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COUNCIL FOR CULTURAL CO-OPERATION

Culture

**COMMITTEE OF EXPERTS
ON THE CINEMA**

CINEMAS OF EUROPE : PROBLEMS ASSOCIATED WITH THE SCREENING OF EUROPEAN FILMS IN EUROPEAN CINEMAS

prepared by

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1 INTRODUCTION & OVERVIEW

a. Purpose of report

This report was commissioned by the Council of Europe in June 1992. Its purpose was to establish the position of European cinema within Europe. It seeks to establish whether there is sufficient provision of cinemas in Europe specifically to show European films and whether there are any schemes to assist European cinema. The research was designed to provide a broad overview of the current position, to assemble some basic data on each country, and to offer some preliminary views on possible action to improve the opportunities for exhibition of European films throughout Europe.

b. Layout of report

The report is arranged as follows: first, this introductory section sets out the methodology and offers an overview of the research findings. Then, each Council of Europe member state has a page or so (depending on available information) summarising the current data on exhibition and state support. After this, there are the conclusions and recommendations for action. Finally, the tables are collected together in the appendix.

c. Methodology and sources

Apart from one or two useful previous reports, the information required to assemble this document was not readily available in published sources. Accordingly the data was compiled principally from the different countries' national film institutes or other comparable bodies, by means of a short questionnaire. Where possible, this information was supplemented by other published reports and some summary data available in journals. Aside from national film institutes, other sources were as follows: Screen Digest November 1991 & June 1992); Retailing European Films: the case of the European exhibition industry (Report for the Media Business School by London Economics, May 1992); Geschaftsbericht 1991-92 (Hauptverbrand Deutscher Filmtheatrer, Wiesbaden); Cultural Trends 1992: no 13 (Policy Studies Institute, London); see also Patricia Perilli: A Level Playing Field? (BFI publications, 1991) for useful supplementary data on European state support schemes for the film industry. The council of Europe member countries covered by this report are those countries for which information was available. Some countries (Cyprus, Luxemboug and Turkey) were not able to offer any data (or scant information) and this is reflected in the report.

d. Acknowledgements

As well as the many national film bodies, I must also make special mention of Barrie Ellis-Jones, whose expertise, generosity and encouragement made this report possible. Thanks too to Mlle Judith Bartagnon, who provided very important assistance in assembling the initial data and Ms Rosalind Hall who helped in collating and presenting the report.

e. Overview

The following summary data presents a consistent theme: European film markets are dominated by powerful American distributors who account for over 50% (usually well over 50%) of box office revenue. Although there are different exhibition structures, ranging from the heavily concentrated, US-dominated model in the UK, to the diversified structure of numerous independent operators in Germany and France, the final outcome is always the same, American films usually dominate numerically, and **always** dominate in terms of market share.

A number of countries have created schemes to support European cinema (or at least alternatives to American film), in the way of a distribution and exhibition subsidy mechanism. Foremost amongst these is France; although Germany, Hungary and Poland also have interesting schemes.

The idea of establishing dedicated European cinemas has not taken root in Europe. However, schemes to facilitate the distribution of European films, and to subsidise cinemas which show them, do exist and can be built upon. Additionally, the emergence of Penta in Italy, a major distribution, exhibition and production company which rivals any American presence in the Italian market, may point the way forward to some form of European distribution company or network of companies.

Central and Eastern European film culture faces special challenges. In these countries the old political systems have largely collapsed and new systems are forming. Indigenous film is not the top priority in countries struggling to re-create themselves. Lacking internationally usable currency, there is little cash for indigenous production. To achieve even a small, healthy industry, a country needs outlets for indigenous work and funds for production. If European countries fail to establish film industries, American hegemony will be inevitable and a consequent impoverishment of European culture.

The new democracies in Central and Eastern Europe are an area for concern that must be highly prioritised if their potential is to be realised. The successes and failures of Western Europe provide valuable lessons.

Without proper provision and planning, European cinema will miss out on the opportunity of the new markets that are being created. In this instance the United States will continue with its successful dominance of the exhibition market, repeating the pattern within Western Europe.

Tables 1-5 give some introductory, summary statistics. Table 1 summarises data on the number of screens and admissions. Tables 2 & 3 show, for six European countries, the market share of US films as against domestic films and films from elsewhere. Tables 4 & 5 give information (for Western European countries only) on the number of screens per population and admissions per head. In addition, Tables 10a and 10b show annual admissions per capita for some European countries.

The coverage of data for each country varies considerably, according to the information available from the national film institutes. In particular, given the infrastructural problems already referred to in Eastern Europe, data on these countries is fragmentary.

All figures have been converted from local currencies to US dollars, using exchange rates given by *The Guardian* on December 1st 1992.

2 COUNTRY BY COUNTRY ANALYSIS

AUSTRIA

Austria has 394 screens and admissions in 1991 totalled 10.5 million. Of the 365 films released there in 1989 (latest figures available) 189 were American (approx. 51%).

BALTIC STATES

Lithuania has 473 cinemas, owned largely by local municipalities. The Ministry of Culture and Education owns a chain of four cinemas. There are no figures for admissions in the Baltic States.

Films have always been bought from the Russian market, which is dominated by American films. Estonia reported that 250 foreign films are imported every year, but this makes no distinction between US and European product. Lack of hard currency makes buying films from abroad difficult.

There is no further information available for Estonia (and none at all for Latvia), but Lithuania has recently established a special prize for cinemas which show art films (whether European or otherwise). Vilnius has now a special cinema for showing such films.

BULGARIA

Bulgaria had 500 screens in 1990, with admissions of 65 million.

BELGIUM

Belgium had 382 screens in 1990. Admissions were 16.2 million. European films are shown as part of regular programmes in many cinemas, although US films make up a substantial portion of the total. In 1989, 173, or 48% of the 361 total releases were American. In 1990-91, there were 124 European films shown (134 in 1989-90) compared to 180 other films, of which 163 were American, giving US films around 53% of releases (figures for the previous year were 177 US films out of a total of 193 non-European films).

There are 11 cinema chains, each owning 10 screens or more, in Belgium.

There are no existing schemes to support the European film industry.

CZECHOSLOVAKIA

Czechoslovakia has approximately 390 cinemas, with audiences of around 65 million. None of the cinemas specialises in European films. This role is taken up to some extent by the network of film clubs which show mainly European classics and other examples of European cinema. In addition, the Slovak Film Institute has recently established in Bratislava a cinema which shows largely European films. However, the market is still dominated by American films, which account for around 90% of those released.

Cinemas in Czechoslovakia are state owned.

There has been little opportunity to think about the film industry in Czechoslovakia since the end of Communist rule. However, the authorities and the relevant film bodies are now beginning to discuss ways of providing support for the distribution of European films.

DENMARK

Denmark had 357 screens in 1990. Admissions were 9.6 million. Figures for 1990 show 841 films screened, of which 49.2% were US films, 45.4% European and 5.2% 'other'.

In 1991, 771 films were screened of which 172 were Danish. Three Danish films were in the Danish top twenty (box-office receipts)

FINLAND

Finland has 333 screens, with admissions in 1991 of 10.8 million. Figures for 1988 show that, of the 188 releases that year, 110 (58.5%) were American.

Finnkino operates 80 screens and has recently acquired two art- house cinemas (Diana & Amanda).

FRANCE

France has 4441 screens. Admissions in 1991 were 117 million. Less than 50% of releases in 1991 were American films - 173 out of the total of 370 (47%) were from the US. However, over the period 1989-90, American films, although still a minority of releases, accounted for 62% of box office revenue. Only 21% of French screens are owned by the three major chains, UGC, Gaumont and Pathe. The US majors are not currently active in the exhibition sector in France. Although there are no cinemas which show exclusively European films, there are 980 screen designated as art-house, which specialise in European films, as well as classics.

The French distribution sector is also diversified. There are five US majors and around eleven large French distributors (dealing with over 10 released in the past three years) ; but there were a further 56 French distributors active in 1989-90, handling a small number of films each year. Thus no single distributor has a dominant position in the French market (see table 6).

France is relatively well-served by Government support schemes for exhibition and distribution. In 1990, 41 million US $ was distributed by Government schemes to allow exhibitors to finance modernisation schemes. The allocation of funds favours the less commercially successful cinemas. US$ 36 million was spent directly subsidising the 980 art-house cinemas, and a further 4 million US $ was allocated for expansion and renovation of cinemas in France. As a recent report concludes:

"The state subsidy system sustains a market structure which in all probability would not survive competition and full market costs. The effect of such and extensive competition and full market costs. The effect of such and extensive subsidisation of cinemas, and in particular smaller more specialist cinemas, is to create more of a cinema culture than would be sustainable in a purely commercially organised industry".

Moreover, French distributors also receive substantial subsidies, via a scheme which operates so as to favour companies which distribute non-US films. US$ 6 million were allocated in 1990. In addition, almost US$ 1 million went to help the distribution of 42 quality films, 23 of which were French. Finally, over US$ 0.74 million was spent directly subsidising distributors who specialise in art-house and experimental films.

GERMANY

Germany has 3706 screens in 3293 cinemas in the West. Admissions in 1991 were 107.6 million in the West and 566.3 million in the East (1990). Total box office revenue generated in Germany in 1991 amounted to US$ 576 million (West) and US$ 40 million (East). Of the total releases in 1991 (333), 161, or 48%, were American. $175 million was earned by US majors operating in West Germany in 1990, the highest returns from any EC country. Over the two years 1989-90, American films accounted for 82% of box office revenue in West Germany.

No cinema specialises in European films; European films are expected to compete with American product at the box office. Likely commercial performance dictates the choice of film by the exhibitor. In 1990, 63% of films shown were American and 35% European. In 1990 and 1991, the share of box office revenue achieved by European films, however, was only 15%. This is an important distinction which applies to all markets where American cinema dominates: the US films are not only the largest numerically, but they also tend to be the most successful at the box office, thus ensuring that the American share of total revenue is higher than the share of releases.

Cinema ownership in Germany is diversified, with a large number of privately owned, individual cinemas (accounting for almost half of the total number of cinemas). The US majors are only now beginning to establish a foothold in the exhibition sector, with the advent of multiplexes to Germany. The largest group is the Reich Group, which own the 300 or so UFA cinemas (see table 7). In the distribution sector, the four US majors dominate the market, as table 8 shows.

There are a number of support schemes for cinema operating in Germany, run under the auspices of the Bundesministerium des Innern, supplemented by regional schemes in Bayern, Hessen and Niedersachsen among others. The emphasis is on support for exhibitors who offer outstanding cultural programmes, which tends to mean predominantly domestic and European films. Commercial performance is a factor is assessing which exhibitors should generally qualify for support: the German government is opposed to subsidising theatres which show unpopular films. The successful exhibitors receive and end-of-year payment of between US$ 6281 and US$ 12,563. Grants and loans to cinemas in 1991 totalled US$ 588,567 and US$ 102,387 respectively.

GREECE

There were around 600 screens in Greece in 1990, attracting admissions of 16.5 million. Latest figures for US vs other releases are for 1987, when American films accounted for 76% of the total of 328 films.

HUNGARY

Hungary has 681 cinemas with estimated admissions of 38 million. There are perhaps 30 cinemas which show European films on a regular basis. However, the market is dominated by US films. In 1991, of 218 releases, 116 (53%) were American, with 19 (8.7%) Hungarian films out of a total of 97 European films (44%). There were 5 from other parts of the world.

There are four main distributing companies in Hungary, including the Hungarian Film Institute (the others are Mokep, Hungarofilm and Budapest Film).

The motion Picture Foundation of Hungary has recently taken steps to improve the distribution of European films. The Foundation nominates films which deserve nation-wide distribution; so far 28 foreign art films have been supported in this way and, in 1992, the Ministry of Culture and Education allocated US$ 670,000 to the Film Distribution Board of the Film Foundation.

ICELAND

In Reykjavik, there were 6 cinemas in 1990 and 22 cinema halls, which secured attendance of 1.2 million. Outside the capital there are another 19 cinemas and 20 country halls. There is one specialised cinema at the University - the Haskolabio (University Cinema) - which has recently introduced a programme of 'European Films'. This guarantees that at least one European film is included in the screening programme at all times.

However, the market is dominated by American films. In 1990, of the 179 films released in Reykjavik, 159 were US and the remaining 20 European.

There are no schemes to encourage the exhibition of European films and there are no plans to introduce support mechanisms.

IRELAND

Three cinemas show European films in Ireland (but not exclusively). There are no state schemes to encourage their exhibition.

ITALY

Italy had 3249 screens in 1990 and 90.5 million admissions. European films accounted for around 45% of the total releases in 1991 (30% of the overall total were Italian), while US films represented 55%. In 1990, the split was almost 50-50, with 252 US releases out of a total of 488 films. Yet in terms of box office revenue, the American films dominate: in 1989-90, US films took 72% of total box office income.

Ownership of cinemas in Italy is widely spread, with small regional chains operating alongside a large number of independent exhibitors. The recent emergence of the Penta Group, and integrated distribution/ exhibition company which owns the Cinema 5 (Finivest) chain of over 300 cinemas world-wide, is changing the structure of Italian exhibition. This company has also altered the distribution structure in Italy, as a major European company has successfully challenged the dominance of the US operators, achieving a 40% share of the Italian market.

Italy does encourage exhibition of Italian films (and this practice has recently been extended to include all EC films) by offering exhibitors relief on tax and by a scheme of compulsory programming of Italian/EC films for 25 days in every 3 months.

NETHERLANDS

There are 418 screens in Holland, which attracted attendances of 14.8 million in 1991. The exhibition market is dominated by US product: in 1991 there were 132 US films released and only 31 European. The US share of the box office during the period 1989-90 was 80%.

There are no dedicated European film exhibitors. The Netherlands does have an alternative cinema circuit of 28, mainly subsidised, private foundations to complement the main commercial circuits.

In addition, there has been state subsidy for two distributors of art films in Holland (although this may change once the Artsplan for 1993-96 has been settled). A small budget is allocated to investment in refurbishment of the art-house circuit (US$ 83,624 in 1991). The local authorities also provide subsidised accommodation for these cinemas.

NORWAY

Norway has 428 screens, with admissions of 11.4 million (1990). There are no specialised European cinemas (although there is a specialist distributor, Europafilm). In 1989, 125 of the 204 films (61%) were American.

The municipalities dominate the ownership of Norway's cinema circuits (Bergen, Oslo & Trondheim Municipal Cinemas), while 152 cinemas are privately owned.

There are schemes to encourage the exhibition of European films. The Norwegian Film Institute allocates US$ 84,482 to importing high quality films, 80% of which are European. In addition the Norwegian Association of Municipal Cinemas receive state funding to import quality films (US$ 0.35 million in 1991) and European films (US$ 0.32 million). Its US$ 0.27 million budget for supporting children's films is largely devoted to European films as well (US$ 0.18 million).

POLAND

Poland has around 600 cinemas, with admissions of 38 million.

In Poland, while all cinemas are technically free to show European films, distributors find it less profitable to handle non-US product. Accordingly, specialist niche cinemas have arisen which specialise in films of 'high artistic values'. The Film Art Foundation in Warsaw owns 3 cinemas which show primarily Polish and 'ambitious' European films.

The most significant development in recent times has been the formation, by the President of State Committee of Polish Cinematography, of the Film Distribution Agency. This has two main functions: support for the distribution of Polish and foreign films of recognised artistic value; and the management of an Art house Network for exhibiting these films. So far, there are about 15 cinemas owned and operated by the Polish FDA, with a further 50 cinemas co-operating with the Management Arthouse Network.

A further 230 or so cinemas still co-operate with the Polish Federation of Film Societies, specialising in art-house and European films.

The Film Distribution Agency identifies films for distribution through its own network. These are mainly from Polish and other European countries, but also includes US independents (eg the films of Jim Jarmusch).

PORTUGAL

In 1991 there were 254 screens in 211 cinemas in Portugal. Admissions were 11 million (1990). No cinemas show exclusively European films, although the Paulo Braco chains in Lisbon and Oporto promote European films as a speciality. In an average year, around 350 American films will be imported, compared to 17 from Europe (including domestic product).

No schemes currently exist to encourage exhibition although plans are apparently being discussed.

No further information is available

RUSSIA

Figures for Russian cinemas and admissions are hard to establish. Recent estimates of the total in the old Soviet Union give 4,500 screens, with admissions of 3,500 million in 1990.

The struggle to rebuild an obsolete and decayed infrastructure has led by default to the domination of Russian screens by US films. Russia is currently considering import quotas as a temporary solution.

SPAIN

In 1991 there were 1806 screens in Spain. Admissions we 78.5 million (1990). There are no specialist European cinemas. In 1991, US films accounted for 66% of total releases (193 films out of 292). A recent report identifies the share of total box office revenue derived by American films in 1989-90 as 83% in Spain.

There are three main cinema chains in Spain: Cinesa, Soler and Reysabel.

Some support schemes exist for distributors and exhibitors: the Spanish Institute of Cinema and Audio-Visual Arts (ICAA) provides subsidies for film prints, subtitling and publicity expenses to distributors. The ICAA also offers subsidies to exhibitors for showing EC films (based on 5% of box office returns over the first two years of the film's life). There are also grants made to maintain cinemas in rural areas.

SWEDEN

There were 1144 screens in Sweden in 1990, with admissions of 15.3 million. There are two major chains in the country, which show largely US films, supplemented by European films, on a commercial basis. Figures for 1988 show that of the 236 films released in Sweden in that year 128 or 54% were American. There are in addition around 20 art-house cinemas which show European and other international films. The Swedish Film Institute for example specialises in Chinese films and recently had a season of Pedro Almodovar films.

There are no state schemes specifically aimed at encouraging the exhibition of European films, but the Swedish Exhibition Council Board has a remit to encourage the screening of 'quality films'. In addition the Swedish Film Institute has a general role to encourage and promote cinema culture on as wide a basis as possible. It will therefore make funds available to distributors to help launch particular films. The Institute also provides support for distribution of films to rural areas to provide outlying audiences with more choice than just US films. Finally, the SFI makes funds available for local publicity to promote unusual films; and refurbishment allowances for cinemas.

SWITZERLAND

Switzerland had 402 screens in 1990, with 14.3 million admissions. There are no cinemas dedicated to showing European films. 189 or 56.5% of the total releases in 1990 (334) were American films. Cinemas are privately owned, and often run by local associations in the rural areas. The largest chain has 15 cinemas.

There are no schemes in Switzerland to support European films.

UNITED KINGDOM

The UK has 1770 screens. Admissions in 1991 were 100.6 million. The leading circuits are as follows:

MGM/Canon/Pathe	435 screens
Odeon	296 screens
UCI	207 screens
National Amusements	97 screens
Warner	57 screens
Apollo	51 screens
Caledonian	19 screens

There are a further 608 screens in independently owned cinemas throughout the country, including the 48 screens (1990) supported by the British Film Institute, which specialise in world cinema, including European films which would otherwise not get a release in the UK. In 1990 these cinemas attracted admissions of around 2 million. To the extent that these are publicly funded, this represents state support for the exhibition of European films. Finally, in London there are independent cinemas which tend to show non-US product.

Nonetheless, American films dominate the British market. In 1991 of the 236 films released in the UK, 65% were US (152), representing approximately 80% of box office revenue. There were around 47 European films released, including 31 British films. Of the top 20 UK releases in 1991, 19 were American films and 1 was an Irish film (financed from America). The British market is controlled by a small number of Hollywood-based distribution companies (see table 9). This high level of concentration restricts the opportunities for non-US films to receive a release. In 1989, it is estimated that the American-based majors took around US$ 103 million from the British distribution market, out of a total turnover of US$ 118 million and over US$ 76 million from the exhibition market out of a total turnover of US$ 112 million.

There are currently no specific state support schemes for exhibition. The market dominance of the US majors may soon be the subject of a Government investigation but otherwise the position of European films in the British market is very weak.

3 CONCLUSION & RECOMMENDATIONS

a. Conclusion

There is insufficient opportunity for European audiences to watch European films. Financial support within Europe for production and exhibition of European films is inadequate. Film distribution and exhibition is heavily dominated by American product. As a result, the great majority of European films, are not even seen on European screens. It is only in those countries where there is dedicated support for European cinema that there is any chance for European exhibition. Without specialist support the film industry within Europe will not survive.

Film audiences have been diminishing in size over time. The more the audience has shrunk, the greater has been the impact on domestic and European film. The market share increase has been in American product. In the UK where audiences have been increasing since 1984, this growth has benefited US films enormously; European film audiences have hardly grown at all.

No country has chosen to establish cinemas dedicated to showing European films, but a number of states have flourishing art-house cinemas which specialise in independent cinema and films from countries other than the United States. Some art-house cinemas are privately owned and some are in the public sector. Some countries have a mix of private and public sector art-house cinemas. There is some financial support for European films, but almost always based upon the criterion of 'quality'. This category excludes the vast majority of European production.

Film is a major, popular art form, both reflecting and shaping attitudes and visions of life. If indigenous European work is not supported, there is a danger that European culture will be impaired and audiences will be restricted to homogenous images of American values. The good health of European cinema requires a cross-fertilization of ideas throughout Europe. Every domestic market in Europe provides an opportunity for the expression of European ideas and the enrichment of film culture.

Central and Eastern Europe are in critical stages of political development. In these countries it is vital for the health of their film industries that good practice is established. It is unlikely that domestic film production will flourish immediately in these countries, establishing networks of support for European cinema at an early stage will provide sensibly for the next decades.

b. Recommendations

i. The following steps should be considered:

ii. The Council of Europe should consider financing *the Europa Cinemas* which will stimulate the exhibition of European 'quality' films.

iii. Central and Eastern Europe share a particular need for support. In order to avoid US saturation of the new markets which will arise, existing regional cinemas should receive financial support for exhibiting European films. Since new film product will be rare initially, a showcase for European product must be provided. *Europa Cinemas* must be funded if Central and Eastern Europe are to maintain a share in their film heritage. These cinemas will provide a natural home for domestic product as soon as the indigenous film industries are able to mature.

iv. The feasibility of a pan-European distribution network should be examined.

v. The status of European cinema in Europe should be reviewed in the light of these recommendations in two years time.

APPENDIX

List Of Tables

Sources:

Tables 9, 10a: Cultural Trends 1992, Issue 13 vol 4 no.1 (Policy Studies Institue)

Tables 1-8 & 10b: Effam 91, Media Business School, London Economics, May 1992

TABLE 1

Table 1 Annual Admissions Per Screen For European Countries

Figure 3 Data: Admissions per screen				
	1960	1970	1980	1990
Belgium	51.6	38.1	42.5	42.4
Denmark	88.0	62.3	33.5	26.9
France	60.9	43.1	38.5	27.0
Germany (West)	87.0	43.6	42.0	31.8
Greece	61.2	130.9	38.5	27.5
Ireland	131.0	83.3	58.3	43.3
Italy	71.7	55.6	28.6	27.9
Luxembourg	128.6	52.0	40.0	29.4
Netherlands	97.3	69.2	53.3	34.3
Portugal	52.2	56.0	72.8	44.0
Spain	57.3	48.5	43.0	44.3
UK	165.1	126.2	64.2	57.7
Total EC	77.7	57.0	39.0	34.0

Source: Screen International

TABLE 2

Table 2 Proportion of films in 6 EC countries according to country of origin

Figure 5 LE Film Database : Percentage of Box Office Receipts

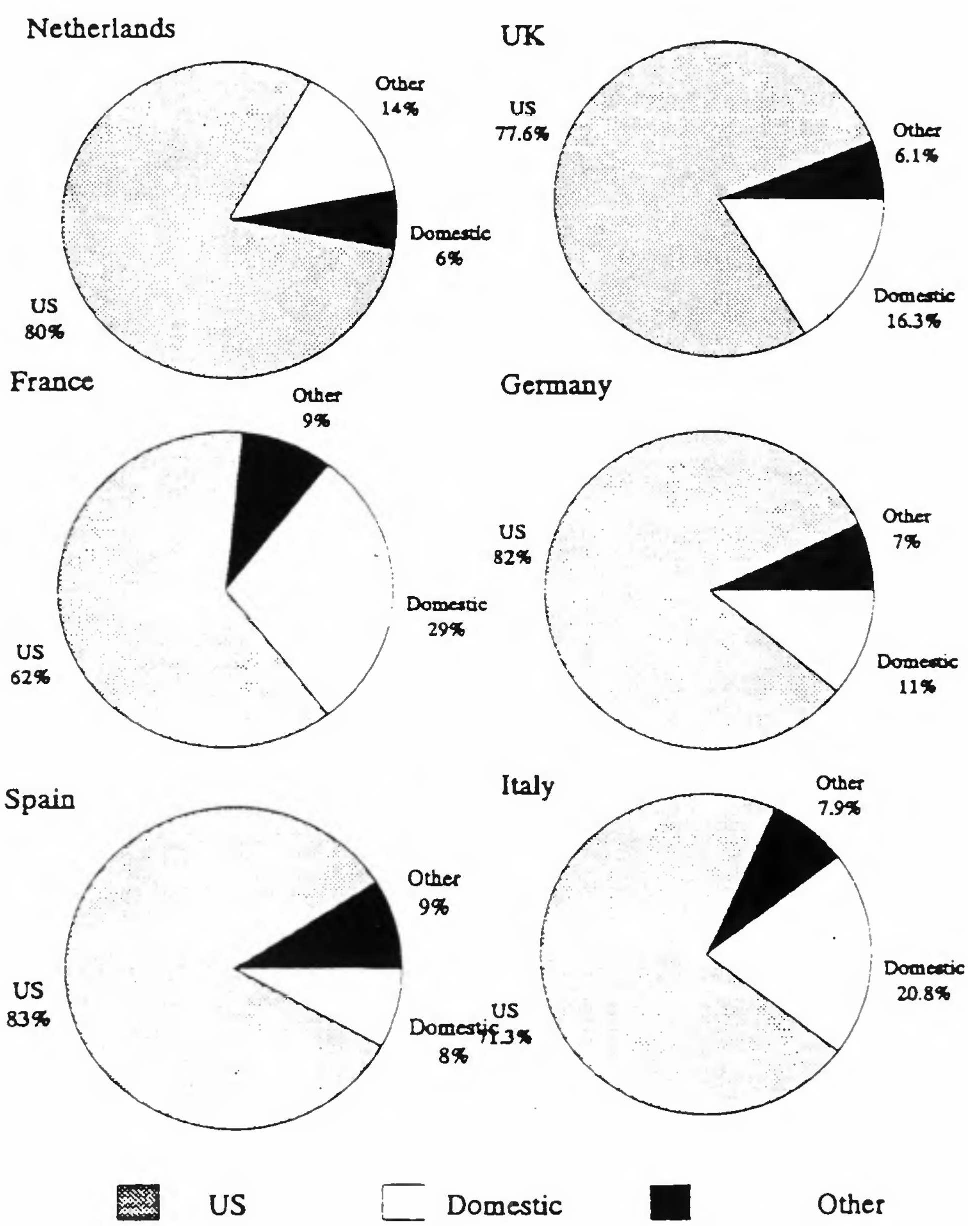


TABLE 3

Table 3 Percentage of box office receipts for 6 countries

Figure 5 Data: LE Film Database : Percentage of Box Office Receipts						
	France	NL	Italy	Spain	Germany	UK
Domestic	29	6	21	8	11	16.3
US	62	80	72	83	82	77.5
Other	9	14	8	9	7	6.1

Source: London Economics' Film Database

TABLE 4

Table 4 Cinema capacity - Screens per million

Figure 1 Data
Cinema Capacity in the EC
(Screens per million people)

	1960	1970	1980	1990
Belgium	170.5	83.9	51.7	37.7
Denmark	110.2	80.2	92.6	70.7
France	128.2	83.4	85.7	81.6
Germany (West)	131.0	59.6	54.7	53.4
Greece	130.7	117.7	124.6	58.2
Ireland	100.0	82.8	54.9	48.5
Italy	205.1	174.4	150.3	57.4
Luxembourg	110.4	75.0	57.5	44.2
Netherlands	49.3	33.2	37.5	29.2
Portugal	55.6	51.8	45.3	22.7
Spain	218.2	204.3	114.0	45.2
UK	58.2	27.7	28.1	29.5
EC Average	134.5	95.7	80.5	51.4

Source: Screen International

TABLE 5

Table 5 Annual admissions per capita

Figure 2 Data:
Admissions per Capita

	1960	1970	1980	1990
Belgium	8.8	3.2	2.2	1.6
Denmark	9.7	5.0	3.1	1.9
France	7.8	3.6	3.3	2.2
Germany (West)	11.4	2.6	2.3	1.7
Greece	8.0	15.4	4.8	1.6
Ireland	13.1	6.9	3.2	2.1
Italy	14.7	9.7	4.3	1.6
Luxembourg	14.2	3.9	2.3	1.3
Netherlands	4.8	2.3	2.0	1.0
Portugal	2.9	2.9	3.3	1.0
Spain	12.5	9.9	4.9	2.0
UK	9.6	3.5	1.8	1.7
Total EC	10.5	5.5	3.1	1.7

Source: Screen International

TABLE 6

Table 6 Releases by distributor

Releases by Type of Distributor, 1988 - 1990

	Films released			Market share of year's releases		
Year	1988	1989	1990	1988	1989	1990
5 US Majors	93	81	74	37.5%	34.3%	32.9%
11 Big French	114	99	95	46.0%	41.9%	42.2%
Other	41	56	56	16.5%	23.7%	24.9%
Total	248	236	225	100	100	100

TABLE 7

Table 7 Structure of exhibition sector

Table C22

Structure of the theatrical exhibition sector (1991)

Numbers of cinemas owned by theatrical exhibition companies	Theatrical exhibition companies		Cinemas	
	Numbers	Percentage distribution	Numbers	Percentage distribution
1	508	46.0	508	15.7
2	238	21.6	476	14.7
3	130	11.8	390	12.0
4 - 10	198	17.9	1090	33.7
11 - 15	12	1.1	153	4.7
16 - 20	9	0.8	158	4.9
21 - 40	4	0.4	143	4.4
more than 40	5	0.5	319	9.9
Total	1 104	100.0	3.237	100.0

Source: G. Neckermann, Filmwirtschaft und Filmförderung

TABLE 8

Table 8 Market share of German distributors

Table 22.3

Market Shares of the Largest Film Distributors in Germany[1]
(Box office revenues of top 100 films)

Distributor	Nationality	Market share (%) 1989	Market share (%) 1990
UIP	US	41.4%	22.9%
Warner	US	16.0%	34.6%
Fox	US	8.0%	9.0%
Columbia Tristar	US	3.7%	10.6%
Market share of US distributors		69.1%	77.1%
Jugendfilm		6.1%	4.6%
Senator	German	6.7%	3.0%
Tobis	German	6.9%	1.7%
Neue Constantin	German	5.0%	5.0%
Concorde	German	1.5%	1.0%
NEF2	German	0.8%	1.0%
Highlight	German	0.0%	1.7%
Scotia	German	0.3%	3.6%
Pandora	German	0.6%	0.4%
Metropol	German	1.4%	0.6%
Ascot	German	0.8%	0.2%
Filmverlag	German	0.2%	0.1%
Market share of German distributors		30.9%	22.9%

Notes
[1] Buena Vista (Walt-Disney) is due to open next year

Source: Top 100 films 1989, 1990

TABLE 9

Table 9 UK box office and distributors

	Film	Distributor	Date of issue	Box office gross (£ millions)(a)
1	*Robin Hood: Prince of Thieves*	Warner	5 July(b)	19.823
2	*Terminator 2: Judgment Day*	Guild	16 August(b)	18.015
3	*The Silence of the Lambs*	Rank	31 May(b)	17.113
4	*Three Men and a Little Lady*	Warner	8 February	12.968
5	*Home Alone*	20th Fox	7 December 1990	11.998
6	*Dances With Wolves*	Guild	6 February	10.598
7	*Sleeping with the Enemy*	20th Fox	12 April	9.231
8	*Naked Gun 2½: The Smell of Fear*	UIP	28 June(b)	8.762
9	*Kindergarten Cop*	UIP	1 February	8.217
10	*The Commitments*	20th Fox	27 September(b)	6.600
11	*Teenage Mutant Ninja Turtles*	Virgin	23 November 1990(c)	6.109
12	*Ghost*	UIP	5 October 1990(c)	6.071
13	*Arachnophobia*	Warner	4 January	5.516
14	*Look Who's Talking Too*	Columbia/Tri-Star	22 March	5.265
15	*Highlander 2: The Quickening*	Entertainment	12 April	5.251
16	*Green Card*	Warner	1 March	5.031
17	*Backdraft*	UIP	2 August	5.025
18	*Misery*	First Independent	10 May	4.715
19	*Edward Scissorhands*	20th Fox	26 July	4.300
20	*Mermaids*	Rank	24 May	3.938

Source: *Screen International*, 10 January 1992.

TABLE 10a

Table 10a Annual admissions per capita for 8 countries

Cinemas: screens, average admission prices and admissions per head of population in the UK and selected countries, 1990

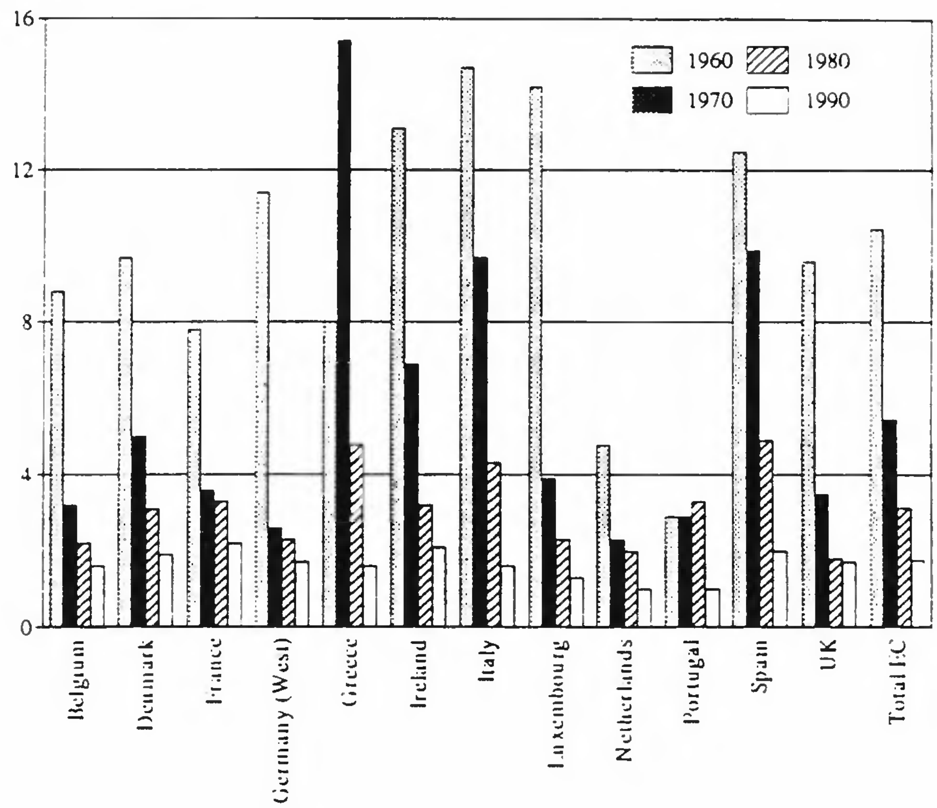
	Screens per million population	Average admission price (US$ equivalents)	Annual admissions per head of population
United Kingdom	31.8(a)	4.46	1.7
Denmark	69.6	4.49	1.9
France	80.3	5.67	2.2
Germany	52.7	5.00	1.7
The Netherlands	28.6	6.26	1.0
Italy	56.4	5.60	1.6
Spain	45.1	3.53	2.0
EC average	51.1	4.85	1.7
Sweden	135.2	8.03	1.8
USA	94.8	4.75	4.2

Source: *Screen Digest*, November 1991; Policy Studies Institute.

TABLE 10 b

Table 10b   Bar Chart of annual admissions per capita

Figure 2   Admissions per Capita



Source: *Screen Digest*