cluster	Nr of films generating 80% of total admissions in 2022	*Nr of films generating 80% of total admissions in 2018*
1	DK	[8 to 20 mio]	37	*55*
2	GB&IE	> 150 mio	40	*62*
3	SI	[2 to 7 mio]	40	*73*
4	TR	[50 to 70 mio]	41	*59*
5	RO	[8 to 20 mio]	43	*67*
6	BG	[2 to 7 mio]	45	*63*
7	PT	[8 to 20 mio]	45	*74*
8	SK	[2 to 7 mio]	45	*72*
9	HU	[8 to 20 mio]	47	*72*
10	EE	[2 to 7 mio]	49	*89*
11	GR	[8 to 20 mio]	50	*84*
12	CZ	[8 to 20 mio]	52	*67*
13	NO	[8 to 20 mio]	52	*58*
14	FI	[8 to 20 mio]	53	*61*
15	HR	[8 to 20 mio]	53	*66*
16	LT	[2 to 7 mio]	54	*79*
17	SE	[8 to 20 mio]	56	*51*
18	AT	[8 to 20 mio]	59	*86*
19	LV	[2 to 7 mio]	60	*70*
20	DE	[90 to 120 mio]	68	*90*
21	ES	[90 to 120 mio]	72	*74*
22	PL	[50 to 70 mio]	76	*72*
23	NL	[30 to 40 mio]	86	*106*
24	CH	[8 to 20 mio]	88	*115*
25	IT	[90 to 120 mio]	93	*109*
26	BE	[8 to 20 mio]	118	*87*
27	FR	> 150 mio	181	*130*
		AVG	63	*77*
		MEDIAN	53	*72*

Source: : European Audiovisual Observatory / LUMIERE

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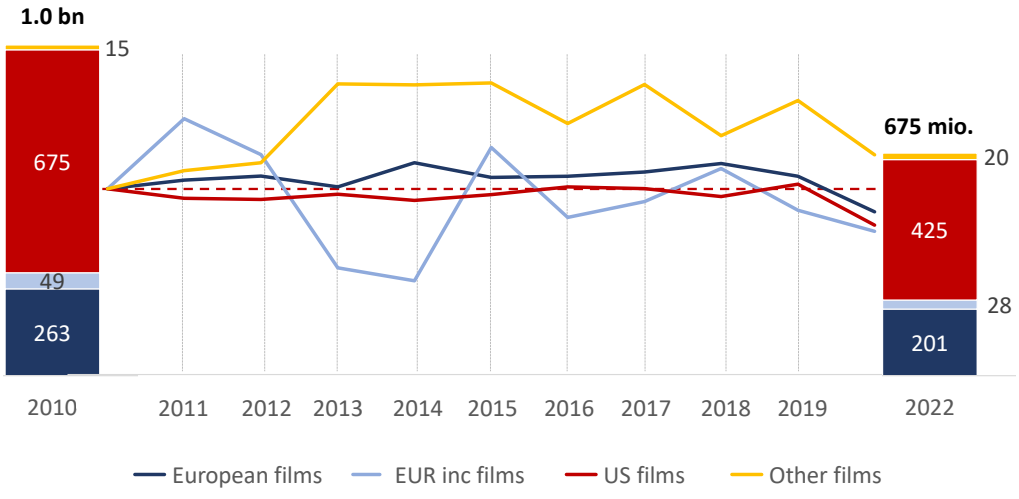
4 HOW DID FILM TYPES DEVELOP OVER TIME?

This chapter shows the development of the different film types between 2010 and 2022, excluding 2020 and 2021 because of their exceptional character making them not fit for comparison twith the situation before and after the COVID pandemic. Chapter 4.1 will look at the development of films of different regional origins, while chapter 4.2. will analyse the development of the four different film types in terms of box office performance, i.e. blockbusters, high-grossing films, mid-tier films as well as low-grossing films.

4.1. Films by origin

Figure 21 shows that **admissions to European and US films**, which together account for 90% of total admissions, were **comparatively stable between 2010 and 2019**. The difference is that admissions to European films surpassed on a sustained basis their comparatively low level of 263 million admissions in 2010, registering on average 301 million admissions for the rest of the decade. For US films on the other hand 2010 was a very strong year with 675 million tickets sold (only matched in 2016, 2017 and 2019; an average 616 million tickets were generated between 2011 and 2015). Due to the comparatively limited number of films, **admissions to EUR INC films vary significantly from year to year**, often depending on the success of only one or two films.

Figure 21. Development of admissions by film origin – 2010 to 2022
In millions; indexed development based on 2010



Source: European Audiovisual Observatory / LUMIERE

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In 2022, admission levels dropped well below 2010 levels for all films, except for **films from other parts of the world**. The latter constituted **the only film category to register a proportionally significant increase** in admissions since 2010 and the only film category where 2022 admissions were actually well above their 2010 level. With a cumulative 20 milllion tickets sold in 2022, this category accounts, though, for only a marginal share of total admissions in Europe.

Given the fact that cumulatively European and US films account for about 90% of films on release, occurrences and admissions, the following analysis will focus on developments related to European and US films with regard to the three main indicators over the past decade.

4.1.1. The importance of European films over time

The following section takes a closer look at the development of the importance of European films for the European box office with regard to the three main indicators.

Table 9. Key indicators for European films – 2010-2022

Estimated; coverage of number of films and occurrences for the years 2010 to 2013 is less comprehensive than from 2014 onwards

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2022	Avg 2010-2019
In absolute figures												
Nr of films	*4 306*	*4 306*	*4 487*	*4 687*	6 007	6 142	6 494	6 823	7 261	8 462	8 145	5 898
Occurrences	*8 436*	*8 373*	*8 942*	*9 204*	11 659	11 974	12 735	13 194	14 134	16 067	15 076	11 472
Admissions (in mio)	263	286	297	268	332	293	296	308	330	296	201	297
As percentage share of total												
Nr of films	67%	68%	67%	66%	65%	65%	65%	66%	67%	66%	68%	66%
Occurrences	54%	54%	56%	55%	55%	56%	54%	56%	58%	58%	61%	55%
Admissions	26%	29%	30%	28%	35%	29%	28%	29%	32%	28%	30%	29%

Source: European Audiovisual Observatory / LUMIERE

In absolute terms, the number of European films and film occurrences has been steadily increasing over the past decade, while admissions to European films have remained comparatively stable. Figure 22 illustrates these developments as an indexed development in relation to the year 2010.

The **number of European films** increased from around 4 300 films on release in Europe in 2010[10] to around 6 000 in 2014 (this increase is assumed to have been caused primarily by improved coverage of the LUMIERE database) and continued to increase to over 8 400 in 2019, dropping only slightly to 8 100 in 2022.

[10] Caveat: It has to be kept in mind that the coverage of the LUMIERE database in terms of number of films captured has increased in a notable manner, which means that the increase in the number of low-grossing films in 2014 compared to the time period 2010 to 2013 may largely be due to this technicality.

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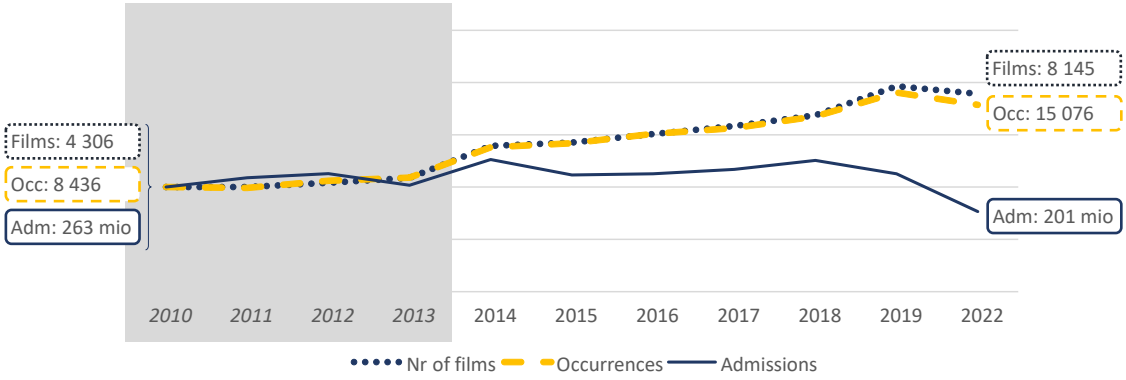
Figure 22. Key indicators for European films – 2010 -2022

Indexed development with base year 2010; Caveat: LUMIERE data coverage is crucial when it comes to measuring the number of films and their occurrences; LUMIERE coverage increased significantly from 2014 onwards and is hence not directly comparable to the years 2010 to 2013; The increase in number of films and occurrences between 2013 and 2014 is therefore assumed to be primarily due to an increase in the data coverage and does not reflect an actual increase in the number of European films; In contrast, LUMIERE data coverage for cumulative admissions is comparable across the entire time series



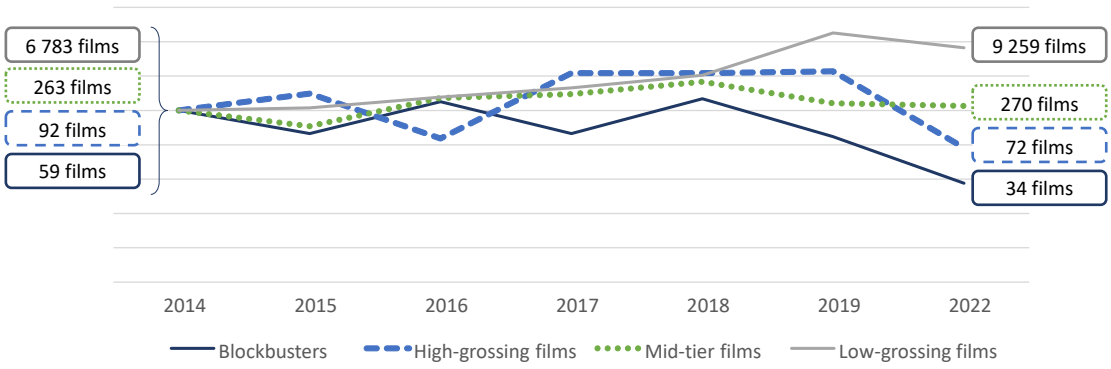
Source: European Audiovisual Observatory / LUMIERE

Similarly, the **occurrences** of European films increased from around 8 400 at the beginning of the decade to 11 700 in 2014 and over 16 000 in 2019. In 2022, occurrences decreased to 15 000 in 2022, which still represents the second-highest level over the past decade.

Given the fact that 93% to 96% of European films fall into the low-grossing category, it is evident that the overall increase in the number of European films (and occurrences by extension) in absolute terms stems primarily from an increase of films in this category, which grew from 4 700 films in 2010 to almost 6 800 films in 2014[11] and to over 9 800 in 2019.

Figure 23. Nr of European films by film type – 2010-2022

Indexed development based on 2014 to avoid technical distortions caused by lower data coverage for the years 2010 to 2013



Source: European Audiovisual Observatory / LUMIERE

[11]Caveat: It has to be kept in mind that the coverage of the LUMIERE database in terms of number of films captured has increased in a notable manner, which means that the increase in the number of low-grossing films in 2014 compared to the time period 2010 to 2013 may largely be due to this technicality.

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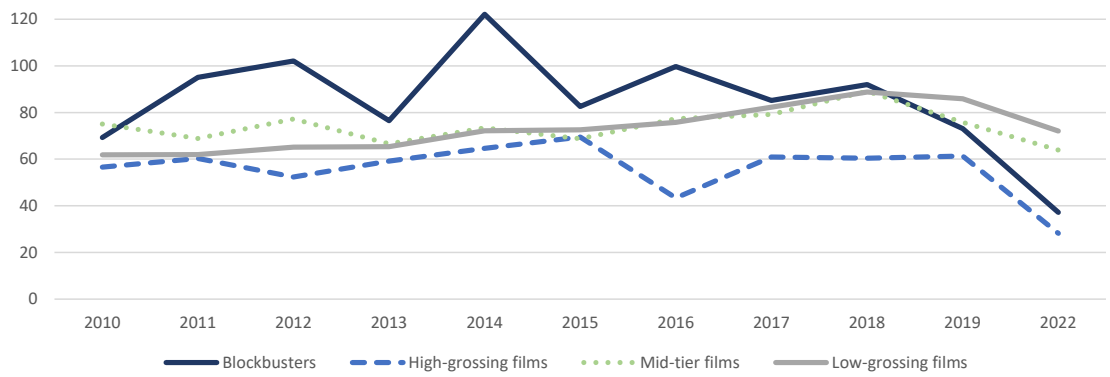
However, proportionally speaking, the growth in low-grossing films was comparable to the growth in the number of European mid-tier and high-grossing films, at least up until 2018 (as illustrated in Figure 15): the number of mid-tier films grew from around 240 films in 2010 to 307 in 2018, while the number of high-grossing films increased from 88 films to 112 in the same time period. It was only in 2019 and 2022 that the number of European low-grossing films shot up while the number of European mid-tier films as well as high-grossing films stagnated or declined, down to 270 and 72 films respectively. The number of European blockbusters fluctuated on a yearly basis between 50 and 60 films up until 2019, but dropped to only 34 European blockbuster films in 2022.

With the exception of the two peak years 2014 and 2018, **admissions to European films** generally ranged between 260 and 300 million during the past decade. While the data indicate no clearly linear growth trend, one can observe that cumulative admissions to European films were higher in the second half of the decade, ranging between 293 and 332 million, than in the first half of the decade (ranging between 268 and 297 million). In 2022, admission to European films dropped to 201 million, as illustrated in Figure 22.

When analysing the development of admissions to European films by film type (see Figure 23) it becomes apparent that the only two film categories which registered a steady increase in admissions over the past decade were European low-grossing films (growing from 62 to just under 90 million) and – to a lesser extent – European mid-tier films (growing from 67 to 75 million, to 76 to 89 million, before dropping to 64 million in 2022).

Admissions to European blockbusters on the other hand fluctuated between years (generally ranging between 80 and 100 million) and dropped sharply in 2019 and 2022, down to 73 and 37 million respectively. Admissions to European high-grossing films tended to be higher during the first half of the decade (generally ranging between 60 and 70 million) when compared to the second half, when they stagnated at 60 million, before dropping to only 28 million in 2022.

Figure 24. Admissions of European films by film type – 2010-2022
In millions



Source: European Audiovisual Observatory / LUMIERE

As a result**,** the **composition of admissions to European films** in terms of film types has been changing over time as illustrated in Figure 25: While the share of low-grossing films has been steadily increasing over time, the admissions share of European blockbusters and high-grossing films has been declining and the share of mid-tier films declined between 2010 and 2014 but has been growing since. In 2022 these trends accelerated with the share of low-grossing and mid-tier films

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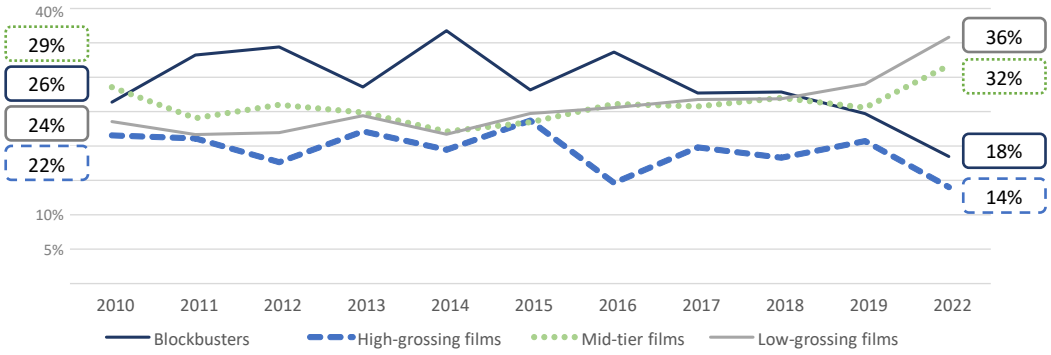
jumping to 36% and 23%, respectively, making them the two most important European film categories in terms of admissions. The admissions share of blockbusters and high-grossing films on the other hand dropped to 18% and 14% respectively – the lowest such levels in the past decade.

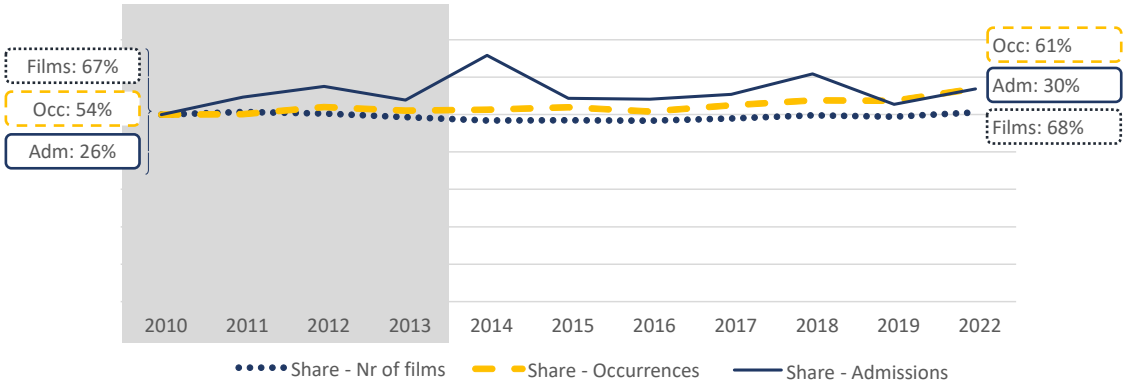
Figure 25. Development of admissions share among European film types – 2010-2022
Estimated share of individual film types with regard to total admissions to European films



Source: European Audiovisual Observatory / LUMIERE

Viewed against the background of the total European box office**, the share of European films across the three indicators developed in slightly different ways** over the past decade as shown in Figure 25. The share of European films among total occurrences has been gradually increasing over time and European films accounted for 61% of occurrences in 2022 compared to 54% in 2010. The share of admissions to European films fluctuated between years but always exceeded the exceptionally low share of 26% in 2010 and amounted to 30% in 2022. The share of European films on release, however, remained very stable, ranging between 65% and 68%.

Figure 26. Indexed development of share of European films for key indicators – 2010-2022
Estimated; indexed based on 2010



Source: European Audiovisual Observatory / LUMIERE

4.1.2. The importance of US films over time

The following section takes a closer look at the development of the importance of US films for the European box office with regard to the three main indicators.

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Table 10. Key indicators for European films – 2010-2022

Estimated; coverage of number of films and occurrences for the years 2010 to 2013 is less comprehensive than from 2014 onwards

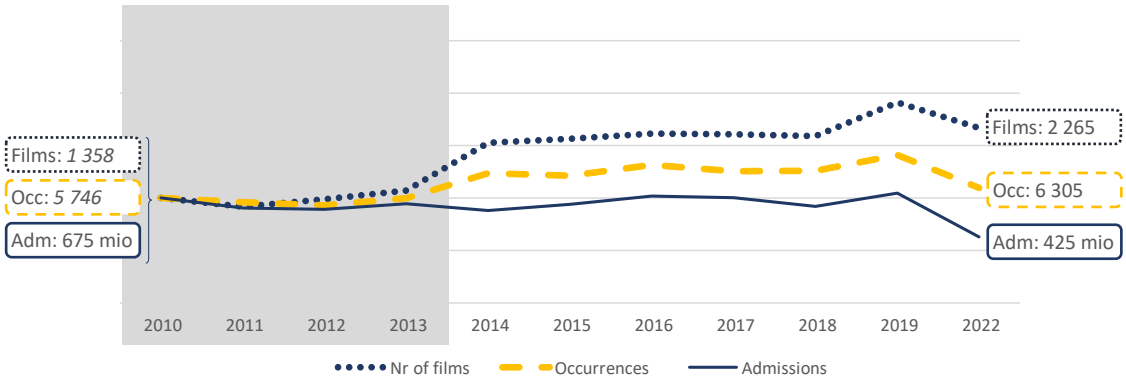
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2022	Avg 2010-2019
In absolute figures												
Nr of films	*1 358*	*1 246*	*1 342*	*1 455*	2 073	2 126	2 191	2 185	2 161	2 597	2 265	1 873
Occurrences	*5 746*	*5 521*	*5 341*	*5 741*	7 106	6 965	7 558	7 208	7 236	8 091	6 305	6 651
Admissions (in mio)	675	610	602	638	595	634	687	677	621	707	425	645
As percentage share of total												
Nr of films	21%	20%	20%	21%	22%	23%	22%	21%	20%	20%	19%	21%
Occurrences	37%	35%	33%	34%	33%	32%	32%	31%	30%	29%	26%	33%
Admissions	67%	61%	61%	67%	62%	62%	66%	64%	60%	66%	63%	64%

Source: European Audiovisual Observatory / LUMIERE

In absolute terms, key indicators for US films have remained comparatively stable since 2014, with the exception of 2019, when they all increased above the long-term average, and 2022, when they – with the exception of the number of films – fell below it, as illustrated in Figure 27. The jump in number of films and occurrences in 2014 is assumed to be due to an increase in data coverage and does not reflect an actual increase in the number of US films.

Figure 27. Key indicators for US films – 2010 -2022

Indexed development with base year 2010; Caveat: LUMIERE data coverage is crucial when it comes to measuring the number of films and their occurrences; LUMIERE coverage increased significantly from 2014 onwards and is hence not directly comparable to the years 2010 to 2013; The increase in number of films and occurrences between 2013 and 2014 is therefore assumed to be primarily due to an increase in data coverage and does not reflect an actual increase in the number of US films; In contrast, LUMIERE data coverage for cumulative admissions is comparable across the entire time series



Source: European Audiovisual Observatory / LUMIERE

Ignoring the increase in 2014, the **number of US films** on release in Europe ranged between 2 100 and 2 200 films per year before climing to almost 2 600 in 2019 and around 2 265 in 2022. Similarly, the **occurrences** of US films have been comparatively stable since 2014, generally ranging between 7 000 and 7 500 occurences per year, increasing to 8 100 in 2019, before dropping to 6 300 in 2022,

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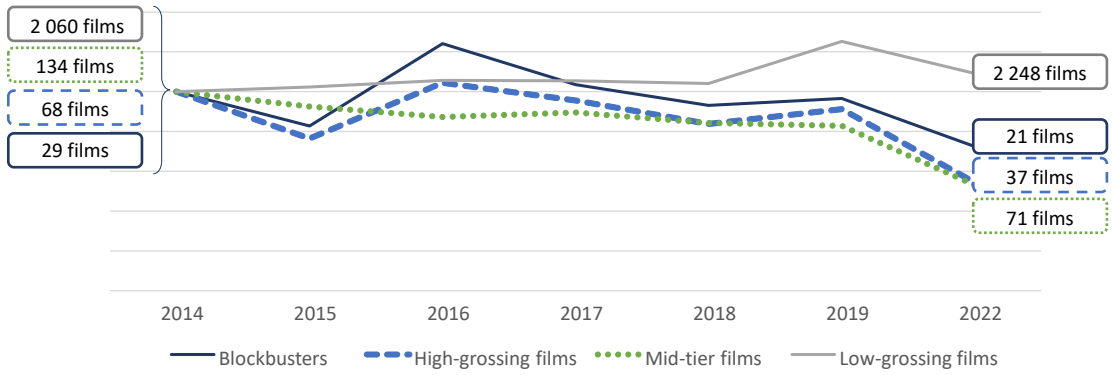
the latter representing the lowest number during the time period observed (ignoring the years 2010 to 2013 because of comparatively low data coverage).

The increase in the number of US films in 2019 was exclusively driven by a larger number of low-grossing US films, as the number of US mid-tier films, high-grossing films and to a certain extent also blockbusters have declined in recent years and dropped to their lowest level in the past decade (see Figure 28).

Figure 28. Nr of US films by film type – 2014-2022

Indexed development based on 2014 to avoid technical distortions caused by lower data coverage for the years 2010 to 2013

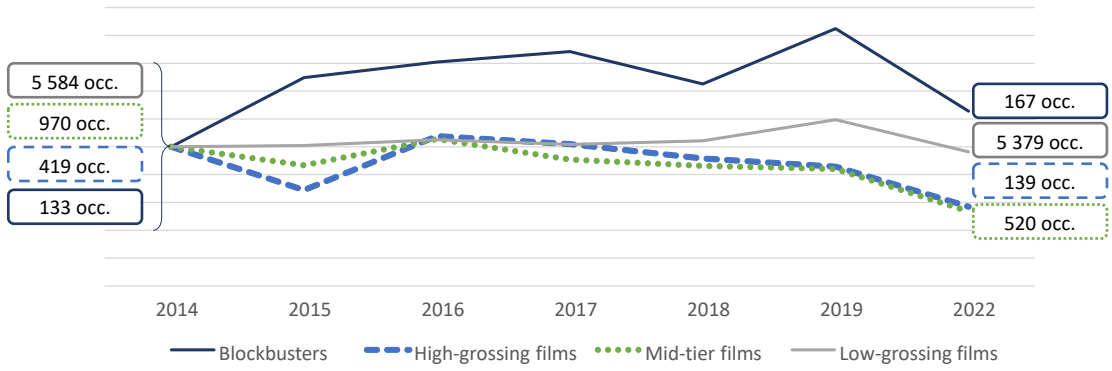


Source: European Audiovisual Observatory / LUMIERE

In contrast, blockbusters are the only type of US film to register a significant proportional increase in occurrences since 2014. Occurrences of low-grossing US films have remained stable with the exception of 2019, when they reached a temporary peak, while occurences of US high-grossing and mid-tier films have been decreasing since 2017.

Figure 29. Occurrences of US films by film type – 2014-2022

Indexed development based on 2014 to avoid technical distortions caused by lower data coverage for the years 2010 to 2013



Source: European Audiovisual Observatory / LUMIERE

Cumulative annual **admissions to US films** have remained fairly stable over the past decade, generally ranging between 610 and 680 million, with a peak of 707 million in 2019 and a drop to 425 million in 2022 (see Figure 27).

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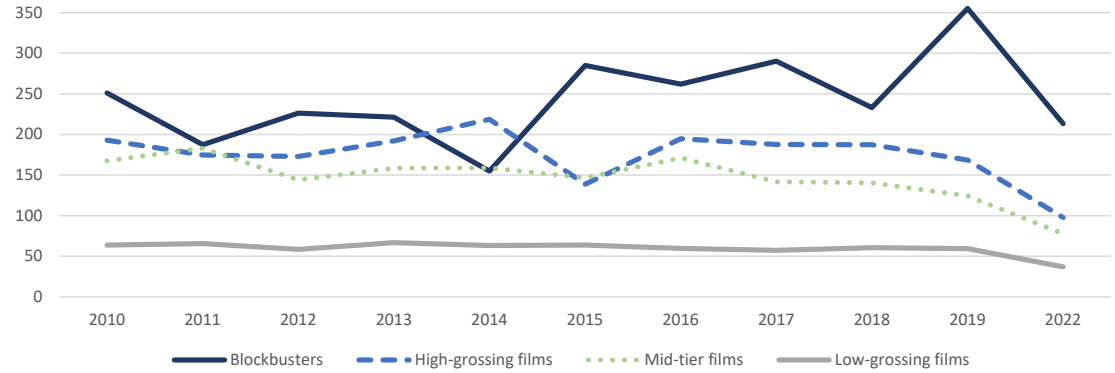
When analysing the development of admissions to US films by film type (see Figure 30) it becomes apparent that the **only category among US films** which registered an **increase in admissions over the past decade were US blockbusters,** growing from an average of 208 million in the first half of the decade to an average of 285 million between 2015 and 2019, before dropping back to 2013 million in 2022.

In contrast, cumulative admissions to US low-grossing films remained comparatively stable, generally ranging between 60 and 70 million, and admissions to both US high-grossing as well as US mid-tier films have been declining to a certain extent over the past decade. This is particularly true for US mid-tier films, for which admissions decreased from an annual average of 162 million between 2010 and 2014 to an average of 145 in the second half of the decade. All US film types registered a significant drop in admissions in 2022, with the exception of low-grossing films, for which the drop was less pronounced.

Figure 30. Admissions of US films by film type – 2010-2022
In millions



Source: European Audiovisual Observatory / LUMIERE

As a result**,** the composition of admissions to US films in terms of film types has been changing over time, with **US blockbusters taking a significantly higher share of total admissions to US films,** as illustrated in Figure 31. The share of US blockbusters jumped in 2015 and remained steadily high until jumping once more in 2019, and ultimately accounting for 50% of total tickets sold to US films in 2022. On the other hand, the share of US high-grossing films dropped in 2015 and has remained comparatively low since then. Furthermore, the share of US mid-tier films has been declining steadily over the better part of the past decade, while the share of US low-grossing films has remained stable, indicating, overlal, a stronger focus of US studios on (potential) blockbuster films.

In contrast to European films, where the composition of admissions in 2022 differed significantly from 2019, the composition of admissions to US films in 2022 was almost identical to the situation observed in 2019.

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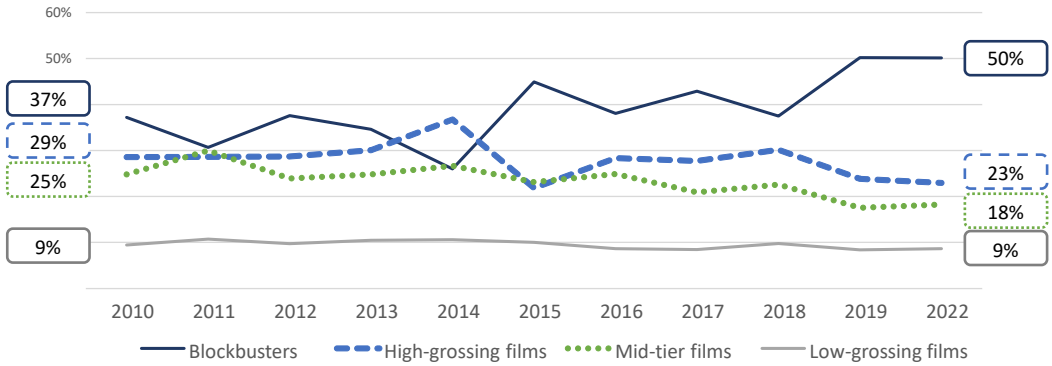
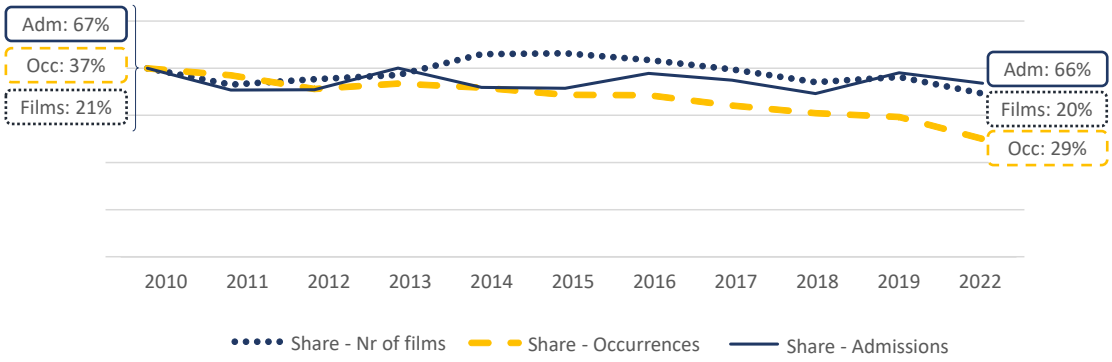
Figure 31. Development of admissions share among US film types – 2010-2022
Estimated share of individual film types with respect to total admissions to European films



Source: European Audiovisual Observatory / LUMIERE

Viewed against the background of the total European box office**, the share of US films across the three indicators developed in slightly different ways** over the past decade, as shown in Figure 32. The share of US films among total occurrences has been gradually decreasing over time: US films accounted for 37% of occurrences in 2010 compared to 29% in 2022. The share of admissions to US films fluctuated slightly between years, ranging between 61% and 67%. The share of US films on release generally amounted to 20% or 21% with the exception of 2014 to 2016, when it amounted to 22% to 23% of total films on release in Europe.

Figure 32. Indexed development of share of US films for key indicators 2010-2022
Estimated; indexed based on 2010



Source: European Audiovisual Observatory / LUMIERE

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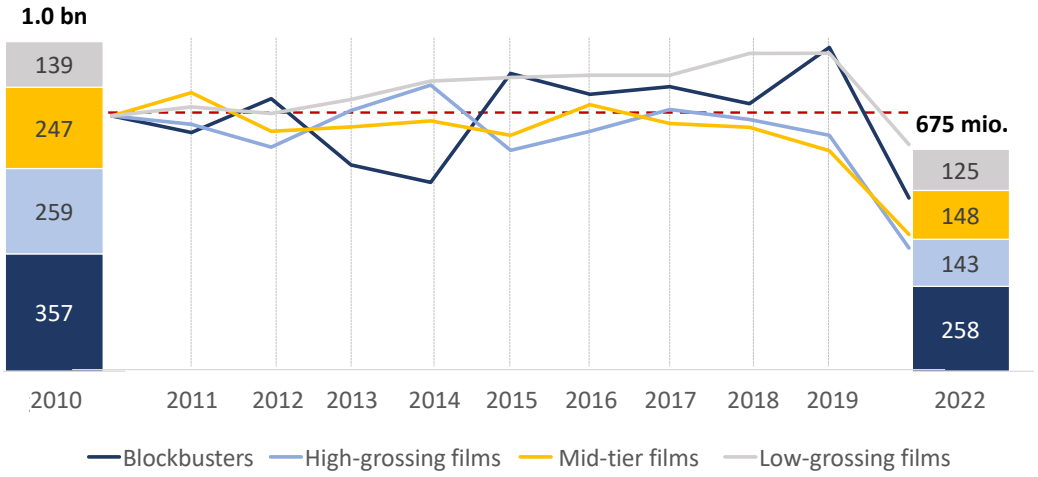
4.2. By film type

Figure 33 shows the development of admissions from 2010 to 2022 for the four film types. The data show that cumulative **admissions to blockbusters were higher in the second half of the past decade than in the first half.**

In contrast, admissions to high-grossing films and mid-tier films never systematically grew above their 2010 levels and have been showing a somewhat declining trend since 2016 and 2017 respectively. **Low-grossing films** were the only film type which registered a **consistent increase in cumulative admissions** over the past decade.

Admissions to all film types plummeted in 2022 compared to 2019, with the drops for blockbusters and high-grossing films more pronounced than for mid-tier and low-grossing films.

Figure 33. Development of admissions by film type – 2010 to 2022
In millions; indexed development based on 2010



Source: European Audiovisual Observatory / LUMIERE

The following sections take a closer look at the development of the key indicators for the four film types based on their box office success:

- Blockbusters
- High-grossing films
- Mid-tier films
- Low-grossing films

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4.2.1. The importance of blockbusters over time

Table 11. Blockbusters – Overview key data 2010-2022

Estimated

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2022	Avg '10-'19
Nr of blockbuster films	**74**	**74**	**74**	**80**	**84**	**77**	**97**	**81**	**90**	**79**	**56**	**81**
Occurrences of blockbuster films	**238**	**231**	**251**	**210**	**198**	**275**	**297**	**284**	**296**	**306**	**208**	**259**
Admissions to blockbuster films	**357**	**337**	**378**	**298**	**277**	**409**	**383**	**393**	**372**	**440**	**258**	**364**
Avg occurrences per film	**3.2**	**3.1**	**3.4**	**2.6**	**2.4**	**3.6**	**3.1**	**3.5**	**3.3**	**3.9**	**3.7**	**3.2**
Avg admissions per film (in mio.)	**4.8**	**4.6**	**5.1**	**3.7**	**3.3**	**5.3**	**4.0**	**4.8**	**4.1**	**5.6**	**4.6**	**4.5**
Share - Nr of films	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*0%*	*1%*
Share - Occurrences	*2%*	*1%*	*2%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*
Share - Admissions	*36%*	*34%*	*38%*	*31%*	*29%*	*40%*	*37%*	*37%*	*36%*	*41%*	*38%*	*36%*
Nr of EUR blockbsuter films	46	47	45	49	55	49	60	48	61	47	34	51
Occurrences EUR blockbuster films	46	53	56	51	65	53	69	51	64	50	34	56
Admissions to EUR blockbuster films	69	95	102	77	122	83	100	85	92	73	37	90
Avg occurrences per EUR film	**1.0**	**1.1**	**1.2**	**1.0**	**1.2**	**1.1**	**1.2**	**1.1**	**1.0**	**1.1**	**1.0**	**1.1**
Avg adm. per EUR film (in mio.)	**1.5**	**2.0**	**2.3**	**1.6**	**2.2**	**1.7**	**1.7**	**1.8**	**1.5**	**1.6**	**1.1**	**1.8**
Share - Nr of films	*1%*	*1%*	*1%*	*1%*	*1%*	*0%*	*1%*	*0%*	*1%*	*0%*	*0%*	*1%*
Share - Occurrences	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*
Share - Admissions	*7%*	*10%*	*10%*	*8%*	*13%*	*8%*	*10%*	*8%*	*9%*	*7%*	*6%*	*9%*
Nr of US blockbuster films	26	24	26	29	29	24	36	30	27	28	21	28
Occurrences US blockbuster films	168	152	172	157	133	199	214	224	193	246	167	186
Admissions to US blockbuster films	251	187	226	221	155	285	262	290	233	355	213	247
Avg occurrences per US film	**6.5**	**6.3**	**6.6**	**5.4**	**4.6**	**8.3**	**5.9**	**7.5**	**7.1**	**8.8**	**8.0**	**6.7**
Avg adm. per US film (in mio.)	**9.7**	**7.8**	**8.7**	**7.6**	**5.3**	**11.9**	**7.3**	**9.7**	**8.6**	**12.7**	**10.2**	**8.9**
Share - Nr of films	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*	*0%*
Share - Occurrences	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*
Share - Admissions	*25%*	*19%*	*23%*	*23%*	*16%*	*28%*	*25%*	*27%*	*23%*	*33%*	*32%*	*24%*

Source: European Audiovisual Observatory / LUMIERE

Overall, the **annual number of films qualifying as a blockbuster** in at least one European market has been **comparatively stable** between 2013 and 2019, as illustrated in Figure 34. It increased from about 74 blockbusters at the beginning of the decade to generally between 80 and 90 films in the following years up until 2019. The number of blockbusters on release in Europe dropped to only 56 in 2022, which represents the lowest level in the time period covered.

In terms of occurrences the development has been **a bit more volatile** over the past 10 years. While there were between 230 and 250 blockbuster occurrences across all the European markets between 2010 and 2012, the number dropped significantly in 2013 and 2014 with only 210 and 198 blockbuster occurrences. The number then jumped to a new high in 2015, before reaching an average of 296 blockbuster occurrences between 2016 and 2019, and then falling back to 208 occurrences in 2022. The 2022 figure represents a

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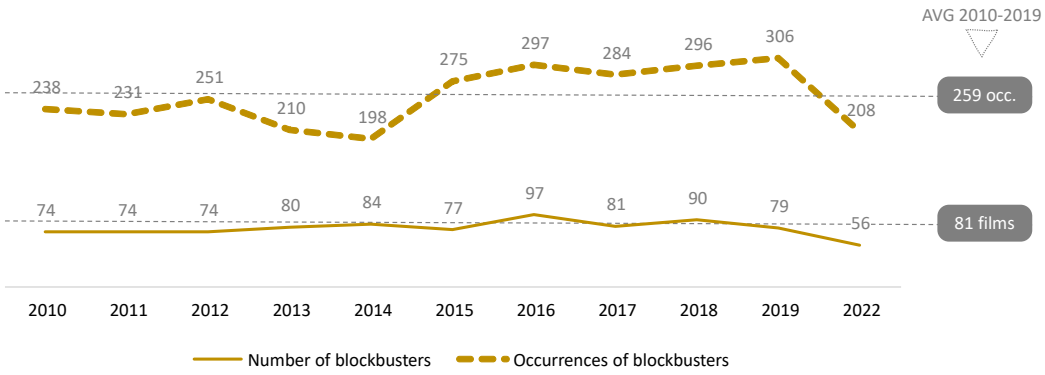
level that is low in comparison to the period 2015 to 2019, but well in line with 2013 and 2014. On average, a single blockbuster film qualified as a blockbuster in 3.2 countries.

Figure 34. Blockbusters – Number of films and occurrences – 2010-2022
Estimated

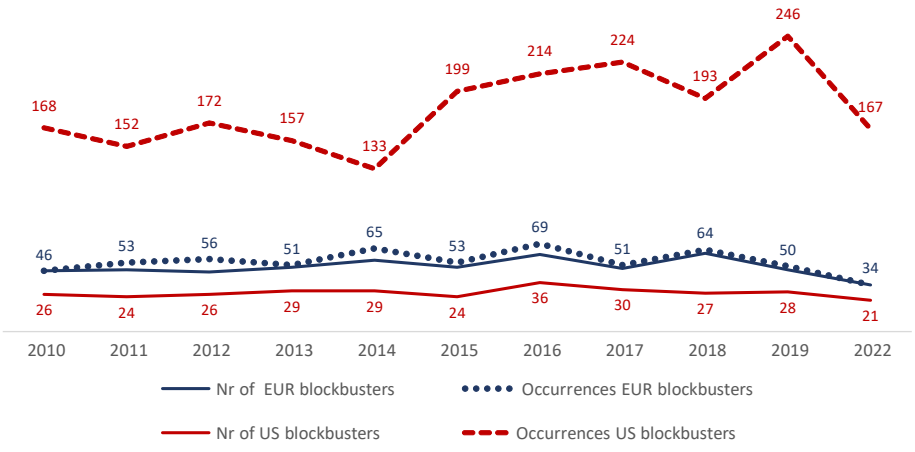


Source: : European Audiovisual Observatory / LUMIERE

US and European blockbusters account for the vast majority of blockbuster releases in Europe (96% of films and 92% of admissions). A comparison (see Figure 35) of the development between the number and occurrences of US and European blockbusters illustrates that there are basically two types of blockbusters: On the one hand, there are US blockbusters which tend to be released in a large number of European territories and tend to qualify as blockbusters in many of them (on average in 6.7 markets). On the other hand, there are European blockbusters which mostly qualify as blockbusters only in their national home market and do not – generally speaking – circulate across other European markets, at least not as blockbusters, as illustrated by their average occurrence: 1.1 markets.

The data further show that the drop in the number of blockbusters in 2022 stems primarily from a decline in the number of European blockbusters, as the number of US blockbusters declined comparatively less in 2022.

Figure 35. European vs US blockbusters – Number of films and occurrences – 2010-2022
Estimated



Source: : European Audiovisual Observatory / LUMIERE

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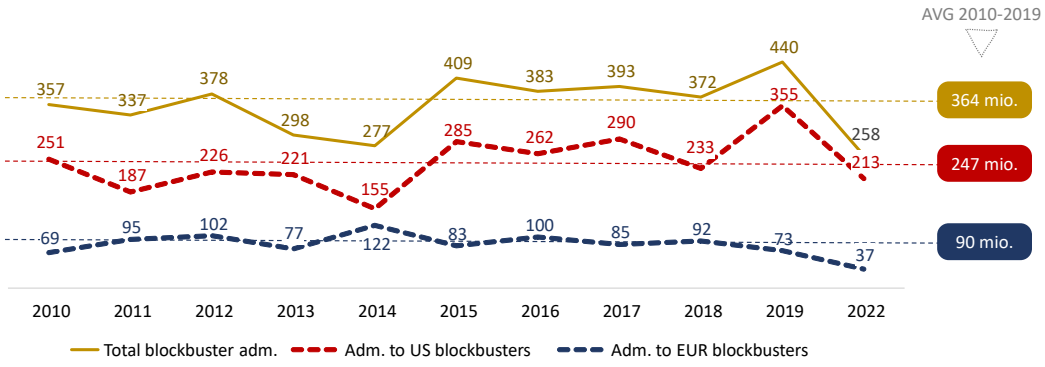
In terms of admissions, blockbusters sold on average 357 million admissions per year between 2010 and 2012 compared to an annual average of almost 400 million admissions between 2015 and 2019. As mentioned, the years 2013 and 2014 were comparatively poor years from a blockbuster perspective with cumulative annual admissions of 298 and 277 million respectively. In 2022, blockbusters cumulatively sold only about 258 million tickets, which clearly is the lowest level of blockbuster admissions in the past decade.

The vast majority of blockbuster admissions come from US blockbusters which generally account for 60% to 74% of total blockbuster admissions. However, their share increased significantly to 81% and 84% in 2019 and 2022, respectively, as European blockbuster admissions declined in a comparatively more pronounced manner in these two years.

Figure 36 clearly illustrates that US blockbusters managed to increase admissions from an average annual level of 220 million between 2010 and 2013 to an average of 285 million between 2015 and 2019. In contrast, European blockbuster admissions, with the exception of a few individual years (notably 2014), did not manage to grow their admissions level over the past decade, as they generally sold around 90 million tickets per year.

While admissions dropped for both European and US blockbusters, in 2022, admissions to European blockbusters dropped to a mere 37 million tickets, which is by far the poorest result over the past decade, whereas the 213 million tickets sold to US blockbusters were more or less in line with results of the first half of the past decade.

Figure 36. Blockbuster admissions in Europe – 2010-2022
Estimated



Source: : European Audiovisual Observatory / LUMIERE

As for the importance of blockbusters with regard to the total European market measured in terms of the three main indicators, the figures show that blockbusters – with the exception of 2013 and 2014 – generally accounted for 35% to 40% of total admissions in European cinemas and that 2022, with an estimated admissions share of 38%, was perfectly in line with the preceding decade.

While the share of blockbusters compared to the total number of films released has been declining both in terms of number of films as well as occurrences, it was so small to start with (0.01% of the number of films and 0.001% of total occurrences), that this decrease is hardly significant and simply reflects the ever-increasing number of other releases.

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4.2.2. The importance of high-grossing films over time

Table 12. High-grossing films – Overview key data – 2010-2022

Estimated

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2022	Avg '10-'19
Nr of high-grossing films	**151**	**161**	**145**	**167**	**161**	**158**	**152**	**183**	**167**	**175**	**115**	**162**
Occurrences of high-grossing films	**474**	**450**	**448**	**528**	**532**	**458**	**555**	**596**	**537**	**498**	**334**	**508**
Admissions of high-grossing films	**259**	**252**	**232**	**264**	**286**	**229**	**246**	**265**	**256**	**242**	**143**	**253**
Avg occurrences per film	**3.1**	**2.8**	**3.1**	**3.2**	**3.3**	**2.9**	**3.7**	**3.3**	**3.2**	**2.8**	**2.9**	**3.1**
Avg admissions per film (in mio.)	**1.7**	**1.6**	**1.6**	**1.6**	**1.8**	**1.5**	**1.6**	**1.4**	**1.5**	**1.4**	**1.2**	**1.6**
Share - Nr of films	*2%*	*2%*	*2%*	*2%*	*2%*	*2%*	*1%*	*2%*	*1%*	*1%*	*1%*	*2%*
Share - Occurrences	*3%*	*3%*	*3%*	*3%*	*3%*	*2%*	*2%*	*3%*	*2%*	*2%*	*1%*	*3%*
Share - Admissions	*26%*	*25%*	*24%*	*28%*	*30%*	*22%*	*24%*	*25%*	*25%*	*23%*	*21%*	*25%*
Nr of high-grossing EUR films	83	81	83	99	90	97	76	109	106	105	71	93
Occurrences high-grossing EUR films	90	85	106	109	108	130	90	129	133	118	72	110
Admissions to high-grossing EUR filr	57	60	52	59	65	69	43	61	60	61	28	59
Avg occurrences per EUR film	**1.1**	**1.0**	**1.3**	**1.1**	**1.2**	**1.3**	**1.2**	**1.2**	**1.3**	**1.1**	**1.0**	**1.2**
Avg adm. per EUR film (in mio.)	**0.7**	**0.7**	**0.6**	**0.6**	**0.7**	**0.7**	**0.6**	**0.6**	**0.6**	**0.6**	**0.4**	**0.6**
Share - Nr of films	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*
Share - Occurrences	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*0%*	*1%*	*1%*	*0%*	*0%*	*1%*
Share - Admissions	*6%*	*6%*	*5%*	*6%*	*7%*	*7%*	*4%*	*6%*	*6%*	*6%*	*4%*	*6%*
Nr of high-grossing US films	64	73	59	64	68	52	71	65	57	62	37	64
Occurrences of high-grossing US filr	365	338	332	398	419	289	451	427	384	359	239	376
Admissions to high-grossing US films	193	175	173	192	219	139	195	188	187	168	98	183
Avg occurrences per US film	**5.7**	**4.6**	**5.6**	**6.2**	**6.2**	**5.6**	**6.4**	**6.6**	**6.7**	**5.8**	**6.5**	**5.9**
Avg adm. per US film (in mio.)	**3.0**	**2.4**	**2.9**	**3.0**	**3.2**	**2.7**	**2.7**	**2.9**	**3.3**	**2.7**	**2.6**	**2.9**
Share - Nr of films	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*0%*	*0%*	*1%*
Share - Occurrences	*2%*	*2%*	*2%*	*2%*	*2%*	*1%*	*2%*	*2%*	*2%*	*1%*	*1%*	*2%*
Share - Admissions	*19%*	*17%*	*18%*	*20%*	*23%*	*13%*	*19%*	*18%*	*18%*	*16%*	*14%*	*18%*

Source: European Audiovisual Observatory / LUMIERE

The **annual number of** films qualifying as **high-grossing films** in at least one European market generally ranged between 150 and 160 films up until 2016, before increasing somewhat to an average of 175 films between 2017 to 2019. As in the case of blockbusters, the number of high-grossing films dropped in 2022, down to 115 films, marking the by-far lowest number of high-grossing films on release in Europe in the analysis time period.

Measured in terms of occurrences of high-grossing films, one can observe an upward trend between 2012 and 2017, from 448 high-grossing film occurrences across all the European markets in 2012 to 596 film occurrences in 2017. Since then, the number of occurrences of high-grossing films in Europe has been declining, decreasing to 537 in 2018, 498 in 2019 and a mere 334 in 2022.

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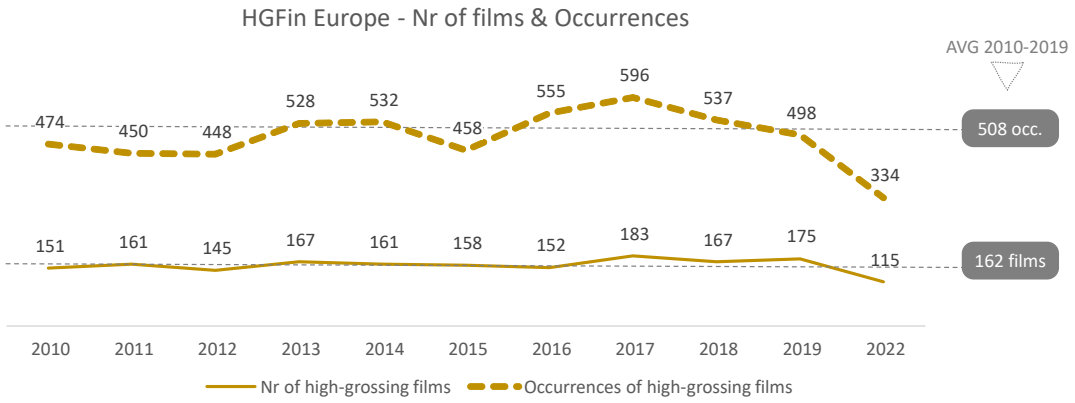
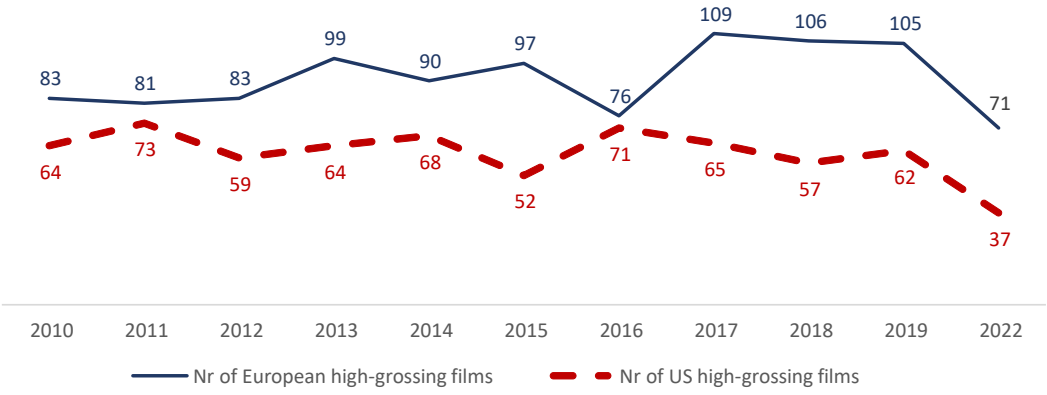
Figure 37. High-grossing films in Europe – Number of films and occurrences – 2010-2022
Estimated



Source: : European Audiovisual Observatory / LUMIERE

US and European films cumulatively account for the vast majority of high-grossing films in Europe (96% of films and 95% of admissions). A comparison of European and US high-grossing films (Figure 38) shows that the number of **European** films qualifying as **high-grossing films** in at least one European market has been **increasing over the past decade** (from fewer than 83 films at the beginning of the decade to 105 to 109 films between 2017 and 2019), while the number of US high-grossing films has been declining since reaching a peak of 71 films in 2016. In both cases the number of films dropped signficantly in 2022.

Figure 38. Number of European vs US high-grossing films – 2010-2022
Estimated



Source: : European Audiovisual Observatory / LUMIERE

As in the case of blockbusters, high-grossing US films tend to be released in a large number of European territories and tend to qualify as high-grossing films in many of them. On average a US high-grossing film qualified as a high-grossing film in six European markets. On the other hand, high-grossing European films mostly only qualify as high-grossing films in their national home market and circulate less across other European markets, as

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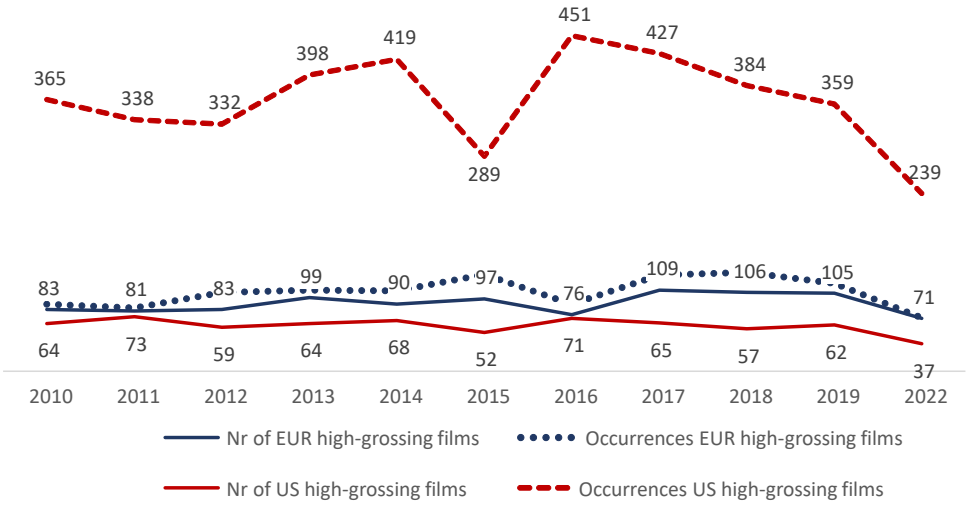
illustrated by their average occurrence per film of 1.2 markets, which is marginally higher than the average occurrence of European blockbusters.

Figure 39. European vs US high-grossing films – Number of films and occurrences – 2010-2022
Estimated.



Source: : European Audiovisual Observatory / LUMIERE

Figure 39 furthermore shows that the number of **occurrences of US high-grossing films has been continuously declining since 2016**, dropping from a peak 451 occurences to 359 in 2019 and falling to only 239 in 2022. This decline in occurrences of high-grossing US films can be explained by the lower number of US high-grossing films (as average occurrences per film remained well above the longterm average of 5.9).

Compared to US films, the **occurrences of European high-grossing films** are much less frequent (110 on average) but have shown a **very modest growth trend** over the past decade – thanks to an increasing number of European high-grossing films rather than an increase in the average occurrence per film – and their fall in 2022 (down to 72) was comparatively less pronounced.

As in the case of blockbusters, **admissions to high-grossing films have been fluctuating between years,** and it is therefore more difficult to identify structural trends. One can however observe that between 2010 and 2014 cumulative admissions to high-grossing films were at or well above their long-term average of 253 million in four out of five years, while this was only the case in two out of five years between 2015 and 2019. One could therefore argue that there has already been a **slight downward trend in admissions generated by high-grossing films since a peak in 2014**, and before they dropped to a record low of 143 million in 2022.

This moderate decline in admissions generated by high-grossing films in recent years was primarily **driven by a decline in admissions to US films,** which decreased from 219 million in 2014 to 168 in 2019 and fell to 98 million in 2022, as illustrated in Figure 40. In contrast, admissions to European high-grossing films remained comparatively stable at around 60

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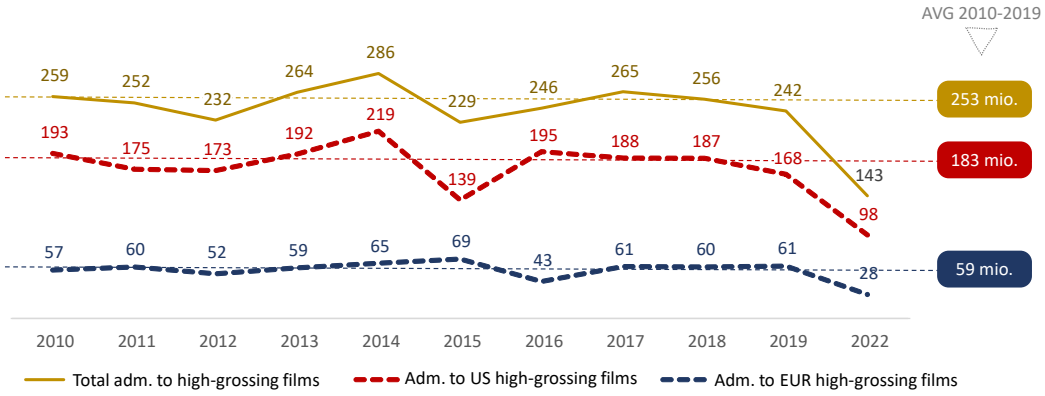
million per year before halving to 28 million in 2022, which is by far the poorest result over the past decade.

Figure 40. Admissions by high-grossing films in Europe – 2010-2022
Estimated



Source: : European Audiovisual Observatory / LUMIERE

As for the **share of high-grossing films** with regard to the total European market measured in terms of the three main indicators, the figures show that high-grossing films generally accounted for around 25% of total admissions in European cinemas. This share was comparatively stable until 2018 but declined to 23% in 2019 and to 21% in 2022, which represents the lowest level in the past decade.

While the share of blockbusters compared to the total number of films released has been declining both in terms of number of films as well as occurrences, it was so small to start with (2.0% of number of films and 2.5% of total occurrences), that the decrease is hardly significant and reflects the ever-increasing number of other releases.

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4.2.3. The importance of mid-tier films over time

Table 13. Mid-tier films – Overview key data – 2020-2022

Estimated

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2022	Avg '10-'19
Nr of mid-tier films	**377**	**385**	**375**	**384**	**395**	**368**	**405**	**416**	**418**	**395**	**340**	**392**
Occurrences of mid-tier films	**1 293**	**1 463**	**1 289**	**1 353**	**1 381**	**1 272**	**1 437**	**1 423**	**1 337**	**1 296**	**885**	**1 354**
Admissions of mid-tier films	**247**	**267**	**234**	**238**	**243**	**231**	**257**	**241**	**238**	**218**	**148**	**241**
Avg occurrences per film	**3.4**	**3.8**	**3.4**	**3.5**	**3.5**	**3.5**	**3.5**	**3.4**	**3.2**	**3.3**	**2.6**	**3.5**
Avg admissions per film (in mio.)	**0.7**	**0.7**	**0.6**	**0.6**	**0.6**	**0.6**	**0.6**	**0.6**	**0.6**	**0.6**	**0.4**	**0.6**
Share - Nr of films	*5%*	*6%*	*5%*	*5%*	*4%*	*4%*	*4%*	*4%*	*4%*	*3%*	*3%*	*4%*
Share - Occurrences	*8%*	*9%*	*8%*	*8%*	*7%*	*6%*	*6%*	*6%*	*5%*	*5%*	*4%*	*7%*
Share - Admissions	*25%*	*27%*	*24%*	*25%*	*25%*	*22%*	*25%*	*23%*	*23%*	*20%*	*22%*	*24%*
Nr of EUR mid-tier films	224	227	229	233	241	220	262	271	283	257	252	245
Occurrences EUR mid-tier films	351	311	383	346	363	351	364	413	429	373	318	368
Admissions to EUR mid-tier films	75	69	77	67	73	69	77	79	89	76	64	75
Avg occurrences per EUR film	**1.6**	**1.4**	**1.7**	**1.5**	**1.5**	**1.6**	**1.4**	**1.5**	**1.5**	**1.5**	**1.3**	**1.5**
Avg adm. per EUR film (in mio.)	**0.3**	**0.3**	**0.3**	**0.3**	**0.3**	**0.3**	**0.3**	**0.3**	**0.3**	**0.3**	**0.3**	**0.3**
Share - Nr of films	*3%*	*3%*	*3%*	*3%*	*2%*	*2%*	*2%*	*2%*	*2%*	*2%*	*2%*	*3%*
Share - Occurrences	*2%*	*2%*	*2%*	*2%*	*2%*	*2%*	*2%*	*2%*	*2%*	*1%*	*1%*	*2%*
Share - Admissions	*7%*	*7%*	*8%*	*7%*	*8%*	*7%*	*7%*	*7%*	*9%*	*7%*	*9%*	*7%*
Nr of US mid-tier films	142	137	126	129	134	124	117	120	113	111	71	125
Occurrences of US mid-tier films	916	1 064	833	939	970	841	1 025	882	838	816	520	912
Admissions to US mid-tier films	167	183	144	158	159	147	171	142	140	124	78	154
Avg occurrences per US film	**6.5**	**7.8**	**6.6**	**7.3**	**7.2**	**6.8**	**8.8**	**7.4**	**7.4**	**7.4**	**7.3**	**7.3**
Avg adm. per US film (in mio.)	**1.2**	**1.3**	**1.1**	**1.2**	**1.2**	**1.2**	**1.5**	**1.2**	**1.2**	**1.1**	**1.1**	**1.2**
Share - Nr of films	*2%*	*2%*	*2%*	*2%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*	*1%*
Share - Occurrences	*6%*	*7%*	*5%*	*6%*	*5%*	*4%*	*4%*	*4%*	*3%*	*3%*	*2%*	*5%*
Share - Admissions	*17%*	*18%*	*15%*	*17%*	*17%*	*14%*	*16%*	*13%*	*14%*	*12%*	*12%*	*15%*

Source: European Audiovisual Observatory / LUMIERE

The **number of mid-tier films** has been comparatively stable over the past decade, with an annual average of 381 films qualifying as a mid-tier film in at least one European market between 2010 and 2015. The number increased somewhat between 2016 and 2018, with an average of 431 mid-tier films per year, before declining again in 2019 (to 395 films). In 2022, the number of mid-tier films in Europe dropped to 340 films, which was a proportionally smaller drop than the drop in blockbuster and high-grossing films.

The data show that the **occurrences of mid-tier films** in Europe has been comparatively stable, growing modestly from around 1 293 in 2010 to 1 437 in 2016, before starting to decline a bit again down to 1 296 in 2019 and registering a particularly pronounced drop in 2022, when only 885 mid-tier film occurrences could be identified. The drop in 2022 was caused by both a lower number of mid-tier films on release as well as slightly lower average occurrences per film (2.6 occurences per film compared to the long-term average of 3.5), suggesting that mid-tier films circulated less widely in 2022 compared to preceding years.

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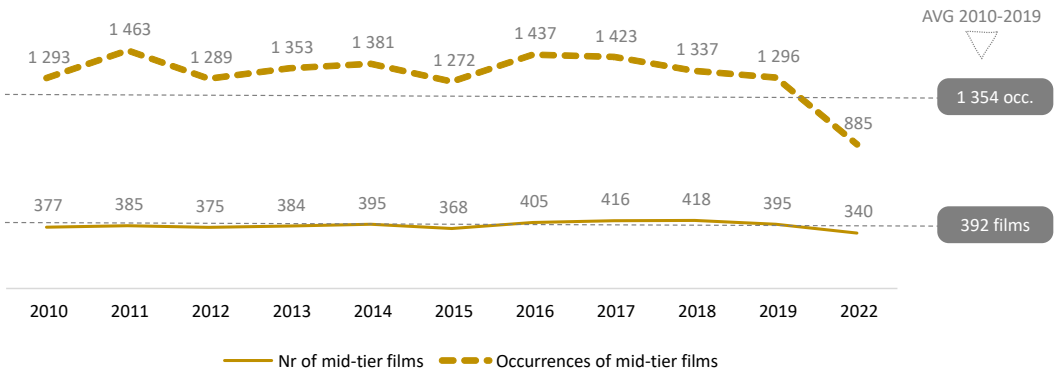
Figure 41. Mid-tier films in Europe – Number of films and occurrences 2010-2022
Estimated

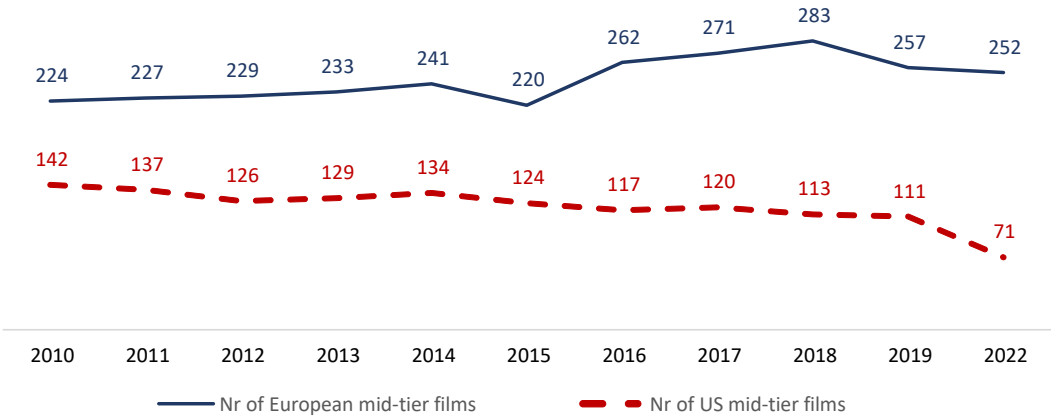


Source: : European Audiovisual Observatory / LUMIERE

A closer look at the data reveals that the decline in 2019 and 2022, both in the number of mid-tier films as well as their occurrences across Europe, was primarily caused by a comparatively strong decrease in US mid-tier films.

Figure 42 furthermore shows that this **decrease of US mid-tier films has been a long-term trend** which significantly **accelerated during the COVID crisis years.** While the **number of European** films qualifying as **mid-tier films** in at least one European market has been **increasing steadily over the past decade** (from fewer than 224 films at the beginning of the decade to 283 films in 2018), the number of US mid-tier films films has been steadily decreasing in the same time period, declining from 142 US mid-tier films in 2010 to 111 in 2019. And even though both European and US mid-tier films declined in 2022, the drop in US mid-tier films was much more pronounced, falling to a mere 71 films, than for European films (declining only marginally from 257 in 2019 to 252 films).

Figure 42. Number of European vs US mid-tier films – 2010-2022
Estimated



Source: : European Audiovisual Observatory / LUMIERE

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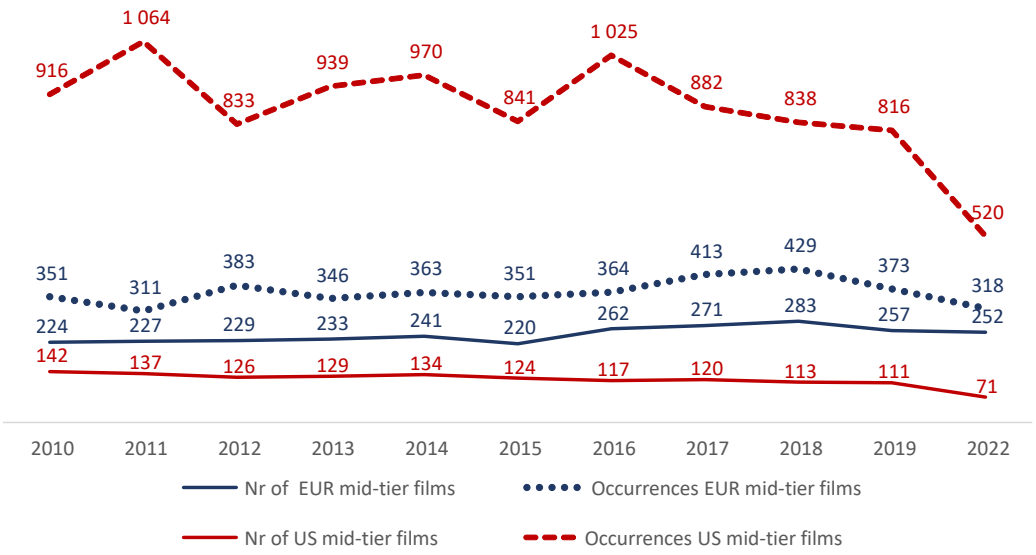
On average, US films tend to qualify as mid-tier in 7.3 European markets, while European films qualify as mid-tier films on average in only 1.5 European markets. Occurrences of European mid-tier films are hence proportionally higher when compared to European blockbusters (1.1 occurences per film) and high-grossing films (1.2 occurences per film).

As illustrated in Figure 43, the number of **occurrences of US mid-tier films has been continuously declining since 2016**, dropping from 1 025 occurences to 816 in 2019 and falling to only 520 in 2022. Compared to US films, the occurrences of European mid-tier films are much less frequent (368 on average) but displayed modest growth up to 2018, and their fall in 2022 (to 318) was comparatively less pronounced.

Figure 43. European vs US mid-tier films – Number of films and occurrences 2010-2022
Estimated



Source: : European Audiovisual Observatory / LUMIERE

It is also this decline in the number of US mid-tier films which is primarily responsible for the **decrease in cumulative admissions to mid-tier films in Europe since 2017**. Admissions to mid-tier films were comparatively stable up until 2018, at around 241 million tickets per year on average, before dropping to 218 million in 2019 and 148 million in 2022.

Mirroring the development in the number of films, admissions to US mid-tier films have been decreasing slightly over the past decade (from around 170 at the beginning of the decade to 140 million in 2017 and 2018) while admissions to European mid-tier films have slightly increased, growing from around 70 million to 89 million in 2018. Cumulatively, US and European films generally accounted for 92% to 96% of total admissions to mid-tier films in Europe.

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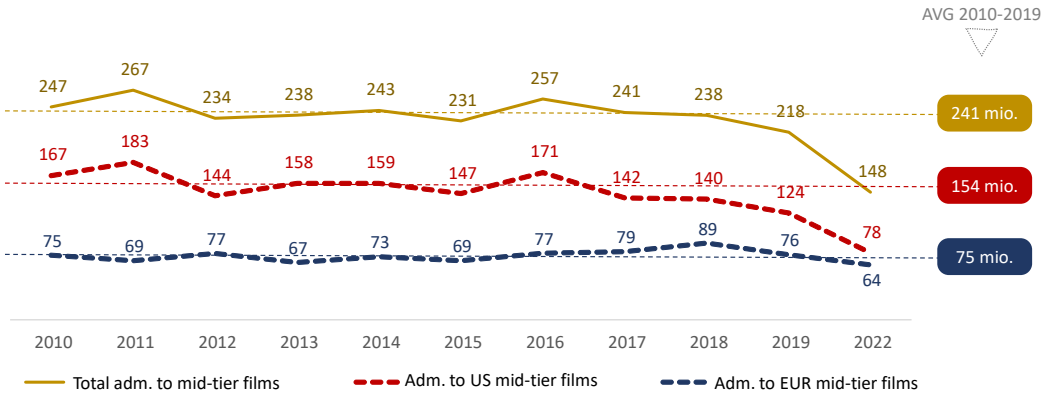
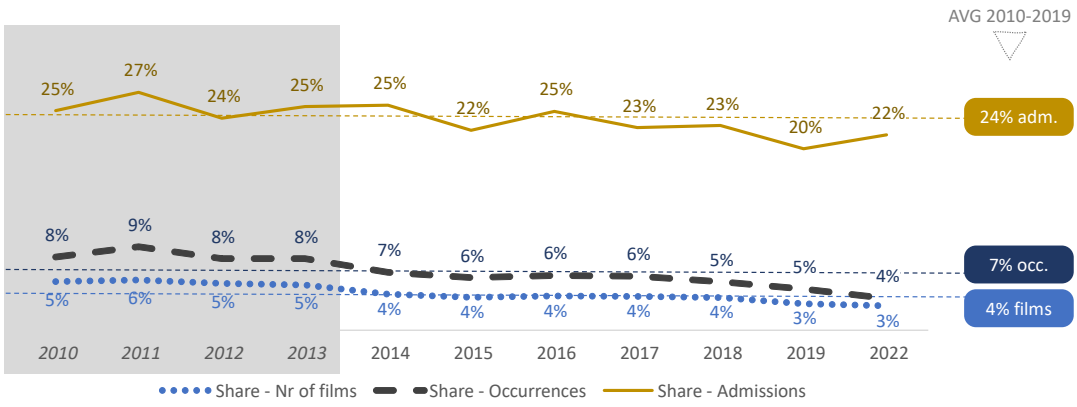
Figure 44. Admissions to mid-tier films in Europe – 2010 - 2022
Estimated



Source: : European Audiovisual Observatory / LUMIERE

As for the **share of high-grossing films** with regard to the total European market measured in terms of the three main indicators, Figure 45 shows that **the role of mid-tier films has somewhat decreased over the past decade**. While accounting for around 25% of total admissions in European cinemas in the first half of the decade, the share of mid-tier films has decreased to between 20% and 23% since 2017, with 2019 representing the lowest level over the time period. Similarly, the share of mid-tier films has been declining both in terms of number of films (from around 5% to 3%) as well as occurrences (from 8% to 9%, to 4% to 5%). However, at least a part of this decline may be explained by a technicality, namely the increased data coverage of the LUMIERE database, particularly from 2014 onwards.

Figure 45. Key indicators: Share of mid-tier films in Europe – 2010-2022
Estimated; Nota bene: The coverage of the LUMIERE database in terms of number of films captured has increased in a notable manner since 2014. The decrease in the number of mid-tier films in 2014 compared to the time period 2010 to 2013 may be partially due to the increased coverage of low-grossing films.



Source: : European Audiovisual Observatory / LUMIERE

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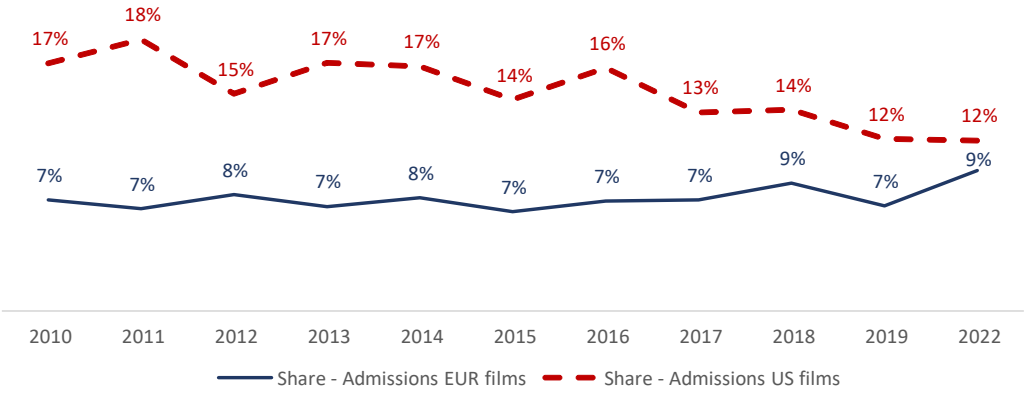
As illustrated in Figure 46, the decrease in the share of mid-tier films was caused entirely by a decrease in the share of admissions to US films (from 17% to 12%), as the admissions share of European mid-tier films actually slightly increased from 7% to 9%.

Figure 46. Admissions share of US and European mid-tier films – 2010-2022
Estimated



Source: : European Audiovisual Observatory / LUMIERE

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4.2.4. The importance of low-grossing films

Table 14. Low-grossing films – Overview key data – 2010-2022

Estimated; The coverage of the LUMIERE database in terms of number of films captured has increased in a notable manner since 2014; The decrease in the number and occurrences of of low-grossing films in 2014 compared to the time period 2010 to 2013 may be primarily due to the increased coverage of low-grossing films rather than an actual increase in the number of films

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2022	Avg '10-'19
Nr of low-grossing films	**6 285**	**6 190**	**6 529**	**6 919**	**9 091**	**9 282**	**9 855**	**10 223**	**10 681**	**12 600**	**11 858**	**8 766**
Occurrences of low-grossing films	**13 737**	**13 450**	**14 053**	**14 726**	**19 102**	**19 506**	**21 100**	**21 156**	**22 327**	**25 828**	**23 252**	**18 499**
Admissions of low-grossing films	**139**	**143**	**140**	**146**	**155**	**157**	**157**	**157**	**168**	**168**	**125**	**153**
Avg occurrences per film	**2.2**	**2.2**	**2.2**	**2.1**	**2.1**	**2.1**	**2.1**	**2.1**	**2.1**	**2.0**	**2.0**	**2.1**
Avg admissions per film (in mio.)	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**
Share - Nr of films	*91%*	*91%*	*92%*	*92%*	*93%*	*94%*	*94%*	*94%*	*94%*	*95%*	*96%*	*93%*
Share - Occurrences	*87%*	*86%*	*88%*	*88%*	*90%*	*91%*	*90%*	*90%*	*91%*	*92%*	*94%*	*89%*
Share - Admissions	*14%*	*14%*	*14%*	*15%*	*16%*	*15%*	*15%*	*15%*	*16%*	*16%*	*19%*	*15%*
Nr of low-grossing EUR films	4 187	4 181	4 386	4 543	5 869	6 003	6 361	6 682	7 106	8 329	8 032	5 765
Occurrences low-grossing EUR films	7 949	7 924	8 397	8 698	11 123	11 440	12 212	12 601	13 508	15 526	14 652	10 938
Admissions to low-grossing EUR film	62	62	65	65	72	73	76	82	89	86	72	73
Avg occurrences per EUR film	**1.9**	**1.9**	**1.9**	**1.9**	**1.9**	**1.9**	**1.9**	**1.9**	**1.9**	**1.9**	**1.8**	**1.9**
Avg adm. per EUR film (in mio.)	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**
Share - Nr of films	*61%*	*61%*	*62%*	*60%*	*60%*	*61%*	*61%*	*61%*	*63%*	*63%*	*65%*	*61%*
Share - Occurrences	*50%*	*51%*	*52%*	*52%*	*52%*	*53%*	*52%*	*54%*	*55%*	*56%*	*59%*	*53%*
Share - Admissions	*6%*	*6%*	*7%*	*7%*	*8%*	*7%*	*7%*	*8%*	*9%*	*8%*	*11%*	*7%*
Nr of low-grossing US films	1 346	1 234	1 322	1 438	2 060	2 108	2 176	2 172	2 144	2 581	2 248	1 858
Occurrences of low-grossing US film	4 297	3 967	4 004	4 247	5 584	5 636	5 868	5 675	5 821	6 670	5 379	5 177
Admissions to low-grossing US films	64	66	59	67	63	64	60	57	61	59	37	62
Avg occurrences per US film	**3.2**	**3.2**	**3.0**	**3.0**	**2.7**	**2.7**	**2.7**	**2.6**	**2.7**	**2.6**	**2.4**	**2.8**
Avg adm. per US film (in mio.)	**0.0**	**0.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**
Share - Nr of films	*20%*	*18%*	*19%*	*19%*	*21%*	*21%*	*21%*	*20%*	*19%*	*19%*	*18%*	*20%*
Share - Occurrences	*27%*	*25%*	*25%*	*25%*	*26%*	*26%*	*25%*	*24%*	*24%*	*24%*	*22%*	*25%*
Share - Admissions	*6%*	*7%*	*6%*	*7%*	*7%*	*6%*	*6%*	*5%*	*6%*	*6%*	*5%*	*6%*

Source: European Audiovisual Observatory / LUMIERE

The **number of low-grossing films** – registered in LUMIERE – steadily increased between 2010 and 2019, growing from 6 285 films qualifying as low-grossing films in at least one European market in 2010 to over 12 600 films in 2019. While there was a drop in the number of low-grossing films in 2022, it was minor, particularly when compared to the drop in blockbusters, high-grossing and mid-tier films.

However, it has to be kept in mind that the coverage of the LUMIERE database in terms of number of films captured has increased in a notable manner from 2014. This increased coverage affected primarily low-grossing films which might not have been captured before. The **increase in the number of low-grossing films in 2014** compared to the time period 2010 to 2013 is assumed to be **primarily due to this increase in coverage rather than an actual jump in the number of low-grossing films.**

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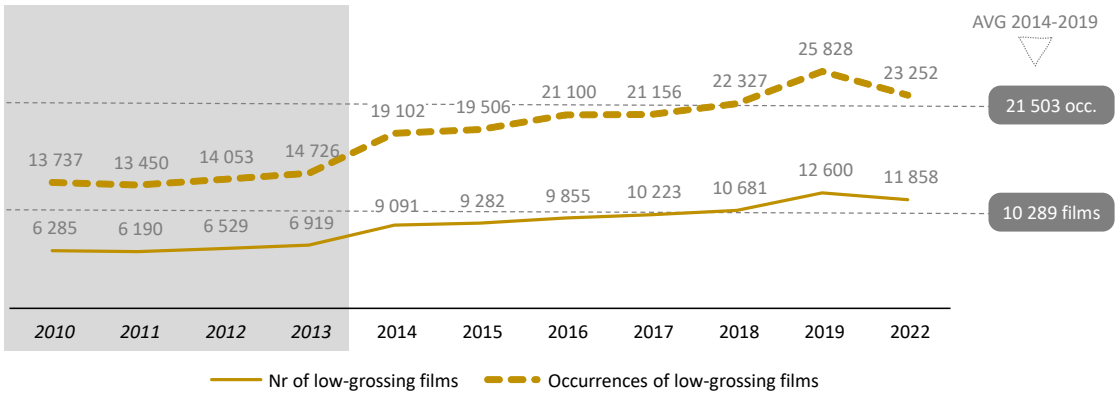
The **increase in low-grossing films** over the past decade has been m**ostly driven by European films** falling into this category, as illustrated in Figure 48.

The number of European films qualifying as low-grossing films in at least one European market increased from fewer than 4 200 at the beginning of the decade to over 8 000 in 2019 and 2022. This compares to a more moderate increase of US films falling into the low-grossing category from around 1 300 films to around 2 170 between 2016 and 2018, before a climb to almost 2 600 in 2019 and 2 250 in 2022.

Figure 47. Low-grossing films in Europe – Number of films and occurrences 2010-2022

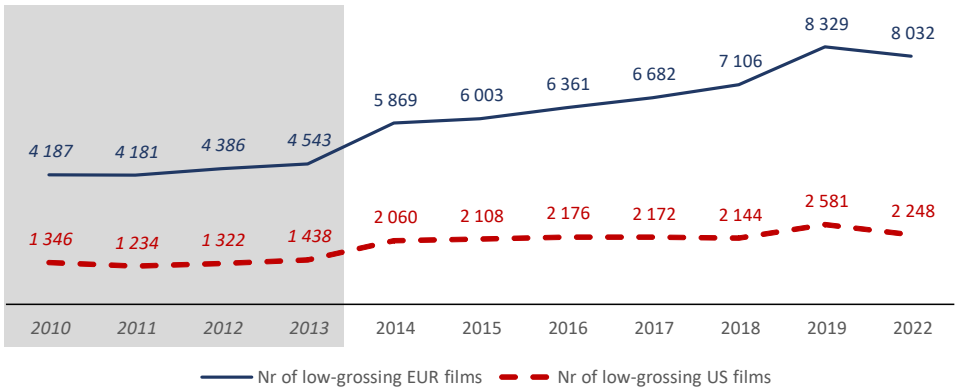
Estimated; The coverage of the LUMIERE database in terms of number of films captured has increased in a notable manner since 2014; The decrease in the number and occurrences of low-grossing films in 2014 compared to the time period 2010 to 2013 may be primarily due to the increased coverage of low-grossing films rather than an actual increase in the number of films



Source: : European Audiovisual Observatory / LUMIERE

Figure 48. European vs US low-grossing films – Nr of films 2010-2022

Estimated



Source: : European Audiovisual Observatory / LUMIERE

Occurrences of low-grossing films mirrored more or less proportionally the increase in the number of underlying films, growing from fewer than 14 000 occurrences at the beginning of the decade to almost 26 000 occurrences in 2019 and 23 500 occurences in 2022. In contrast to blockbusters, high-grossing and mid-tier films (3.1 – 3.3 occurences per film on average), low-grossing films circulated (as low-grosssing films) less widely with an average

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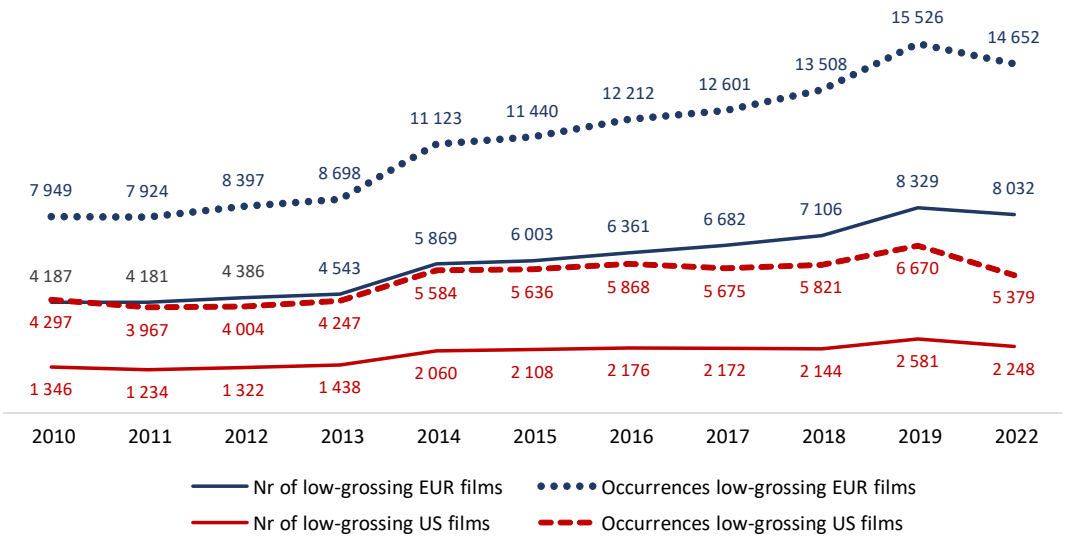
of 2.1 occurences per film. The gap between the number of films and their occurrences is hence less pronounced.

On average US films tend to qualify as low-grossing films in 2.8 European markets, compared to 1.9 markets in the case of European films. Occurrences of European low-grossing films are hence proportionally higher when compared to European blockbusters (1.1 occurences per film), high-grossing films (1.2) and mid-tier films (1.5).

As illustrated in Figure 49, the category of low-grossing films is the only category where the occurrences of European films exceed the occurrences of US films due to the significantly lower difference in the average occurrence per film in that category when compared to other categories, as well as the significantly larger number of European low-grossing films in absolute terms. While the occurrences of US low-grossing films has been comparatively stable since 2014, the occurence of European films falling into this category has been increasing steadily over time, driving the overall growth in this category.

Figure 49. European vs US low-grossing films – Number of films and occurrences 2010-2022
Estimated



Source: : European Audiovisual Observatory / LUMIERE

Despite the significant increase in the number of – particularly European – **low-grossing films, growth in admissions** generated by films in this category has been **moderate**, from around 140 million at the beginning of the decade to 168 million in 2018 and 2019. As illustrated in Figure 50, growth in admissions to low-grossing films has been mostly **driven by an increase in cumulative admissions to European low-grossing films**, as admissions to US films falling into this category stagnated at around 65 million during the first half of the decade and have been slightly declining since 2016. Cumulative admissions to European low-grossing films on the other hand increased from 62 million in 2010 to almost 90 million in 2018 and 2019, declining to 'only' 72 million in 2022. Cumulatively, US and European films generally account for 88% of total admissions generated by low-grossing films in Europe.

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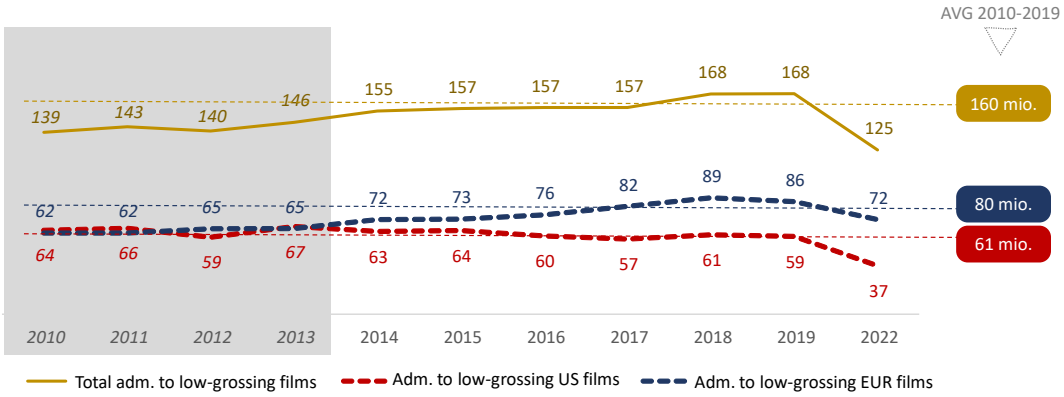
Figure 50. Admissions to low-grossing films in Europe – 2010-2022
Estimated

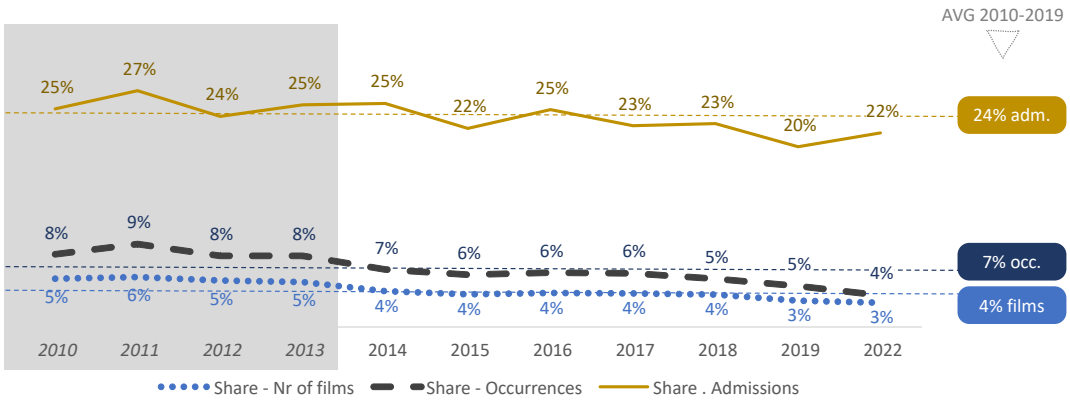


Source: : European Audiovisual Observatory / LUMIERE

As for the **share of low-grossing films** with regard to the total European market measured in terms of the three main indicators, Figure 51 shows that the role of low-grossing films was **comparatively stable** – albeit with a slight increase – over the course of the decade up until 2019. While accounting for 93% to 94% of the total number of films on release and 90% to 91% of film occurrences in Europe, low-grossing films cumulatively account generally for about 15% to 16% of total admissions.

The **importance of low-grossing films for the European box office** was, however, **significantly more pronounced in 2022,** as their share increased to 96% of total films, 94% of total film occurrences and 19% of total admissions, representing by far the highest admissions share of low-grossing films in the past decade.

Figure 51. Key indicators: Share of low-grossing films in Europe – 2010-2022
Estimated



Source: : European Audiovisual Observatory / LUMIERE

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