



TRENDS OF THE EUROPEAN FILM MARKET

EUROPA CINEMA

André Lange

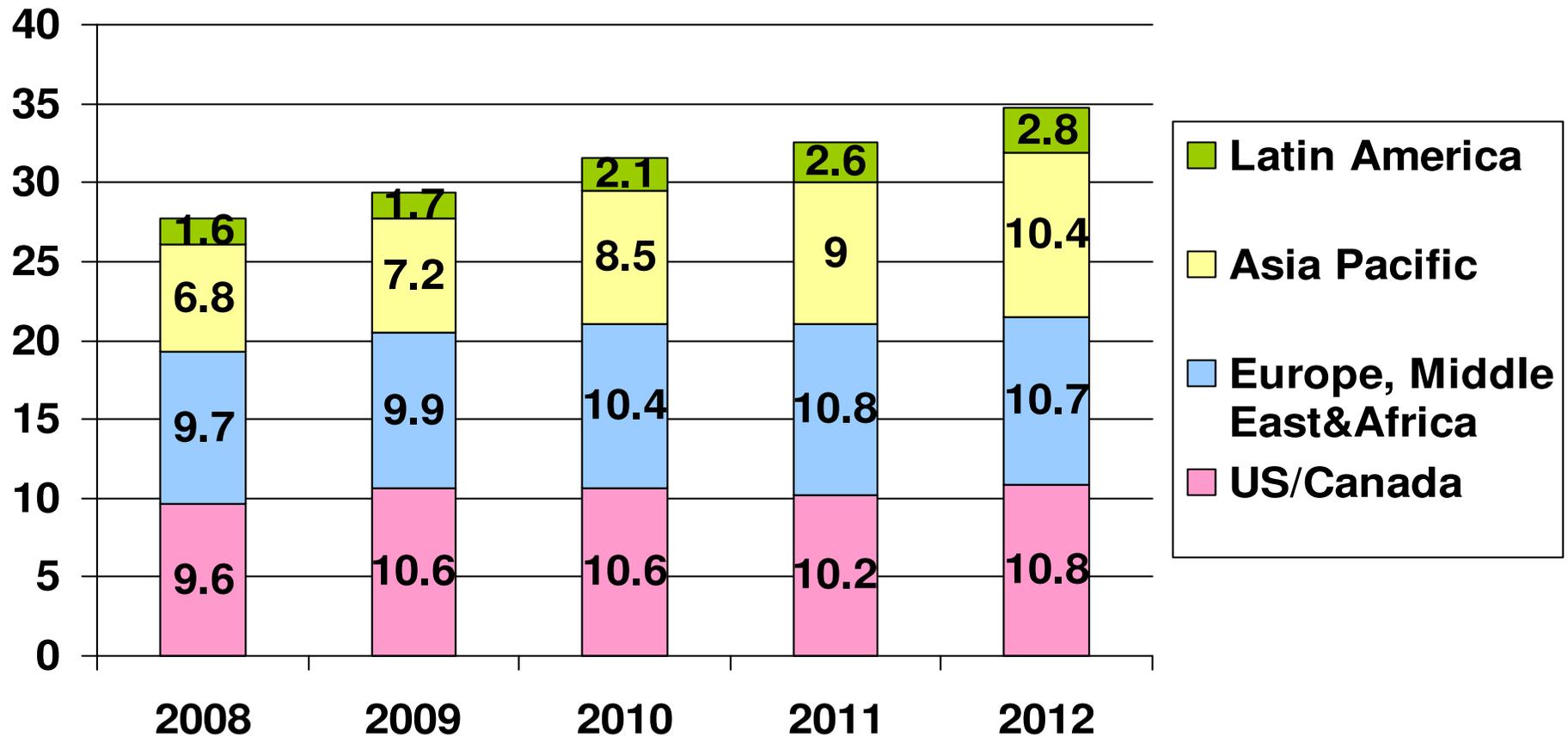
**Head of Department for Information on Markets and Financing
European Audiovisual Observatory**

OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSTELLE



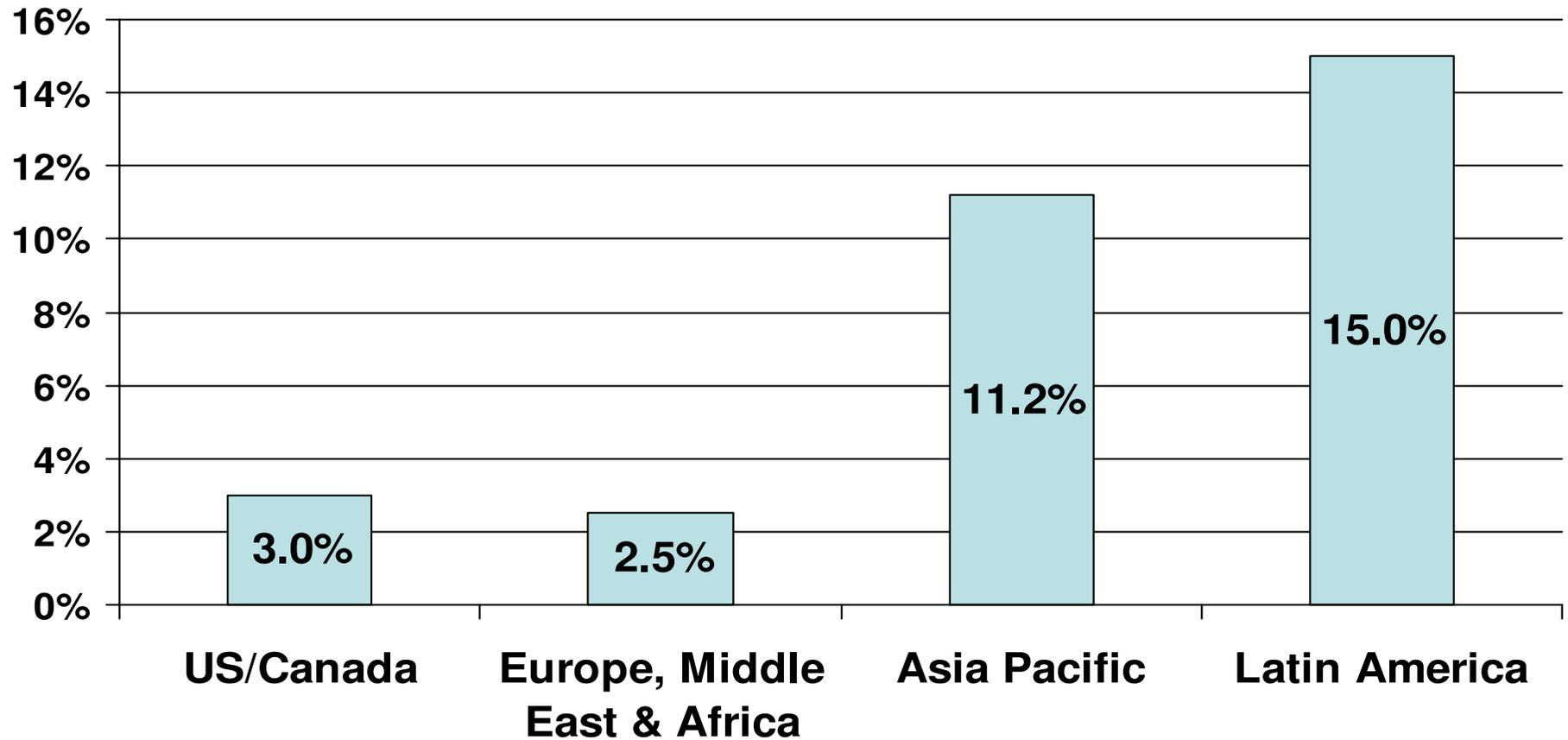
GLOBAL BOX OFFICE – ALL FILM (2008-2012) (USD Billions) – Source MPAA

EMEA market share fell from 35 % in 2008 to 30.8 % in 2012.



BOX-OFFICE YEARLY AVERAGE RATE OF GROWTH (2008-2012)

Source: European Audiovisual Observatory on MPAA data

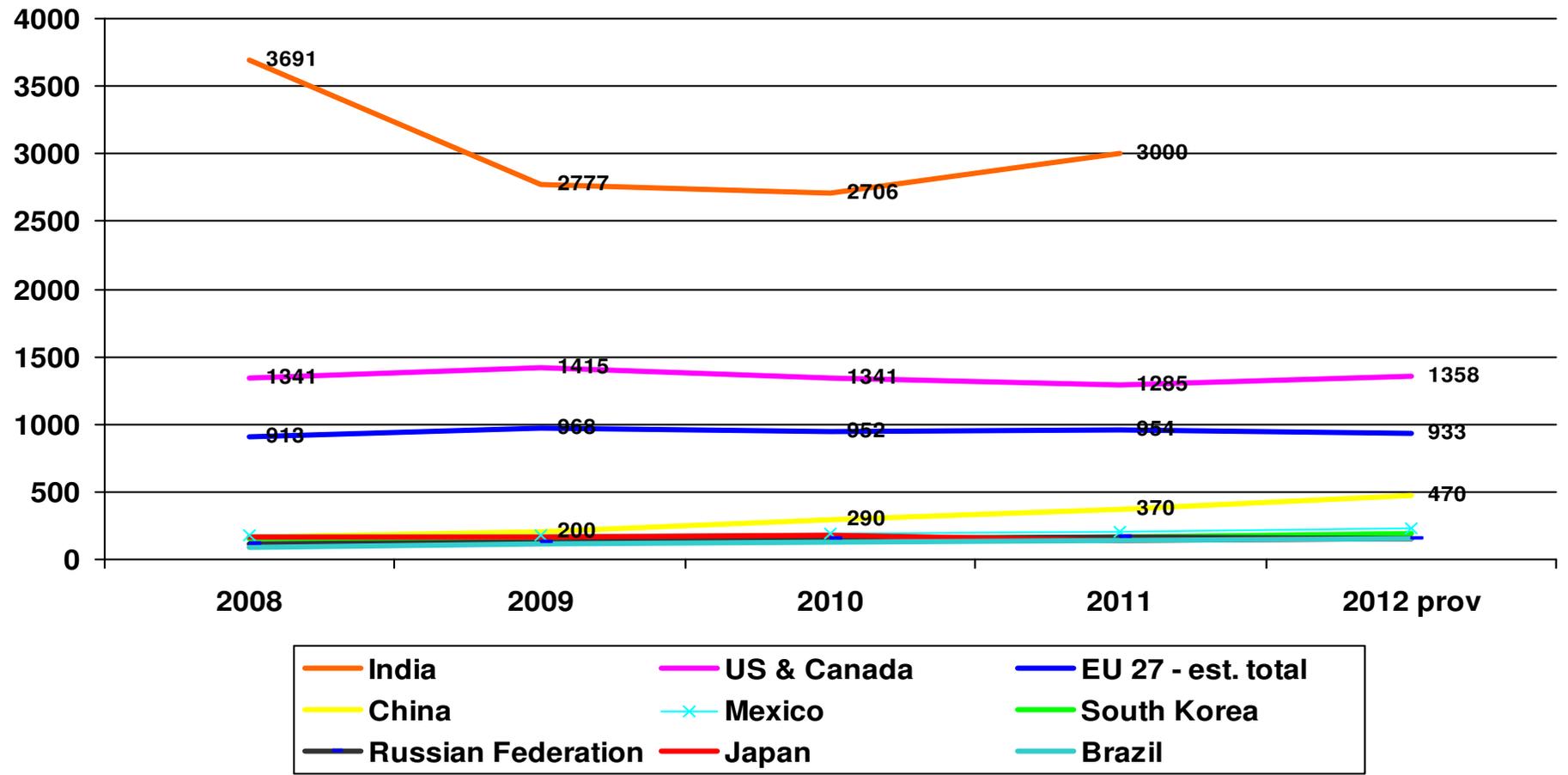


NUMBER OF ADMISSIONS (2008-2012)

in millions

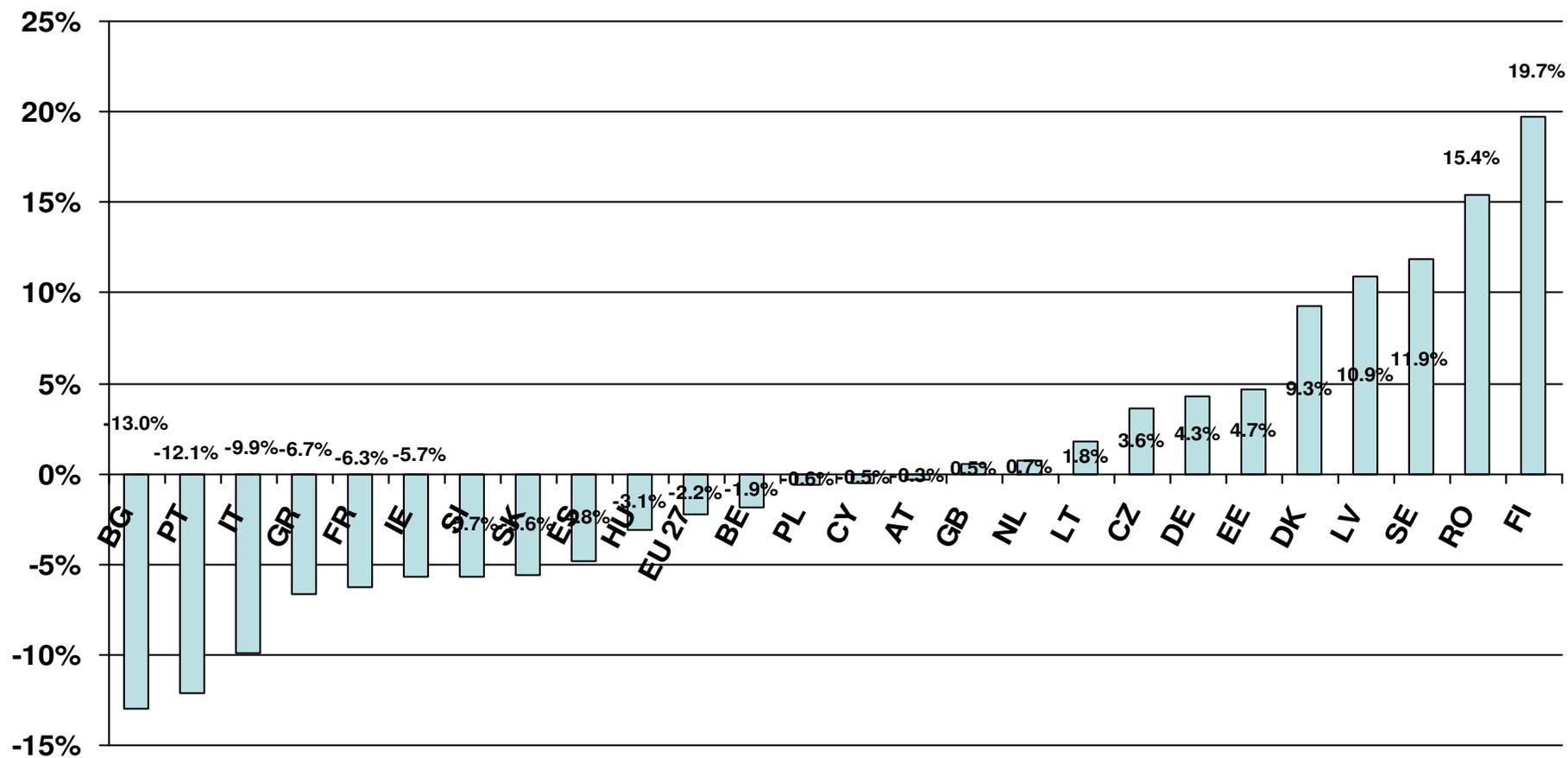
Source: European Audiovisual Observatory

EU has lost 21 millions admissions (-2.2%) in 2012



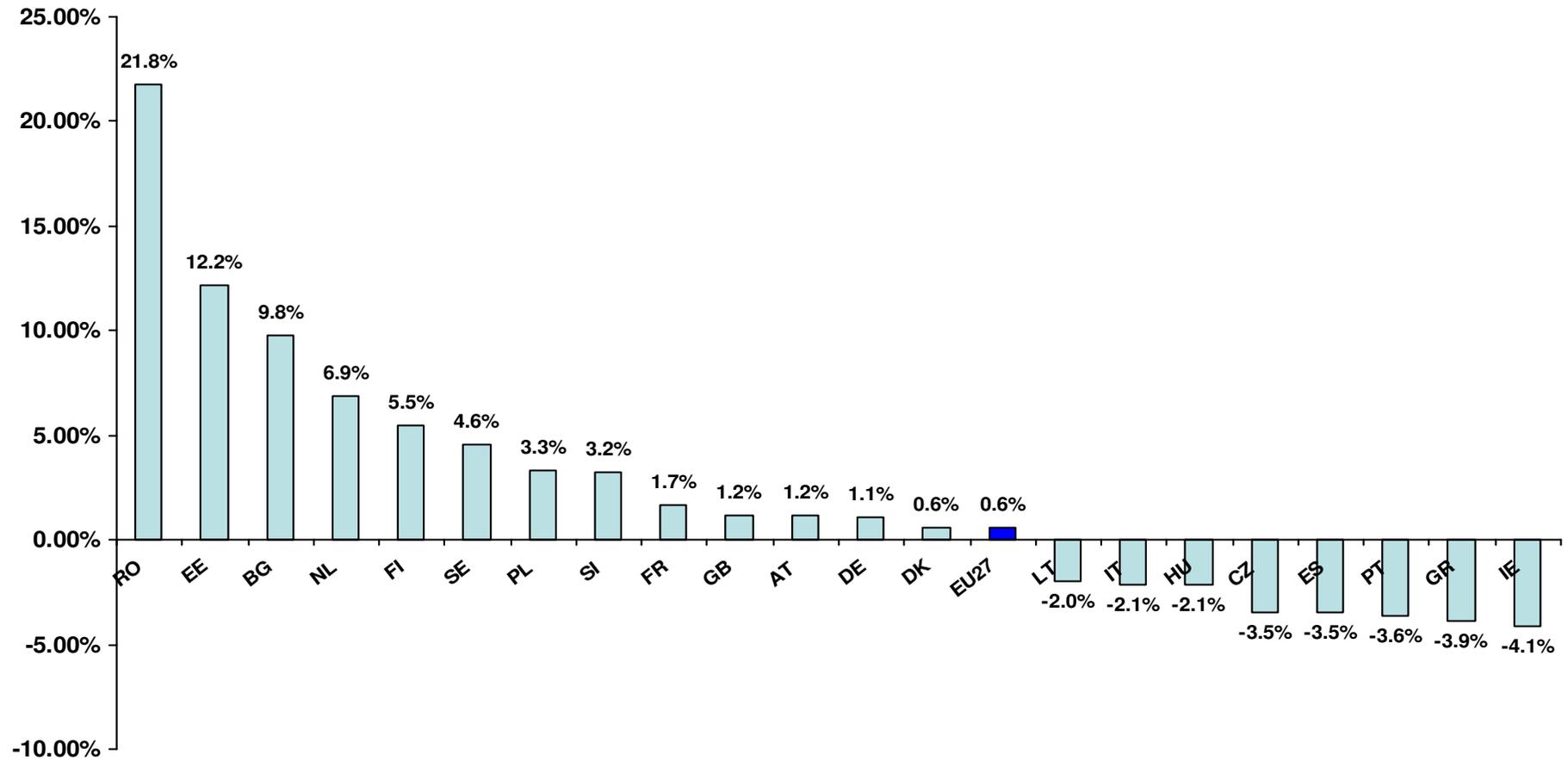
ADMISSIONS GROWTH / DECLINE IN THE EU 2012/2011

Source: European Audiovisual Observatory



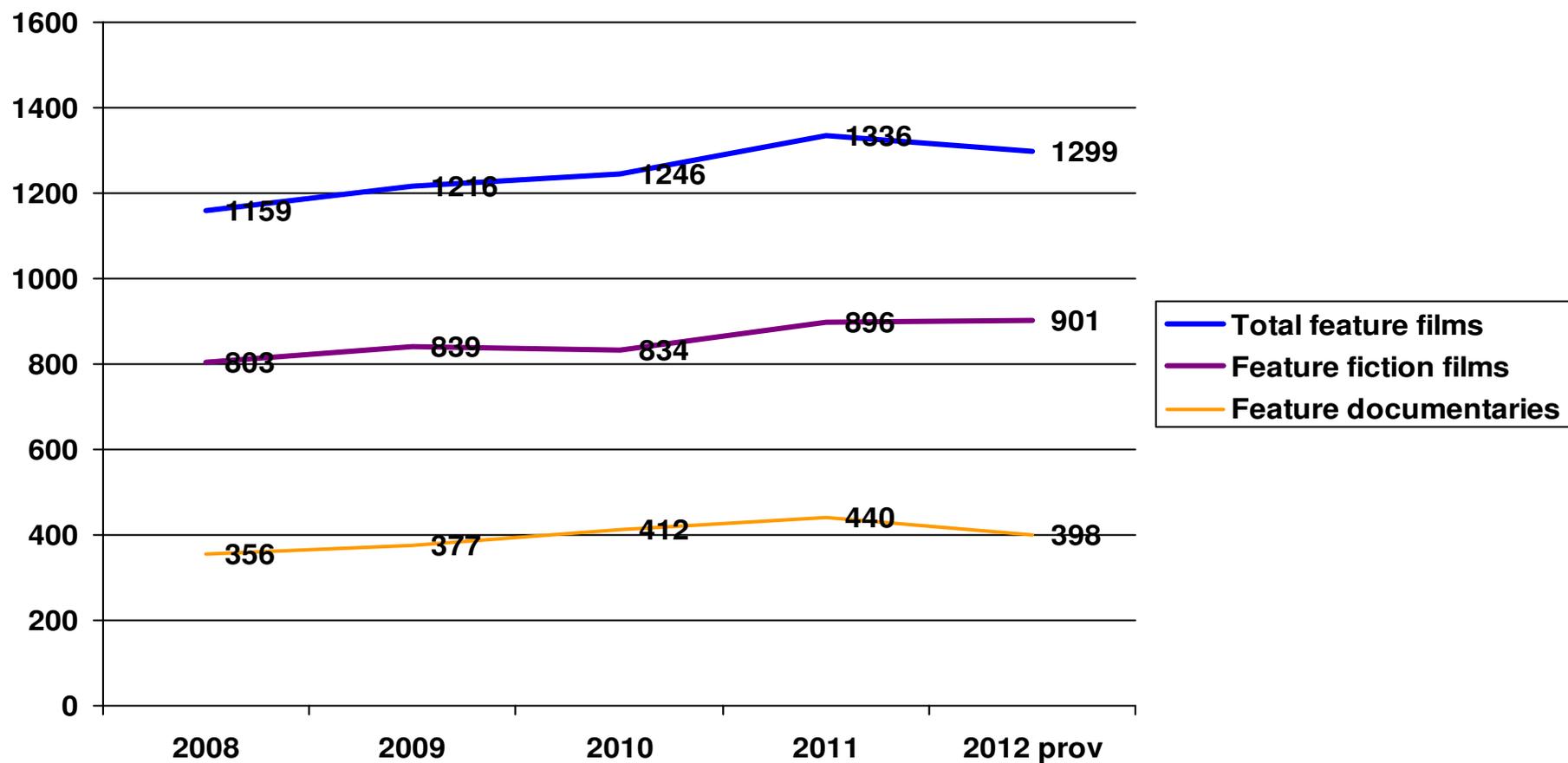
AVERAGE YEARLY GROWTH OF ADMISSIONS IN THE EUROPEAN UNION (2007-2012) in %

Source: European Audiovisual Observatory



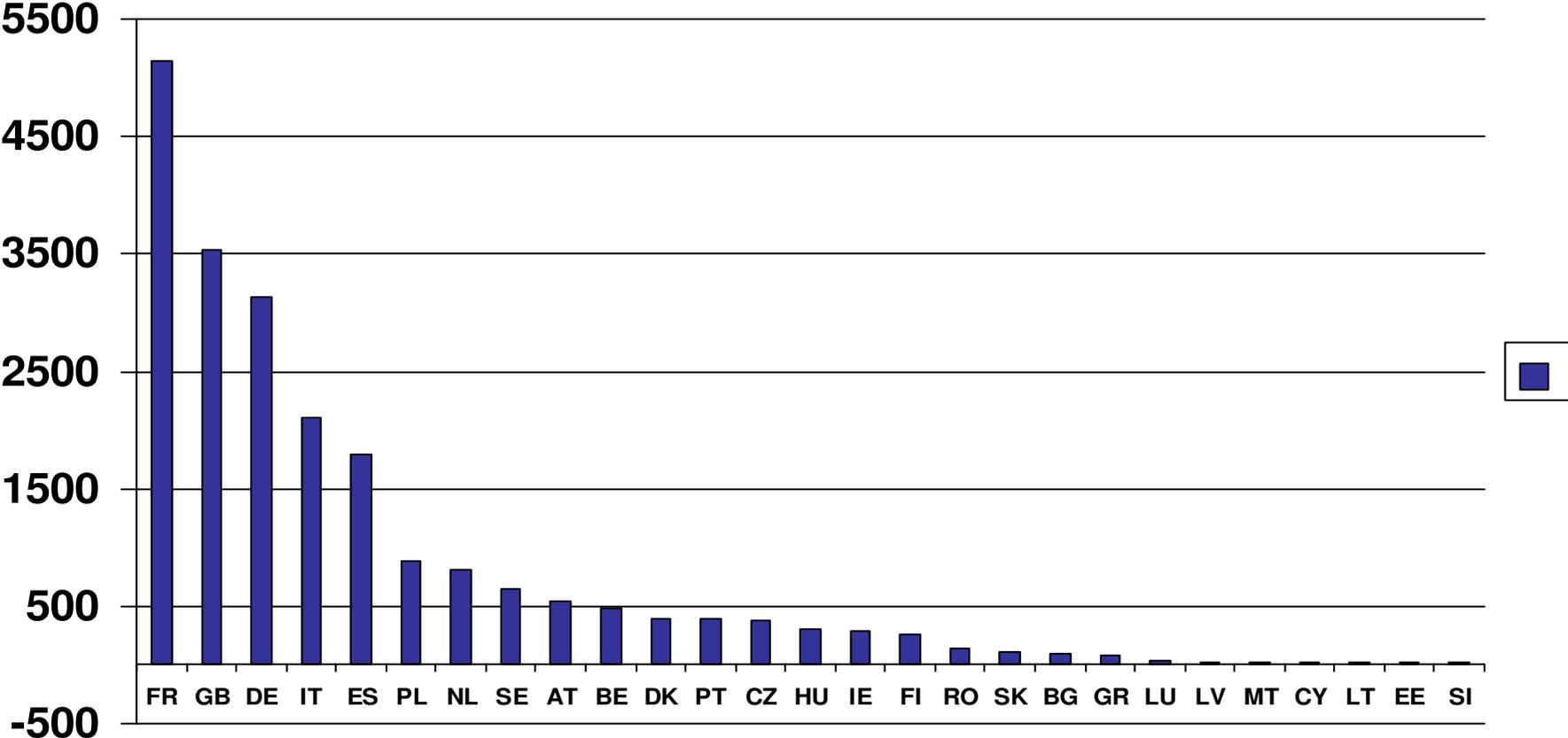
FILM PRODUCTION IN THE EU (2008-2012)

Source: European Audiovisual Observatory



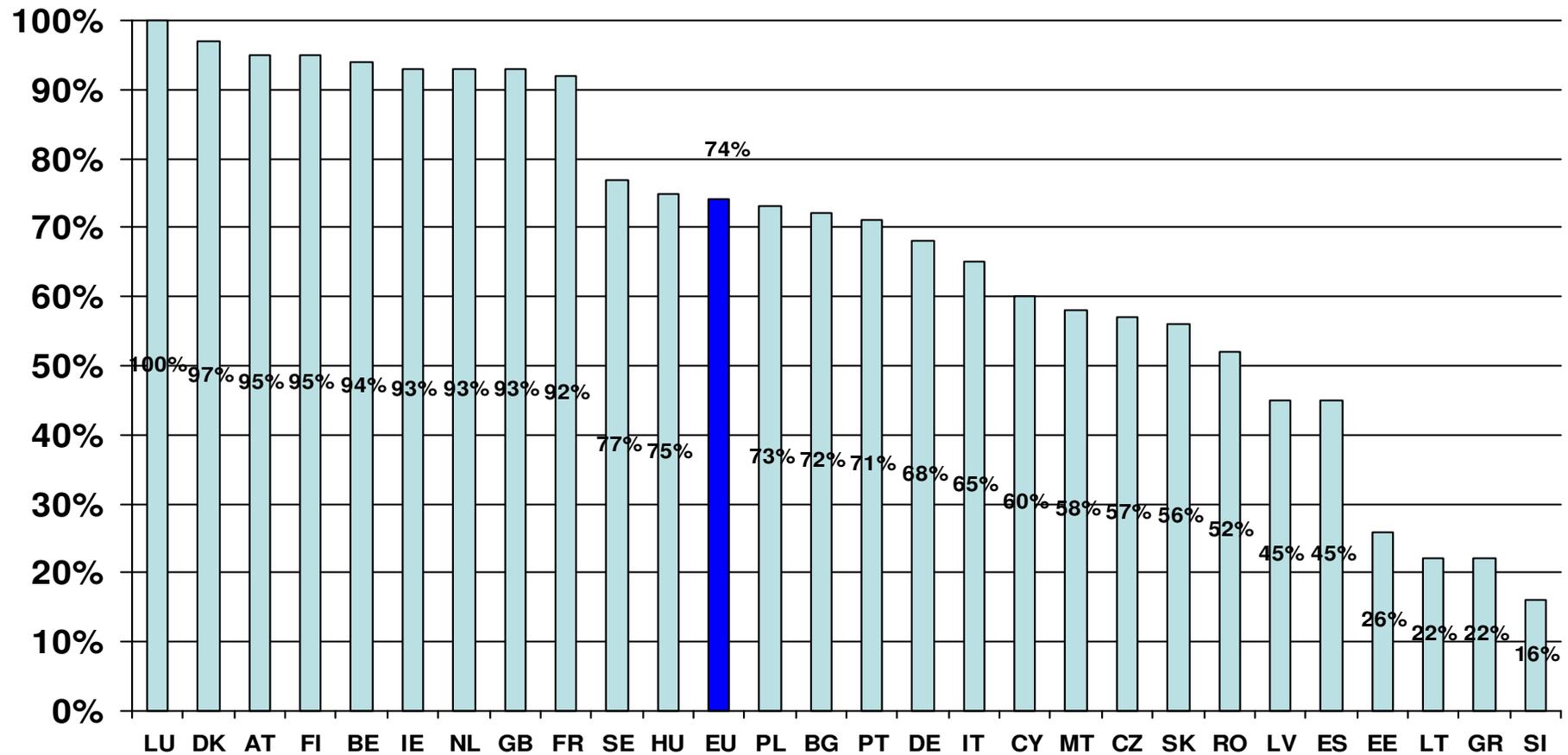
21 693 DIGITAL SCREENS IN THE EU AS AT 31.12. 2012

Source: Mediasalles



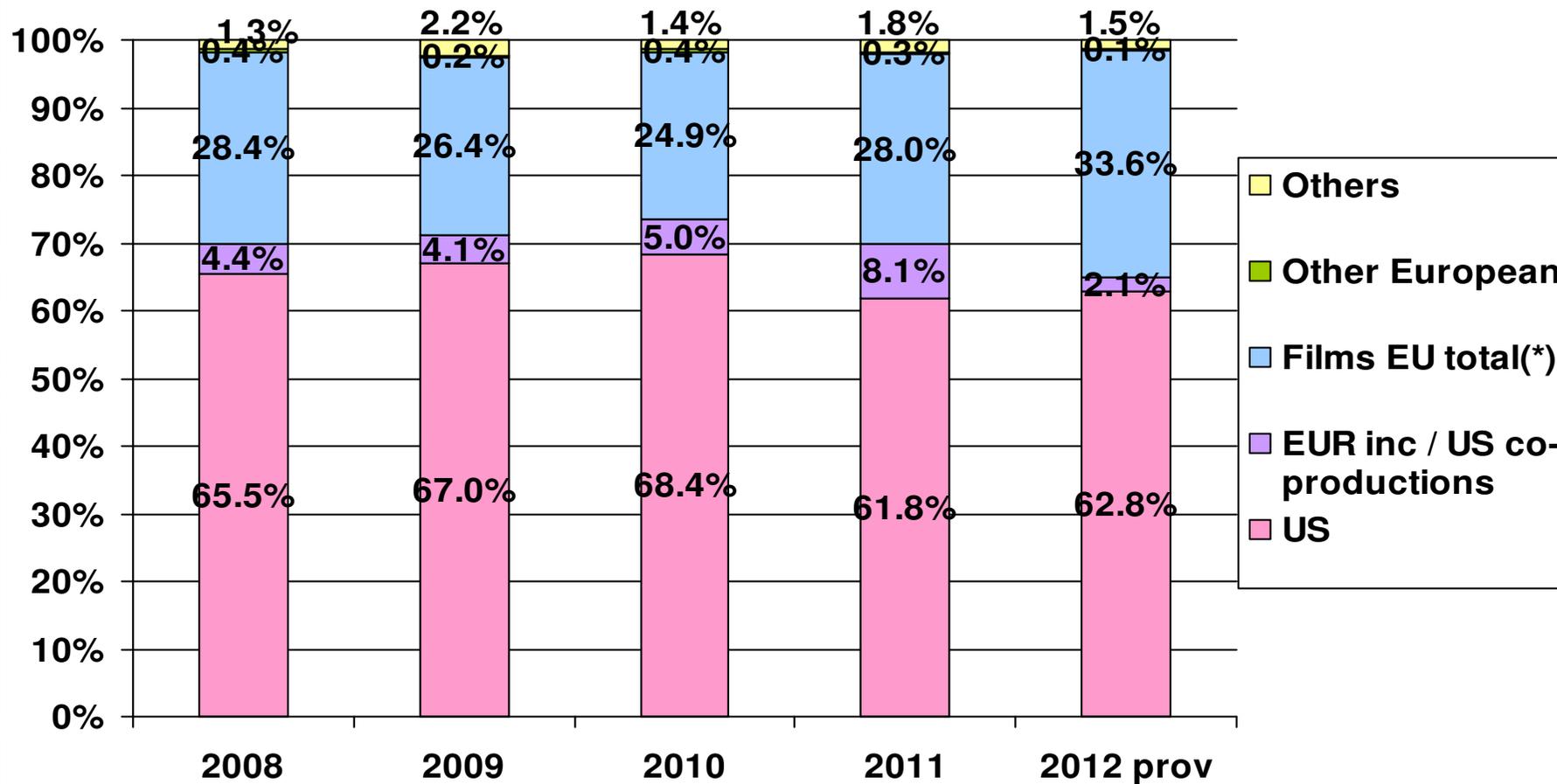
PENETRATION OF DIGITAL SCREENS IN THE EU (as at 31.12.2012)

Source: European Audiovisual Observatory on MEDIA SALLES data



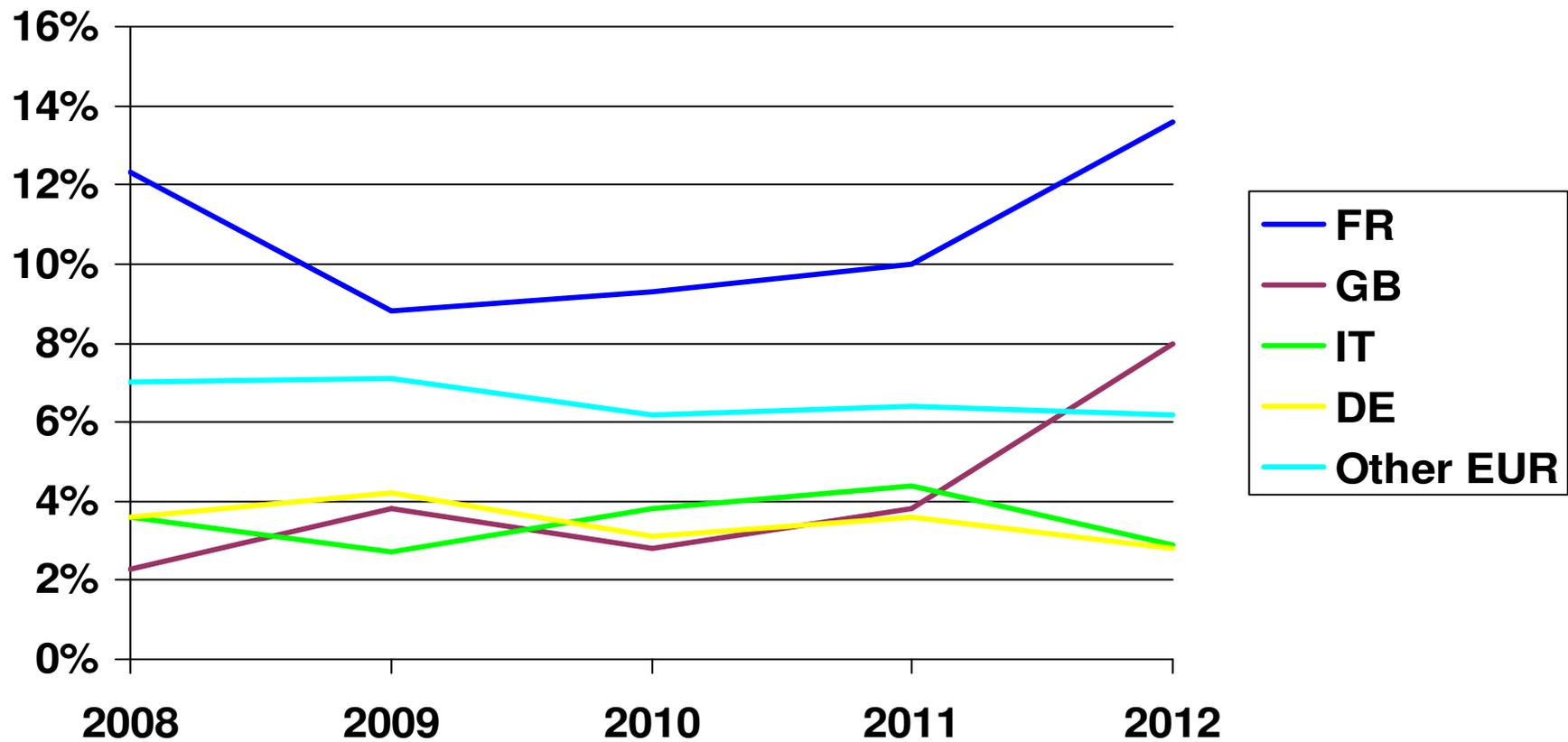
EU ADMISSIONS MARKET SHARE BY REGION OF ORIGIN (2008-2012)

Source: European Audiovisual Observatory / LUMIERE database



EU ADMISSIONS MARKET SHARE BY COUNTRY OF ORIGIN (2008-2012)

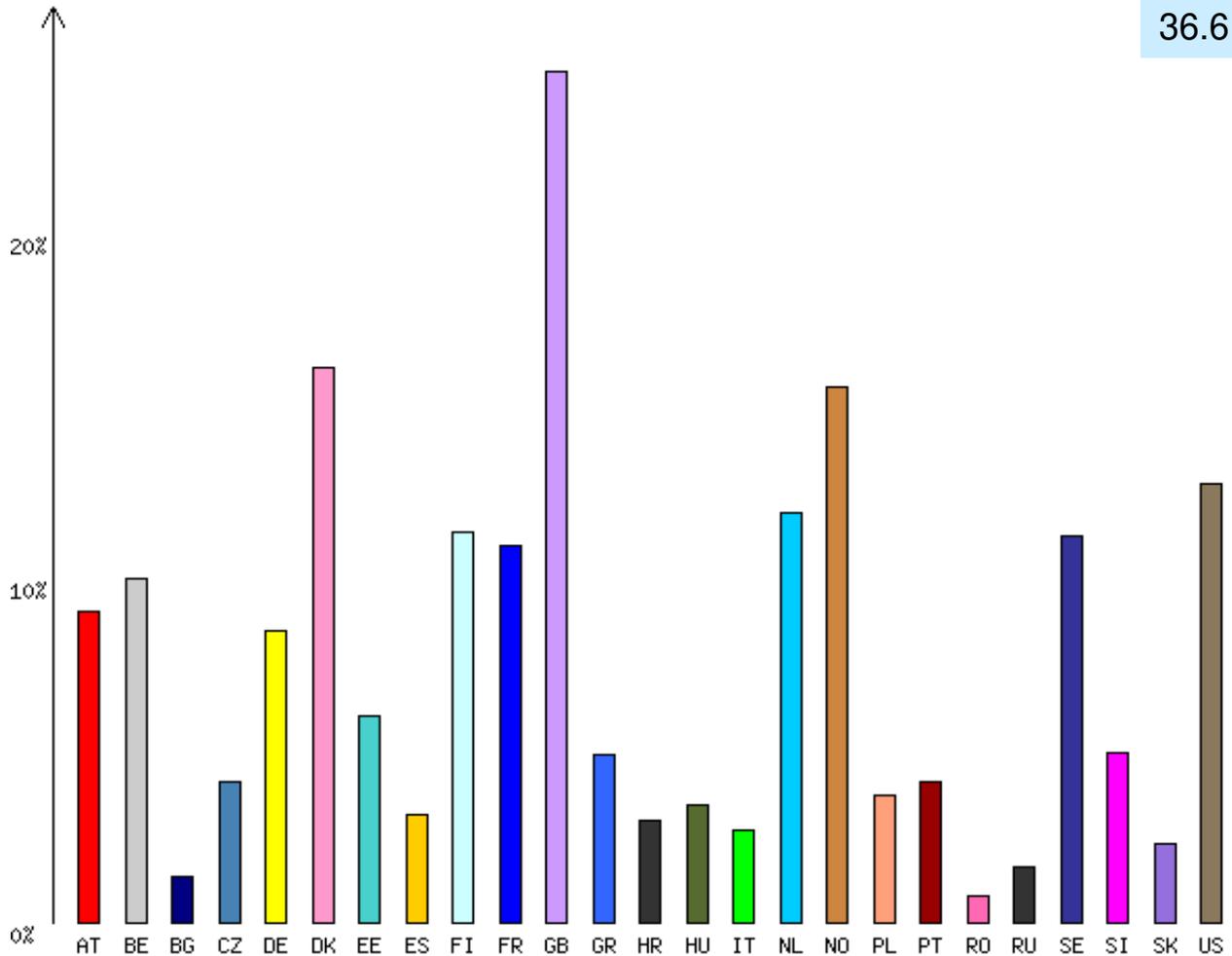
Source: European Audiovisual Observatory / LUMIERE database



PENETRATION RATE OF SKYFALL IN EUROPE AND IN US/CA

(admissions / inhabitants)

Source: LUMIERE database

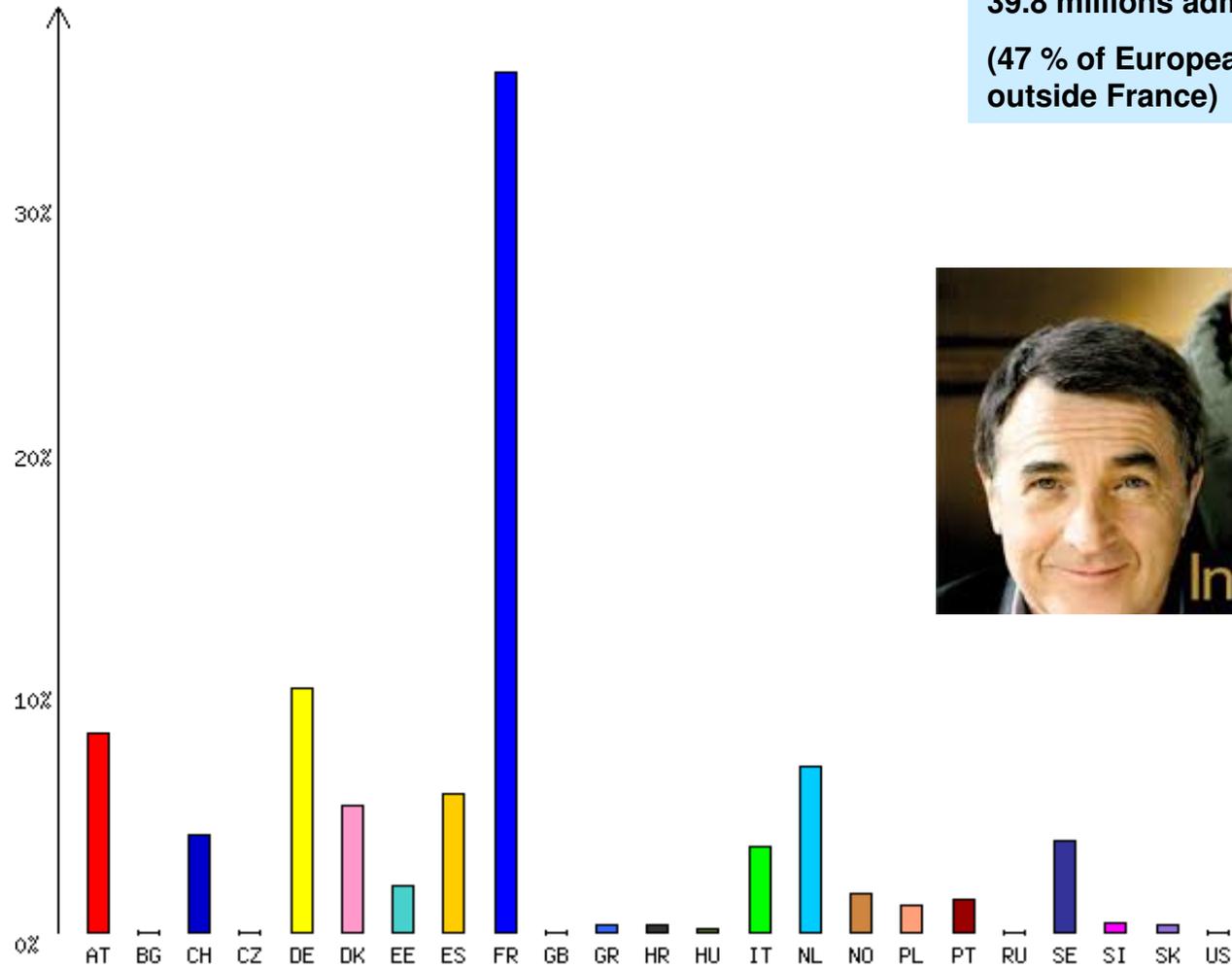


43.4 M admissions in EU
36.6 M admissions in US/CA

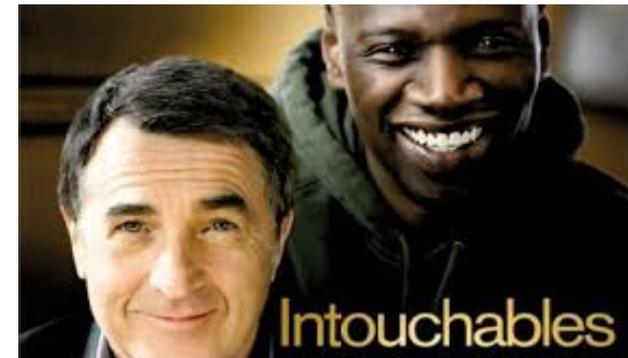


PENETRATION RATE OF *INTOUCHABLES*

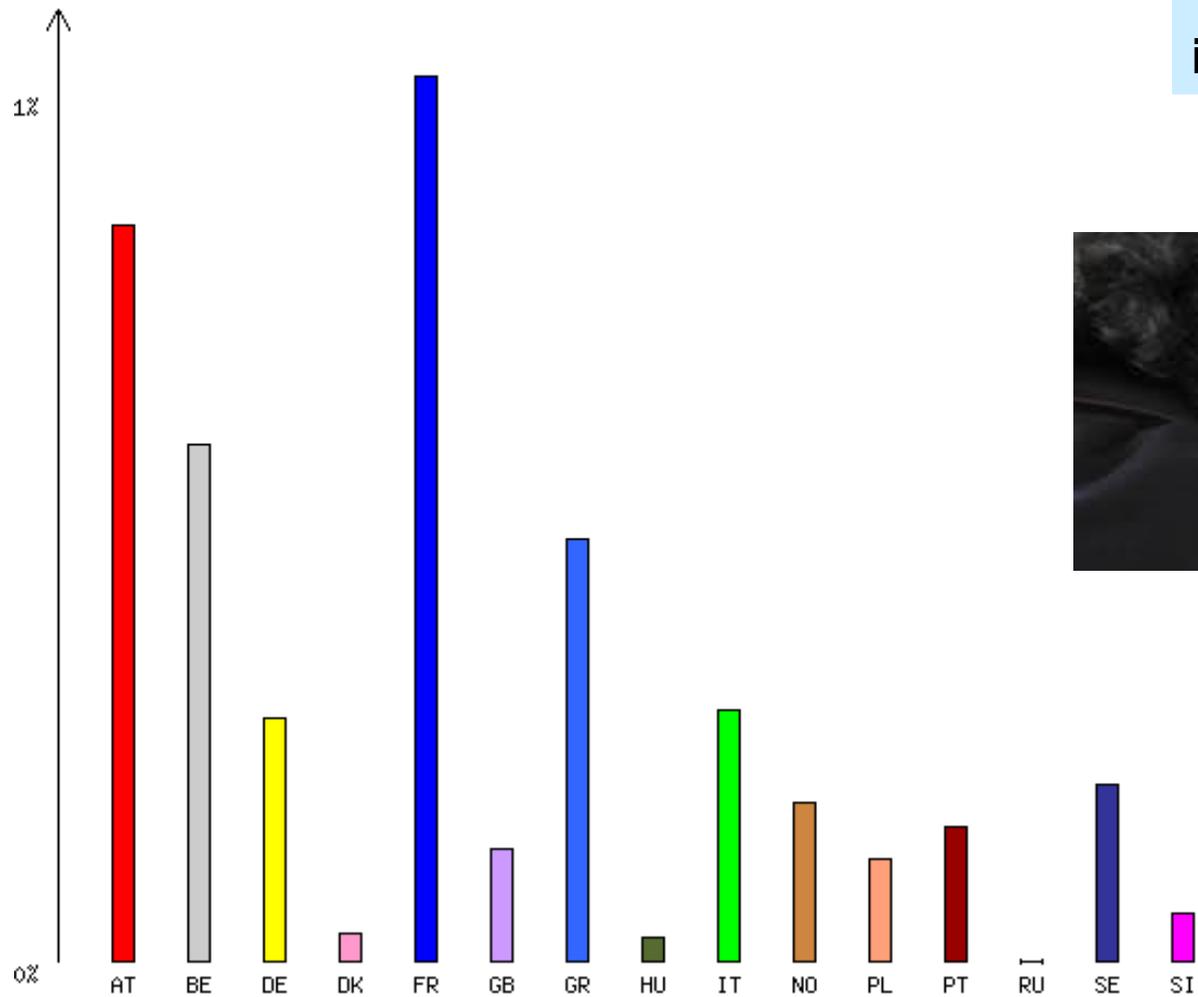
Source: LUMIERE database



39.8 millions admissions in EU
(47 % of European admissions outside France)



PENETRATION RATE OF *AMOUR*



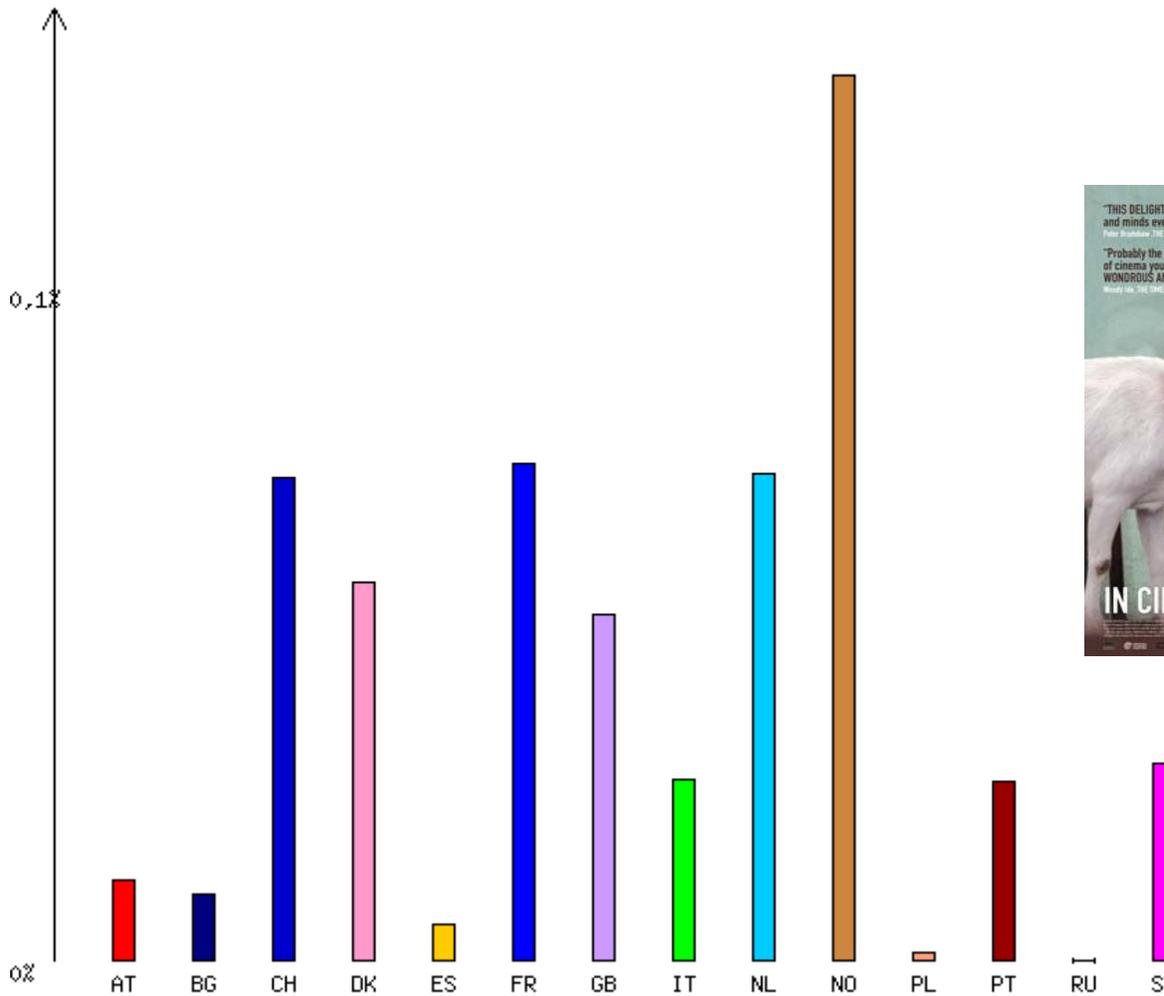
1.4 millions admissions in the EU



PENETRATION RATE OF *LE QUATTRO VOLTE*, LABEL EUROPA CINEMA 2010

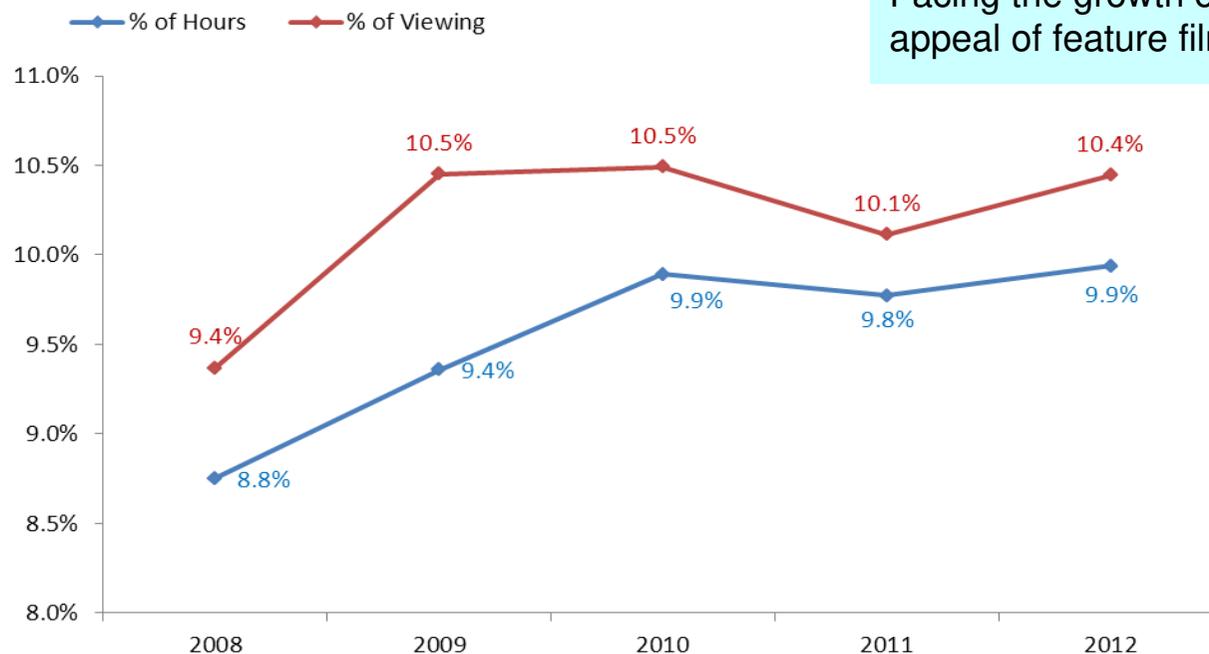
Source : LUMIERE database

122 680 admissions in EU



OFFER AND CONSUMPTION OF FEATURE FILMS ON MAIN FREE TV IN THE BIG 5 EUROPEAN COUNTRIES

Facing the growth of on-demand markets, the appeal of feature films on TV is getting stronger



Countries: France, Germany, Italy, Spain, United Kingdom
Channels: Top 5 best performing channels (based on Total Day)
 France: TF1, France 2, M6, France 3, TMC
 Germany: RTL, ARD, ZDF, Sat.1, Pro7
 Italy: Rai 1, Canale 5, Rai 3, Italia 1, Rai 2
 Spain: La 1, Tele 5, Antena 3, Cuatro, La Sexta
 United Kingdom: BBC1, ITV, BBC2, Channel 4, Channel 5

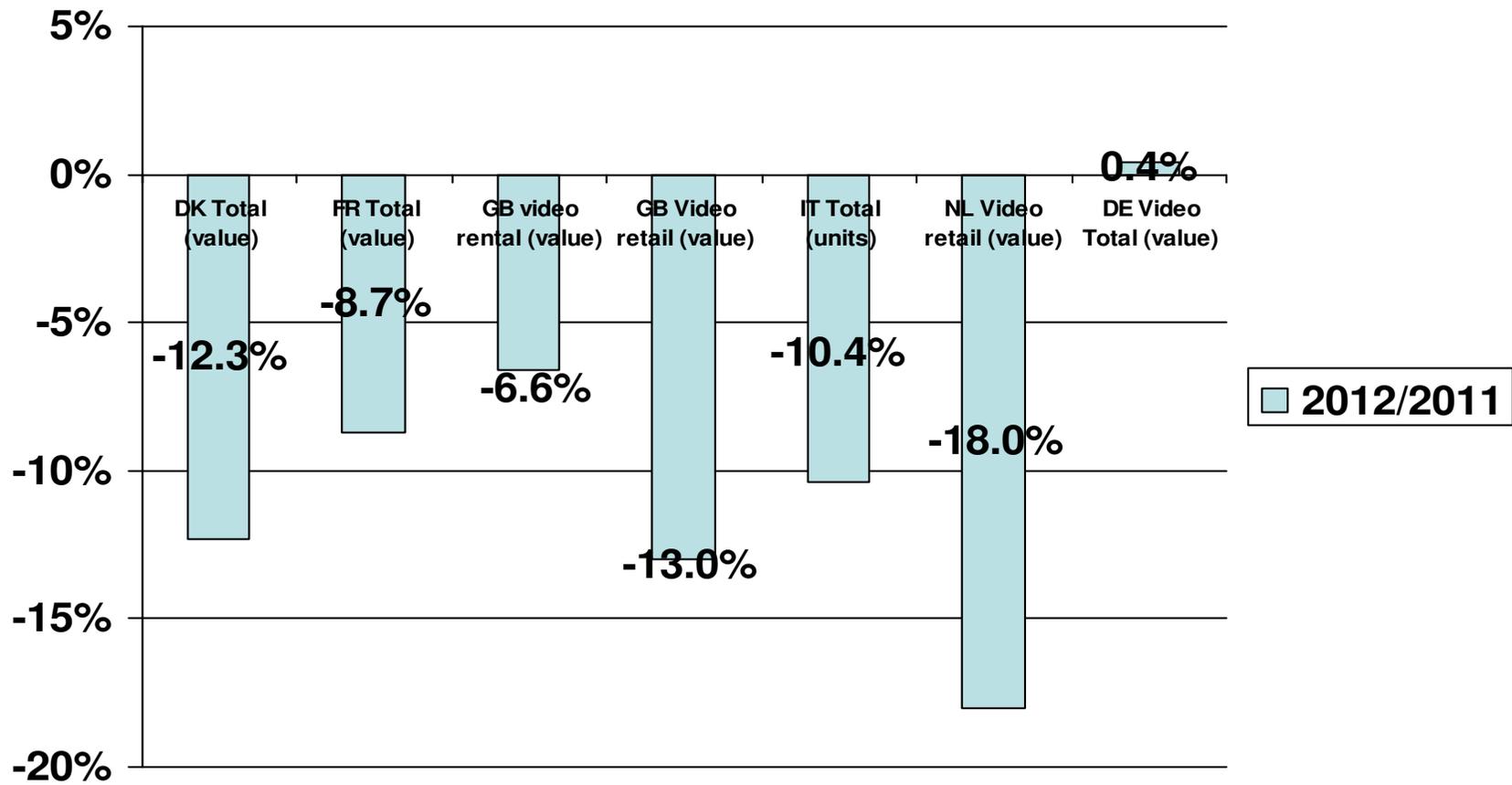


This chart is based on all movies broadcast total day on the channels studied over the period. “% of hours” shows the percentage of movies broadcast and “% of viewing” shows the percentage of audience based on all individuals. Ratings in thousands of viewers as well as the duration of each movie have been taken in account.

Source : Eurodata TV Worldwide / Relevant partners

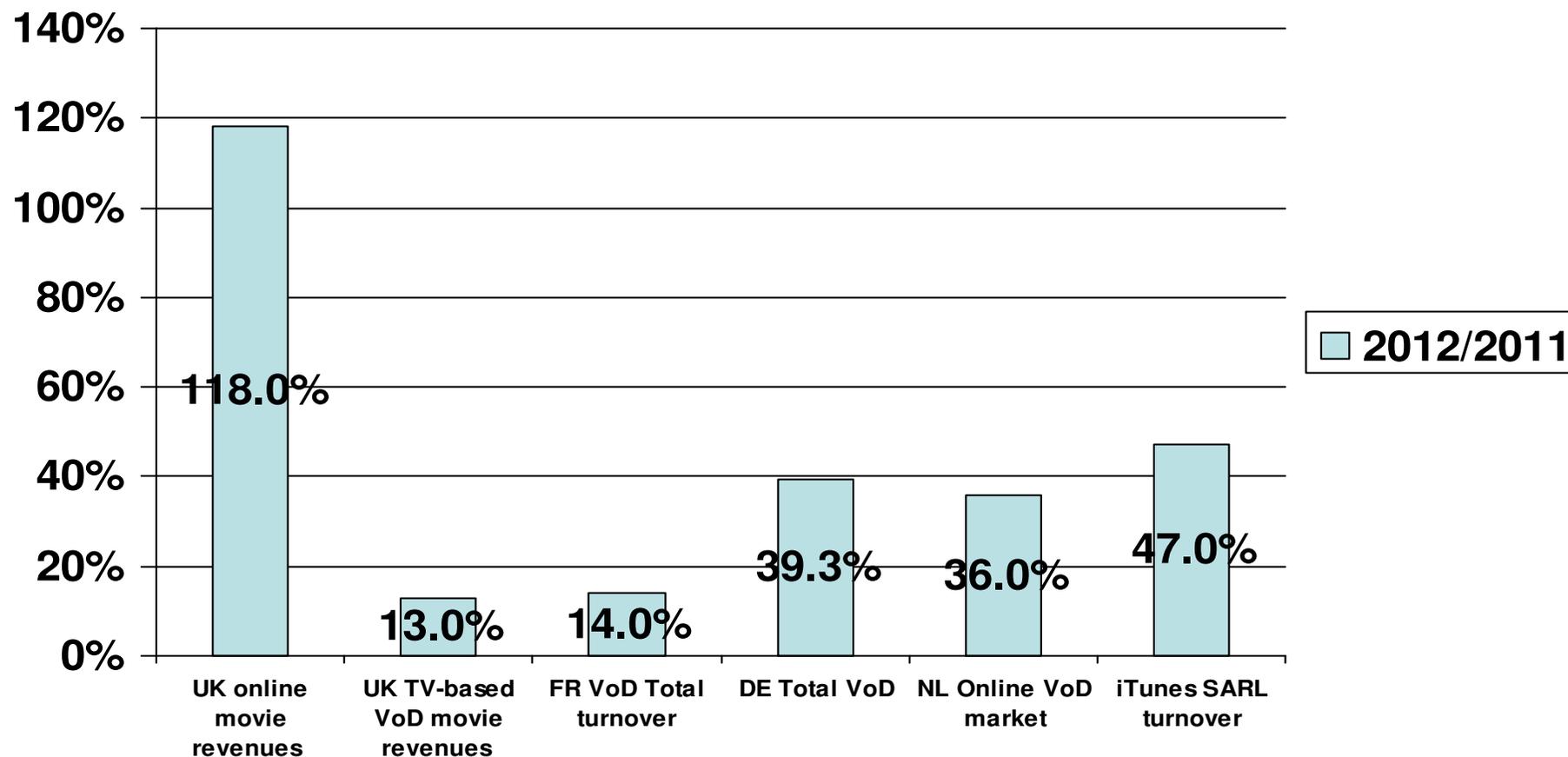
DECLINE / GROWTH OF THE PHYSICAL VIDEO MARKET IN SOME EUROPEAN COUNTRIES (2012/2011) in %

Source: European Audiovisual Observatory from national sources



SOME INDICATORS OF THE GROWTH OF THE PAYING VOD MARKET (2011/10)

Source : European Audiovisual Observatory from national sources



THE EUROPEAN AUDIOVISUAL OBSERVATORY HAS ENLARGED THE MAVISE DATABASE TO ON-DEMAND AUDIOVISUAL SERVICES : MORE THAN 3000 OD AVS IDENTIFIED



MAVISE
Database on TV and on-demand audiovisual services and companies in Europe

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Previously viewed:

Welcome to the MAVISE database

MAVISE provides you with detailed profiles of:

- 29 national TV markets
- 10109 television channels
- 3080 on-demand audiovisual services
- 7886 companies (broadcasters, packagers, transmitters)
- 5387 TV programmes (news, current affairs, political programmes)

What are you looking for?

Information on:

- A specific national audiovisual market
- A specific TV channel
- A specific on-demand audiovisual service
- A specific audiovisual company
- A specific news or current affairs TV programme

A list of:

- Licensing / registering authorities in a country
- TV channels
- On-demand audiovisual services
- Companies in a country
- News or current affairs TV programmes in a country

Advanced search mode

The advanced search option allows you to perform multiple criteria searches.

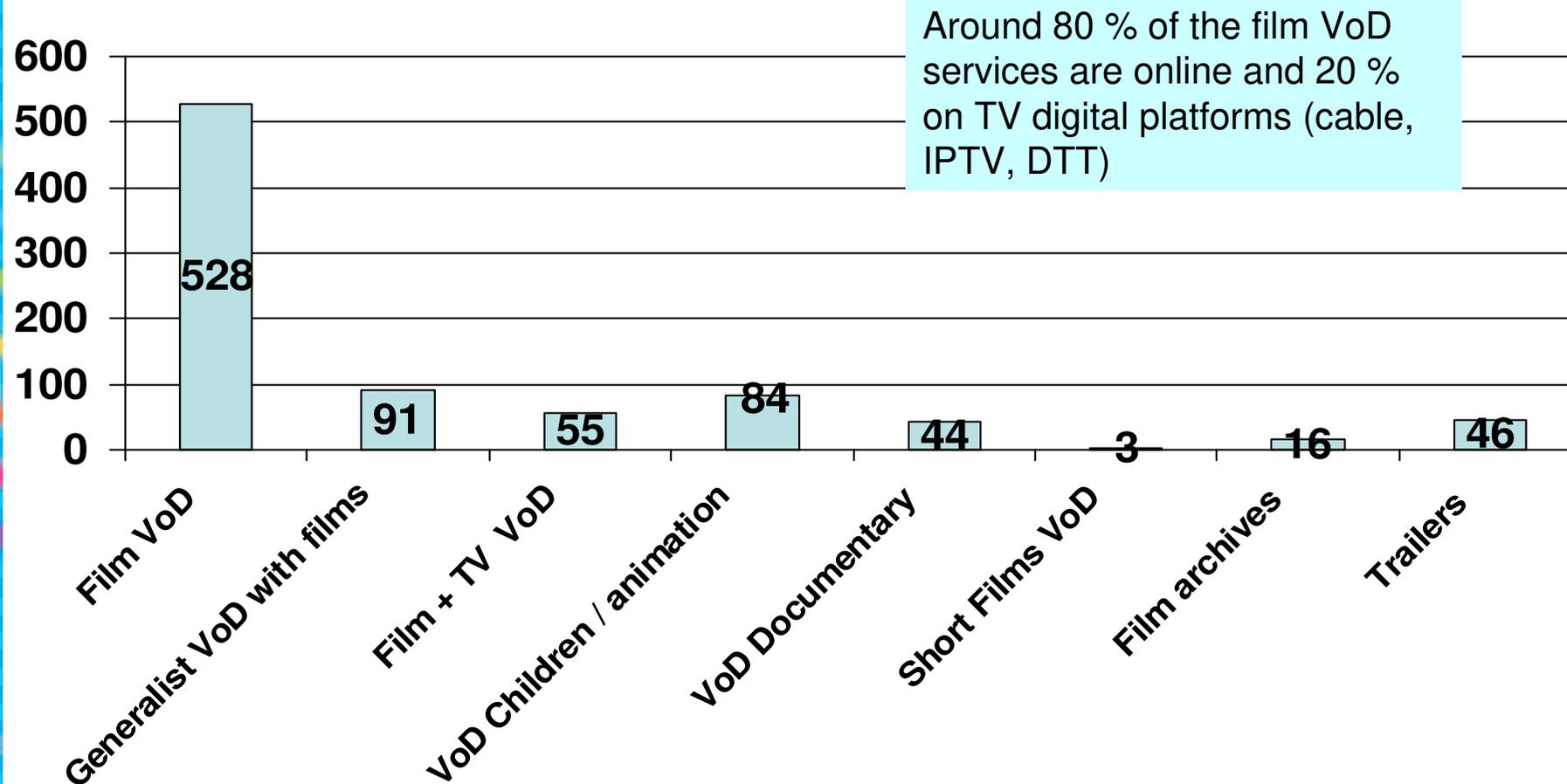
<http://mavise.obs.coe.int>



This database MAVISE is edited and published by the [European Audiovisual Observatory](#).
The software of the database was developed in the framework of a contract with the [DG Communication of the European Commission](#) (2007-2011) and owned by the European Union (represented by the European Commission).
Whilst the software of the database is property of the European Union, the European Audiovisual Observatory is the owner of its content, with the exception of elements provided by third parties, in particular Lyngemark Satellite providing information on the line-up of satellite channels and Bureau Van Dijk providing information on the addresses of companies.
The data collection process of information on the European television and on-demand audiovisual markets by the European Audiovisual Observatory is partly made possible in the context of a framework contract with the DG Communication of the European Commission (2012-2016) and specific contracts with this DG (for television) and DG for Communications Networks Content and Technology (for on-demand audiovisual services).
The data collection process has benefited from the help of the European Platform of Regulatory Authorities.
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While every care has been taken to ensure accuracy, no guarantee is given that the material is free from error or omission. Our goal is to keep this information timely and accurate. In particular, an important number of on-demand audiovisual services accessible through distribution platforms do not provide clear identification of the company providing services. In a significant number of cases the identification of the company providing on-demand audiovisual services, and hence of the country of establishment of the services, is based on rational assumptions by the expert and analysts feeding the database. If errors are brought to our attention, we will try to correct them. If you wish to propose changes concerning the presentation of your company in the database, please contact: mavise@coe.int

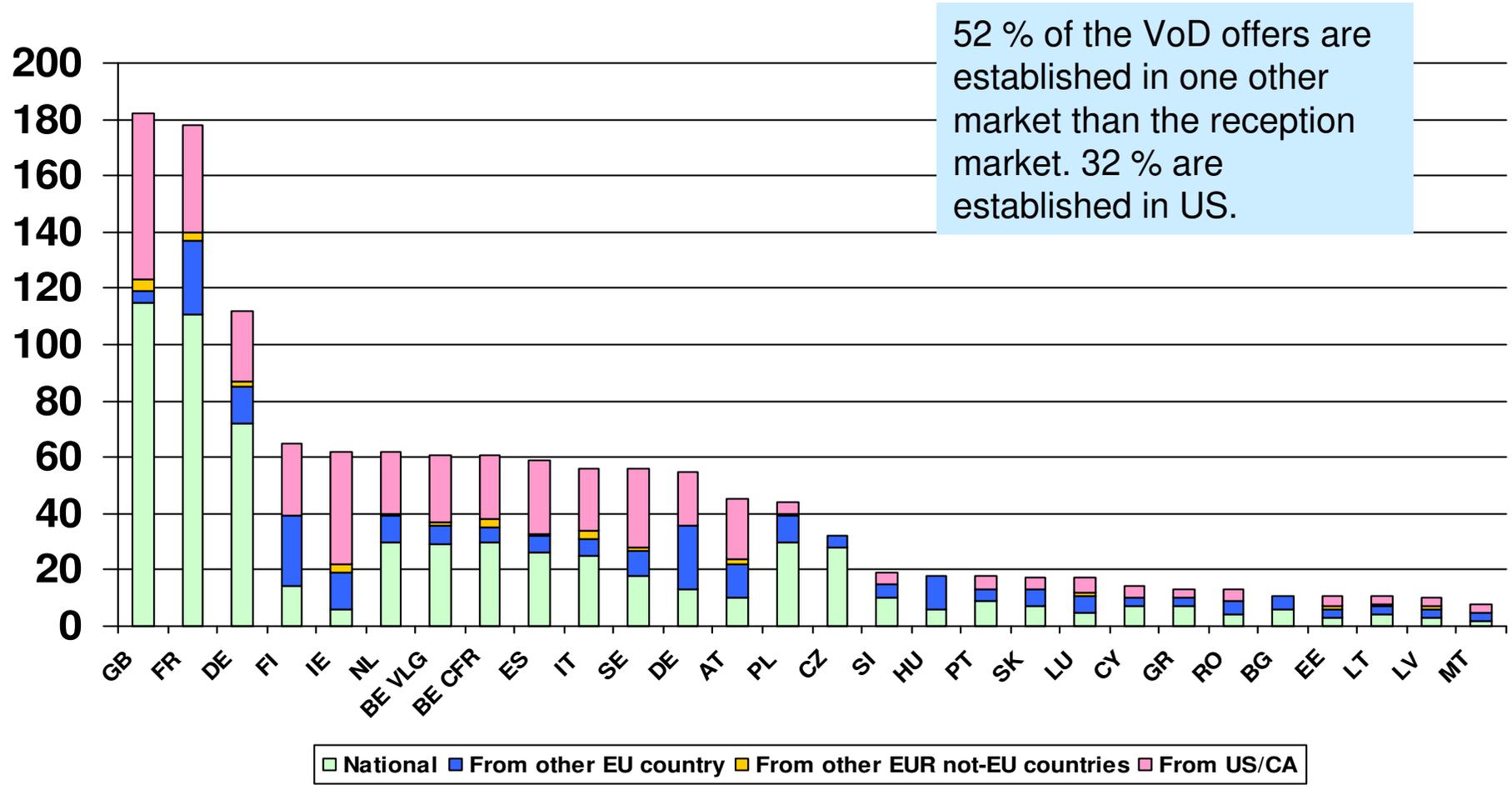


ON-DEMAND AUDIOVISUAL SERVICES RELATED TO FILMS IN THE MAVISE DATABASE (May 2013)



NUMBER OF VOD SERVICES (ALL GENRES EXCEPT ADULTS) AVAILABLE IN THE EU COUNTRIES – April 2013

Source : European Audiovisual Observatory / MAVISE database



NUMBER OF FILM VOD SERVICES BY COUNTRY OF ESTABLISHMENT (April 2013)

Source : European Audiovisual Observatory – MAVISE database

MUBI

YouTube

Google play

Available on Xbox Video

viewster

ace trax

iTunes

NETFLIX

LOVEFiLM.COM

VIAPLAY

Sony Entertainment Network

FILMNET

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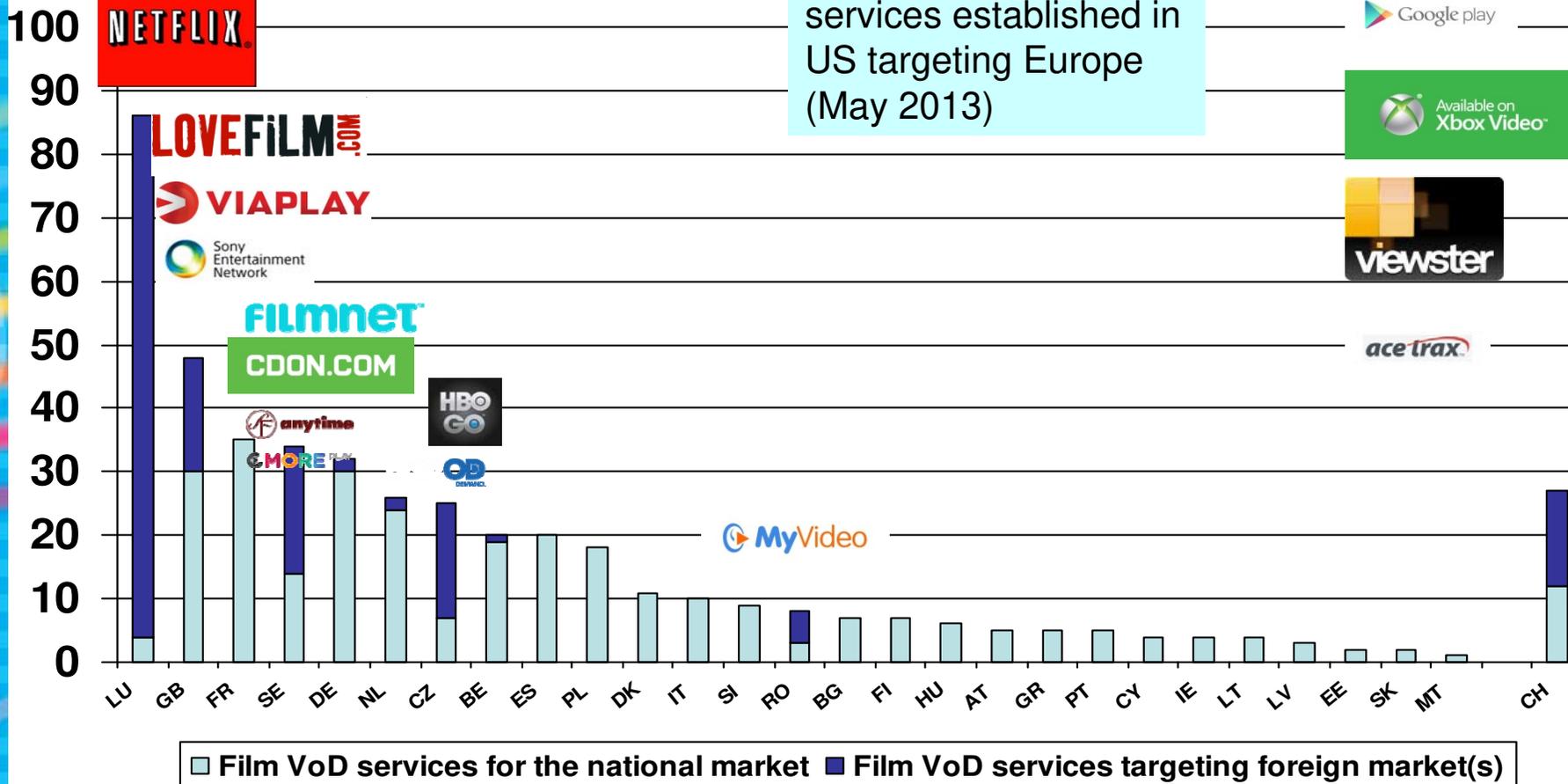
MORE

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HBO GO

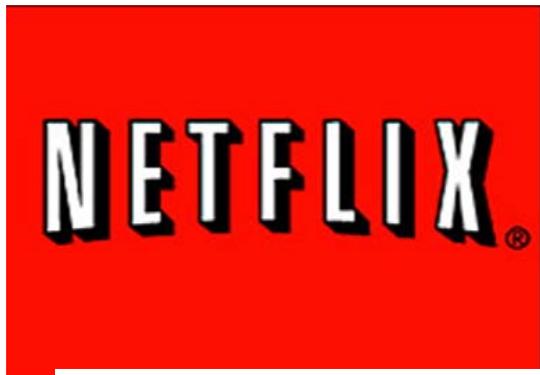
MyVideo

... and 125 films VoD services established in US targeting Europe (May 2013)



Legend: ■ Film VoD services for the national market ■ Film VoD services targeting foreign market(s)

48% OF VoD SERVICES IN THE EU ARE UNDER US CONTROL (APRIL 2013)





- THANK YOU !

- <http://www.obs.coe.int>

- <http://lumiere.obs.coe.int>

- <http://mavise.obs.coe.int>