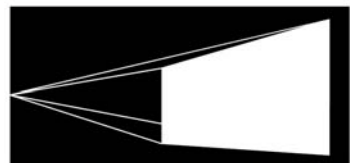


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Digital screens: how many and where?

Presentation by

Elisabetta Brunella,
Secretary General of MEDIA Salles

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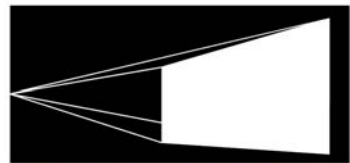


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MEDIA Salles is presenting today

- **New statistics on cinema-going in Europe in 2009**
- **Data on digital cinemas and screens worldwide**

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New statistics on cinema-going in Europe in 2009

An exceptional year both in Western and Central-Eastern Europe

- an increase in admissions
- even a larger increase in gbo
- an acceleration of digitalisation

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New statistics on cinema-going in Europe in 2009

an increase in admissions

Europe's admissions: + 6.3%, from 1,102 to 1,172 million

70 million additional spectators

EU countries: + 6.08%, from 916.1 to 971.8 million

Western Europe: + 5.7% from 870.9 to 920.5 million

*Central-Eastern Europe and Mediterranean Rim:
+ 8.7% from 231.1 to 251.3 million*

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New statistics on cinema-going in Europe in 2009

Admissions: focus on the 5 main Western markets

France: + 5.7%, from 190 to 200.8 million – best result since 1982

UK: + 5.6%, from 164.2 to 173.5 million

Germany: + 13.1% from 129.4 to 146.3 million

Spain: + 2%, from 107.8 to 110 million

Italy: - 0.3% from 108.7 to 108.3 million

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New statistics on cinema-going in Europe in 2009

Admissions grow in smaller Western markets too

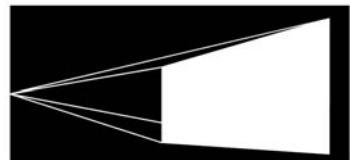
Austria : + 17.7%

The Netherlands: + 15.8%

Sweden: + 13.5%

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New statistics on cinema-going in Europe in 2009

Dips are recorded in

Finland : - 0.9%

Portugal: - 1.7%

Ireland: - 3.2%

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New statistics on cinema-going in Europe in 2009

Admissions:

focus on Central-Eastern Europe and the Mediterranean Rim

Russia: + 11.7%, from 118.5 to 132.4 million

Poland: + 16.1%, from 33.8 to 39.2 million

Turkey: -5.2% from 38.5 to 36.5 million

Romania: + 31.7%, from 3.8 to 5 million

Slovak Republic: +23.3% from 3.4 to 4.1 million

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New statistics on cinema-going in Europe in 2009

an increase in GBO

Western Europe: + 13.7%
As admissions went up by 6%,
It means that the average ticket price has increased.

Main reason:
more offer of 3D digital movies,
sold at a higher price

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New statistics on cinema-going in Europe in 2009

an acceleration in digitalisation

2,602 screens with DLP Cinema or 4K technology

increasing from 1,535

between 1st January 2009 and 30 June 2009

+70% in 6 months

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New statistics on cinema-going in Europe in 2009

First available data on digitalisation as at 1st January 2010
confirms increase in the second semester of 2009 too

Digital screens in France – now the leading market in Europe -
increased from 598 to 876 between June 2009 and January 2010
+46% in 6 months

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Data on digital cinemas and screens worldwide

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Growth rate in 2008 – full year: + 71%

Growth rate in 2009 – first semester: + 69%

2008 – an average of 50 new projectors every month

2009 – an average of 170 new projectors every month

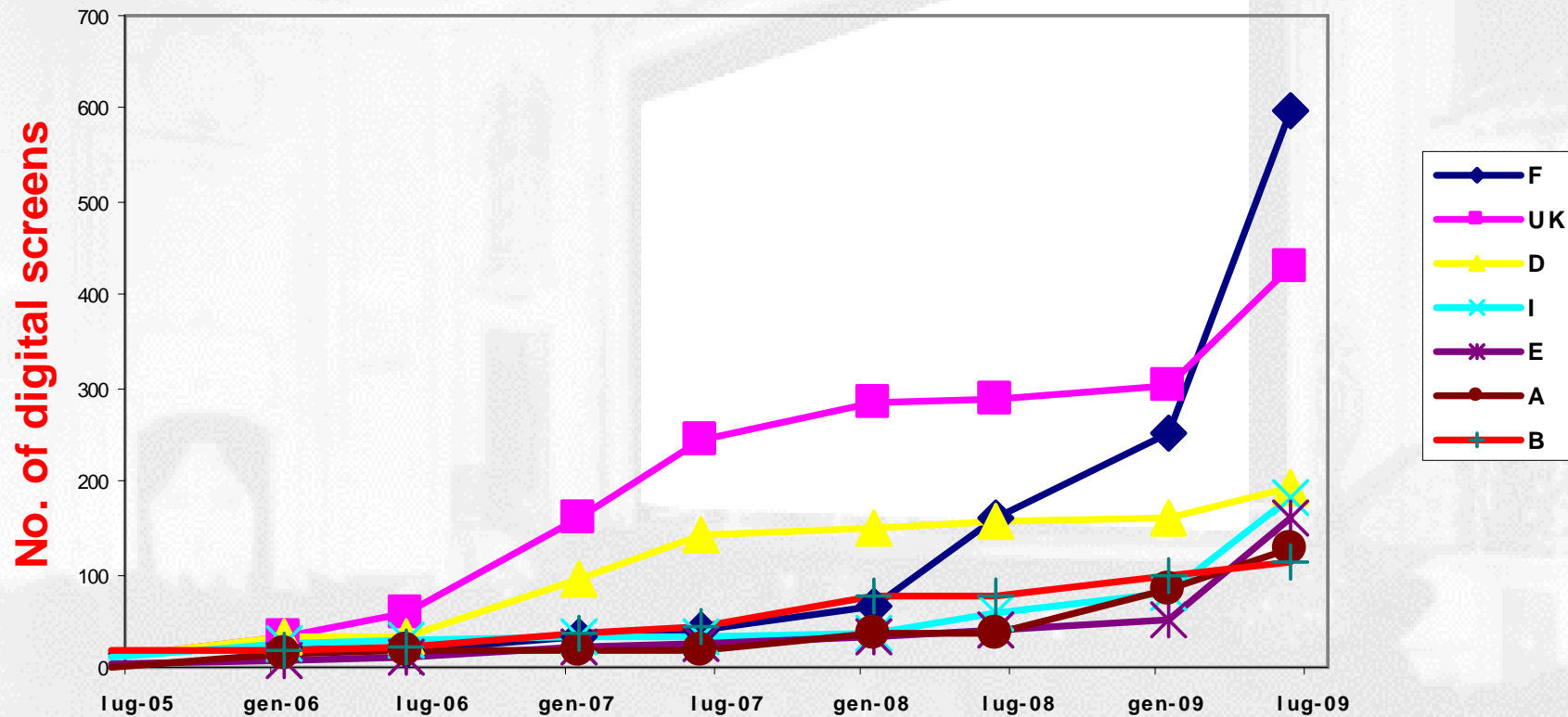
2008 – average number of digital screens per cinema: 1,87

2009 – average number of digital screens per cinema: 1,93

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**Number of digital screens in Western Europe by semester
 (July 2005 - July 2009)**



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Digital screens in Europe as at 30 June 2009

| Country | No. of cinemas | No. of screens |
|---------|----------------|----------------|
| A | 40 | 128 |
| B | 18 | 114 |
| BG | 9 | 19 |
| CH | 28 | 41 |
| CY | 1 | 1 |
| CZ | 21 | 25 |
| D | 105 | 208 |
| DK | 13 | 15 |

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Digital screens in Europe as at 30 June 2009

| Country | No. of cinemas | No. of screens |
|---------|----------------|----------------|
| E | 107 | 162 |
| EE | 1 | 2 |
| F | 150 | 598 |
| FIN | 18 | 27 |
| GR | 11 | 15 |
| HR | 6 | 7 |
| HU | 15 | 20 |

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Digital screens in Europe as at 30 June 2009

| Country | No. of cinemas | No. of sites |
|---------|----------------|--------------|
| I | 132 | 183 |
| IRL | 15 | 47 |
| ISL | 4 | 7 |
| L | 5 | 22 |
| LT | 3 | 4 |
| LV | 1 | 2 |
| MT | 1 | 2 |
| N | 34 | 58 |
| NL | 48 | 77 |
| P | 39 | 51 |

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Digital screens in Europe as at 30 June 2009

| Country | No. of cinemas | No. of screens |
|--------------|----------------|----------------|
| PL | 64 | 82 |
| RO | 7 | 24 |
| RS | 1 | 2 |
| RU | 125 | 161 |
| S | 17 | 20 |
| SI | 9 | 9 |
| SK | 4 | 4 |
| TR | 31 | 33 |
| UK | 267 | 432 |
| Total | 1,350 | 2,602 |

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Widespread growth but at different rates

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Growth rate in 2009 – first semester

| Country | Growth rate in 2009 – first semester |
|---------|--------------------------------------|
| A | +52% |
| B | +16% |
| BG | +12% |
| CH | +46% |
| CY | - |
| CZ | 1150% |
| D | 19% |
| DK | 50% |

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Growth rate in 2009 – first semester

| Country | Growth rate in 2009 – first semester |
|---------|--------------------------------------|
| E | +224% |
| EE | - |
| F | +136% |
| FIN | +125% |
| GR | +88% |
| HR | - |
| HU | +186% |
| I | +129% |

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Growth rate in 2009 – first semester

| Country | Growth rate in 2009 – first semester |
|---------|--------------------------------------|
| IRL | +24% |
| IS | - |
| L | +5% |
| LT | - |
| LV | - |
| MT | - |
| N | +21% |
| NL | +43% |

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Growth rate in 2009 – first semester

| Country | Growth rate in 2009 – first semester |
|----------------|--------------------------------------|
| P | +16% |
| PL | +55% |
| RO | +71% |
| RS | - |
| RU | +79% |
| S | +150% |
| SI | - |
| SK | - |
| TR | +65% |
| UK | +43% |
| Average | 69% |

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Digital cinemas worldwide

Number of digital screens worldwide by continent

| Continent | Total no. of digital screens as at 1st Jan. 2006 | Total no. of digital screens as at 1st Jan. 2007 | Total no. of digital screens as at 1st Jan. 2008 | Total no. of digital screens as at 1st Jan. 2009 | % of growth of digital screens between 2006 and 2007 | % of growth of digital screens between 2007 and 2008 | % of growth of digital screens between 2008 and 2009 |
|------------------------|--|--|--|--|--|--|--|
| Africa and Middle East | 1 | 3 | 3 | 27 | 200% | - | 800% |
| Asia and Pacific | 207 | 354 | 786 | 1458 | 71% | 122% | 85% |
| Europe | 204 | 527 | 897 | 1535 | 158% | 70% | 71% |
| Latin America | 16 | 21 | 26 | 48 | 31% | 24% | 85% |
| North America | 173 | 1957 | 4576 | 5660 | 1031% | 134% | 24% |
| Total | 601 | 2862 | 6288 | 8728 | 376% | 120% | 39% |

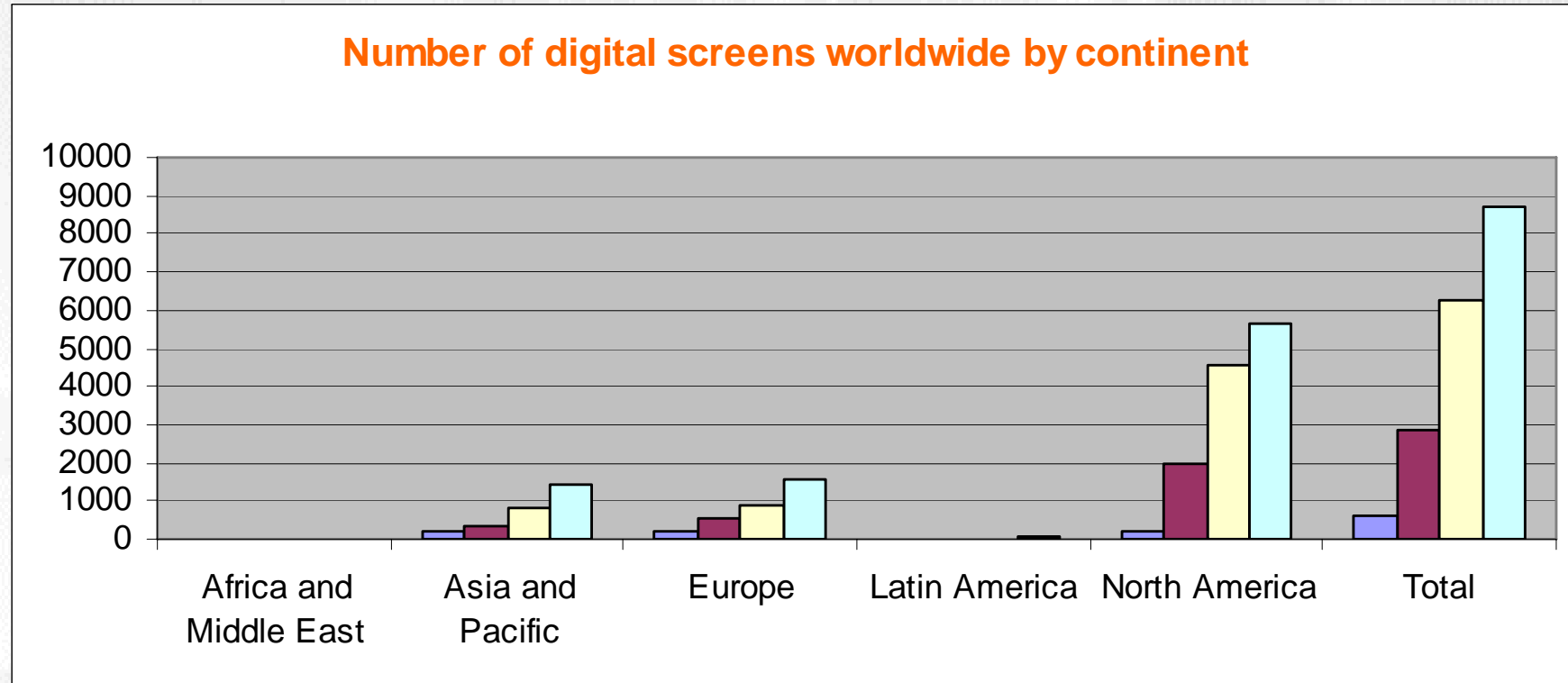
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Digital cinemas worldwide

Number of digital screens worldwide by continent



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Digital cinemas worldwide

Number of digital sites worldwide by continent

| Continent | Total no. of digital cinemas as at 1st Jan. 2006 | Total no. of digital cinemas as at 1st Jan. 2007 | Total no. of digital cinemas as at 1st Jan. 2008 | Total no. of digital cinemas as at 1st Jan. 2009 | Av. no. of digital screens per site at 1st Jan. 2006 | Av. no. of digital screens per site at 1st Jan. 2007 | Av. no. of digital screens per site at 1st Jan. 2008 | Av. no. of digital screens per site at 1st Jan. 2009 |
|------------------------|--|--|--|--|--|--|--|--|
| Africa and Middle East | 1 | 3 | 3 | 20 | 1 | 1 | 1 | 1,4 |
| Asia and Pacific | 164 | 260 | 475 | 810 | 1,3 | 1,4 | 1,7 | 1,8 |
| Europe | 148 | 358 | 550 | 821 | 1,4 | 1,5 | 1,6 | 1,9 |
| Latin America | 15 | 17 | 22 | 35 | 1,1 | 1,2 | 1,2 | 1,4 |
| North America | 133 | 343 | 854 | 1130 | 1,3 | 5,7 | 5,4 | 5,0 |
| Total | 461 | 981 | 1904 | 2816 | 1,3 | 2,9 | 3,3 | 3,1 |

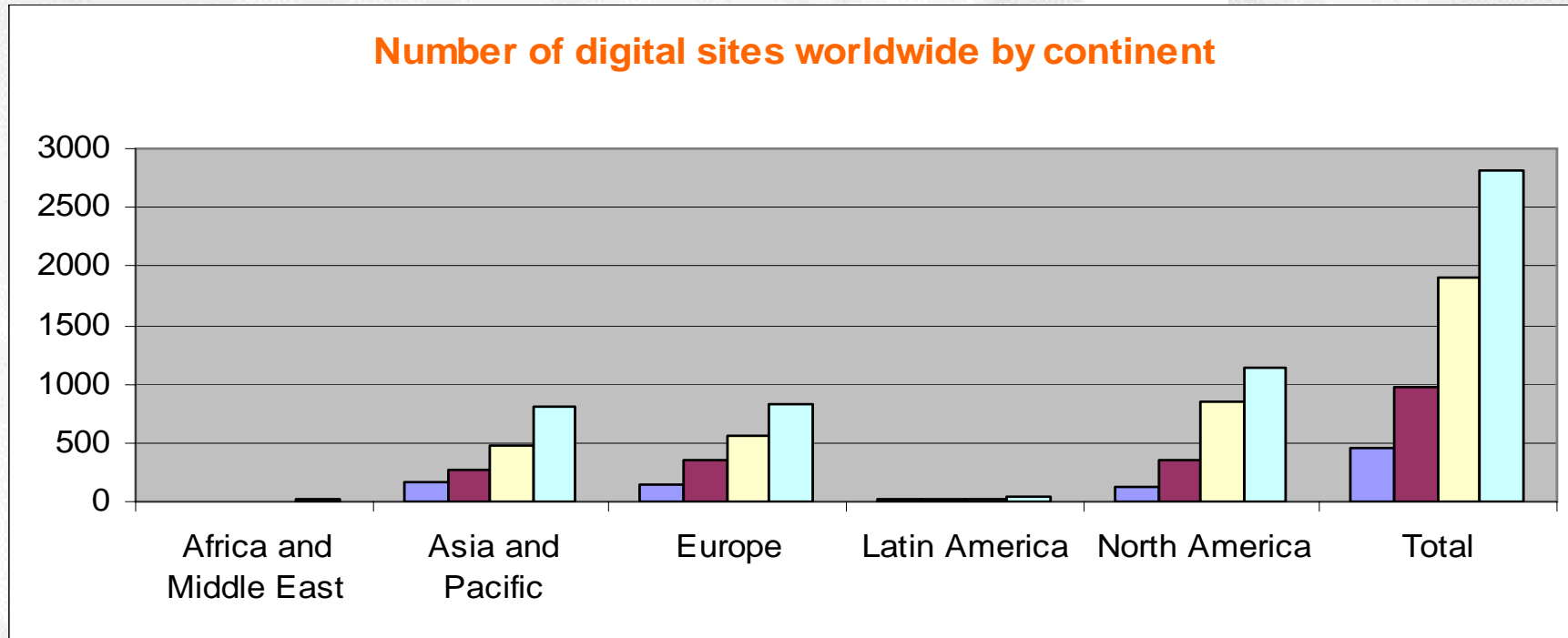
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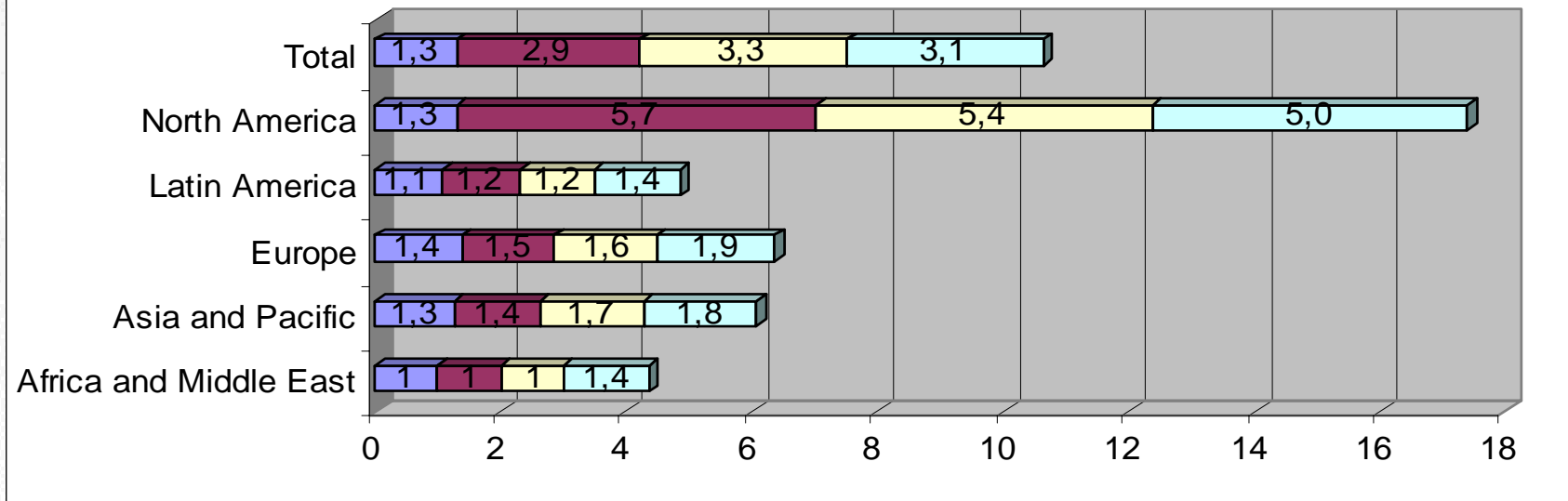
Digital cinemas worldwide

Number of digital sites worldwide by continent



Digital cinemas worldwide

Average number of digital screens per site worldwide



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Growth of digital screens is affected by 3D

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**The penetration of 3D digital screens
has risen more or less everywhere to
reach 55% in Europe.**

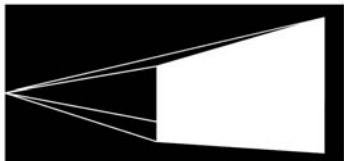
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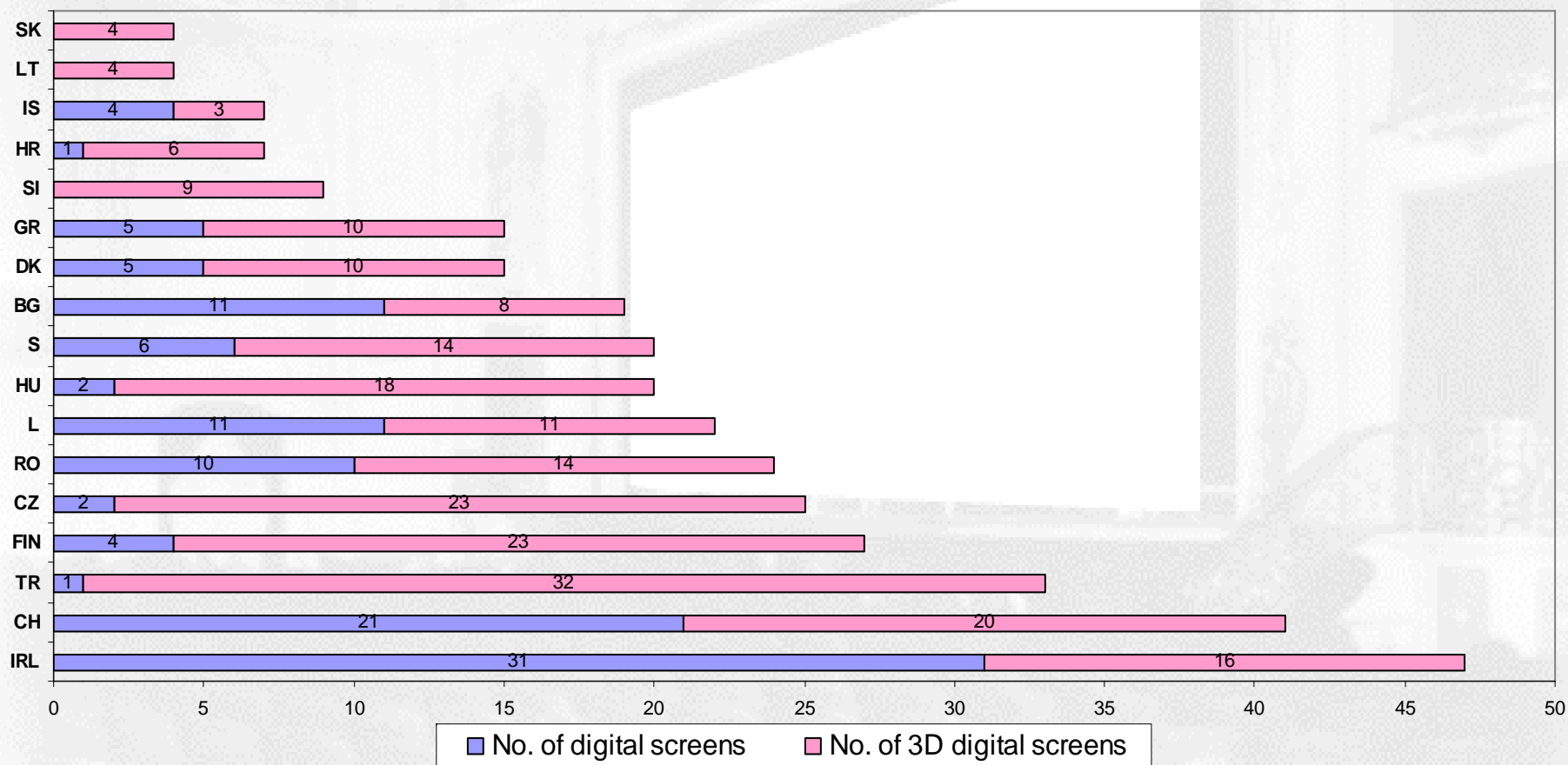
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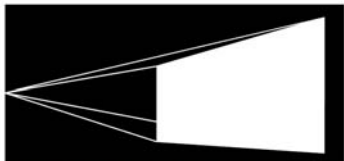


Total number of digital screens in Europe by country as at 30 June 2009
Countries with a total of up to 50 digital screens

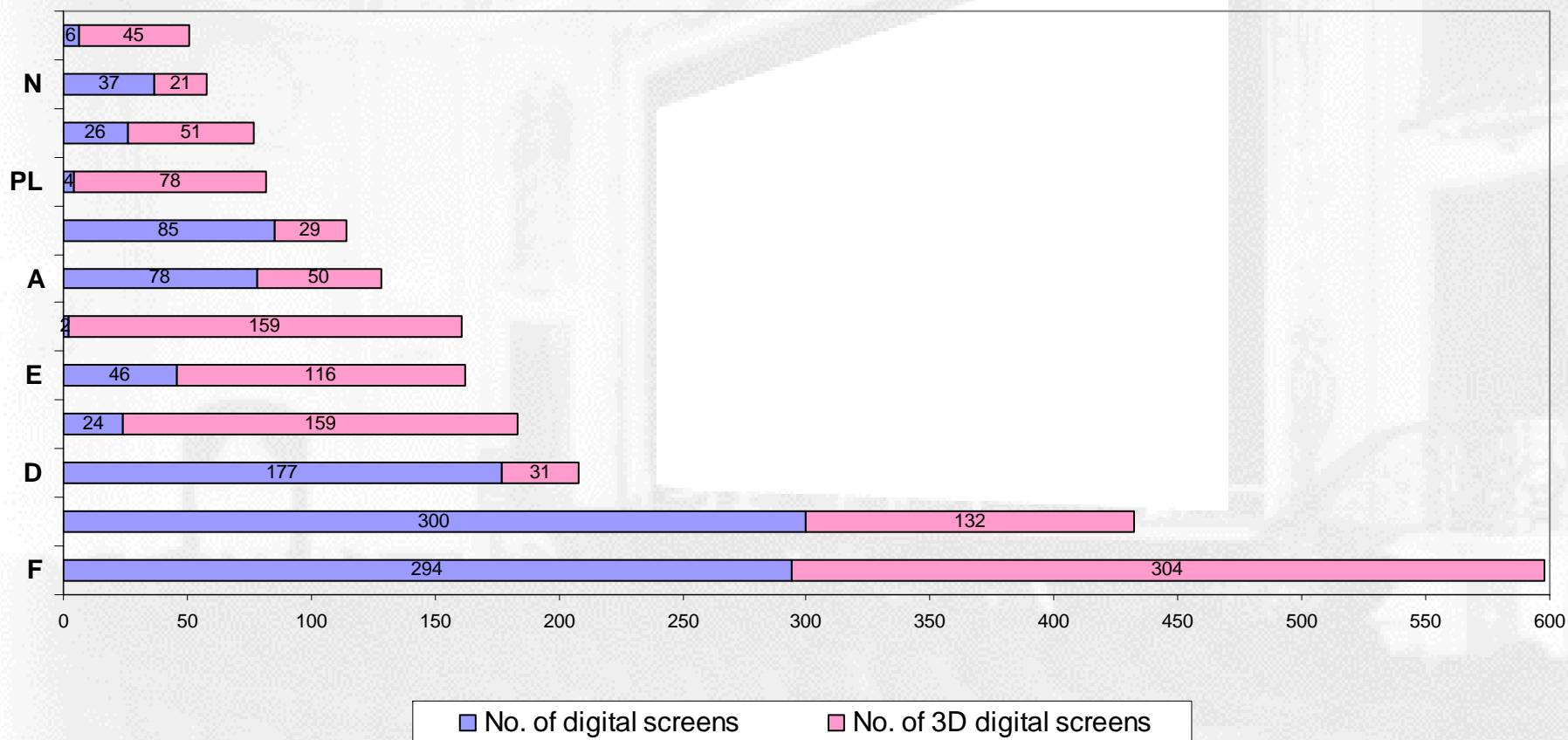


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Total number of digital screens in Europe by country as at 30 June 2009
Countries with a total of at least 50 digital screens



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Many thanks for your attention

MEDIA Salles statistical data is available on the web

www.mediasalles.it

See you in Cannes for
the new statistics on digitalisation as at 1st January 2010

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Or see you at “DigiTraining Plus: European Cinemas
Experiencing New Technologies”

2011 edition

We already have new ideas
but we count on your suggestions too!

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