

## Cinemagoing Trends

Once a year we update our Cinemagoing Trends & Forecasts database (available through our web site) and look at the big picture. The latest issue contains actual data from 2000 to 2011, with forecasts running to 2016. In 2011 global box office in the 57 countries included in the database, and which we estimate to cover 95% of all cinema business worldwide, reached US\$32.5 billion.

### Top Ten Theatrical Markets 2011

US\$ million	Gross box office
USA	9190.9
Japan	2273.8
China	2029.3
France	1909.2
UK	1667.4
India	1457.0
Germany	1334.4
South Korea	1118.9
Australia	1057.0
Canada	974.9

The only one of the top ten markets to be among the ten fastest-growing was China, though Russia and Brazil (in 13<sup>th</sup> and 14<sup>th</sup> positions) also rank as large markets.

### Ten Fastest-Growing Markets 2006-2011

% change admissions	2006-11
China	327.0
Romania	160.6
Malaysia	113.5
Colombia	90.4
United Arab Emirates	89.4
Russia	76.4
Bulgaria	72.2
Peru	71.8
Estonia	55.7
Brazil	52.8

The fastest-growing market in North America and Western Europe was the Netherlands, where admissions rose by just over 30%.

Undoubtedly the biggest development of the last five years has been 3D. A measure of the revenue this generated is shown below through the medium of average ticket prices. The amount can be seen to have varied according to local conditions; it is also evident that growth in revenues from this source stuttered to a halt in 2011. We think the next

big thing is going to be more differentiation in the cinema experience: premium technologies like IMAX; premium comfort and facilities for older and richer cinema-goers.

### Annual % Change in Ticket Prices

	USA	Japan	France	Germany
2001	5.0	-2.9	1.0	1.6
2002	2.7	-0.1	2.5	6.6
2003	3.8	2.3	2.8	-2.6
2004	3.0	-1.0	1.3	-0.1
2005	3.2	-0.4	0.9	2.7
2006	2.2	-0.2	1.1	1.8
2007	5.0	-1.4	0.2	1.4
2008	4.4	-0.2	0.9	1.6
2009	4.5	0.2	2.2	8.6
2010	5.2	4.0	3.1	9.0
2011	0.5	-1.1	0.1	1.7

### ... & Forecasts

While this is a promising avenue, the key driver in the cinema business is attendance growth. Readers will therefore be happy to note that we expect worldwide attendance to be up by 13% over the next five years, much more in some countries.

### Five Fastest-Growing Markets 2011-2016

% change admissions	2011-16
Romania	103.9
China	71.1
Bulgaria	61.3
Malaysia	34.5
Croatia	29.3

Other markets, however, will shrink, with Greece, Spain and Portugal all expected to sell significantly fewer tickets in 2016 than a decade earlier as a result of the crisis in the Eurozone.

