Statistics in focus

INDUSTRY, TRADE AND SERVICES

THEME 4 – 8/2003

SECTORIAL PROFILES

Contents

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Cinema statistics

The upward trend in cinema-going came to a halt in 2002

Andreas Dollt

- The EU-15 cinema industry enjoyed strong growth during the 1990s following the opening of multiplex theatres. In 2001, EU-15 cinema admissions increased by 10.2%, while in the USA they grew by 4.7%. Box office receipts rose by 12.9% in the EU-15 and by 9.8% in the USA.

- Early estimates indicate that EU-15 admissions in 2002 stayed at roughly the same level as in 2001. Provisional figures show that admissions in Germany decreased by 8%, in Spain by 4%. On the positive side, attendance rose 13% in the UK and Austria, 9% in Ireland, 8% in Denmark and 6% in Italy. Admissions in France, Luxembourg, the Netherlands and Sweden remained almost unchanged. In 2002, US admissions grew 10.2% over 2001 (the highest increase since 1957).

- A factor affecting cinema attendances is the supply of screens. In 2001, there were over 10,000 cinema theatres hosting nearly 25,000 screens in the EU-15. Between 1990 and 2001, the number of screens rose by 50%. A concentration process resulted in an increasing number of multiplexes at the expense of single-screen cinemas.

- Admissions to cinemas are heavily dependent on the films released. The most popular film in 2001 was *'Harry Potter and the Sorcerer's Stone'* (894 million euro in world box office receipts). Amongst the films released in 2002, *'Harry Potter and the Chamber of Secrets'* leads the list of world box office receipts as of 17 February 2003 with 772 million euro, since the film added 178 million euro in revenues after New Year. Films of US origin are popular in EU-15, accounting for 65% of box office receipts in 2001.

Table 1: Main cinema indicators for EU-15 and United States in 2001

	EU-15	Annual change [%]	USA	Annual change [%]
Admissions [million]	928.1	+10.2	1,487.3	+4.7
Admissions per capita	2.4		5.4	
Box office receipts [million euro]	5,167.4	+12.9	9,392.8	+9.8
Box office receipts per capita [euro]	13.7		33.8	
Number of cinema sites	10,558	+1.1	7,070	-4.7
Cinema sites per 100,000 inhabitants	2.8		2.5	
Number of screens	24,822	+4.2	36,764	-1.7
Screens per cinema	2.4		5.2	
Screens per 100,000 inhabitants	6.6		13.2	
Number of long length films produced	625	+3.5	739	-3.0

US data source: MPAA
US growth of box office receipts measured in USD

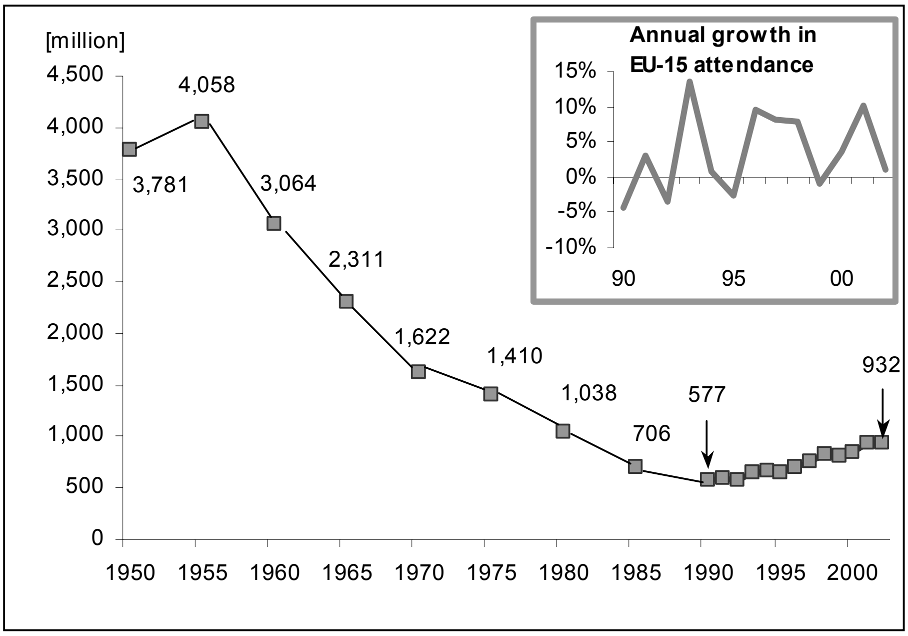
Source: Eurostat unless otherwise mentioned

EU cinema admissions grew significantly during the 1990s

After a steady decline in cinema admissions since the 1950s, Europe recorded a recovery in cinema performances in the 1990s, reinforced by the construction of modern multiplex cinemas. From 1990 to 2002, cinema admissions in the EU-15 rose by 62%, although annual growth rates vary (from -4% to +14%). The negative growth in 1999 was largely explained by the success of *'Titanic'* the previous year, which accounted for around 10% of the ticket sales that year.

The number of cinema-goers in 2001 increased in all Member States, except Finland (-8%) and Belgium (-2%). The growth in admissions in 2001 was most significant in Germany (17%), France (12%) and Denmark (12%), followed by the Netherlands (11%) and the UK (9%). In the US the admissions increased in 2001 from 1,421 million to 1,487 million (+4.7% compared to 2000).

Figure 1: Number of admissions (cinema tickets sold) in the EU-15, 1950 - 2002



The upward trend in cinema-going in EU-15 came to a halt in 2002. The first half-year showed promising growth, but disappointing levels were reached during the second half in several important countries, according to their monthly data published.

The most successful films released in 2002, as of 17 February 2003, were *'Harry Potter and the Chamber of Secrets'* with worldwide gross box office receipts of 772 million euro, followed by *'Spider-Man'* (752 million euro), *'Lord of the Rings: The Two Towers'* (693 million euro) and *'Star Wars: Episode II - Attack of the Clones'* (603 million euro).

Table 2: EU-15 admissions and box office receipts, 1990 - 2002

	Admissions		Box office	
	Total [million]	Per screen [1000]	Total receipts [million ECU/ EUR]	Per screen [1000 ECU/ EUR]
1990	577	35	2,400	145
1991	594	36	2,608	156
1992	574	35	2,590	157
1993	653	39	2,936	177
1994	658	39	3,043	179
1995	642	35	3,008	166
1996	702	37	3,377	178
1997	760	39	3,798	193
1998	819	40	4,208	203
1999	812	35	4,271	186
2000	842	35	4,577	192
2001	928	37	5,167	208
2002	938p	:	:	:

Admissions in 2002 provisional estimate based on 90% coverage

Table 3: Admissions in 2000, 2001 and 2002, and box office receipts in 2000 and 2001 by country

	Admissions					Box office receipts				
	Total [million]			per capita	by national	Total [million EUR]		per capita	by origin of film c)	
	2000	2001	2002 e)	2001	origin (%)	2000	2001	2001	National (%)	USA (%)
EU-15	842.2	928.1	938.2	2.4	:	4,576.8	5,167.4	13.7	:	65
B	23.5	23.2	:	2.3	3.7	126.3	130.9	12.8	2	72
DK	10.7	11.9	12.9	2.2	19.2	74.4	86.7	16.2	28	59
D	152.5	177.9	163.9	2.2	:	824.5	987.2	12.0	16	79
EL a)	12.7	13.2	:	1.3	:	69.0	73.6	7.0	5	80
E	135.4	146.8	140.7	3.6	9.9	536.3	616.4	15.1	10	82
F	165.5	185.8	185.1	3.1	32.4	891.4	1,013.9	17.2	32	54
IRL	14.9	15.9	17.3	4.2	:	76.2	83.0	21.7	10	:
I	103.4	111.1	: d)	1.8	24.9	544.8	591.6	10.9	25	64
L	1.4	1.4	1.4	3.2	0.5	7.6	8.5	19.3	0	81
NL	21.5	23.9	24.0	1.5	10.3	128.1	149.5	9.4	9	60
A	16.3	17.0	19.2	2.1	:	102.6	119.5	14.7	7	:
P b)	17.8	19.3	:	1.9	:	66.2	76.1	7.4	8	65
FIN	7.1	6.5	:	1.3	14.9	46.6	46.3	8.9	15	75
S	17.0	18.1	18.3	2.0	25.7	135.6	147.0	16.5	22	64
UK	142.5	155.9	176.0	2.6	:	947.2	1,037.2	17.3	12	81
IS	1.6	1.6	:	5.7	10.9	13.7	:	49.0	14	80
N	11.4	12.3	11.9	2.8	6.1	72.6	84.9	19.3	6	65
CH	15.6	17.1	:	2.4	:	138.0	160.6	22.3	4	76
US	1,420.8	1,487.3	1,639.3	5.4	:	8,309.7	9,392.8	33.8	93	:
JP	135.3	163.3	:	1.3	:	1,717.6	1,842.0	14.6	39	53

a) Source: Media Salles
b) BO receipts estimated
c) Latest available year; Source: EAO
d) Admissions 2002: ANICA shows increase of 6%
e) EU-15 2002 admissions estimated based on 90% coverage in 2001 admissions. Preliminary figures. Sources: DK: DFI; D: FFA; E: ICAA F: CNC; IRL & UK: Carlton Screen Advertising; L: Utopolis; NL: NFC; A: FAFÖ; S: SFI; N: Film&Kino; US: MPAA

With 186 million spectators in 2001, France confirmed its position as the most important market in the EU. Other significant Member States were Germany (178 million spectators) and the UK (156 million).

On average, EU inhabitants go to the cinema 2.4 times per year, against 5.4 times for US inhabitants. Iceland is the only country where the annual frequency per capita was higher than in the US (5.7). The EU Member State with the highest frequency was Ireland, with 4.2 annual admissions per capita, followed by Spain (3.6). The lowest frequency was found in Japan, Finland and Greece, where people go to the cinema 1.3 times per year.

Gross box office receipts in the EU-15 in 2001 amounted to 5.2 bn euro. The per capita analysis of the box-office receipts shows that spectators in the EU-15 spend an average of 13.7 euro per year on cinema tickets, while the average US spectator spends nearly three times as much (33.8 euro).

The highest spending within the EU-15 was recorded in Ireland with 21.7 euro per capita, followed by UK with 17.3 euro. In Iceland, the spending per capita was even higher than in the USA (49 euro).

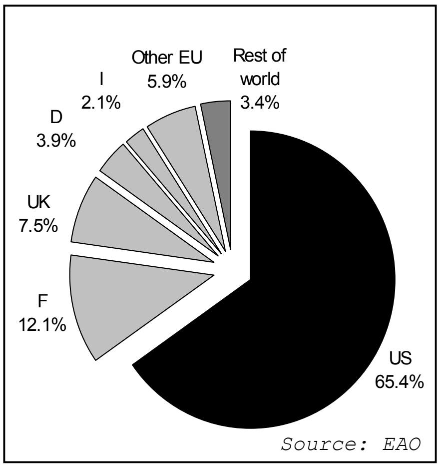
'Harry Potter and the Sorcerer's Stone' was the most successful film in 2001 (43 million admissions in the EU). The total gross box office exceeded 960 million euro worldwide. This film opened in November 2000.

Year 2001 was marked by the success of the national films on the domestic market. In France, Sweden, Italy and Denmark, national films play a relatively important role, accounting for between 19% and 32% of the admissions in 2001.

Number one in cinema admissions for France in 2001 was a national production — *'Amélie Poulain'* — with 8.2 million spectators. In Denmark, Germany and Spain, domestic films were also the most seen (see table 4 below).

In 2001, the market share for European films in the EU was estimated at 32%, according to EAO. American films accounted for 65% of EU admissions.

Figure 2: Breakdown of total EU admissions by origin of film in 2001



The US dominance was most evident in the UK, Luxembourg, Greece and Iceland, where US productions accounted for more than 80% of box office receipts.

The market share for European films outside Europe remains weak. In 2001, only 5% of box office receipts in the United States came from European films (Source: MPAA).

Table 4: Admissions and share of total admissions of most popular films in 2001

	Most seen film Title	Admissions [1000]	Admissions [% of total]	Second Title	Admissions [1000]	Admissions [% of total]	Third Title	Admissions [1000]	Admissions [% of total]	Top 10 Admissions [1000]	Top 10 Admissions [% of total]
B	Harry Potter (US)	1,260	5.4	Pearl Harbor (US)	759	3.3	Bridget Jones's Diary (UK/US)	600	2.6	6,365	27.5
DK	Italiensk for begyndere (DK)	649	5.4	Harry Potter (US)	629	5.3	Anja & Viktor (DK)	572	4.8	3,786	31.8
D	Der Schuh des Manitu (D)	10,527	5.9	Harry Potter (US)	10,416	5.9	What Women Want (US)	6,478	3.6	59,674	33.5
E	Los Otros (E)	6,081	4.2	Misión en Marbella (E)	5,275	3.7	Harry Potter (US)	4,112	2.9	35,983	24.9
F	Amélie Poulain (F/D)	8,191	4.4	La vérité si je mens ! 2 (F)	7,701	4.2	Harry Potter (US)	6,978	3.8	52,449	28.4
I	Harry Potter (US)	3,444	3.2	Cast Away (US)	2,442	2.3	L'ultimo bacio (I)	2,338	2.2	21,408	20.0
NL	Harry Potter (US)	1,620	6.8	Bridget Jones's Diary (UK/US)	1,068	4.5	Pearl Harbor (US)	823	3.4	7,744	32.4
A	Der Schuh des Manitu (D)	1,948	11.5	Harry Potter (US)	814	4.8	What Women Want (US)	740	4.4	6,705	39.4
FIN	Harry Potter (US)	365	5.6	Bridget Jones's Diary (UK/US)	295	4.5	Crouching Tiger Hidden Dragon	197	3.0	1,668	25.7
S	Harry Potter (US)	900	5.0	Lord of the Rings I (US/NZ)	816	4.5	Bridget Jones's Diary (UK/US)	790	4.4	5,789	32.0
UK	Harry Potter (US)	5,359	3.4	Bridget Jones's Diary (UK/US)	4,201	2.7	Lord of the Rings I (US/NZ)	2,910	1.9	27,339	17.5

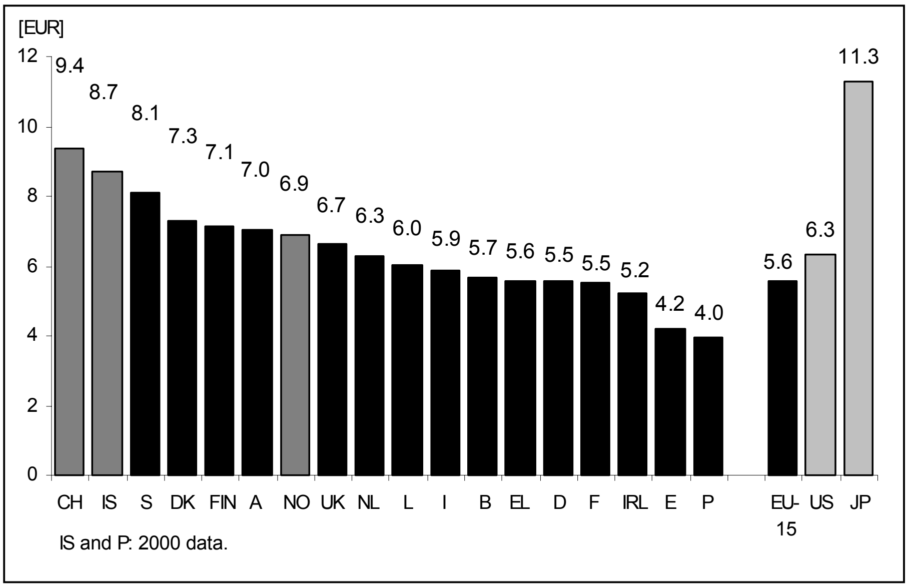
FIN: Top 8 films admissions Data for EL, IRL, L and P not available Source: European Audiovisual Observatory

The average ticket prices in the EU-15 were lower than in the United States: 5.6 euro versus 6.3 euro. In Switzerland and Iceland the average ticket price was higher than in any EU country: 9.4 euro and 8.7 euro, respectively.

In the EU, the highest average ticket prices were recorded in Sweden — 8.1 euro per admission — followed by Denmark, at 7.3 euro in 2001.

The lowest average ticket prices were recorded in Portugal and Spain with less than 5 euro.

Figure 3: Average ticket price in 2001



Half as many screens per cinema in the EU-15 as in the United States

Cinema exhibition started more than 100 years ago. The Lumière brothers opened the first cinema in Paris in 1895. The number of cinema theatres reached its maximum in Europe in the 1920s, starting to decline thereafter. In the nineties the decline came to a halt and with the growth of multiplex cinemas the number of screens even increased considerably.

Today, there are over ten thousand cinema sites in the EU-15, about 3,500 more than in the United States. Looking at the number of cinema sites per 100,000 inhabitants, the density in the United States is lower than in the EU-15, with 2.5 compared to 2.8. Sweden and Iceland recorded the highest density with over 9 theatres per 100,000 inhabitants, while in the UK, the Netherlands and Belgium the density was the lowest, between 1.2 and 1.3.

In the nineties, there was a tendency for traditional cinemas to close down, whilst multiplex sites (cinemas with 8 or more screens) continued to grow. In the EU-15, over 8,300 new film screens were constructed in the 1990 to 2001 period. In 2001, 19% of the cinemas in the EU-15 were multiplexes. The EU-15 had a net gain of 114 cinemas and 1,004 screens in 2001 compared with the year before. This net change corresponds to an average 9 new screens per new cinema.

After the new Millennium, the strong growth in the number of screens came to a halt in the USA. In 2001, the number of screens in USA even decreased. The USA had a net loss of 351 cinemas and 632 screens in 2001. This reflects the US industry's excess screen capacity, in which older multiplexes or less competitively positioned theatres are being rendered obsolete by newer megaplexes with 16 or more screens.

In the EU-15 there was an average of 2.4 screens per cinema, about 25 thousand screens in total, while in the United States there were 5.2 screens per cinema, with nearly 37 thousand screens in 2001. In the UK, a quarter of the cinemas are multiplexes, comprising of eight or more screens. As figure 5 shows, the number of screens situated in multiplexes, as a percentage of the total number of screens increased substantially in the UK, which now has the highest rate with 56% in 2001. The increase of multiplex screens was even more significant in Spain and Austria. In Sweden,

Figure 4: Annual growth in number of screens in EU-15 and United States

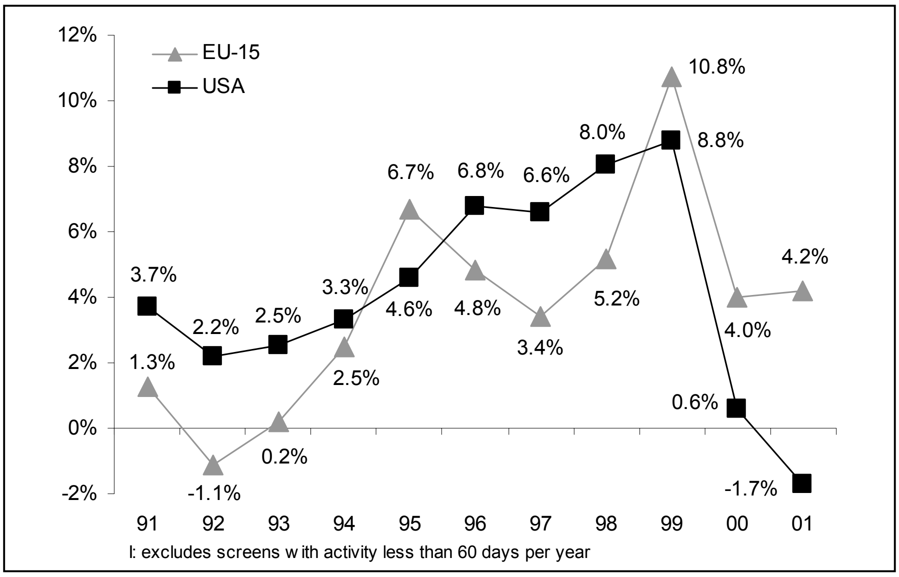


Table 5: Cinema sites, screens and seats in 2001

	Number of cinema sites	Number of screens	Number of enterprises (NACE 92.13)
EU-15	10,552	24,822	:
B	123 a)	458 a)	155
DK	165	361	147 b)
D	1,815	4,792	1,661 b)
EL	350 a)	400 a)	:
E	1,254	3,770	738 b)
F	2,182	5,236	793 b)
IRL	70 a)	322 a)	:
I	2,243	3,200	1,097 b)
L	11	25	10
NL	173	558	:
A	206 a)	587 a)	:
P	238	455	:
FIN	219	339	75 b)
S	811	1,155	181
UK	692	3,164	214 b)
IS	25 b)	47 b)	:
N	244 a)	394 a)	:
CH	334 a)	508 a)	:
US	7,070 c)	36,764 c)	:
JP	:	2,585	:

a) Data source Media Salles
b) 2000 data
c) Data source MPAA and US Census Bureau

Figure 5: Screens in multiplexes (% of total number of screens)

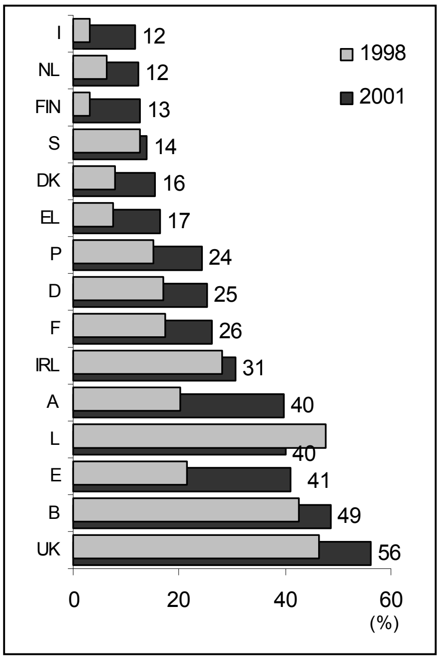
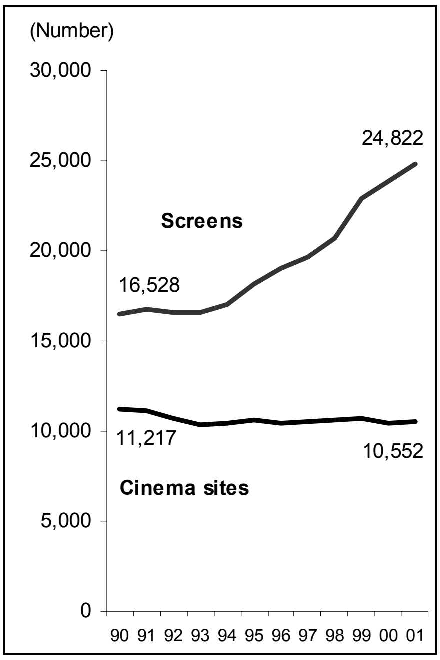


Figure 6: Screens and cinema sites in the EU-15, 1990 - 2001



Italy and Finland the single-screens dominated in over 80% of the cinemas.

According to Media Salles, there were 50 megaplexes (with 16 or more screens) in the EU-15 as of 1 January 2002. 13 megaplexes were located in Spain, 11 in France and 10 in the UK. The total number of screens in the megaplexes was 963, which corresponds to 3.9% of all screens in the EU-15. The cinema with highest number of screens is located in the UK (with 30 screens) and the one with the highest number of seats can be found in Spain (9,200 seats).

The EU-15 has fewer screens per head than the United States. In 2001, there were 6.6 cinema screens for every 100,000 EU inhabitants, as against 13.2 in the USA.

There are over 600 companies competing in the US theatrical exhibition industry (source: AMC). The nine largest exhibitors (in terms of number of screens) operated approximately 54% of the screens in 2001. Acquisitions in the last few years has led to fewer major actors controlling larger market shares. The largest exhibitor in the USA runs nearly 6,000 screens.

The EU-15 market has also been affected by acquisitions. UGC and CineStar are two examples of exhibitors that grew substantially over the last few years due to acquisitions. There are several large differences between the two markets: While there is a high concentration among the top 9 exhibitors in the US, the EU-15 market is fragmented with over 5,000 enterprises. The top 9 largest exhibitors in EU-15 only control 17% of the screens. Many actors operate in just one country with just one cinema theatre. But as table 6 shows, a few chains are present in several EU Member States, operating hundreds of screens.

Table 6: Nine largest exhibitors in EU-15 in 2002 and the USA in 2001 by number of screens

Largest exhibitors in EU-15	Countries of operation	Number of screens	Market share % total screens
UGC	F, UK, IRL, E, B, I	850	3.4
Odeon	UK	612	2.5
Warner	UK, E, P, I	542	2.2
Gaumont	B, F	500	2.0
CineStar	D	419	1.7
CinemaxX	D	356	1.4
UCI	UK	355	1.4
Cine UK	UK	323	1.3
Kinepolis	B, F, I, E	274	1.1
Total nine largest		**4,231**	**17.0**
Total screens EU-15 a)		**24,822**	

Largest exhibitors in USA	Number of screens	Market share % total screens
Regal	5,886	16.0
AMC	3,310	9.0
Carmike	2,431	6.6
Loews	2,323	6.3
Cinemark	2,223	6.0
National Amusements	1,081	2.9
Hoyts	926	2.5
Famous Players	880	2.4
Century	723	2.0
Total nine largest	**19,783**	**53.8**
Total screens USA	**36,764**	

a) 2001 data

625 new full length films were produced in the EU-15 in 2001

In the period from 1995 to 2001, the volume of feature film production in the EU-15 saw an increase of 41%. The increase was especially pronounced between 1995 and 1996 (28%). Between 1996 and 2001, total film production in the EU-15 remained relatively stable (+10%). 625 new full length films were produced in 2001 in the EU-15, 21 more than in 2000. Measured in number of full length films produced in the EU-15, output is smaller than the film production of the United States (739 films in 2001).

The average cost for a British film in 1999 was 7.7 million euro, while the average German film cost 4.8 million euro (source: EAO) and the average French film cost was lower: 1.9 million euro (source: CNC). The average cost for an American film in 1999 was 12 million euro (Source: MPAA).

There is no equivalent in Europe of the "studio" structure of the United States industry. Producers are not organised in any commercial structure which could properly be called a studio. The majority of European productions are made by small producers in a highly fragmented industry where 80% of companies produce no more than one film a year. Even though the structure is different there are indeed some important film studios in the EU, like the Cinecittà near Rome, Pinewood Studios near London, Bavaria Film Studios in Geiselgasteig, near Munich, Studio Babelsberg in Potsdam, near Berlin and Studios de Boulogne in Paris.

France was the Member State with the highest number of cinematographic full length films produced: 204 in 2001 (33 films more than in 2000), of which 126 were national productions. France was also active with international co-production, as they made 78 such films (+18 films). Production investment increased to 905 million euro in 2001 (source: CNC). StudioCanal, which is an important film producer; made 122 films in 2001 for a total investment cost of 153 million euro or 1.25 million euro per film. The most expensive film from StudioCanal was *'Le Pacte des Loups'*, which cost 23 million euro to produce.

Spain was second with 106 films produced, of which 66 were 100% national production.

Italy was third with 103 films produced in 2001, the same number as in 2000. The production of national films decreased from 86 in 2000 to 68 in 2001.

US domestic film production has accounted for between 94% and 99% of all the US films produced in the late 1990s (source: MPAA). The US industry, especially the big film studios, is highly international and operates in the global market, but international co-productions rarely occur.

Figure 7: Cinematographic full-length films produced

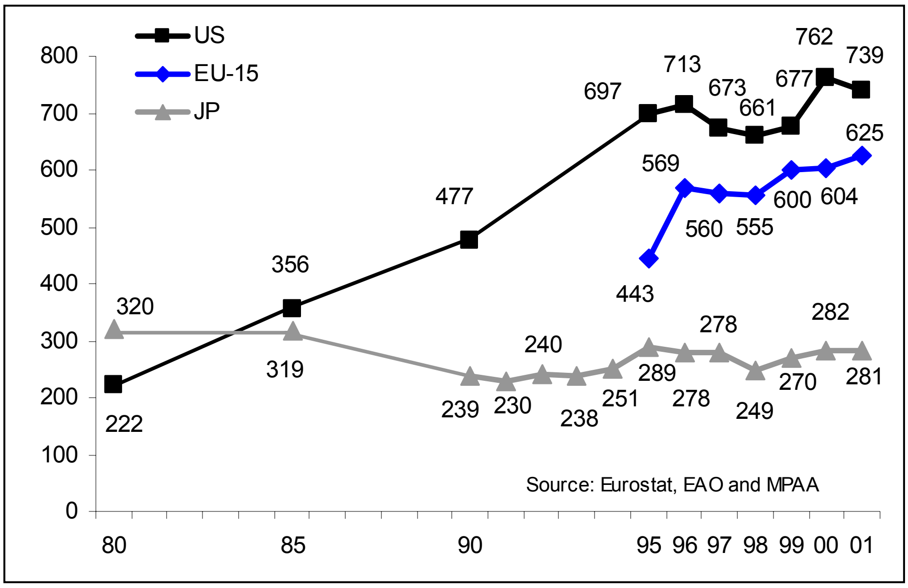


Table 7: Number of full length films produced in 2001

	Cinematographic long length films produced	of which 100% national production
EU-15 ac)	625	
B c)	12	
DK	18	12
D	83	57
EL	25	16
E	106	66
F	204	126
IRL c)	8	
I	103	68
L	16	0
NL	32	28
A c)	13	
P	17	4
FIN	12	10
S	25	16
UK	83	52
IS c)	6	1
N bc)	16	11
CH bc)	31	19
US d)	739	
Japan bc)	270	

a) Double counting eliminated, when co-production with several EU countries
b) Films produced in 1999
c) source: EAO
d) US data, source: MPAA

➢ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

This Statistics in Focus (SiF) is based on annual audiovisual services statistics in the **AUVIS** domain from Eurostat's reference database New Cronos, Theme 4 Industry, Trade and Services. Some additional data were added using European Audiovisual Observatory, Media Salles and the Motion Picture Association of America as a source.

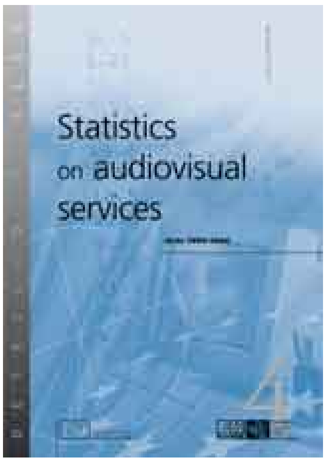
AMC	American Multi-Cinema Inc, United States
CNC	Centre National de la Cinématographie, France
EAO	European Audiovisual Observatory.
MPAA	Motion Picture Association of America.
Number of admissions	Number of tickets sold.
Box office receipts	the turnover from tickets sold, including taxes and other duties, excluding concessions sales (popcorn, soft drinks, candy and other products).
One screen	One cinema hall.
Multiplex	A cinema with 8 or more screens.
Megaplex	A cinema with 16 or more screens.
Cinema site	A cinema theatre with one or several screens.
Long length film	Minimum 60 minutes long cinema film.
NACE 92.13 (table 5)	Motion picture projection. This class includes: motion picture or video projection in cinemas, in the open air or in other projection facilities. This class also includes activities of cine-clubs. NACE is the statistical classification of economic activities in the European Community.

Symbols

:	Data not available.
p	Provisional data. Admissions for 2002 are estimated. Based on data available for both 2001 and 2002, two sums are made. The growth is then projected on the 2001 EU-15.

For more information: Statistics on audiovisual services (paper or PDF, EN only)

This publication aims to provide comprehensive statistical information on the audiovisual sector in the EU, EFTA and some important non-European OECD countries. The publication includes 150 statistical tables covering mostly the period 1980- 2000, and 80 graphs.



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9. Video games market
Other general information
Appendix: Definitions

New version of this publication will be available in summer 2003 under the title "Cinema, TV and Radio in the EU".

Further information:

➢ Reference publications

Title Statistics on audiovisual services, data 1980-2000
Catalogue No KS-BT-02-001-EN-C Price EUR 17.5

➢ Databases

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