Cinema exhibition and distribution in Europe

Second edition

screendigest

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Overview

During the 1990s, the European cinema exhibition and distribution sectors have undergone radical changes, moving from being stagnant markets to dynamic and potentially lucrative industrial sectors. The arrival of the multiplex cinema in much of Europe was the catalyst for a return to cinemas for audiences everywhere, which in turn sparked the interest of theatrical (and other) distributors.

Most of Europe now has a healthy competitive film environment, although the dominance of the US majors in many markets does squeeze out local distributors to some extent. However, local distributors are fighting back and have latched on to the globalisation of films and their financing structures to acquire and distribute competitive product for an international audience.

This report takes a detailed look at the structures and players in the European cinema exhibition and theatrical distribution sectors, together with market values and forecasts. The data provided has been put together in such a way as to make it as comparable as possible given the heterogeneity of data in Europe.

Report contents

- **Chapter 1** is given over to Europe-wide basic data and analyses of this data. The data is for the period 1990 to 2000, and forecasts are given from 2001 to 2005.

- **Chapter 2** takes a look at the pan-European nature of European cinema exhibition, screen advertising, e-cinema and distribution, detailing European-wide circuits and strategies for all sectors and breaking down the presence of the US majors in the 19 European territories profiled.

- Following these two largely data-driven chapters come the territory profiles (**Chapter 3**). These profiles concentrate on breaking down the structures and players of the European cinema exhibition, distribution and screen advertising sectors, providing all the important data and analyses for these sectors.

Acknowledgements

During the course of this research, a great many people, companies and trade associations and institutions were contacted and the large majority were happy to speak to us. Whilst there are too many people to mention individually, we would like to thank them all for their time and their contribution to this report.

The key sources for basic data by territory are as follows. We would like to thank them.

Austria	● Austrian Film Commission ● FAFO
Belgium	● Ministry of Culture ● Moniteur du Film
Czech Republic	● Ministry of Culture ● Czech Distributors Association
Denmark	● Danish Film Institute
Finland	● Finnish Film Foundation
France	● CNC ● Ecran Total
Germany	● SPIO ● Filmförderungsanstalt (FFA) ● EDI
Greece	● Greek Film Centre
Hungary	● Ministry of Culture and Education ● Hungarian Film Distributors' Association
Ireland	● Irish Film Institute ● Irish Film Board ● UIP
Italy	● ANICA ● Cinetel
Netherlands	● Dutch Federation for Cinematography
Norway	● Norwegian Film Institute, Film & Kino ● Norwegian Film Fund
Poland	● State Committee for Cinematography ● Ministry of Culture, Film Department
Portugal	● INE (Statistics Portugal) ● IPAMA ● Obercom
Spain	● AIMC ● ICAA
Sweden	● Swedish Film Institute
Switzerland	● Federal Office of Culture ● ProCinema ● Swiss Film Centre
UK	● Cinema Advertising Association ● Cinema Exhibitors Association ● EDI ● UK Film Council
Europe	● European Audiovisual Observatory ● The Economist

Some companies and associations did not manage to speak to us. We hope that this will change next year, when they have seen the results of this research.

Sources and methodology

Sources

In the vast majority of cases, the data included in this report comes from what are considered official sources. These include government agencies, national film bodies, exhibitor and distributor associations, and company spokespeople (see Acknowledgements, page vi).

In certain cases, there is no available data and, here, we have formed estimates based on market information, trends and conversations with local players.

The way we collected and compiled the data for this report can be stratified according to the level at which the data was collected.

■ **Level 1**
All the government bodies and film agencies of the territories profiled were contacted for basic and raw data.

■ **Level 2**
We contacted exhibitor and distributor trade associations and lobbying groups for extra and more specialised information on their particular spheres of activity. This includes commissioned reports, conversations and published data.

■ **Level 3**
We contacted the majority of companies mentioned in the report for their own data and market impressions. This includes face-to-face conversations, telephone calls, e-mails, faxes, annual reports, websites and brochures.

■ **Level 4**
We performed an extensive press and publication search to identify other sources of information on the sectors profiled in this report.

Methodological notes

Catchment areas
See explanation on page 3: 2

Currency
Historical data is converted to Euros and US dollars at current average annual exchange rates. Forecasts are made at constant 2000 exchange rates.

Forecasts
Forecast data for screens is constructed in the following way:

■ The screen total is divided into multiplex and non-multiplex screens. For multiplex screens, the data is as far as possible based on actual forecasts screen and site builds over the next five years. The non-multiplex screen forecasts are based on an average of the growth rates over the past 10 years.

Definition of a multiplex
Multiplexes can be defined in various ways, and are done so across Europe. Screen Digest defines a multiplex as follows: in order to provide a basis for comparison, we define a multiplex to be a cinema complex—either new or a conversion—with five screens or over.

Czech Republic
Screen count includes 150 open-air theatres

Greece
Include summer and winter cinemas

Italy
The source for data changed in 2000, the producer trade body becoming the new source for statistics. This led to a change in methodology between box office data used in 1999 and 2000, and explains the dramatic decline in the latter.

Italy
Cinema screens refer to those screens open for more than 60 days a year

Luxembourg
Because of insufficient data, Luxembourg is not represented nor included in European Union totals.

Norway
Rural cinemas not included in screen counts

Poland
There was a currency devaluation in 1994, leading to dramatic changes in local currency data

International country codes used in this report

AT	Austria	HU	Hungary
AU	Australia	IL	Israel
BE	Belgium	IT	Italy
CH	Switzerland	LU	Luxembourg
CZ	Czech Republic	NL	Netherlands
DE	Germany	NO	Norway
DK	Denmark	PL	Poland
ES	Spain	PT	Portugal
EU	European Union	SE	Sweden
FI	Finland	UK	United Kingdom
FR	France	US	United States of America
GR	Greece	ZA	South Africa

3 Country profiles

Territories profiled in this section

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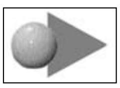
Each profile is divided into the following sections

Exhibition

Distribution



Forecasts

Decade of change graph

This graph shows the growth rate over a decade of admissions and screens. The 'Strength' figure in the top right hand corner of the graphic is a measure of how much admissions growth outstripped screen growth during the decade. A figure of more than 1 means that admissions grew faster than screen counts. However, a figure of between 0 and 1 means that screen growth was faster than admissions growth.

NA means that the growth was negative (either for screens or for admissions) and a comparison was not possible.

Catchment areas

The 'Catchment Area' section is an evaluation of how many people need to be within a cinema complex's reach for it to perform at the industry average. It is not simply a calculation of admissions needed for a complex of a certain size.

The figure has been calculated in the following way.

- Take the number of admissions per screen per year in latest full year (2000).
- Multiply the number of screens in the complex by the admissions per screen per year figure. This gives the average admissions per year for whole complex.
- Divide the resulting figure by the figure for admissions per head per year at latest full year (2000). The resulting figure is designed to show how many people are needed to maintain the sector average according to the number of screens per complex.

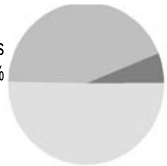
Belgium

Cinema in 2002 at a glance

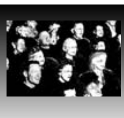
screens	476 (+3.9%)
admissions	22,800 (-2.9%)
box office revenue	€123m (+0.8%)
average ticket price	€5.40 (+3.8%)
total feature film releases	573
domestic films released	34
domestic films' share of releases	5.9%
domestic films' share of box office	2.5%
US films market share	61.0%

percentage changes are from 2001 to 2002

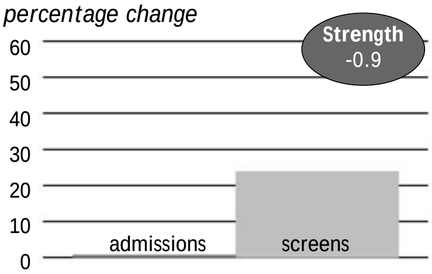
Market split 2002



Exhibition



Decade of change 2002 v 1992



Strength: ratio by which a gain in admissions exceeds an increase in the number of screens

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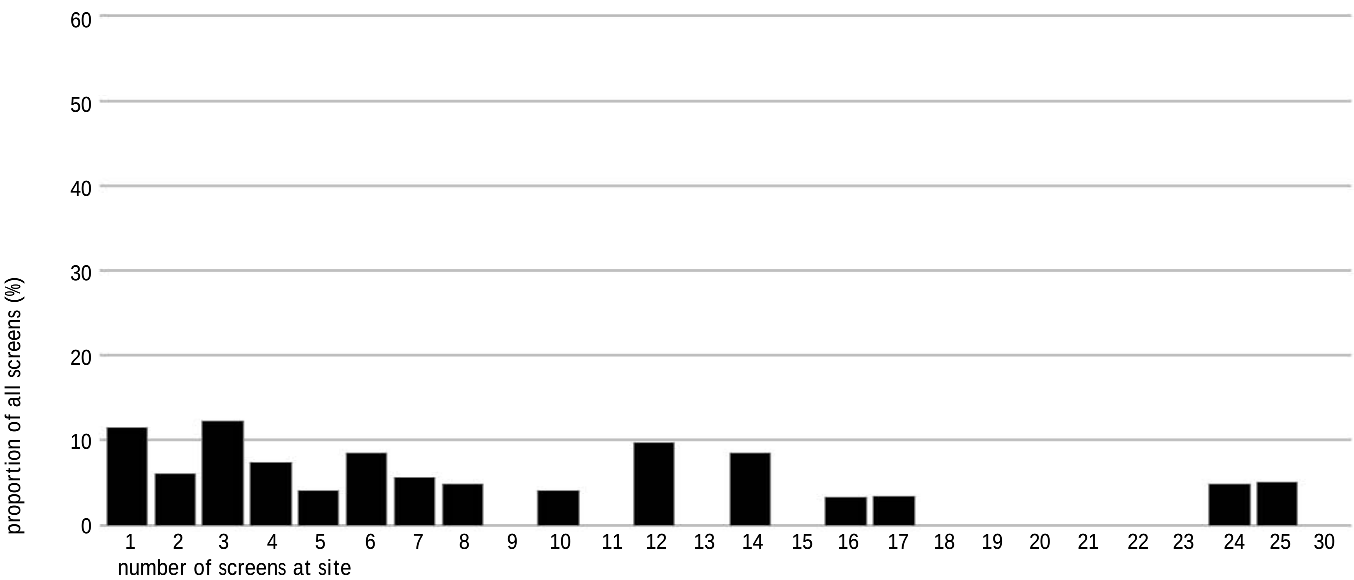
Belgium: breakdown of screens by size of complex



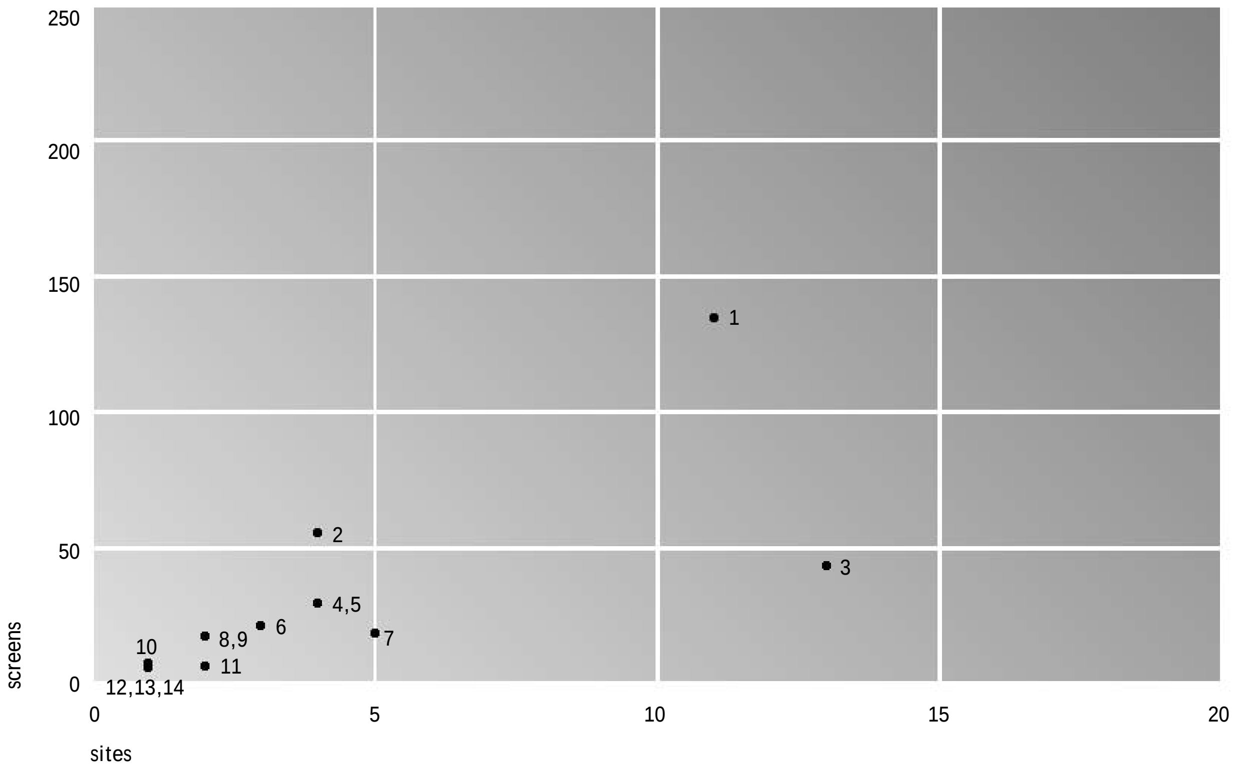
Source: Screen Digest

Belgium: leading exhibition circuits

ranked by number of screens

		owner(s)	*sites*	*screens*	*share of screens*
1	Kinepolis	Kinepolis	11	135	28.4
2	UGC Cine Cité	UGC (FR)	4	56	11.8
3	Hanne-Hemelaer	Hanne Family/Hemelaer	13	44	9.2
4	Cinecity	Vangenechten	4	30	6.3
5	Le circuit Simon (Utopia Belgium)	Kinepolis 12.5%/Utopia 87.5%	4	30	6.3
6	Le circuit Senden		3	22	4.6
7	Studio FilmTheaters	Rastelli family (now PLC)	5	19	4.0
8	Carpentier	Carpentier Family 80%/Kinepolis 20%	2	18	3.8
9	Van Schel		2	18	3.8
10	Vanhakendover		1	8	1.7
11	Le circuit Staels		2	7	1.5
12	Le circuit Piret		1	7	1.5
13	Le circuit Pescatore		1	7	1.5
14	Le circuit Dujardin		1	6	1.3

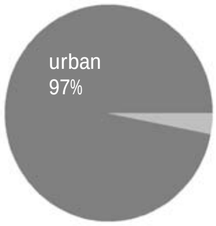
Belgium: cinema sites and screens of leading exhibitors



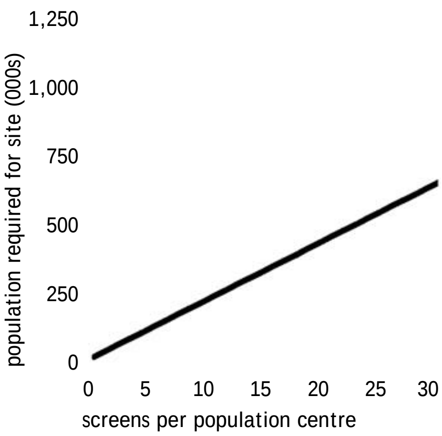
numbers refer to the ranking table above

Source: Screen Digest

Urban:rural population split



Belgium: catchment area demographics



Calculations based on	
annual admissions per screen	47,899
annual visits per head of population	2.21

catchment: required population for number of screens at location

screens	*catchment*	*screens*	*catchment*
1	20,941	16	335,059
2	41,882	17	356,001
3	62,824	18	376,942
4	83,765	19	397,883
5	104,706	20	418,824
6	125,647	21	439,766
7	146,589	22	460,707
8	167,530	23	481,648
9	188,471	24	502,589
10	209,412	25	523,530
11	230,353	26	544,472
12	251,295	27	565,413
13	272,236	28	586,354
14	293,177	29	607,295
15	314,118	30	628,237

Source: Screen Digest

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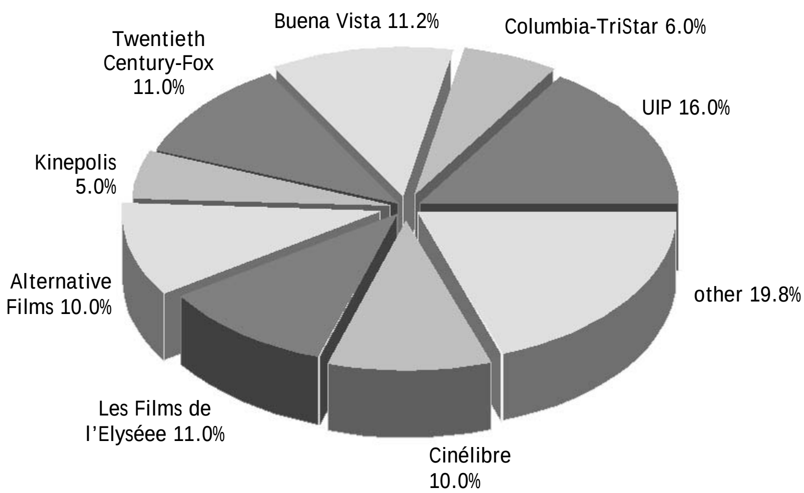
Distribution

Belgium: distributor market shares 2002



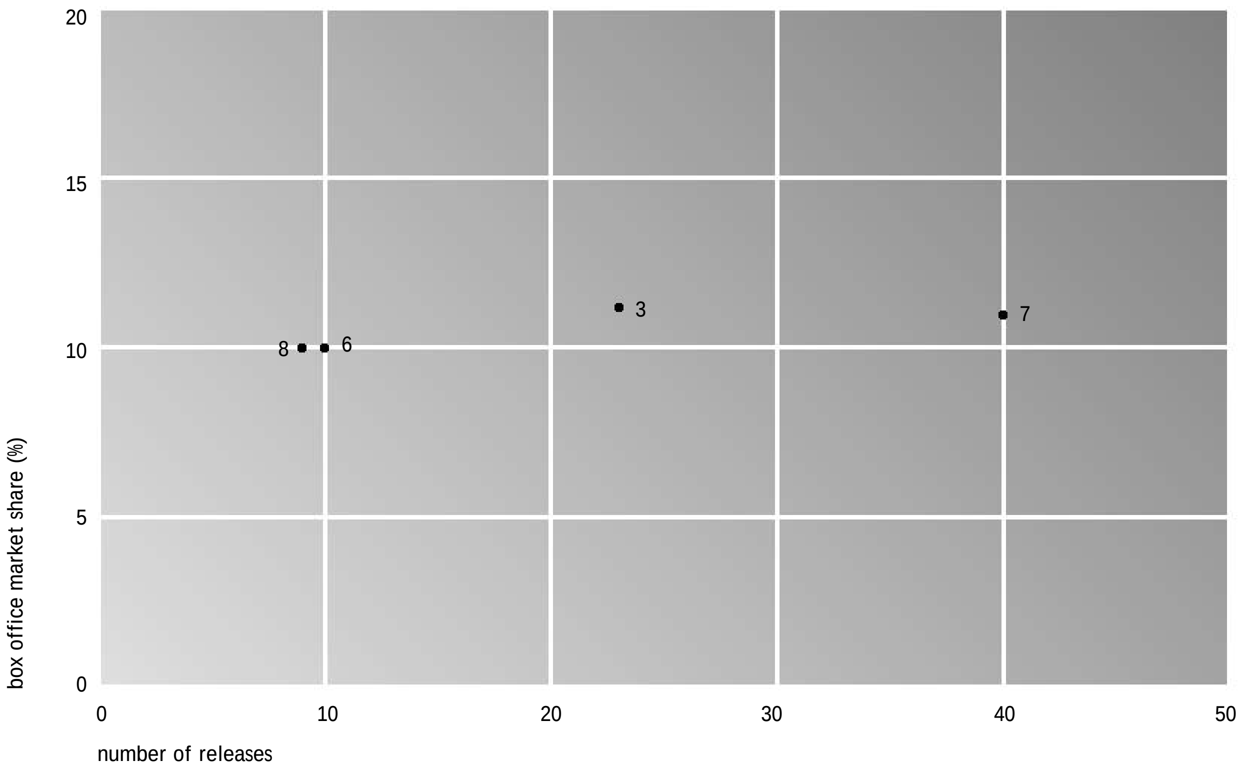
Source: Screen Digest

Belgium: distributor market shares 1997-2001

		box officemarket share			
		1997	*1998*	*1999*	*2000/01*
		%	%	%	%
1	UIP	15.2	21.1	17.5	16.0
2	Columbia TriStar	24.4	32.9	9.9	6.0
3	Buena Vista	18.2	15.4	9.7	11.2
4	Twentieth Century-Fox	0.0	0.0	9.5	11.0
5	Kinepolis Film Distribution	9.0	9.2	9.1	5.0
6	Alternative Films	0.0	0.8	4.1	10.0
7	Les Films de l'Elysée	2.6	1.5	1.9	11.0
8	Cinelibre	0.6	0.6	0.6	10.0
	Other	17.6	1.2	10.6	19.8
	Warner Bros	9.1	10.4	15.3	–
	Belga Films	1.8	3.4	4.8	–
	Paradiso	0.3	0.3	3.9	–
	Cineart	1.1	3.1	3.0	–

Source: *Le Moniteur du Film*

Belgium: releases and box office shares of leading distributors 2000/01



Numbers relate to rankings in table above

Source: Screen Digest

Belgium: leading theatrical distributors

distributor	*ownership*	*market share latest data %*	*annual releases latest data*	*market share per release %*	*key content suppliers*
Alternative Films	Alternative Films	10	10	1.00	Local and European
Belga Films	RTL-Tvi (50%)/Belga	:	11	:	Local and international indie
Buena Vista International	Walt Disney	11.2	23	0.49	Walt Disney Studios, Spyglass (local)
Cinelibre		10	9	1.11	Local and European
Columbia TriStar	Sony Pictures	6		:	Columbia Tristar
Twentieth Century-Fox	Twentieth Century-Fox	11	:	:	Twentieth Century-Fox, MGM
Les Films de l'Elysée	Les Films de l'Elysee	11	40	0.28	TF1, UGC International , Lions Gate
Independent Films	Independent Films Distribuie	:	:	:	
Kinepolis Films Distrib'n	Kinepolis	5	:	:	European and international
UIP	JV Paramount/Universal	16	:	:	Paramount, Universal
Warner Bros	Warner Bros	16	:	:	Warner Bros

Source: Screen Digest

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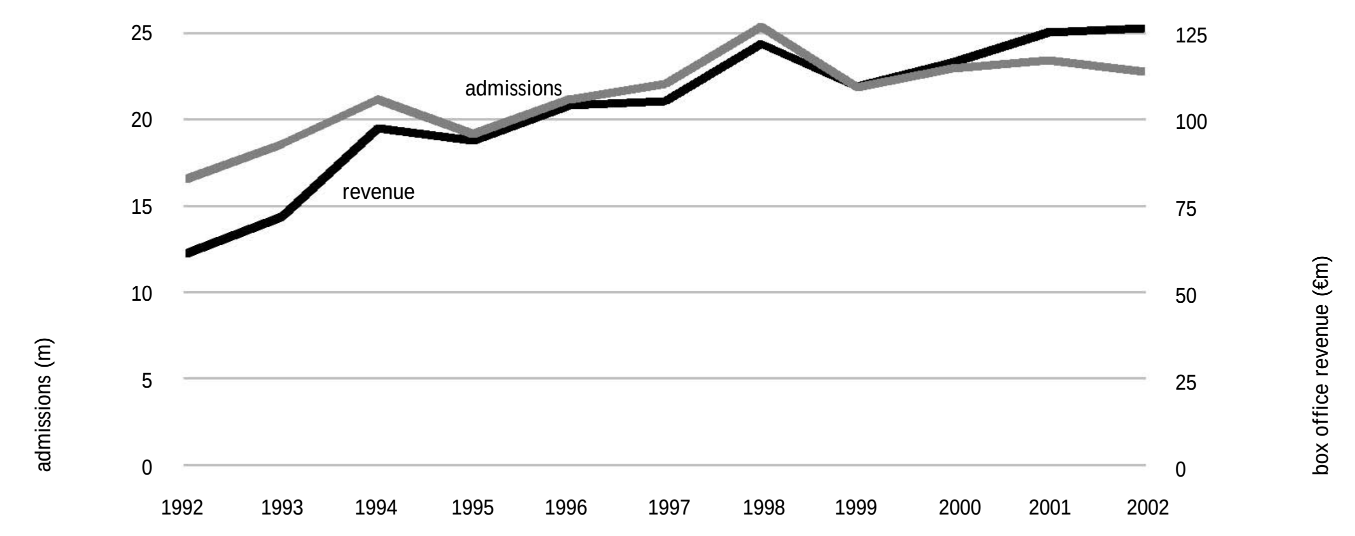
Belgium: cinema exhibition and distribution 1992-2002

		1992	*1993*	*1994*	*1995*	*1996*	*1997*	*1998*	*1999*	*2000*	*2001*	*2002*
population	000s	10,068	10,100	10,131	10,143	10,170	10,192	10,214	10,239	10,263	10,264	10,318
Admissions and box office												
admissions	000s	16,600	18,600	21,200	19,200	21,200	22,100	25,400	21,900	23,550	23,477	22,800
gross box office revenue	Bfr m	2,483	2,837	3,763	3,526	3,988	4,157	4,823	4,305	4,577	:	:
gross box office revenue	€m	60	70	95	91	101	103	119	107	113	122	123
gross box office revenue	$m	82	82	113	120	129	116	133	114	105	109	116
admissions per head		1.65	1.84	2.09	1.89	2.08	2.17	2.49	2.14	2.29	2.29	2.21
box office per head	Bfr	246.57	280.84	371.43	347.63	392.13	407.89	472.22	420.43	445.97	:	:
box office per head	€	5.93	6.94	9.37	9.02	9.98	10.06	11.63	10.42	11.06	11.89	11.92
box office per head	$	8.16	8.12	11.11	11.80	12.66	11.39	13.01	11.10	10.21	10.64	11.27
admissions change	%	0.6	12.0	14.0	-9.4	10.4	4.2	14.9	-13.8	7.5	-0.3	-2.9
box office growth*	%	-9.6	17.4	35.4	-3.6	11.0	1.1	15.8	-10.1	6.3	7.5	0.8
screen change	%	-1.8	6.8	2.9	0.5	4.0	8.0	4.8	-0.6	-1.4	-6.1	3.9
average ticket price	Bfr	149.55	152.50	177.50	183.65	188.11	188.11	189.89	196.57	194.35	:	:
average ticket price	€	3.60	3.77	4.48	4.76	4.79	4.64	4.67	4.87	4.82	5.20	5.40
average ticket price	$	4.95	4.41	5.31	6.23	6.07	5.25	5.23	5.19	4.45	4.65	5.10
average ticket price growth*	%	-10.2	4.8	18.8	6.4	0.5	-3.0	0.7	4.2	-1.1	7.9	3.8
Cinema provision												
cinema sites		142	146	144	141	140	141	145	140	135	133	132
cinema screens		383	409	421	423	440	475	498	495	488	492	512
multiplex sites		13	14	13	13	16	19	21	22	23	28	34
multiplex screens		112	148	140	140	181	218	241	252	261	290	329
% multiplex sites	%	9.2	9.6	9.0	9.2	11.4	13.5	14.5	15.7	17.0	21.1	25.8
% multiplex screens	%	29.2	36.2	33.3	33.1	41.1	45.9	48.4	50.9	53.5	58.9	64.3
average screens per site		2.70	2.80	2.92	3.00	3.14	3.37	3.43	3.54	3.61	3.70	3.88
number of seats		89,942	100,300	96,815	100,508	105,600	114,000	120,516	120,000	119,000	106,197	104,864
average seats per screen		235	245	230	238	240	240	242	242	244	216	232
average revenue per screen	Bfr 000	6,482	6,935	8,938	8,336	9,064	8,752	9,685	8,697	9,379	:	:
average revenue per screen	€	155,848	171,361	225,392	216,220	230,635	215,922	238,434	215,582	232,502	247,967	240,234
average revenue per screen	$	214,610	200,550	267,404	282,834	292,659	244,421	266,740	229,660	214,646	221,980	227,118
average admissions/screen		43,342	45,477	50,356	45,390	48,182	46,526	51,004	44,242	48,258	47,717	44,531
screens per million people		38.0	40.5	41.6	41.7	43.3	46.6	48.8	48.3	47.5	47.9	49.6

*based on local currency
Nb Change in screen counting methodology from 2000
Source: Screen Digest (including basic data from *Annuaire de l'audiovisuel*, *Moniteur du Film*)

Belgium: cinema admissions and box office revenue



Source: Screen Digest

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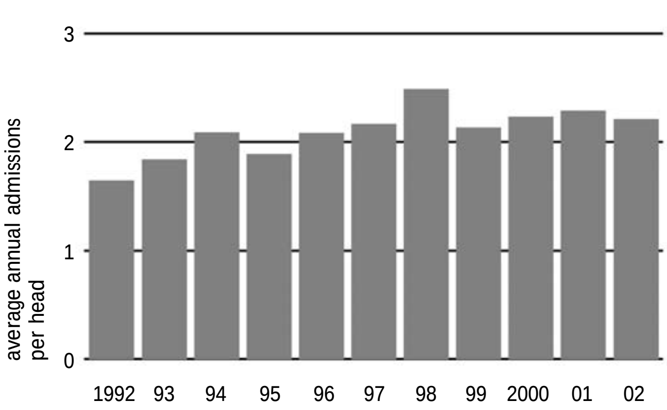
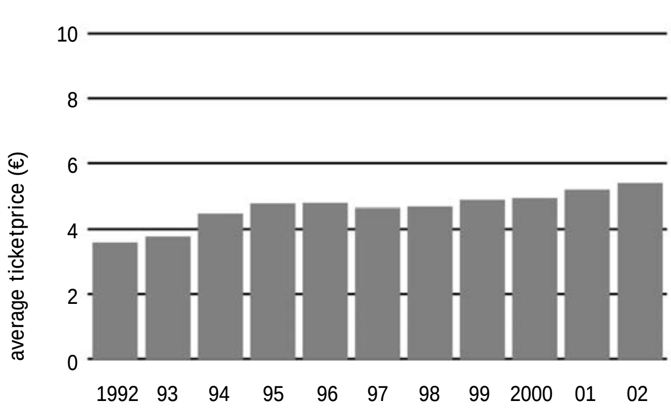
Belgium: average annual admissions per head



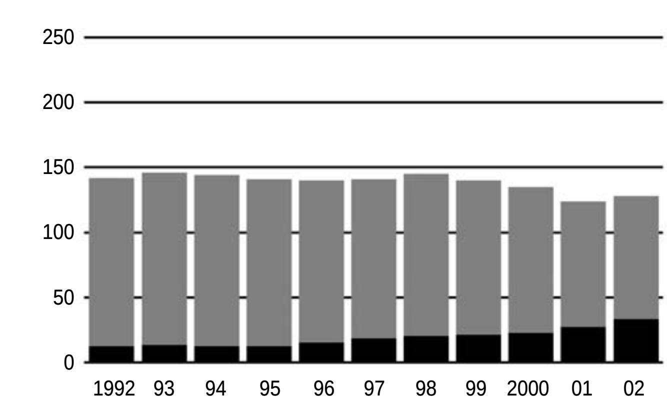
Source: Screen Digest

Belgium: average ticket price



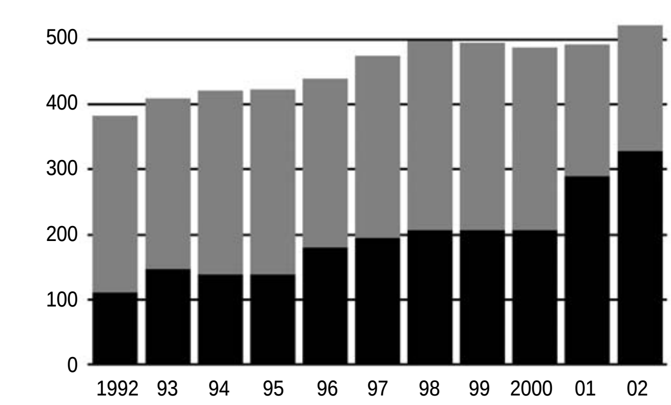
Source: Screen Digest

Belgium: cinema sites



Source: Screen Digest

Belgium: cinema screens



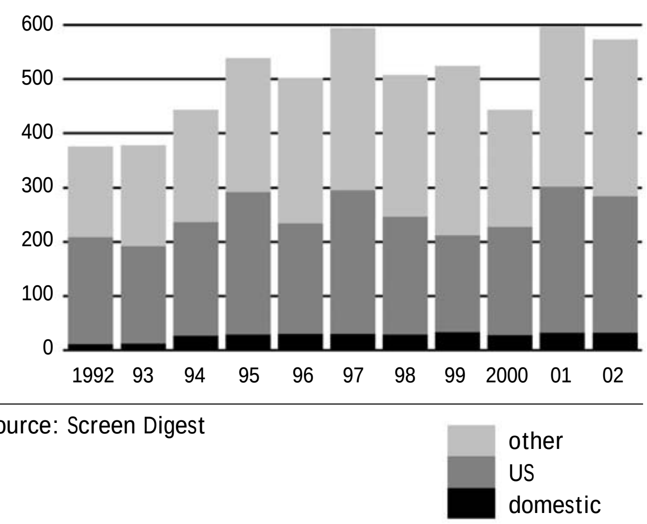
Source: Screen Digest

Belgium: cinema exhibition and distribution 1992-2002

		1992	*1993*	*1994*	*1995*	*1996*	*1997*	*1998*	*1999*	*2000*	*2001*	*2002*
Distribution and film releases												
active distributors		:	:	28	28	30	33	27	32	36	36	34
films released		376	378	444	518	477	573	487	449	444	597	573
releases per distributor		:	:	15.86	18.50	15.90	17.36	18.04	14.03	12.33	16.58	16.85
total films released		376	378	444	518	477	573	487	449	444	597	573
domestic films		12	13	28	30	31	31	30	35	29	33	34
US films		198	180	209	263	204	265	217	178	200	270	251
other films		166	185	207	225	242	277	240	236	215	294	288
domestic film releases	%	3.2	3.4	6.3	5.8	6.5	5.4	6.2	7.8	6.5	5.5	5.9
US film releases	%	52.7	47.6	47.1	50.8	42.8	46.2	44.6	39.6	45.0	45.2	43.8
% other films released	%	44.1	48.9	46.6	43.4	50.7	48.3	49.3	52.6	48.4	49.2	50.3
Market shares												
total box office revenue	€ m	60	70	95	91	101	103	119	107	113	122	123
domestic films' box office	€ m	1	4	2	1	0	0	1	1	1	4	3
US films' box office	€ m	0	49	72	66	71	76	85	76	96	78	74
other films' box office	€ m	0	18	21	24	30	27	32	31	16	46	45
market share: domestic films	%	2.2	5.0	1.6	1.1	0.3	0.1	0.9	0.5	1.0	3.3	2.5
market share: US films	%		69.3	75.8	72.4	69.7	73.7	71.9	70.9	85.0	63.9	61.0
market share: other films	%		25.7	22.6	26.5	30.0	26.2	27.2	28.6	14.0	38.0	36.5
revenue of leading 10 films	€ m	:	:	:	:	35	30	40	29	:	29	30
box office of leading 10 films	%	:	:	:	:	34.5	28.9	34.1	27.1	:	24.5	24.8
top five distributors' share	%	:	:	:	:	67.0	75.9	89.0	62.0	62.0	65.0	65.2
Distributor revenues												
distributor revenues	Bfr m	:	:	1,779	1,636	1,877	1,942	2,219	1,980	2,289	:	:
distributor revenues	€m	:	:	45	42	48	48	55	49	57	61	62
distributor revenues	$m	:	:	53	56	61	54	61	52	52	55	58
distributor revenue growth*	%	:	:		-5.4	12.6	0.3	14.0	-10.1	15.6	7.5	0.8

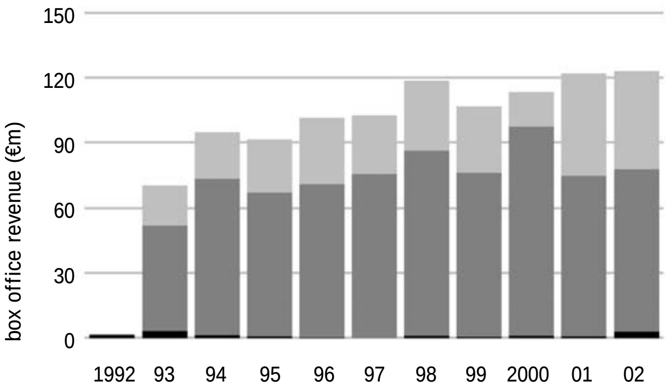
*based on euro
Source: Screen Digest (including basic data from *Annuaire de l'audiovisuel*, *Moniteur du Film*)

Belgium: feature film releases by origin



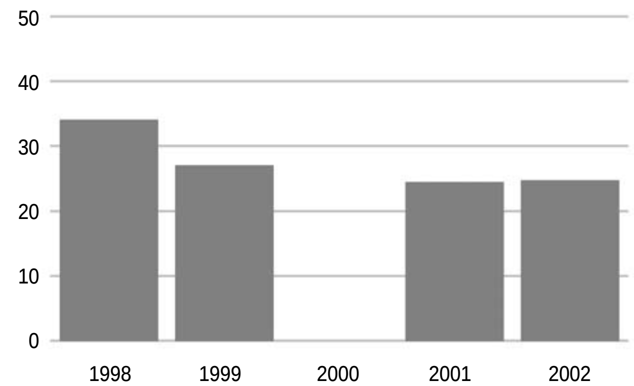
Source: Screen Digest

Belgium: box office revenue by origin of film



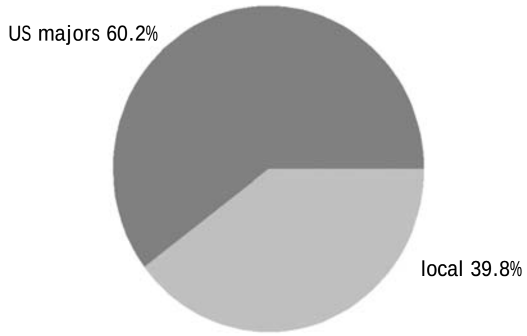
Source: Screen Digest

Belgium: share of box office revenue taken by top 10 films 1998-2002



Source: Screen Digest

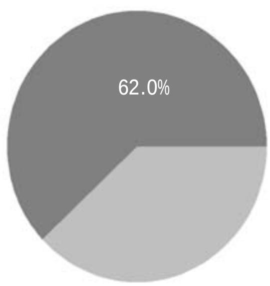
Belgium: market split between US majors and local distributors 2002



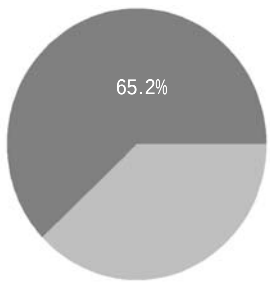
Source: Screen Digest

BELGIUM: MARKET CONCENTRATION INDICATORS

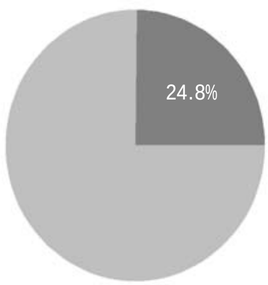
Leading five exhibitors' share of total screens



Market share of leading five distributors



Box office revenue taken by leading 10 films

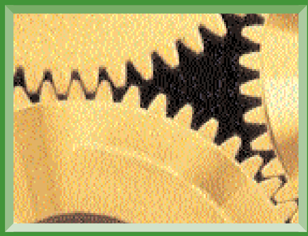


Source: Screen Digest

Forecasts

		2002	2003	2004	2005	2006	2007
screens	no	577	588	597	607	613	620
multiplex screens	*no*	*329*	*345*	*359*	*374*	*385*	*396*
non-plex screens	*no*	*248*	*243*	*238*	*233*	*229*	*224*
multiplex screens as % of all screens	%	57.0	58.7	60.2	61.6	62.7	63.9
admissions	m	22,800	23,507	24,141	24,793	25,413	26,048
box office	€m	123.0	131.4	139.6	148.4	156.7	165.5
average ticket price	€	5.40	5.59	5.78	5.99	6.17	6.35
admissions per screen	000s	39,530	39,959	40,422	40,856	41,430	41,989
admissions per head	no	2.22	2.29	2.35	2.41	2.47	2.53
box office per head per year	€	11.96	12.78	13.58	14.44	15.24	16.09
box office per screen per year	€000	213.3	223.3	233.8	244.6	255.5	266.7

Source: Screen Digest



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