



PRESS RELEASE
European Audiovisual Observatory, Council of Europe
Strasbourg, 9 February 2009

**The Russian Federation joins Europe's
big five cinema markets in 2008**

EU admissions stable

On the occasion of the 59th Berlin International Film Festival the European Audiovisual Observatory releases its first estimates for European cinema attendance in 2008. The Observatory estimates that total admissions in the European Union increased marginally in relation to 2007. With around 920 million tickets sold, 2008 attendance rose by just 0.3% above the 2007 level. The most remarkable change was seen in the Russian Federation where admissions grew by 16% to reach 124 million tickets sold. This total makes Russia the fourth largest cinema market in Europe in terms of cinema attendance.

Cinema Attendance in European Countries (2004 - 2008 provisional)

in millions

Country	2004	2005	2006	2007	2008 prov	% change 2008/2007	Source
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European Union member countries (EU 27)

AT*	Austria	19,4	15,7	17,3	15,7	15,5	-1,3%	FAFO / Österreichisches Filminstitut / OBS
BG	Bulgaria	3,1	2,4	2,4	2,5	2,8	12,1%	National Film Center
CZ	Czech Republic	12,0	9,5	11,5	12,8	12,9	0,4%	Ministry of Culture / UFD
DE	Germany	156,7	127,3	136,7	125,4	129,4	3,2%	FFA
DK	Denmark	12,8	12,2	12,6	12,1	13,2	8,9%	Danish Film Institute
EE	Estonia	1,2	1,1	1,6	1,6	1,6	0,2%	Estonian Film Foundation
ES*	Spain	143,9	127,7	121,7	116,9	108,0	-7,6%	ICAA / OBS
FI	Finland	6,9	6,1	6,7	6,5	7,0	7,4%	Finnish Film Foundation
FR	France	195,5	175,5	188,8	177,7	188,8	6,2%	CNC
GB	United Kingdom	171,3	164,7	156,6	162,4	164,2	1,1%	Cinema Advertising Association / Nielsen EDI
HU	Hungary	13,7	12,1	11,7	11,1	10,2	-8,5%	National Film Office
IE	Ireland	17,3	16,4	17,9	18,4	18,2	-0,7%	Carlton Screen Advertising / Nielsen EDI
IT*	Italy	116,3	105,6	106,1	116,4	111,6	-4,1%	Centro Studi Cinecittà Holding / Cinetel / OBS
LT	Lithuania	1,5	1,2	2,5	3,3	3,3	-1,4%	Baltic Films
LV	Latvia	1,7	1,7	2,1	2,4	2,4	-2,7%	National Film Centre
NL	The Netherlands	23,0	20,6	23,4	23,1	23,5	1,7%	NFC / NFF / MaccsBox - NVB & NVF
PL	Poland	33,4	23,6	32,0	32,6	33,8	3,4%	boxoffice.pl
PT	Portugal	17,1	15,8	16,4	16,3	15,9	-2,5%	Instituto do Cinema e do Audiovisual
SE	Sweden	16,6	14,6	15,3	14,9	15,2	1,5%	Swedish Film Institute
SK	Slovakia	2,9	2,2	3,4	2,8	3,3	18,2%	Slovak Film Institute
EU 27 - est. total		1013	899	932	917	920	0,3%	European Audiovisual Observatory

Other European countries

CH	Switzerland	17,2	15,0	16,4	13,8	14,0	1,5%	Swiss Federal Statistical Office
NO	Norway	12,0	11,3	12,0	10,8	11,9	9,7%	Film & Kino
RU	Russian Federation	67,4	83,6	91,8	106,6	123,9	16,2%	Russian Film Business Today
TR	Turkey	29,7	27,3	34,9	31,2	38,5	23,6%	Sinema Gazetesi

* 2008 estimated by European Audiovisual Observatory

In absolute terms admissions grew most significantly in the Russian Federation (+17.3 million, +16.2%), followed by France (+11.1 million, +6.2%), Turkey (+7.4 million, +23.6%) and Germany (+4 million, +3.2%). While attendance increased by 1.1% in the UK (+1.8 million), admissions dropped by an estimated -4.1% in Italy (-4.8 million) and by -7.6% in Spain (-8.9 million). In Italy the year-on-year decline followed exceptionally good results in 2007, but Spain saw its 4th consecutive year of declining admissions levels.

In the rest of Europe, significant growth in cinema attendance was seen in certain Central and Eastern European countries: Slovakia (+18.2% - driven primarily by the success of national co-production *Báthory*), Bulgaria (+12.1%) and Poland (+3.4%). Scandinavia shaped up as another growth region for theatrical markets in 2008 with admissions rising in Norway (+9.7%), Denmark (+8.9%), Finland (+7.4%) and Sweden (+1.5%).

Increasing demand for local films in many European markets

2008 proved to be another year of strong demand for national productions, with market shares for local productions increasing in 14 out of the 19 European Union countries for which provisional data is available. In many countries the success of national films contributed significantly to driving or stabilising overall cinema attendance.

National market share exceeded 30% in a total of 5 countries. Led by *Recep İvedik* local titles accounted for all of the top 10 titles in Turkey, with national market share reaching almost 60%, the highest level in any European country covered by the Observatory. This was followed by France (45.7% driven by the phenomenal success of *Bienvenue chez les Ch'tis*), the Czech Republic (39.6%; *Báthory*), Denmark (33%; *Flammen & Citronen*) and the UK (31%; *Mamma, Mia! Quantum of Solace*). Record national market shares were also achieved in Germany (26.6%; *Keinohrhasen*), Norway (22.5%; *Max Manus*), Poland (25.4%; *Lejdis*), the Netherlands (17.8%; *Oorlogswinter*), Belgium (~ 10%; *Lof*) and Austria (6%; *Echte Wiener*).

Market Shares for National Films in European Countries (2004 - 2008 provisional)

in %

Country	2004	2005	2006	2007	2008 prov	change percentage points	Source
European Union member countries (EU 27)							
AT Austria	-	2.7%	2.6%	1.9%	6.0%	4.1%	Österreichisches Filminstitut
BE* Belgium	6.3%	5.8%	6.5%	7.5%	10.0%	2.5%	Ministère de la Communauté Française
BG Bulgaria	-	-	-	1.2%	4.8%	3.6%	National Film Center
CZ Czech Republic	23.8%	25.1%	30.1%	35.2%	39.6%	4.4%	Ministry of Culture / UFD / OBS
DE Germany	23.8%	17.1%	25.8%	18.9%	26.6%	7.7%	FFA
DK Denmark	23.7%	32.4%	24.8%	27.0%	33.0%	6.0%	Danish Film Institute
EE Estonia	5.4%	5.1%	9.2%	14.3%	7.3%	-7.0%	Estonian Film Foundation
ES* Spain	13.4%	16.7%	15.5%	13.4%	14.2%	0.7%	ICAA / OBS
FI Finland	17.0%	15.0%	23.9%	20.0%	22.6%	2.6%	Finnish Film Foundation
FR France	38.4%	36.6%	44.6%	36.5%	45.7%	9.2%	CNC
GB* United Kingdom	23.4%	33.0%	19.1%	28.5%	31.0%	2.5%	UK Film Council
HU Hungary	10.3%	15.4%	18.7%	13.3%	10.2%	-3.1%	National Film Office
IT* Italy	21.6%	25.7%	25.8%	32.0%	29.3%	-2.7%	Centro Studi Cinecittà Holding / Cinetel
LT Lithuania	2.9%	6.3%	1.1%	2.6%	5.5%	2.9%	Statistics Lithuania / Baltic Films
LV Latvia	3.7%	1.8%	1.7%	7.4%	6.8%	-0.6%	National Film Center
NL The Netherlands	9.2%	13.2%	11.3%	13.5%	17.8%	4.2%	NFF / MaccsBox - NVB & NVF
PL Poland	8.7%	3.4%	15.9%	24.7%	25.4%	0.7%	Min. Cult / boxoffice.pl / OBS
PT Portugal	1.3%	3.2%	2.7%	2.8%	2.5%	-0.3%	Instituto do Cinema e do Audiovisual
SE Sweden	23.3%	22.6%	18.8%	21.6%	20.0%	-1.6%	Swedish Film Institute
Other European countries							
CH Switzerland	2.5%	5.9%	9.5%	5.1%	3.0%	-2.1%	Swiss Federal Statistical Office
NO Norway	14.9%	14.0%	16.6%	17.2%	22.5%	5.3%	Norwegian Film Institute / Film & Kino
RU Russian Federation	12.1%	29.7%	25.7%	26.3%	25.5%	-0.8%	Russian Film Business Today
TR Turkey	38.4%	41.8%	51.8%	38.0%	59.2%	21.2%	Sinema Gazetesi

* estimated data

Notes:

- Data have been collected with the collaboration of the EFARN (European Film Agency Research Network).
- All 2008 figures are provisional.
- The 2008 Austrian admissions figure is a total market estimate by the European Audiovisual Observatory on the basis of 14.7 million admissions recorded by Nielsen EDI and an assumed coverage rate of 95%.
- The 2008 Spanish admissions figure is a total market estimate by the European Audiovisual Observatory, on the basis of the January to November admissions as communicated by the ICAA. National market share is also estimated by the Observatory based on ICAA data covering January to November 2008.
- The 2008 Italian admissions figure is a total market estimate by the European Audiovisual Observatory, on the basis of a growth rate of -4.1% as communicated by Cinetel / ANICA.
- Market shares for Portugal, the Russian Federation and the United Kingdom are on the basis of gross box office, other market share figures are on the basis of admissions. In the case of the United Kingdom the market share estimate is based on UK and Republic of Ireland gross box office figures.
- 2008 figures for the Netherlands are based on provisional registration as of Jan 5, 2009.

NEXT FIGURES FROM THE OBSERVATORY

**The European Audiovisual Observatory will publish a complete overview of
2008 European cinema market trends in early May 2009.**

Press Contact:

Alison Hindhaugh, alison.hindhaugh@coe.int

Direct phone: + 33 3 88 14 44 10

Market Analyst

Martin Kanzler, martin.kanzler@coe.int

Department for Information on Markets and Financing

European Audiovisual Observatory

Set up in December 1992, the European Audiovisual Observatory's goal is to gather and diffuse 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. In addition to contributions to conferences, other major activities are the publication of a Yearbook, newsletters and reports, the compilation and management of databases (LUMIERE, KORDA and IRIS MERLIN) and the provision of information through the Observatory's Internet site (<http://www.obs.coe.int>).



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