

UNIC UPDATE ON CINEMA EXHIBITION IN 2013



Cine32, ENCORE HEUREUX Architectes / Photo: Sébastien Normand

5 February 2014

Press Release for Immediate Publication

The International Union of Cinemas (UNIC), representing cinema exhibitors and their national trade associations across 29 European territories, today released an update on box office revenues, cinema admissions and other sector indicators for 2013. While data for a number of countries is based on estimates, the overview presents a first assessment of the development of the sector over the last year (2012–2013). Final data on the performance of each territory will be released in Spring 2014.

UNIC

Union Internationale des Cinémas
International Union of Cinemas

1. CINEMA-GOING IN 2013

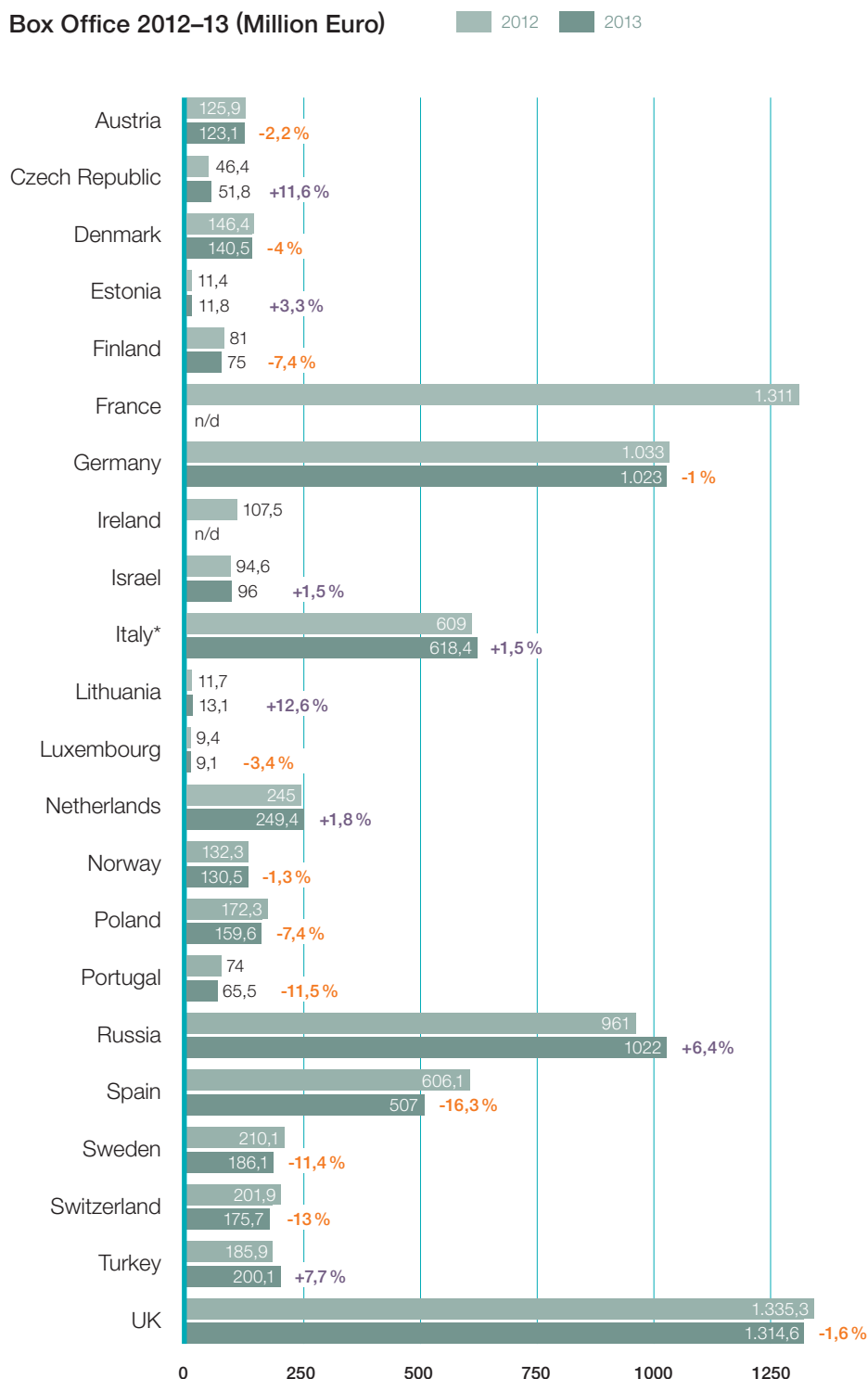
Moderate drop in box office and admissions across UNIC territories after strong previous year results

2013 was characterised by a moderate drop in box office revenues and cinema admissions across UNIC territories. This follows a period when the European cinema exhibition sector – despite significant regional differences – benefited from generally positive results in 2012. In 2013, total box office revenues declined by 1,9 per cent and admissions declined by 1.2 per cent for territories where preliminary data has been made available.

Weaker results in some territories

France, the UK and Germany witnessed slightly less successful performance in 2013 after impressive results in 2012. Box office revenues decreased by 1.6 per cent in the UK and 1 per cent in Germany. Admissions dropped by 5.3 per cent for France and by 4 per cent for both the UK and Germany. Smaller territories across Western Europe – with the exception of the Netherlands (box office + 1.8 per cent; admissions + 0.7 per cent) – experienced similar developments.

Box Office 2012–13 (Million Euro)



Source: UNIC members 2013/2012

Complementary information from CZ (Unie Filmových Distributoru), EE (Eesti Filmi Instituut & Baltic Films Co-operation Platform), LT (Lietuviu Filmu Centras & Baltic Films Co-operation Platform), PL (Polski Instytut Sztuki Filmowej) and PT (Instituto do Cinema e do Audiovisual).

*Cinetel: 90 per cent of the market; SIAE global results to be published in June 2013

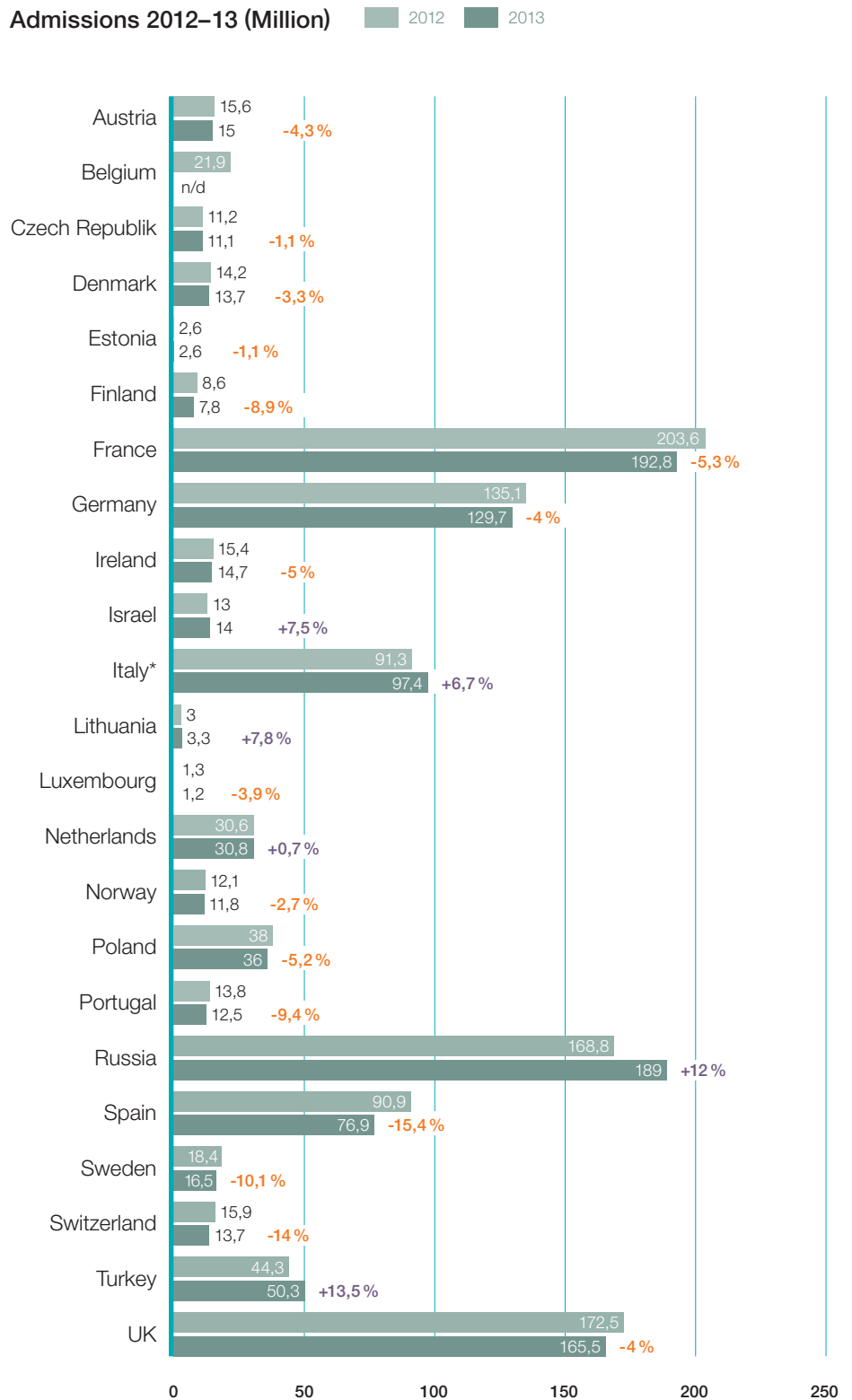
2013 Success stories

Several 'success stories' stood out in 2013, showing how varied the situation was across UNIC territories. Russia saw another period of sustained growth, with an increase in box office revenues of 6.4 per cent and admissions growth of 12 per cent. The Turkish and Israeli markets also grew by 7.7 per cent and 1.5 per cent in box office revenues as well as by 13.5 per cent and 7.5 per cent in admissions respectively. It is these growth markets that helped ensure that cinema exhibition across UNIC territories overall remained robust in 2013.

Italy upbeat, dramatic results in Spain

While most southern European territories continued to go through very difficult times the Italian exhibition sector bounced back with an increase in box office revenues (1.5 per cent) and a healthy increase of 6.7 per cent in admissions. Spain, on the other hand, continued to suffer from economic difficulties and ill-advised government tax initiatives. Box office revenues decreased by 16.3 per cent and admissions decreased by 15.4 per cent.

Admissions 2012-13 (Million)

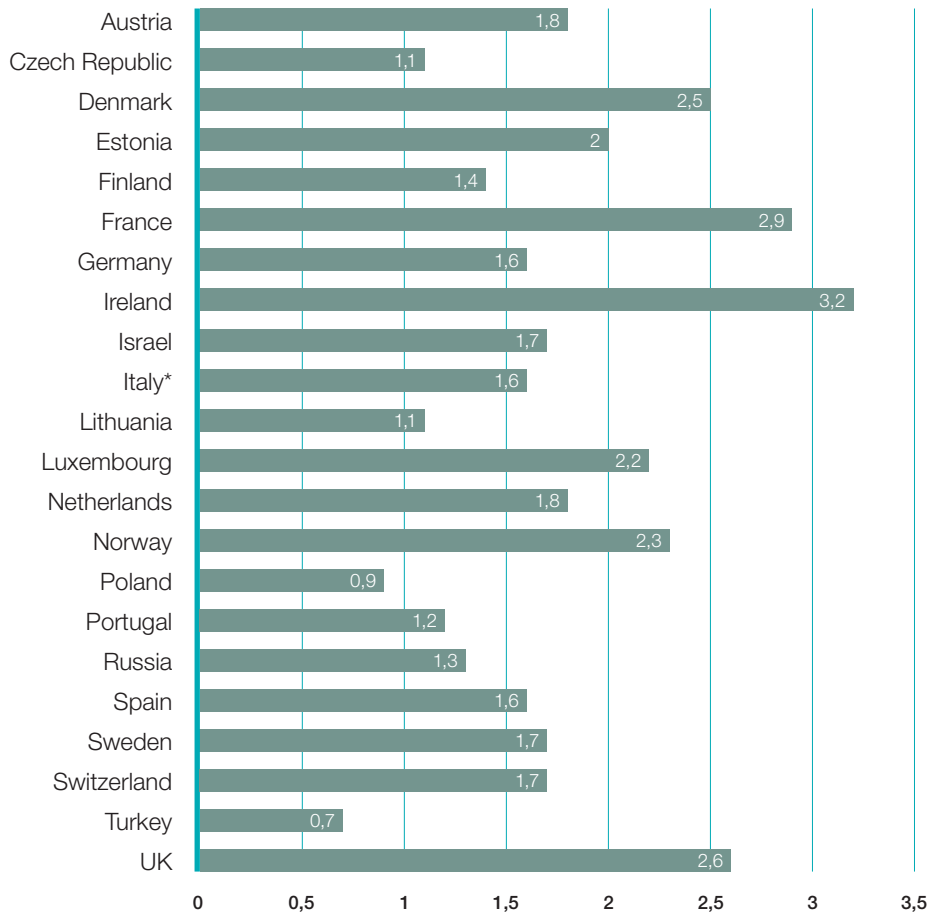


Source: UNIC members 2013/2012
 Complementary information from CZ (Unie Filmowych Distributoru), EE (Eesti Filmi Instituut & Baltic Films Co-operation Platform), LT (Lietuviu Filmu Centras & Baltic Films Co-operation Platform), PL (Polski Instytut Sztuki Filmowej) and PT (Instituto do Cinema e do Audiovisual).
 *Cinetel: 90 per cent of the market; SIAE global results to be published in June 2013

Average 1.6 visits to the cinema per year

The average annual number of cinema visits decreased marginally by 0.1 to 1.6 visits per capita across UNIC territories in 2013. In growth markets such as Israel (1.7), Italy (1.6), Russia (1.3) and Turkey (0.7) cinema-going increased. The rate was highest in Ireland (3.2). While admissions per capita remained stable in Denmark (2.5) and the Netherlands (1.8), it slightly decreased in other UNIC territories.

Admissions per capita 2013



Source: UNIC members 2013/2012
Complementary information from CZ (Unie Filmowych Distributoru), EE (Eesti Filmi Instituut & Baltic Films Co-operation Platform), LT (Lietuviu Filmu Centras & Baltic Films Co-operation Platform), PL (Polski Instytut Sztuki Filmowej) and PT (Instituto do Cinema e do Audiovisual).
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2. PERFORMANCE OF INDIVIDUAL FILMS AND LOCAL FILMS' SHARE

Leading at the international box office

Across UNIC territories several productions from the US performed remarkably well at the box office. Amongst these were *The Hobbit: The Desolation of Smaug*, *Frozen*, *Despicable Me 2*, *Fast & Furious 6*, *The Hunger Games: Catching Fire* and *Iron Man 3*.

Stable local films' share in 2013, led by Turkey and France

Based on current data the market share of national films across UNIC territories remained stable from 2012 to 2013. Turkey led with a local share of 47 per cent and 9 Turkish films that were the most popular at the box office. France, which saw a decrease compared to 2012, still accounted for 33.3 per cent of admissions for French films.

Scandinavian success story

Scandinavian territories maintained their reputation for producing successful local content. Local films dominated the charts in Norway, Denmark and Finland. Denmark stood out in particular, with four Danish films amongst the Top 5, led by *The Keeper of Lost Causes* and *The Hunt*.

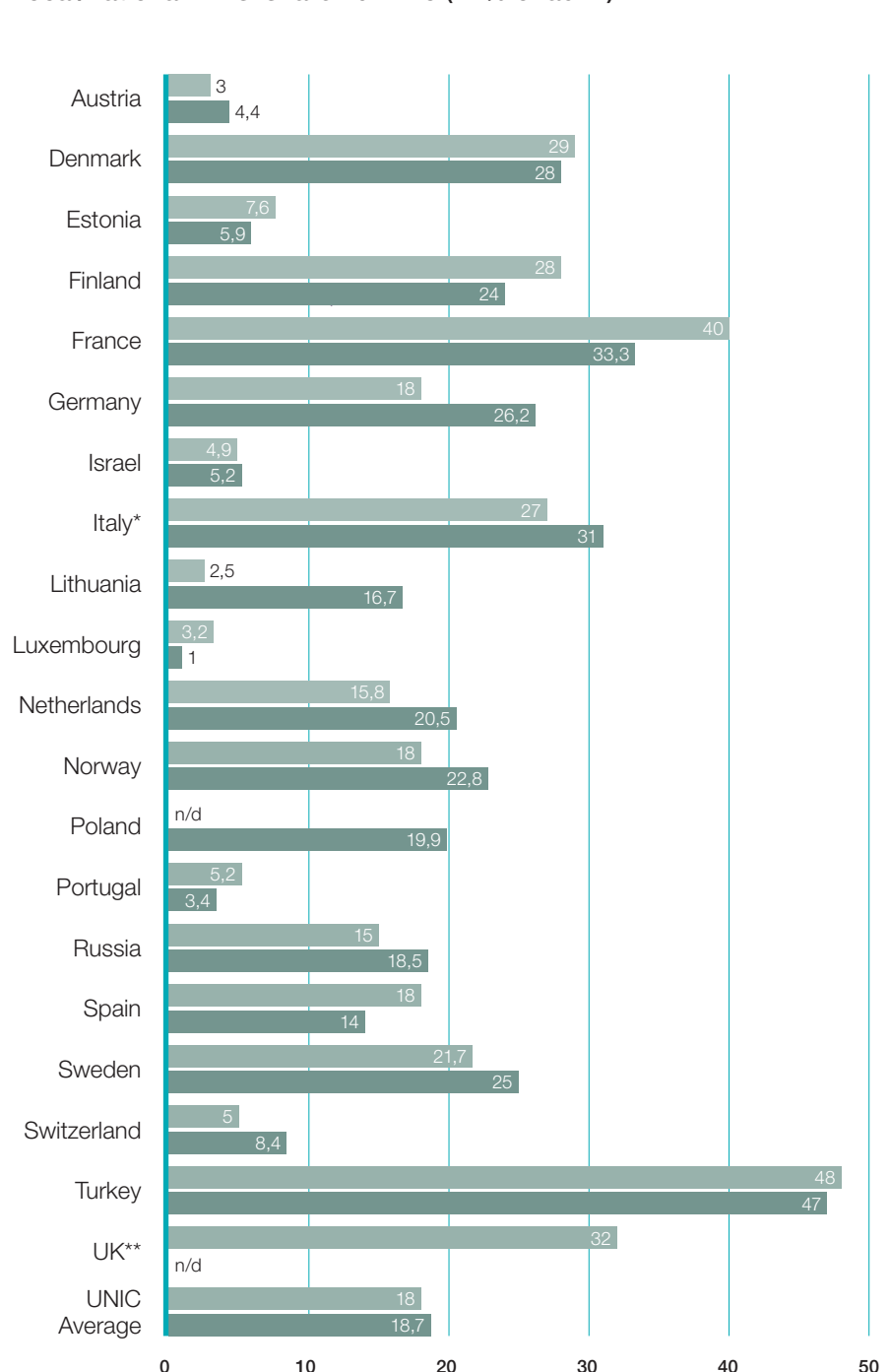
Positive trends in Italy, the Czech Republic and Russia

Italy's positive results can partly be explained by the success of *Sole a Catinelle*. In the Czech Republic, the increase of 11.7 per cent in box office returns can also be ascribed to the success of local films. In Russia, *Stalingrad* became the highest grossing film of all time.

Non-national European films: the success of French cinema abroad

In Portugal, *La Cage Dorée* – a French film about Portuguese immigrants – is the only non-national European film to have achieved strong box office results. French cinema already accomplished this feat last year in Germany with *Intouchables*.

Local/national films' share 2012–13 (in % of adm.)



Source: UNIC members, 2013/2012

Complementary information from CZ (Unie Filmových Distributoru), EE (Eesti Filmi Instituut & Baltic Films Co-operation Platform), LT (Lietuviu Filmu Centras & Baltic Films Co-operation Platform), PL (Polski Instytut Sztuki Filmowej) and PT (Instituto do Cinema e do Audiovisual).

* Cinetel: 90 per cent of the market. SIAE global results to be published in June 2013

** The definition of UK film used is that employed by the British Film Institute for categorisation purposes.

	TOP 1	TOP 2	TOP 3	TOP 4	TOP 5
Austria	The Hobbit: The Desolation of Smaug	Django Unchained	The Hangover Part 3	Fast & Furious 6	Despicable Me 2
Czech Republic	Babovresky	The Hobbit: The Desolation of Smaug	The Smurfs 2	Pribeh Kmotra	Ctyrlitek ve sluzbach krále
Denmark	The Keeper of Lost Causes	The Hunt	The Hobbit: The Desolation of Smaug	My Sisters Children in Africa	All for Two
Estonia	Despicable Me 2	The Croods	Fast & Furious 6	Monsters University	Turbo
Finland	21 Ways to Ruin a Marriage	The Hobbit: The Desolation of Smaug	Despicable Me 2	Rolli and the Golden Key	The Hunger Games: Catching Fire
France	Despicable Me 2	Iron Man 3	Django Unchained	Gravity	Les Profs
Germany	The Hobbit: An Unexpected Journey	Fack Ju Göthe	The Hobbit: The Desolation of Smaug	Django Unchained	Frozen
Italy	Sole a Catinelle	Despicable Me 2	Il Principe Abusivo	Iron Man 3	Fast & Furious 6
Lithuania	Valentine Alone	Despicable Me 2	Women Lie Better. Kristina	Croods	Fast & Furious 6
Luxembourg	Frozen	Despicable Me 2	Django Unchained	The Hangover Part 3	The Hunger Games: Catching Fire
Netherlands	The Hobbit: The Desolation of Smaug	Despicable Me 2	The Hunger Games: Catching Fire	Verliefd op Ibiza	Fast & Furious 6
Norway	Solan og Ludvig – Jul i Flåklypa	The Hobbit: The Desolation of Smaug	The Hunger Games: Catching Fire	Iron Man 3	Fast & Furious 6
Poland	The Hobbit: An Unexpected Journey	Drogowka	The Hobbit: The Desolation of Smaug	Frozen	Walesa
Portugal	La Cage Dorée	Fast & Furious 6	Frozen	Despicable Me 2	7 Pecados Rurais
Russia	Stalingrad	Iron Man 3	Thor: The Dark World	Despicable Me 2	Fast & Furious 6
Spain	The Croods	The Hobbit: The Desolation of Smaug	Despicable Me 2	World War Z	Frozen
Sweden	The Hobbit: The Desolation of Smaug	The Hunger Games: Catching Fire	Hundraåringen som klevt ut genom fönstret och försvann	Monica Z	Despicable Me 2
Switzerland	Despicable Me 2	Django Unchained	Fast & Furious 6	The Hangover Part 3	The Hobbit: The Desolation of Smaug
Turkey	Dugun Dernek	CM101MMXI	Celal ile Ceren	Kelebegin Ruyasi	Selam
UK	Despicable Me 2	Les Miserables	Iron Man 3	The Hobbit: The Desolation of Smaug	The Hunger Games: Catching Fire

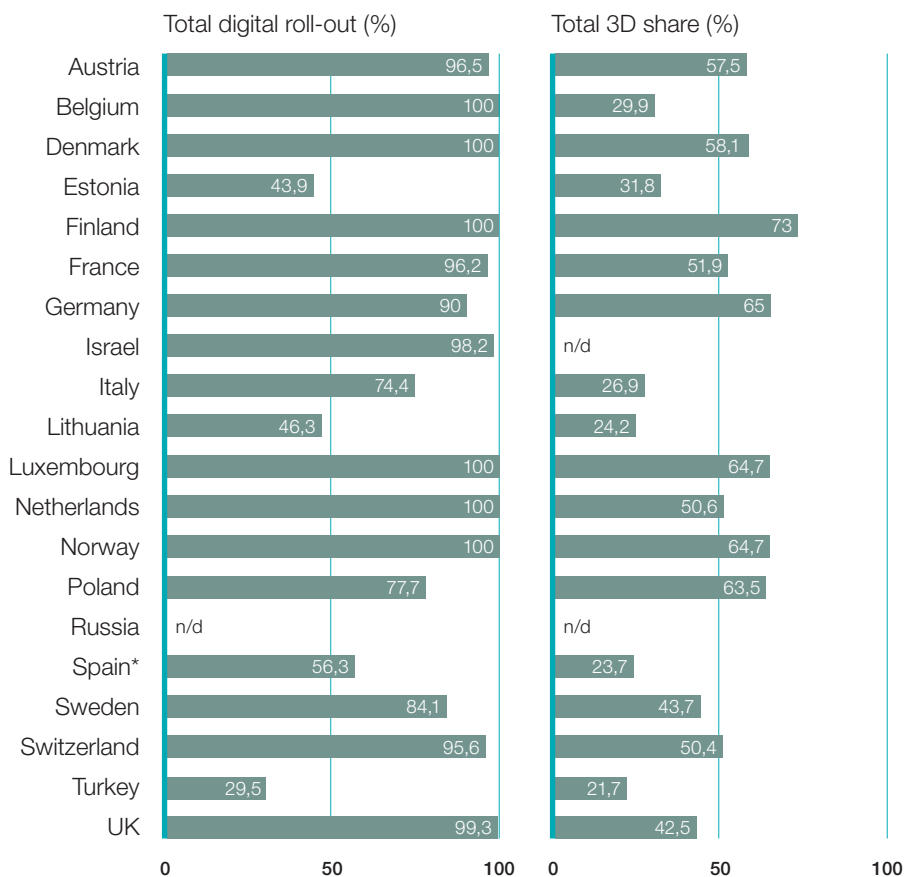
Local films European non-national films

Source: UNIC members 2013/2012
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3. DIGITAL ROLL-OUT

Digitisation across all UNIC territories in 2013 reached 84 per cent. The number of countries that are either fully digitised or are in the final stages of completing this process is growing steadily. Belgium, Denmark and Finland are 100% digitised. Austria, France, Germany, the UK, Israel and Switzerland are expected to follow soon, having crossed the 90 per cent mark in 2013. Sweden is catching up rapidly. Except for Italy, where significant progress was made in recent months, digitisation remains a challenge for most Southern European territories, with Spain and Turkey lagging significantly behind.

Digital roll-out and 3D share in 2013



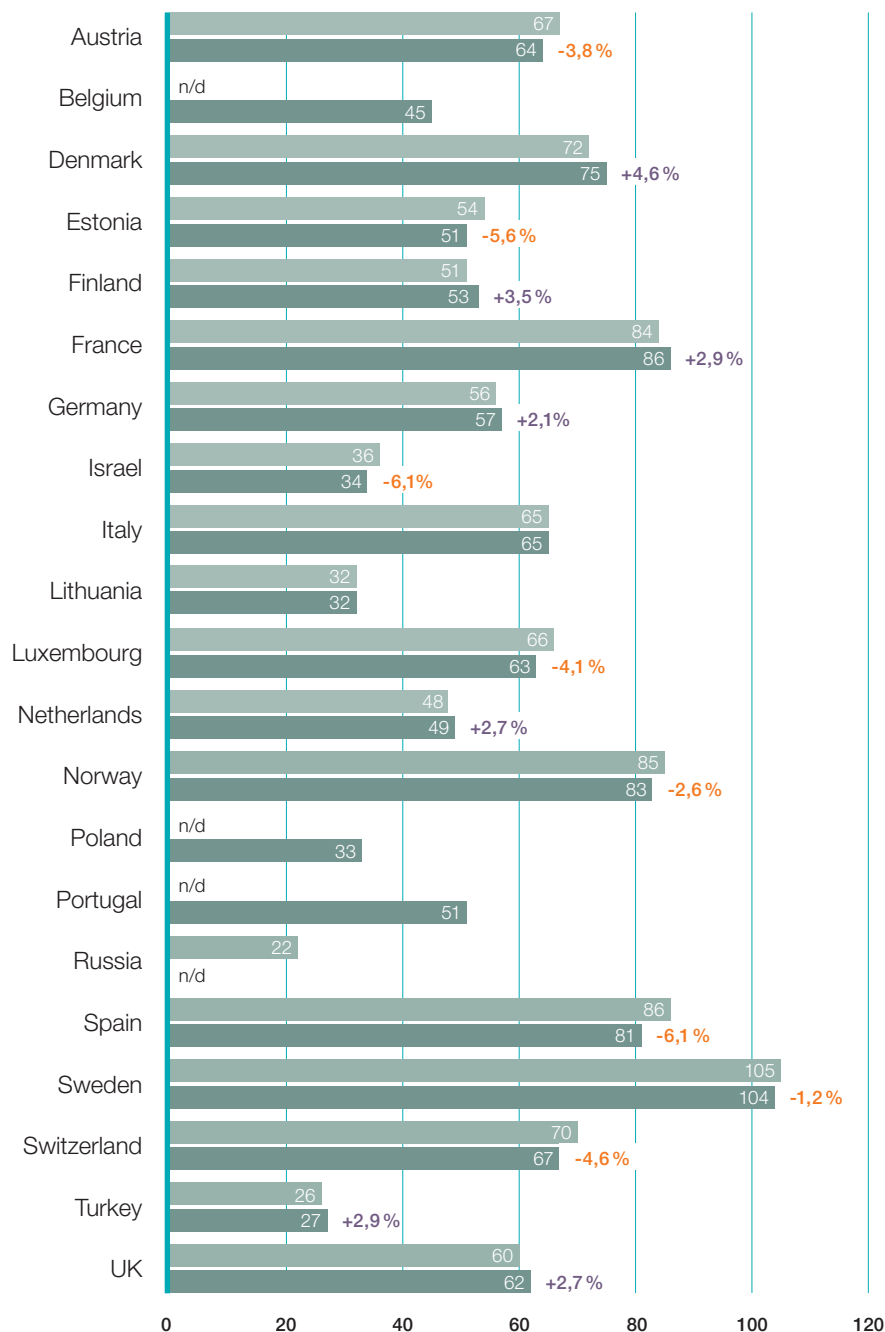
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 *Spain: up to 9 May 2013. Next update to be released in spring/summer.

4. SCREEN DENSITY

The number of total cinema screens in UNIC territories remained stable in 2013. On average, UNIC territories for which data was available counted 59 screens per million inhabitants. Growth in central Europe and Russia continued at a slower pace as the market came closer to saturation. In Spain, general economic conditions resulted in the closure of cinemas which translated into the greatest reduction in screen density amongst UNIC members.

Screen density per million inhabitants 2012–13

2012 2013



Source: UNIC members, 2013/2012
 Complementary information from CZ (Unie Filmovych Distributoru), EE (Eesti Filmi Instituut & Baltic Films Co-operation Platform), LT (Lietuviu Filmu Centras & Baltic Films Co-operation Platform), PL (Polski Instytut Sztuki Filmowej) and PT (Instituto do Cinema e do Audiovisual).
 *Spain: screens data up to May 9th 2013. FECE will release more informations in spring/summer.

ABOUT UNIC

UNIC – the International Union of Cinemas – represents the interests of cinema operators and their trade associations in 29 countries in the European Union along with Norway, Russia, Turkey, Switzerland and Israel (<http://www.unic-cinemas.org>). Together these territories account for around 33,000 screens and represent one fourth of the global cinema exhibition market.

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