



PRESS RELEASE
European Audiovisual Observatory, Council of Europe
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**EU film production reached record high in 2008
as admissions to European films remained strong**

- A record of 1 145 feature films (including feature documentaries) were produced in the EU in 2008
- European films took a market share of 28.4% in 2008
- *Mamma Mia!* and *Quantum of Solace* topped the European charts
- Cinema attendance in the 27 member states of the European Union increased by 0.5% to 924 million admissions in 2008

European film production grows to record high

In order to improve the comparability of production data across countries the European Audiovisual Observatory has revised its methodology for counting European feature film productions. The revised series aims to distinguish clearly between fiction films and feature documentaries.

Based on the provisional data available, the Observatory estimates that a total of 1 145 feature films, including feature documentaries, were produced in the 27 member states of the European Union in 2008, up 112 films from 2007. This increase fits with a trend which has seen European production figures rising continuously over the past years, coming to only a preliminary halt in 2007, and represents an all-time record high. Based on these adjusted figures, European production levels for entirely national and majority co-productions have increased by 10.8% year-on-year and by an annual average of 7.1% since 2004.

The 2008 total splits into an estimated 878 feature fiction films and 267 feature documentaries. Overall growth was primarily driven by the strong increase in feature documentaries, 58 more than in 2007, and entirely national fiction films, which increased from 632 to 675 in 2008. International fiction co-productions remained fairly stable with a total of 203 fiction films majority co-produced by a European Union member country in 2008.

Production levels increased in 16 out of the 27 member states, slightly decreased in 6, and remained stable in the remaining 5 member states. Overall growth was primarily the result of rising production volumes in Italy (+37), Ireland (+16), France (+11) and Spain (+9). France remains the country with the highest level of production activity (196 feature films), followed by Germany (151), Spain (150) and Italy (146).

Strong results for European film

Based on available data, the European Audiovisual Observatory estimates that European films achieved a provisional market share of 28.4% of total admissions in the European Union, almost matching the previous record high of 28.6% in 2007 and staying well above previous years' levels.

The enormous success of national films in many markets was largely responsible for maintaining European market share at this high level. Out of 24 member states for which data were available, 14 countries registered an increase in national market shares on a year-on-year basis. In addition, in 11 of these countries national market share reached its highest level in the past five years. France led the pack, with *Bienvenue chez les Ch'tis* and *Astérix aux Jeux Olympiques* bringing local market share to 45.4% , the highest level since 1984. Local films like *Keinohrhasen* and *Die Welle* propelled national market share in Germany to a record high of 26.6%, up 7.7 percentage points from 2007. Other countries achieving high national market shares included the Czech Republic (39.6%), Denmark (33%), the UK (31%), Italy (29.3%), Poland (25.4%), and Slovakia (15.6%).

Supported by strong results on the home market, French productions took a 12.6% share of total admissions in the European Union, up from 8.4% in 2007. Italian films contributed 3.6% to total EU admissions, followed by German films (3.5%) and UK productions - excluding those considered as inward investments - (2.2%). UK films had enjoyed an exceptionally high market share in 2007 due to the pan-European success of *Mr Bean's Holiday*.

Films produced in Europe (chiefly in the UK) with incoming US investment, such as *Quantum of Solace*, increased their market share from 6.3% to 6.8%. Market share for US films remained stable at 63.2%.

Table 1 : Breakdown of admissions in the European Union according to the country of origin

Region		2004	2005	2006	2007	2008 est
European films total		24.6%	24.6%	27.9%	28.6%	28.4%
EUR inc / US co-productions		5.8%	12.5%	5.5%	6.3%	6.8%
US		67.3%	60.2%	63.4%	63.2%	63.2%
Others		2.3%	2.7%	3.2%	1.8%	1.6%

European films by country of origin						
FR	France	8.6%	9.2%	10.6%	8.4%	12.6%
GB	United Kingdom	4.5%	3.9%	2.8%	6.1%	2.2%
IT	Italy	2.2%	2.9%	3.0%	3.8%	3.6%
DE	Germany	4.3%	3.2%	4.8%	3.8%	3.5%
ES	Spain	2.4%	2.3%	2.8%	2.1%	1.4%
Other EUR	Other European countries	2.7%	3.1%	3.9%	4.6%	5.0%

Source: European Audiovisual Observatory – LUMIERE database

Mamma Mia! tops the European charts in 2008

The US / UK adaptation of the successful ABBA musical *Mamma Mia!* topped the European charts, selling around 33.7 million tickets in 2008. The latest James Bond adventure *Quantum of Solace* took second place with 27.5 million admissions and was one out of seven sequels to figure in the top 20 with *Indiana Jones*, *Madagascar 2* and *The Dark Knight* also featuring in this ranking. Besides UK inward investment sequels *Quantum of Solace* and *The Chronicles of Narnia: Prince Caspian*, two French films made it to the top of the EU charts. *Bienvenue chez les Ch'tis* attracted an audience of over 24 million people, 20.4 million in France alone, making it the 6th most successful film in Europe in the past year. Standing his ground not only at the Olympic Games, *Astérix* took 12th place selling some 13.5 million tickets.

Table 2 : Top 20 films by admissions in Europe in 2008*

Rank	Original title	Country of origin	Production Year	Director	Admissions
1	Mamma Mia!	US / GB inc	2008	Phyllida Lloyd	33 738 217
2	Quantum of Solace	GB inc / US	2008	Marc Forster	27 486 233
3	Indiana Jones and the Kingdom of the Crystal Skull	US	2008	Steven Spielberg	26 515 992
4	Madagascar: Escape 2 Africa	US	2008	Eric Darnell, Tom McGrath	25 045 775
5	The Dark Knight	US / GB inc	2008	Christopher Nolan	24 533 627
6	Bienvenue chez les Ch'tis	FR	2008	Dany Boon	24 159 485
7	Kung Fu Panda	US	2008	Mark Osborne, John Stevenson	22 107 540
8	Hancock	US	2008	Peter Berg	20 597 392
9	WALL-E	US	2008	Andrew Stanton	18 949 774
10	Sex and the City	US	2008	Michael Patrick King	16 399 742
11	High School Musical 3: Senior Year	US	2008	Kenny Ortega	14 658 612
12	Astérix aux jeux olympiques	FR / DE / ES / IT	2008	Frédéric Forestier, Thomas Langmann	13 457 503
13	The Chronicles of Narnia: Prince Caspian	GB inc / US	2008	Andrew Adamson	13 370 024
14	The Mummy: Tomb of the Dragon Emperor	US / DE	2008	Rob Cohen	11 556 207
15	Iron Man	US	2008	Jon Favreau	10 398 971
16	Horton Hears a Who!	US	2008	Jimmy Hayward, Steve Martino	9 515 049
17	National Treasure: Book of Secrets ⁽¹⁾	US	2007	Jon Turteltaub	9 008 476
18	I Am Legend ⁽²⁾	US	2007	Francis Lawrence	8 363 365
19	Burn After Reading	US / GB	2008	Joel Coen, Ethan Coen	7 715 768
20	What Happens in Vegas	US	2008	Tom Vaughan	7 638 313

(1) 1 995 225 admissions in Europe in 2007.

(2) 7 156 695 admissions in Europe in 2007.

Source: European Audiovisual Observatory – LUMIERE database

Taking into consideration films produced in Europe with incoming investment from the US, the list of top European films was dominated by French and UK productions which took the top 5 places. The 6 French and 5 UK productions in the list cumulatively accounted for 77.4% of total admissions to the top 20 films. Strong national performances brought 3 German and 3 Turkish features as well as 1 Polish production *Lejdis* into the 2008 ranking.

Table 3 : Top 20 European films by admissions in Europe in 2008*

Rank	Original title	Country of origin	Production Year	Director	Admissions
1	Quantum of Solace	GB inc / US	2008	Marc Forster	27 486 233
2	Bienvenue chez les Ch'tis	FR	2008	Dany Boon	24 159 485
3	Astérix aux jeux olympiques	FR / DE / ES / IT	2008	Frédéric Forestier, Thomas Langmann	13 457 503
4	The Chronicles of Narnia: Prince Caspian	GB inc / US	2008	Andrew Adamson	13 370 024
5	Sweeney Todd: The Demon Barber of Fleet Street	GB inc / US	2007	Tim Burton	5 168 008
6	Keinohrhasen ⁽¹⁾	DE	2007	Til Schweiger	5 123 519
7	Recep İvedik	TR	2008	Togan Gökbakar	4 660 305
8	Earth ⁽²⁾	GB / DE	2007	Alastair Fothergill, Mark Linfield	3 903 142
9	A.R.O.G	TR	2008	Ali Taner Baltacı, Cem Yilmaz	3 743 397
10	Die Welle	DE	2008	Dennis Gansel	2 896 929
11	Taken	FR	2008	Pierre Morel	2 880 927
12	The Boy in the Striped Pyjamas	GB inc / US	2008	Mark Herman	2 831 897
13	Natale a Rio	IT	2008	Neri Parenti	2 777 062
14	Gomorra	IT	2008	Matteo Garrone	2 695 221
15	Der Baader Meinhof Komplex	DE / FR / CZ	2008	Uli Edel	2 662 899
16	Babylon A.D.	FR / US	2008	Mathieu Kassovitz	2 606 405
17	Lejdis	PL	2008	Tomasz Konecki	2 529 122
18	Disco	FR	2008	Fabien Onteniente	2 524 015
19	Muro: Nalet olsun içimdeki insan sevgisine	TR	2008	Zübeyr Sasmaz	2 380 478
20	Mesrine, l'instinct de mort	FR / CA / IT	2008	Jean-François Richet	2 355 405

(1) 1 520 694 admissions in Europe in 2007.

(2) 1 999 255 admissions in Europe in 2007.

Source: European Audiovisual Observatory – LUMIERE database

European admissions increased slightly in 2008

The European Audiovisual Observatory estimates that cinema attendance in the European Union increased slightly by 0.5% to around 924 million in 2008, countering a 1.3% drop to 920 million in 2007.

Admissions increased in 18 out of 27 EU member states, while 9 countries registered a decline. Overall growth was primarily due to the success of national films in France, bringing French admissions to a total of 190 million, 12 million more than in 2007. This 6.7% increase in the French market accounted for more than half of the total increase observed in the EU and significantly contributed to saving the EU cinema

* The European charts are based on a compilation of admissions accounting for about 88% of total cinema attendance in the European Union plus data for Turkey, Norway and Switzerland

market from a second successive year of decline. Other markets registering strong theatrical results included Germany (+ 4 million; +3.2%), the United Kingdom (+1.8 million; +1.1%), Poland (+1.1 million; +3.4%) and Denmark (+1.1 million; +8.9%) as well as several Central and Eastern European countries and Scandinavia as a whole.

In contrast, cinema markets shrank significantly in Spain and Italy. Admissions decreased by 9.1 million (-7.8%) in Spain and by around 4.8 million (-4.1%) in Italy, cumulatively accounting for 75% of the total decrease observed in the EU. While the year-on-year decline in Italian admissions followed exceptionally good results in 2007, Spain saw its fourth consecutive year of shrinking attendance.

Outside the European Union, both the Russian Federation and Turkey celebrated a year of records. Growing by 16% to 124 million, the Russian Federation registered its highest admissions level in recent years, making it the fourth largest cinema market in Europe in terms of attendance and continuing the impressive growth trend which has seen the Russian theatrical market almost double over the past four years, from a base of 67 million tickets sold in 2004. In Turkey, spurred by the success of national films, cinema attendance jumped to 38.5 million, up 23.4% from 2007 and representing the highest level in years.

Table 4 : Cinema attendance in Europe (2004-2008 prov.)

Country	2004	2005	2006	2007	2008 prov	% change 2008/2007
AT Austria	19.38	15.68	17.34	15.69	15.63	-0.4%
BE Belgium e	24.12	22.10	23.93	22.68	21.84	-3.7%
BG Bulgaria	3.12	2.42	2.36	2.47	2.82	14.2%
CY Cyprus	0.96	0.78	0.82	0.87	~	~
CZ Czech Republic	12.05	9.48	11.51	12.83	12.88	0.4%
DE Germany	156.71	127.32	136.68	125.43	129.40	3.2%
DK Denmark	12.79	12.19	12.60	12.12	13.20	8.9%
EE Estonia	1.19	1.13	1.59	1.63	1.63	0.2%
ES Spain	143.93	127.65	121.65	116.93	107.81	-7.8%
FI Finland	6.93	6.06	6.69	6.52	6.86	5.3%
FR France	195.70	175.48	188.79	177.73	189.71	6.7%
GB United Kingdom	171.25	164.69	156.56	162.43	164.22	1.1%
GR Greece e	12.00	12.70	12.77	13.75	~	~
HU Hungary	13.66	12.12	11.67	11.12	10.35	-6.9%
IE Ireland	17.26	16.40	17.85	18.37	18.23	-0.7%
IT* Italy e	116.34	105.55	106.11	116.40	111.63	-4.1%
LT Lithuania	1.40	1.22	2.41	3.23	3.27	1.2%
LU Luxembourg	1.36	1.16	1.25	1.15	~	~
LV Latvia	1.68	1.68	2.14	2.42	2.35	-2.7%
MT Malta e	1.03	0.99	0.94	1.00	~	~
NL The Netherlands	23.05	20.63	23.39	23.06	23.51	2.0%
PL Poland	33.40	23.61	32.02	32.65	33.75	3.4%
PT Portugal	17.14	15.75	16.37	16.30	15.98	-2.0%
RO Romania	4.00	2.83	2.78	2.93	3.80	29.7%
SE Sweden	16.61	14.61	15.34	14.94	15.25	2.1%
SI Slovenia	3.00	2.44	2.69	2.40	2.42	0.5%
SK Slovakia	2.90	2.18	3.40	2.77	3.36	21.3%
EU 27 - est. total	1012.9	898.9	931.6	919.8	924.2	0.5%

Country	2004	2005	2006	2007	2008 prov	% change 2008/2007
CH Switzerland	17.20	14.95	16.38	13.79	14.30	3.7%
HR Croatia	2.98	2.17	2.67	2.48	2.26	-9.1%
IS Iceland	1.45	1.40	1.53	1.49	1.50	0.7%
MK "Former Yugoslav Republic of Macedonia"	0.30	0.10	0.10	0.14	~	~
NO Norway	11.97	11.31	12.01	10.82	11.87	9.7%
RU Russian Federation	67.40	83.60	91.80	106.60	123.89	16.2%
TR Turkey	29.70	27.25	34.86	31.16	38.47	23.4%

Source: European Audiovisual Observatory

Notes for Editors:

- Data have been collected with the collaboration of the EFARN (European Film Agency Research Network).
- All 2008 figures are provisional.

The European Audiovisual Observatory, Council of Europe

Set up in December 1992, the European Audiovisual Observatory's mission is to gather and distribute information on the audiovisual industry in Europe. The Observatory is a European public service body comprised of 36 member states and the European Community, represented by the European Commission. It operates within the legal framework of the Council of Europe and works alongside a number of partner and professional organisations from within the industry and with a network of correspondents. In addition to contributions to conferences, other major activities are the publication of a Yearbook, newsletters and reports, the compilation and management of databases and the provision of information through the Observatory's Internet site (<http://www.obs.coe.int>).

Number of feature films produced in the European Union

Estimating the total volume of production of feature films in the European Union remains difficult, chiefly due to the risk of double counting of co-productions and to differing national methodologies for the collection of this data. Included in the total for the European Union are feature-length films intended for theatrical exploitation, excluding minority co-productions, US and foreign production in the United Kingdom. For some countries no separate data are available for feature fiction and feature documentary films.

Market shares (Table 1)

The market shares shown in this figure are based on an analysis of results of films released in 23 countries members of the European Union in 2008. In order to draw up such market shares, a single 'country of origin' must be attributed to each film, an attribution that can prove difficult in the case of international productions. In these cases the Observatory's aim is to attribute a country of origin corresponding to the source of the majority financial input and/or creative control of the project. Since 2005 the Observatory has identified specifically films that have been produced in one or more European countries (or elsewhere) with US investment by using the reference 'inc' (incoming investment) in the country of origin attribution. It should be noted, however, that the availability of further information may occasionally lead to changes in the attribution of country of origin and that the origin of a film as attributed in the LUMIERE database may not always be identical with that indicated by national sources.

The provisional data on market shares in the European Union in 2008 shown in table 1 are based on the data on admissions to individual films as collected in the LUMIERE database on 20th April 2009. At this date the coverage rate of the database for admissions in the 23 European Union countries for which data is available was of around 88%. Due to various gaps in data collection and delivery in various countries, coverage of 100% of admissions is currently unachievable. By the end of 2009, however, the LUMIERE data coverage rate for EU 27 in 2008 can be expected to reach around 89 or 90%. For 2008, LUMIERE has still to include additional data on the following EU countries: Austria, Cyprus, Greece, Ireland, Malta, Lithuania, Luxembourg, Slovakia, Slovenia, Spain and Sweden. For Greece the only figures available are admissions to European non-national films, published each year by the MEDIA Programme, based on the distributors' declarations made in the framework of the automatic distribution support scheme.

European admissions rankings (Tables 2 and 3)

The pan-European film rankings shown in tables 4 and 5 are drawn up using information stored in the LUMIERE database as of 20th April 2009. This database on admissions to films released in Europe is available on-line and free-of-charge, and is the result of collaboration between the European Audiovisual Observatory and various specialised national sources as well as the MEDIA Programme of the European Union. LUMIERE provides country-by-country analysis of admissions for about 16,000 films in distribution in Europe since 1996. 2008 data for 26 European countries is now available, including data for the major European Union markets, as well as data for the North American market. The rankings (Tables 2 and 3) shown in this press release are based on data from all European countries for which results have been received.

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**The European Audiovisual Observatory
will be present at the Marché du Film, Cannes
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This press release is available online: http://www.obs.coe.int/about/oea/pr/mif2009_cinema.html

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More detailed information can be found in *FOCUS 2009. World Film Market Trends*
Compiled by the European Audiovisual Observatory and published by the Marché du Film.

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