

Cinema-going in Europe in 2013

Presentation by
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Secretary General of
MEDIA Salles

Saturday, 8 February, 2014

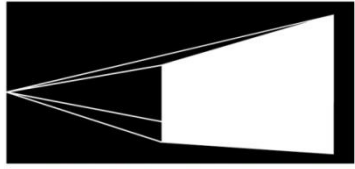
AG Kino General Meeting, Berlin



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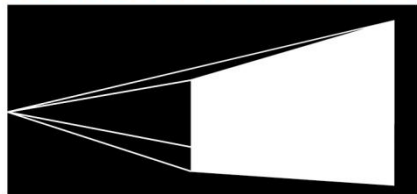
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Cinema-going in Europe in 2013

**A snapshot on 35 countries
from Iceland to Russia,
from Turkey to Portugal**





New statistics on cinema-going in Europe in 2013

Cinema admissions in Europe:

-1.8% decrease

1,158,5 M in 2013

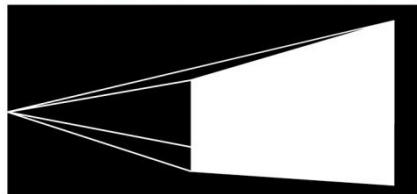
compared to 1,179.8 in 2012



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New statistics on cinema-going in Europe in 2013

Western Europe (19 countries):

From 904.5 M in 2011

to 881.7 M in 2012

To 840.8 in 2013

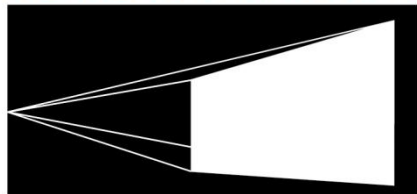
-4.6%



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New statistics on cinema-going in Europe in 2013

**Central and Eastern Europe and the
Mediterranean Rim (16 countries):**

From 295.5 M in 2011

to 298.1 M in 2012

to 317.7 in 2013

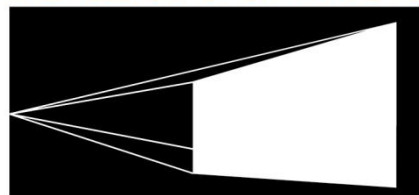
+6.6%



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New statistics on cinema-going in Europe in 2013

Focus on the 6 leading countries: no common trends

France: 192.8 M (-5.3%)

Russia: 174.4 M (+8.7%)

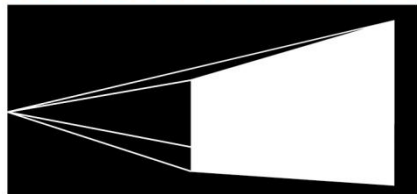
United Kingdom: 165.5 M (-4%)

Germany: 129 M (-4.5%)

Italy: 104.1 M (+6%)

Spain: 80 M (-15%)





New statistics on cinema-going in Europe in 2013

2013: stable markets

Denmark: -0.2%

Belgium: +0.5%

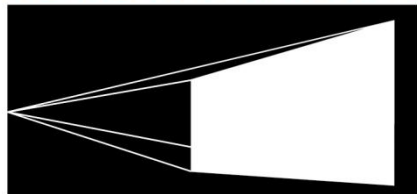
The Netherlands: +0.8%



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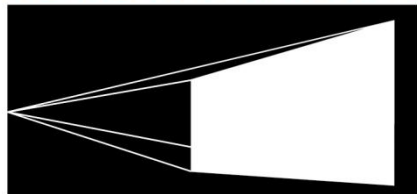
2013: a record year for

Romania: +13.8%

Turkey: +14.7%

Bulgaria: +16.7%

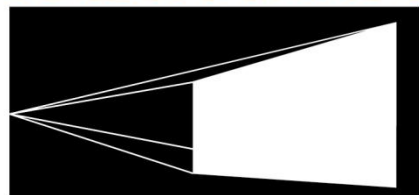




The digital roll-out as at 1 January 2014

**87% of the world's screens
are now digital**



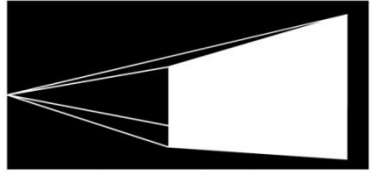


The digital roll-out as at 1st January 2014

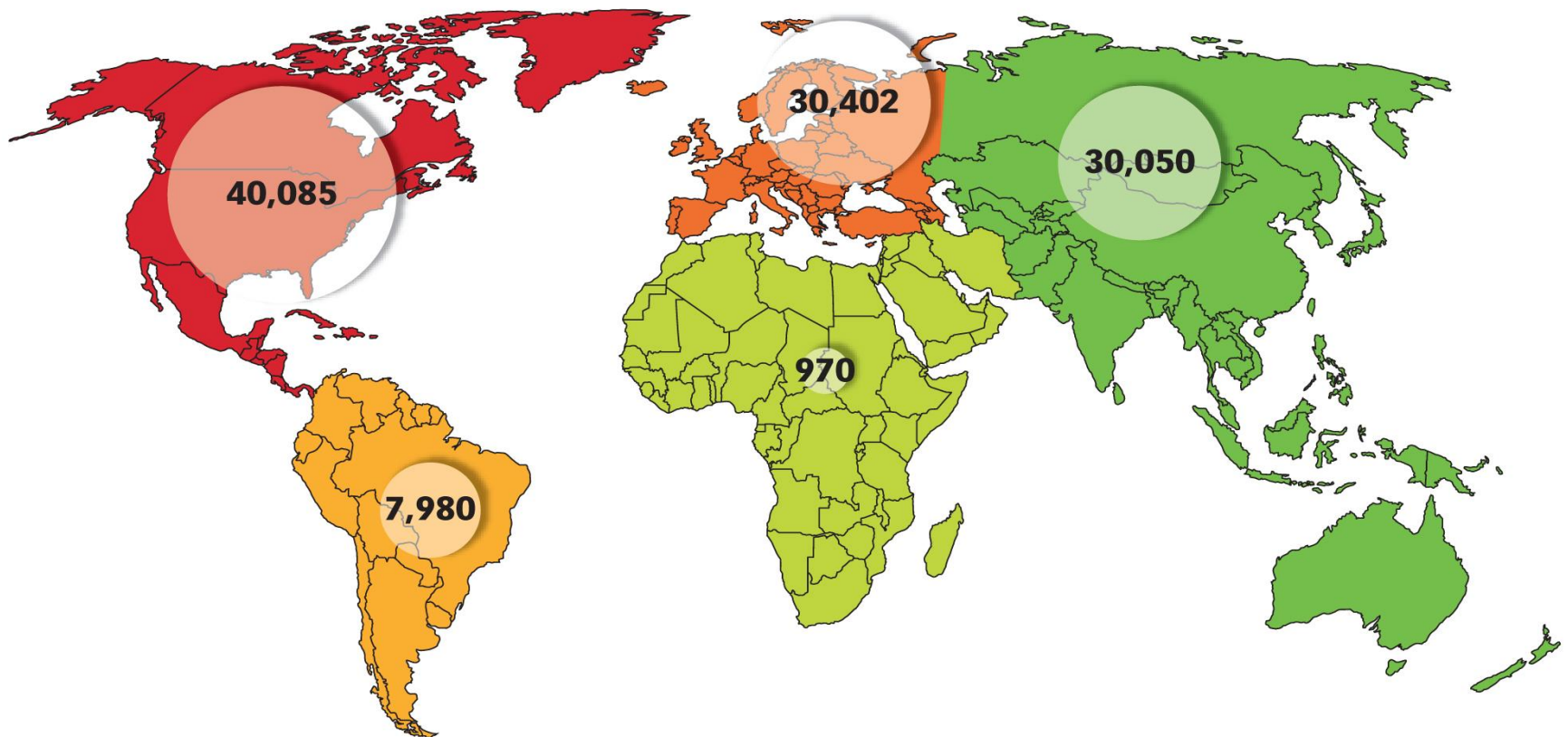
**109,407 digital screens worldwide
+22%**

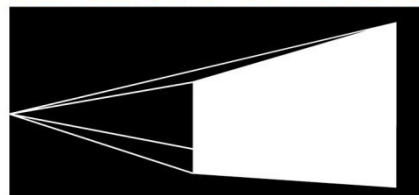
Compared to 1st January 2013





The digital roll-out as at 1st January 2014



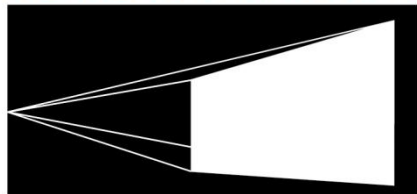


The digital roll-out as at 1st January 2014

**30,402 digital screens in Europe
+21%**

Compared to 1st January 2013





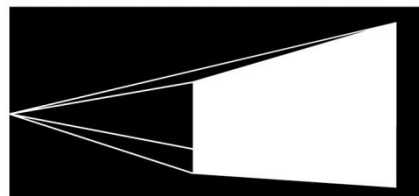
**The digital roll-out
as at 1st January 2014**

Focus on Europe

**84% of European screens
are now digital**

but...



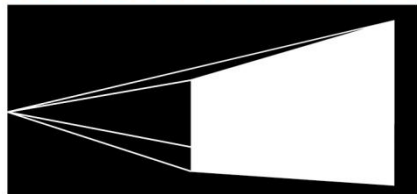


Focus on Europe

The 6 leading markets

Country	Digital penetration rates as at 30 June 2013	Digital penetration rates as at 1 January 2014
France	98%	99%
United Kingdom	97%	99%
Germany	79%	90%
Russia	79%	81%
Italy	60%	75%
Spain	55%	65%



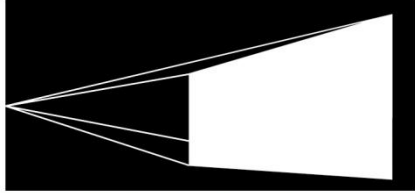


Still below the European average

Serbia (26%)
Slovenia (45%)
Czech Republic (51%)

Estonia (44%)





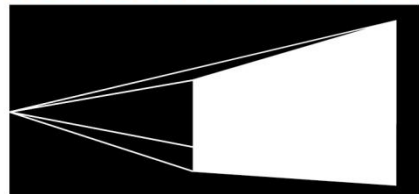
100% digital or very close

**Not only Norway, Luxembourg,
Liechtenstein and the Netherlands,**

but now

**Finland, Sweden, Denmark,
Belgium, Austria, Switzerland
too**





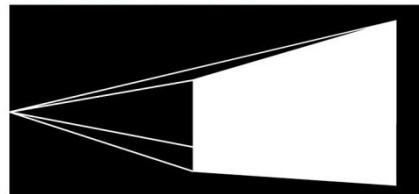
Digital penetration rate doesn't say it all

The case of Romania

84% of screens are now digital

but only 50% of cinemas





Digital penetration rate doesn't say it all

The case of Romania

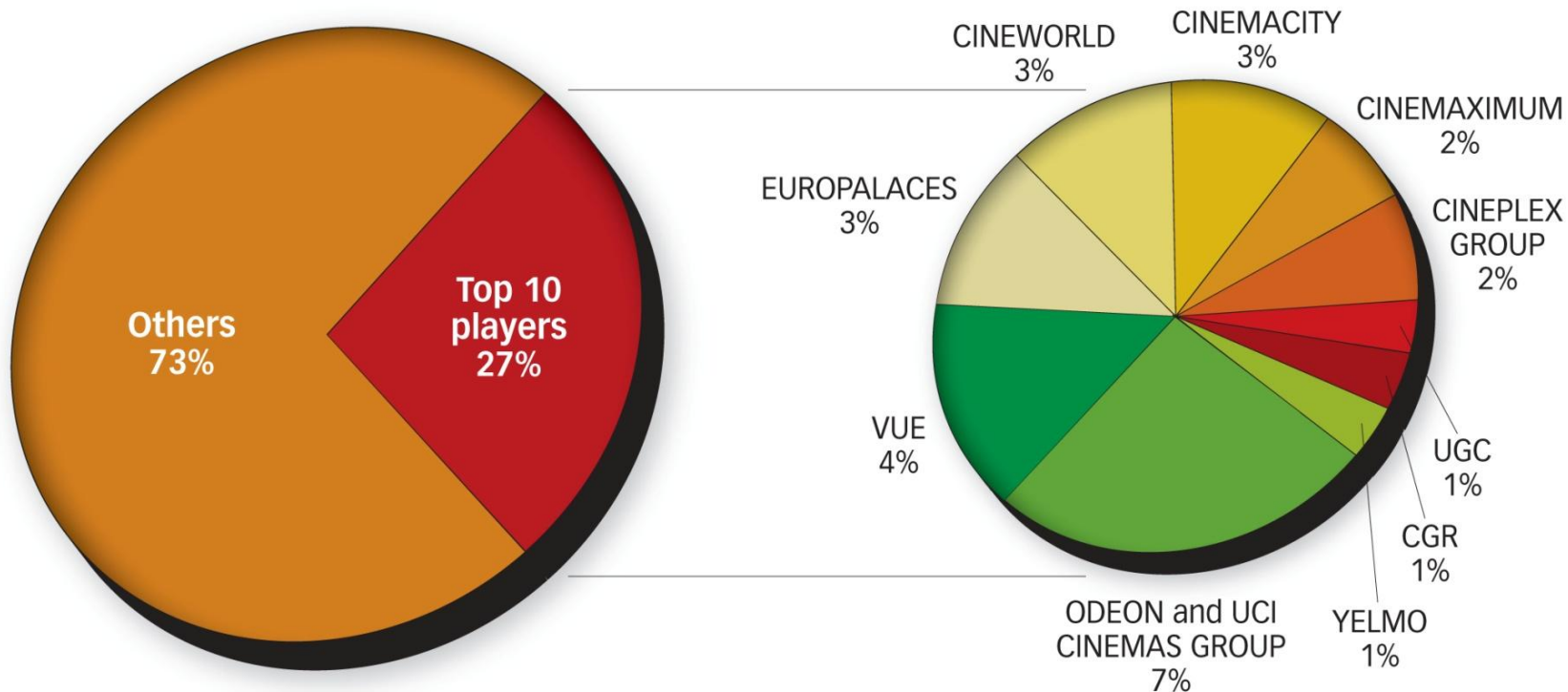
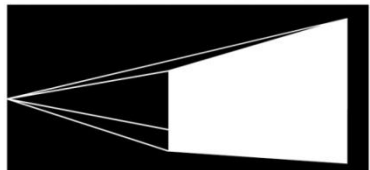
**The cinemas that haven't converted
to digital are all monoscreens**

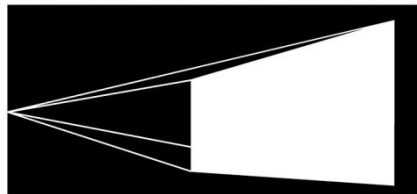
but one



**Multiplexes and large networks
are now 100% digital**

**The 10 leading digital circuits control
8.300 screens, i.e. 27%
of Europe's digital base**





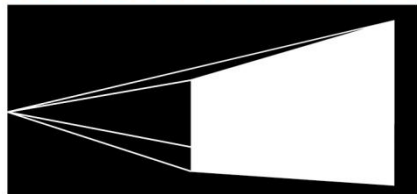
In conclusion

The great challenge for 2014:

**Will the remaining 6,000 non-digital screens
be able to convert? Are they risking closure?**

**Will Europe experience the same
as the USA?**



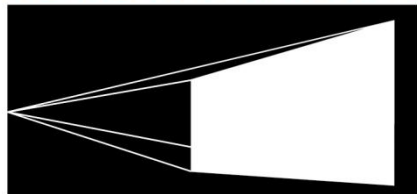


**“In the US 36,000 screens out of 40,000
have been digitized.
The remaining 4,000 are likely
to close down pretty soon”**

John Fithian, President of NATO

Giornale dello Spettacolo, December 2013

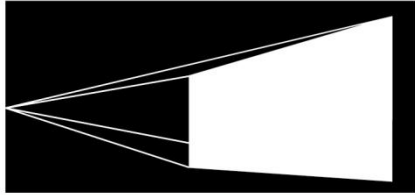




Will Europe succeed in using new technologies to offer not only new films but also more cinemas?



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To know more on these topics...

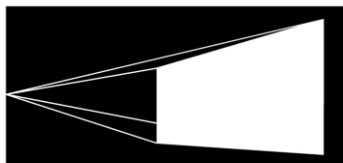


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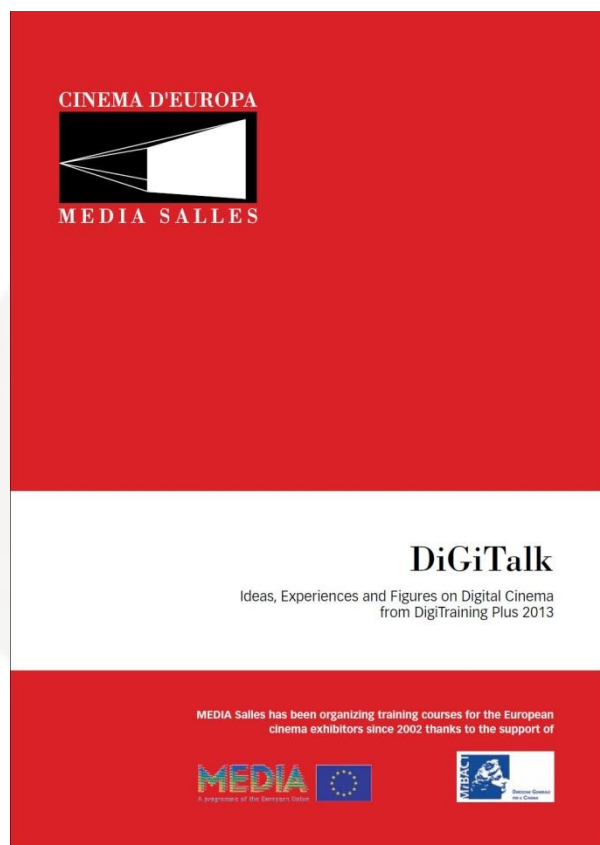
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summarizing ideas, experiences and
figures from DigiTraining Plus 2013
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It includes a rich section of tables
and graphs on digital cinema in
Europe and worldwide

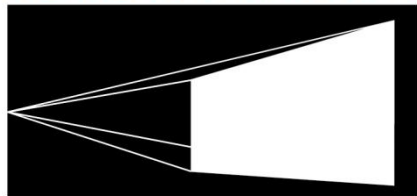


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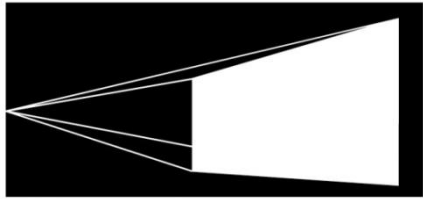


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The eleventh edition of “DigiTraining Plus: New Technologies for the European Cinemas of the Future”

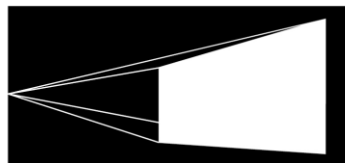
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