European Audiovisual Observatory
Press Release

Strasbourg, 14 February 2014

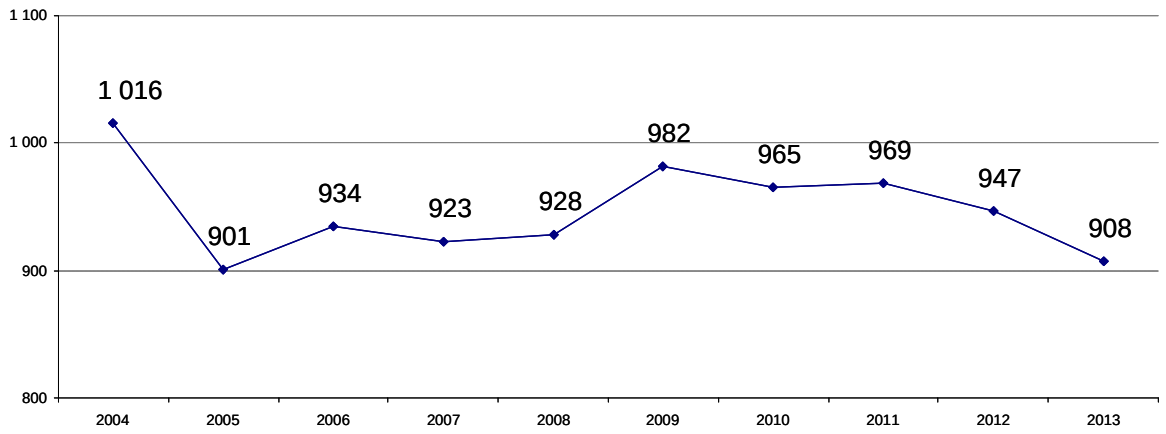
Cinema admissions in the European Union down by 4.1% in 2013

On the occasion of the 64th Berlin International Film Festival the European Audiovisual Observatory releases its first estimates for European cinema attendance in 2013. The Observatory estimates that total admissions in the European Union[1] dropped by 4.1% to 908 million tickets sold, around 39 million less than in 2012 (947 million). This would mark the second lowest admissions level in the EU since the turn of the century.

More than two thirds of EU markets experienced a decline in admissions, while admission levels increased in only 8 out of the 26 EU territories for which provisional data were available. The cumulative admissions drop in the EU was however driven by the significant decline in four out of the five largest EU markets: Spain (-15.2 million; -16%), France (-10.8 million; -5.3%), the UK (-7 million; -4%) and Germany (-5.4 million; -4%). Only Italy withstood the general downward trend with admissions estimated to have grown by 6.6% to 106.7 million tickets sold. Apart from Italy, year-on-year growth in cinema attendance of over 1% could only be achieved in six Central and Eastern European member states, led by Bulgaria (+16.7%), Romania (+13.8%) and Lithuania (+6.8%).

As often in the past years, significant growth was only achieved outside of the EU. With admissions growing by 10.5% to 173.5 million tickets sold in 2013 the Russian Federation overtook the UK as the second largest European market in terms of admissions. Box office records were also broken in Turkey, with cinema attendance growing by 14.8% to 50.4 million admissions, the highest level in the past few decades.

Cinema attendance in the European Union 2004-2013 provisional
in millions, estimated; pro-forma calculations taking into account new member states



Source: European Audiovisual Observatory

[1] Caculated on a pro-forma basis for the 28 EU member states as of 2014.

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National & US market shares

The market share of national films tends to fluctuate depending on the success of generally a few local blockbusters. National market shares increased in 13 and declined in 10 EU markets for which data were available. US market share on the other hand increased in 11 out of the 13 markets for which provisional data were available with the average US market share in these markets increasing from 63% to 68%.

Despite dropping to its lowest level in years, France remained the EU market with the highest national market share with local productions taking 33% of total admissions (down from 40% in 2012), followed by Italy (31%), Denmark (30%) and Germany (26%). Looking outside of the EU, Turkey remained the leading European country in terms of national market share with Turkish films taking a record share of 58% of total admissions in 2013, a level unparalleled in any other European market in the past few decades.

Gross Box Office

Though it is too early to estimate total gross box office (GBO) for the EU, preliminary data suggest that – in contrast to the past three years - increasing ticket prices in 19 out of 25 EU markets no longer sufficed to compensate for the decline in admissions with GBO declining in 14 out of the 25 EU markets for which data were available.

Key Cinema Data in European Countries 2012 – 2013 provisional

Country		Admissions (in mio) 2012	2013 prov	Change %	Currency	GBO (in mio) 2012	2013 prov	Change %	National market share [1] 2012	2013 prov	Sources
European Union member countries (EU 28)											
AT	Austria est	16.4	15.7	-4.2%	EUR	131.9	131.0	-0.6%	1.7%	4.0%	OBS / ÖFI
BE	Belgium est	21.9	n.c.	n.c.	EUR	158.8	n.c.	n.c.	n.c.	n.c.	FCB
BG	Bulgaria	4.1	4.8	16.7%	BGN	34.0	39.8	17.3%	4.8%	0.6%	National Film Center
CY	Cyprus est	0.8	0.6	-24.4%	EUR	6.3	4.9	-22.5%	n.c.	0.1%	Min. Cult.
CZ	Czech Republic	11.2	11.1	-1.1%	CZK	1 275.6	1 424.2	11.7%	24.3%	24.2%	Czech Cinematography Fund
DE	Germany	135.1	129.7	-4.0%	EUR	1 033.0	1 023.0	-1.0%	18.1%	26.2%	FFA
DK	Denmark	13.6	13.6	-0.2%	DKK	1 053.4	1 051.8	-0.2%	28.7%	30.0%	Danish Film Institute
EE	Estonia	2.6	2.6	-1.1%	EUR	11.4	11.8	3.3%	7.6%	5.9%	Estonian Film Foundation
ES	Spain est	94.2	79.0	-16.1%	EUR	614.2	510.7	-16.8%	17.0%	13.9%	ICAA (2012) / OBS (2013)
FI	Finland	8.4	7.8	-7.0%	EUR	78.8	76.0	-3.6%	28.1%	23.0%	Finnish Film Foundation
FR	France	203.6	192.8	-5.3%	EUR	1 305.6	n.c.	n.c.	40.3%	33.3%	CNC
GB	United Kingdom	172.5	165.5	-4.0%	GBP	1 099.0	1 083.0	-1.5%	32.1%	21.5%	BFI / CAA / Rentrak
GR	Greece est	10.1	9.2	-9.0%	EUR	70.2	59.3	-15.5%	6.9%	7.2%	Greek Film Center / Media Salles / OBS
HR	Croatia	4.1	4.0	-1.6%	HRK	111.9	121.0	8.1%	8.6%	11.1%	Croatian Audiovisual Center
HU	Hungary est	9.5	9.7	2.2%	HUF	12 000.0	12 900.0	7.5%	1.5%	1.5%	NMHH
IE	Ireland est	15.4	n.c.	n.c.	EUR	108.3	n.c.	n.c.	1.5%	n.c.	Irish Film Board
IT	Italy est	100.1	106.7	6.6%	EUR	637.1	646.3	1.4%	26.5%	31.0%	Cinetel / SIAE / OBS
LT	Lithuania	3.0	3.3	6.8%	LTL	40.6	45.4	11.9%	2.8%	16.5%	Lithuanian Film Centre
LU	Luxembourg est	1.3	1.2	-3.9%	EUR	9.4	9.1	-3.4%	n.c.	n.c.	Media Salles
LV	Latvia	2.3	2.4	4.0%	LVL	6.9	7.2	5.7%	4.1%	4.0%	National Film Centre
MT	Malta est	0.7	0.7	-6.9%	EUR	4.0	3.7	-7.0%	n.c.	n.c.	Media Salles
NL	Netherlands	30.6	30.8	0.8%	EUR	244.6	249.4	2.0%	14.2%	20.5%	NFF / MaccsBox - NVB & NVF
PL	Poland	38.5	36.3	-5.7%	PLN	711.3	665.2	-6.5%	16.1%	19.9%	Polish Film Institute
PT	Portugal	13.8	12.5	-9.4%	EUR	74.0	65.4	-11.5%	5.3%	3.4%	ICA
RO	Romania	8.3	9.5	13.8%	RON	144.8	168.0	16.0%	3.6%	3.2%	Centrul National al Cinematografiei
SE	Sweden	18.4	16.6	-9.6%	SEK	1 815.7	1 643.0	-9.5%	22.1%	24.8%	Swedish Film Institute
SI	Slovenia	2.7	2.3	-16.1%	EUR	12.0	10.6	-11.7%	4.8%	10.7%	Slovenian Film Center
SK	Slovakia	3.4	3.6	4.8%	EUR	17.5	18.8	7.1%	3.1%	4.5%	UFD / Slovak Film Institute
EU 28 Total est		947	908	-4.1%	EUR	6 569	~	~	~	~	European Audiovisual Observatory
Other European countries											
CH	Switzerland	15.5	13.3	-14.2%	CHF	242.6	207.8	-14.3%	4.8%	6.7%	OFS
IS	Iceland est	1.4	1.4	-4.0%	ISK	1 524.6	1 494.2	-2.0%	9.1%	3.1%	Statistics Iceland (2012) / OBS (2013)
MK	FYR of Macedonia	0.2	0.1	-61.8%	MKD	20.4	7.6	-62.9%	26.6%	n.c.	Macedonian Film Fund
NO	Norway	12.1	11.8	-2.7%	NOK	1 110.1	1 095.1	-1.4%	17.9%	22.8%	Film & Kino
RU	Russian Federation	157.0	173.5	10.5%	RUB	37 419.3	41 873.9	11.9%	15.1%	18.8%	Nevafilm / Russian Film Business
TR	Turkey	43.9	50.4	14.8%	TRY	421.9	505.3	19.8%	47.0%	58.0%	Antrakt

[1] Based on admissions except for BG, GB, IS and RU. Includes minority co-productions with the exception of CH, FI, HU, NO and SE.
[2] National market share based on GBO up to and including 19 January 2014, includes minority co-productions.
Source: European Audiovisual Observatory

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Notes:

- Data have been collected with the collaboration of the EFARN (European Film Agency Research Network).
- All 2013 figures are provisional.
- Market shares for Bulgaria, Ireland, Iceland, 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.

NEXT FIGURES FROM THE OBSERVATORY

The European Audiovisual Observatory will publish a complete overview of 2013 European cinema market trends in early May 2014.

The European Audiovisual Observatory

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 40 member states and the European Union, 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).

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