• **AUSTRIA** Metropol, Innsbruck - Hollywood Megaplex, Pasching - Hollywood Megaplex, Sankt Pölten - Filmstudio, Villach • **BELGIUM** Ugc Acropole, Bruxelles - Ugc de Brouckère, Bruxelles - Sphinx, Gent - Studio Agora, Louvain La Neuve - Rialto, Oostende - Ciné Focus, Turnhout • **DENMARK** Palads Theater, Copenhagen - Herlev Teaterbio, Herlev - Middelfart Bio & Café, Middelfart - Gladsaxe Bio, Søborg • **FINLAND** Kino Iiris, Lahti - Studio, Oulu • **FRANCE** Le Studio, Bastia - Brive Art et Essai Le Club, Brive - Casino Normandie, Cabourg - Ciné Caluire, Caluire - Forum, Chambéry - Le Cinématographe, Château Arnoux - Cinéma du Palais, Créteil - Eldorado, Dijon - Ermitage, Fontainebleau - L'Arc en Ciel, Ganges - Les Baladins, Guingamp - Les Baladins, Lannion - Le Palace, Le Vigan - Cinéma Yves Montand, Livry-Gargan - Eden, Menton - George Méliès, Montreuil sous Bois - Méliès, Nemours - Le Sémaphore, Nîmes - Cinémas de la Ferme du Buisson, Noisiel - Les Baladins, Perros-Guirec - Bretagne, Quimper - Cinéma le France, Saint-Etienne - Rex, Sarlat - Le Régent, St. Gaudens - Lido, St. Raphaël - Le Sejefy's, St. Sulpice - La Scala, Thionville - Jacques Tati, Tremblay-en-France - Crac, Valence • **GERMANY** Schloßlichtspiele, Ansbach - Neue Schauburg, Augsburg - Eiszeit Kino, Berlin - Kino Kiste, Berlin - Orfeo-Programmkino, Fellbach-Schmiden - Lumiere, Göttingen - Filmladen, Kassel - Filmstudio, Leverkusen - Cinema, Münster - Mephisto, Ulm - d'Linse, Weingarten • **GREECE** Pleiades, Korydallos - Galaxias, Lamia • **HUNGARY** Tallin, Szolnok • **IRELAND** Gaiety Cinema, Carrick-on-Shannon • **ITALY** Cinema Moderno, Argenta - Vittoria, Cassano delle Murge - Universal, Chieri - Cinema Norba, Conversano - Cinema Citrigno, Cosenza - Supercinema Modernissimo, Cosenza - Helios, Fermo - Salesiani, Figline Valdarno - Politeama, Frascati - Sala Don Bosco, Genova - Sala Argentia, Gorgonzo-

The high rate of cinema-going in America (frequency, which is steadily growing, has reached 5,5 tickets sold per inhabitant) shows few openings for foreign productions. Whilst American products, thanks partly to the colossal Titanic, have occupied a considerable share of the world market (the market share of American films in European countries stayed below 64-65% in France and Italy only), the ten most successful European titles in the USA in 1998 accounted for only 2,7% of the gross overall profits. Amongst these, only four titles were not United States co-productions.

Of the markets under examination, Australia records the highest rate of increase in screens. Admissions are also rising, as is box office when expressed in home currency. The drop in box office shown in Ecu in the table is in fact due to strong variations in the rate of exchange: gross income from the theatres rose over the 1997-1998 period from 583,9 to 629,2 million Australian dollars (with a 7,8% increase). The average profitability of Australian screens is, instead, dropping: the number of screens is, in fact, increasing more than the rate of cinema-going. There is a drop in the average figures per theatre, both in terms of admissions and in terms of box office (in this case even when calculated in home currency: the average is, in fact, 399 thousand AUD in 1998, compared to 408 thousand in 1997).

The Japanese market is also growing: admissions crossed the 150 million mark in 1998. The per capita rate of cinema-going for Japanese citizens is also on the increase and reaches 1,22 tickets per inhabitant. However, this is still the lowest figure for the markets under consideration, well below the already weak average figure for Europe (2,23).

Thanks to a considerable increase in the number of theatres, which now number almost 2 000, the ratio of inhabitants per screen is dropping, although this indicator still rests at above 60 000: the figure is extremely high when compared to that of other markets, particularly the United States, where it dropped in 1998 to below 8 000.

As on the European market, in Japan, too, the majority of box office was in favour of American productions which rose to a market share of above 60% (in 1997 this share had been slightly above 50%), whilst the ten most successful films in the same year were all American (in first place the omnipresent Titanic). As a result there was a drop to 30% in the market share of home-produced films (which represented 36% of box office in 1996 and 41% in 1997).

To conclude, the "price of ticket" indica-

Cinema Exhibition in Western Europe and other markets

	EUROPE*					U.S.A.					JAPAN					AUSTRALIA				
	1995	1996	1997	1998	var % 98/97	1995	1996	1997	1998	var % 98/97	1995	1996	1997	1998	var % 98/97	1995	1996	1997	1998	var % 98/97
Population (x 1 000 000)	362,8	363,9	364,9	365,8	0,23%	261,7	264,2	266,5	269,1	0,98%	125,1	125,3	125,6	125,8	0,17%	18,0	18,2	18,3	18,6	1,64%
Number of screens	18 737	19 615	20 467	21 666	5,86%	27 805	29 690	31 640	34 186	8,05%	1 776	1 828	1 884	1 993	5,79%	1 137	1 251	1 431	1 576	10,13%
Admissions (x 1 000 000)	664,6	711,0	757,3	815,1	7,63%	1 262,6	1 338,6	1 387,7	1 480,0	6,65%	127,0	119,6	140,7	153,1	8,81%	69,0	73,9	76,0	82,0	7,89%
Gross Box Office (ECU x 1 000 000)	3 088	3 427	3 815	4 238	11,11%	4 245	4 677	5 682	6 040	6,29%	1 189	1 037	1 246	1 370	9,99%	287,0	343,8	354,2	346,5	-2,16%
Frequency per head	1,83	1,95	2,08	2,23	7,21%	4,82	5,07	5,21	5,50	5,57%	1,02	0,95	1,12	1,22	8,93%	3,83	4,06	4,15	4,41	6,27%
Average ticket price	4,65	4,82	5,04	5,20	3,17%	3,36	3,49	4,09	4,08	-0,24%	9,36	8,67	8,86	8,95	1,02%	4,16	4,65	4,66	4,23	-9,23%
Number of inhabitants per screen	19 361	18 551	17 830	16 883	-5,31%	9 412	8 899	8 423	7 872	-6,54%	70 439	68 545	66 667	63 126	-5,31%	15 831	14 548	12 788	11 802	-7,71%
Average admissions per screen	35 470	36 249	37 001	37 622	1,68%	45 409	45 086	43 859	43 293	-1,29%	71 509	65 427	74 682	76 820	2,86%	60 686	59 073	53 110	52 030	-2,03%
Average gross box office revenues per screen	164 819	174 732	186 376	195 622	4,96%	152 670	157 528	179 585	176 669	-1,62%	669 482	567 287	661 350	687 621	3,97%	252 404	274 780	247 514	219 891	-11,16%

Sources: MEDIA Salles, Motion Picture Association of America, Motion Picture Producers Association of Japan, CNC from Motion Picture Directors Association of Australia, Australian Film Commission. 1998 data is provisional.

* Data referring to Western Europe includes the following countries: Austria, Belgium, Denmark, Finland, France, Germany, Iceland (Reykjavik only), Ireland, Italy (data relevant to screens with more than 60 days of activity per year), Luxemburg, the Netherlands, Norway, Spain, Sweden, Switzerland and the United Kingdom.