

UNIC's update on cinema-going in 2018
6 February 2019
For Immediate Publication

UNIC: OVER 1.25 BILLION CINEMA-GOERS IN EUROPE FOR FOURTH CONSECUTIVE YEAR

Brussels: 6 February 2019 – The International Union of Cinemas (UNIC), the body representing European cinema trade associations and operators, has today released its provisional update on admissions and box office revenues across Europe for 2018.

While some data remains to be collated and figures for certain territories are based only on initial estimates, the overview provided by UNIC represents the first wide-ranging assessment of the performance of the European cinema sector in 2018. More detailed final data on the performance of each territory will be released in Spring 2019.

European cinema-going in 2018

Across 2018, cinema-going in Europe decreased by approximately 3.3 per cent following a record-breaking previous year, yet still totalled over 1.25 billion admissions and € 8 billion¹ at the box office for the fourth year in a row. Total admissions for EU Member States (where data was available) decreased by 2.9 per cent, with close to 950 million visits to the cinema.

Despite continued investment in technology and audience development initiatives, cinema operators across the region experienced mixed performances, with a combination of different factors - including a particularly warm summer and the FIFA World Cup - contributing to a dip in attendance in several leading European territories. Box office was mainly driven by international titles, including, but not limited to, *Avengers: Infinity War*, *Bohemian Rhapsody*, *The Incredibles 2*, *Mamma Mia! Here We Go Again* and *Hotel Transylvania 3: Summer Vacation*.

Once final box office figures for all UNIC territories are available, total box office revenues will be shared.

Record performances in the UK, Turkey, Poland and Romania

Despite a very slight dip of 0.1 per cent in box office results, UK exhibitors enjoyed a record-breaking year with over 177 million admissions, the highest level of cinema-going since 1970. Similarly, Polish cinemas attracted almost 60 million cinema-goers, a 5.5 per cent year-on-year increase, bolstered by three local productions leading at the box office including *Kler* and *Kobiety Mafii*. Even more impressively, Romania almost quadrupled its cinema attendance in the last ten years, with a record 14.5 million tickets sold in 2018, as box office increased by 12.5 per cent. Finally, Turkish cinemas attracted over 70 million cinema-goers for the second year in a row, with a record-breaking 62.9 per cent national films' market share led by the local production *Müslüm*.

Balanced results in France, Spain and Russia

While France experienced a 4.3 per cent decline in attendance, French exhibitors still attracted over 200 million cinema-goers and enjoyed a record market share for national films of almost 40 per cent, with three local films in the box office top five. The same trend could be observed in Spain (box office -1.9 per cent / admissions -2.0 per cent), finishing just shy of the symbolic 100 million admissions mark. Russia - after outperforming France in 2017 as the leading European territory in terms of cinema admissions - experienced its second-best year ever, despite a 5.7 per cent decrease in admissions, as local film *Dvizhenie vverkh* led at the box office.

Lacklustre year in German-speaking territories and Southern Europe

Germany (box office -14.8 per cent / admissions -13.9 per cent), Austria (box office -9.5 per cent / admissions -11.4 per cent) and Switzerland (box office -12.6 per cent / admissions -12.9 per cent) all

¹ Variations in currency exchanges rates had a significant impact on this total, particularly in relation to box office in Russia, which decreased by 17.4 per cent in € compared to 5.6 per cent in rubles, and Turkey, where it decreased by 29.4 per cent in € compared to a 3.0 per cent increase in lira. Those two territories alone account for a € 165 million loss in total box office.

suffered from a lack of successful local and international content. Decreases were also witnessed in Italy (box office -5.0 per cent / admissions -6.9 per cent), Greece (box office -7.7 per cent / admissions -7.4 per cent) and Portugal (box office -4.0 per cent / admissions -5.9 per cent).

Mixed fortunes in Scandinavia and Southern Europe

Denmark (box office +5.1 per cent / admissions +4.0 per cent) and Norway (box office +9.1 per cent / admissions +3.0 per cent) enjoyed a positive year, with several local productions making it into the box office top five, including the Danish film *Journal 64*. Following a record-setting 2017 and despite a 22.7 per cent market share for national films, Finland suffered an 8.2 per cent decline in admissions, while Swedish cinema operators experienced stable results, with box office and admissions declining by less than 1.0 per cent.

Continued growth in CEE and the Balkans

With the exceptions of territories such as Slovakia (box office -4.3 per cent / admissions -10.9 per cent) and Bulgaria (box office -9.2 per cent / admissions -12.1 per cent) - both after breaking their all-time box office records in 2017 - the majority of territories in Central and Eastern Europe enjoyed another year of growth, including the Czech Republic (box office +13.2 per cent / admissions +7.3 per cent), Hungary (box office +4.8 per cent / admissions +2.0 per cent) and Lithuania (box office +9.8 per cent / admissions +4.9 per cent). The same upward trend was experienced in the Balkans, with positive results in Croatia (box office +7.8 per cent / admissions +1.4 per cent) and Serbia (box office +19.9 per cent / admissions +18.0 per cent).

Admissions per capita, share of European films, outlook for 2019

Admissions per capita for all UNIC territories (where data was available) remained stable at 1.5 visits per year. France and Ireland (at 3.2 and 3.3 respectively) again experienced the highest rates of cinema-going.

Due to incomplete figures for several countries, it is too early to assess the total market share for European films in 2018. Turkey (62.9 per cent), France (39.3 per cent) and Poland (35.5 per cent) experienced the highest national films' market share across UNIC territories.

The industry looks forward to a particularly busy and promising release schedule in 2019, packed with highly anticipated European as well as international titles.

Attachments

Table with tentative market performance indicators for 2018 (where available). Chart of top five films across UNIC territories.

Notes for editors

UNIC is the European trade grouping representing cinema exhibitors and their national trade associations across 37 European territories. More information available on unic-cinemas.org

Sources

UNIC members 2018. Complementary information from CZ (Unie Filmových Distributoru), BG (Национален филмов център), DE (Filmförderungsanstalt), EE (Eesti Filmi Instituut & Baltic Films Co-operation Platform), FR (Centre National du Cinéma et de l'Image Animée), GR (Ελληνικό Κέντρο Κινηματογράφου), HR (Hrvatski Audiovizualni Centar), HU (Nemzeti Média- és Hírközlési Hatóság), IE (Wide Eye Media), LT (Lietuvių Filmu Centras & Baltic Films Co-operation Platform), LV (Nacionālais kino centrs & Baltic Films Co-operation Platform), ME (Filmski centra Crne Gore), PT (Instituto do Cinema e do Audiovisual), RU (Nevafilm Research), SK (Únia filmových distribútorov), UK (British Film Institute).

Contact

International Union of Cinemas (UNIC)
Phone: 0032 2 8809939
communications@unic-cinemas.org

Country (currency)	BOX OFFICE 2017-18 (million, in local currency)			ADMISSIONS 2017-18 (million)			Per capita	National films' share
	2018 (prov.)	2017	Change	2018 (prov.)	2017	Change		
Albania (ALL)	211.8	180.0	+17.0%	0.4	0.3	+7.0%	0.1	n/d
Austria (EUR)	117.8	130.2	-9.5%	12.8	14.5	-11.4%	1.5	4.5%
Bosnia and Herzegovina (BAM)	6.1	5.7	+7.1%	1.2	1.1	+7.9%	0.3	0.5%
Bulgaria (BGN)	46.0	50.7	-9.2%	4.9	5.6	-12.1%	0.7	6.7%
Croatia (HRK)	147.4	136.8	+7.8%	4.7	4.6	+1.4%	1.1	1.1%
Cyprus (EUR)	6.5	6.5	+1.0%	0.8	0.8	+1.0%	0.9	0.0%
Czech Republic (CZK)	2,268.9	2,004.2	+13.2%	16.3	15.2	+7.3%	1.5	20.0%
Denmark (DKK)	1,136.1	1,080.8	+5.1%	13.0	12.5	+4.0%	2.3	28.0%
Estonia (EUR)	20.6	19.4	+6.2%	3.6	3.5	+3.4%	2.8	16.3%
Finland (EUR)	90.3	98.5	-8.4%	8.1	8.8	-8.2%	1.5	22.7%
France (EUR)	n/d	1,380.6	n/d	200.5	209.4	-4.3%	3.2	39.3%
Germany (EUR)	899.3	1,056.1	-14.8%	105.4	122.3	-13.9%	1.3	23.5%
Greece (EUR)	60.0	65.0	-7.7%	9.4	10.1	-7.4%	0.9	7.1%
Hungary (HUF)	21,945.4	20,931.4	+4.8%	15.5	15.1	+2.0%	1.6	6.1%
Ireland (EUR)	117.3	113.8	+3.1%	15.8	16.1	-2.1%	3.3	2.0%
Israel (ILS)	533.4	582.6	-8.4%	16.7	18.2	-8.5%	1.9	5.9%
Italy (EUR)*	555.4	584.8	-5.0%	85.9	92.3	-6.9%	1.4	23.0%
Latvia (EUR)	13.3	12.9	+3.2%	2.5	2.5	+1.9%	1.3	18.8%
Lithuania (EUR)	22.4	20.4	+9.8%	4.3	4.1	+4.9%	1.5	27.9%
Luxembourg (EUR)	7.5	8.2	-8.6%	1.1	1.2	-9.1%	1.8	4.9%
Macedonia (MKD)	87.9	82.0	+7.2%	0.4	0.4	-3.0%	0.2	n/d
Montenegro (EUR)	1.1	1.1	+2.4%	0.3	0.3	+1.4%	0.5	0.3%
Netherlands (EUR)	312.4	301.9	+3.5%	35.7	36.0	-0.8%	2.1	10.5%
Norway (NOK)	1,376.0	1,260.9	+9.1%	12.1	11.8	+3.0%	2.3	25.1%
Poland (PLN)	1,123.3	1,072.4	+4.7%	59.7	56.6	+5.5%	1.6	35.5%
Portugal (EUR)	78.4	81.7	-4.0%	14.7	15.6	-5.9%	1.4	1.5%
Romania (RON)	300.0	266.6	+12.5%	14.5	13.9	+4.5%	0.7	2.8%
Russia (RUB)	50,284.5	53,290.3	-5.6%	200.2	212.2	-5.7%	1.4	29.5%
Serbia (RSD)	1,602.8	1,337.2	+19.9%	4.1	3.5	+18.0%	0.6	21.0%
Slovakia (EUR)	33.0	34.5	-4.3%	6.0	6.7	-10.9%	1.1	3.7%
Slovenia (EUR)	12.6	11.6	+8.3%	2.4	2.3	+6.0%	1.2	3.4%
Spain (EUR)	585.7	597.0	-1.9%	97.7	99.7	-2.0%	2.1	17.5%
Sweden (SEK)	1,940.7	1,959.9	-1.0%	16.4	16.5	-1.0%	1.6	16.9%
Switzerland (CHF)	183.5	209.9	-12.6%	12.1	13.9	-12.9%	1.7	6.0%
Turkey (TRY)	896.8	870.8	+3.0%	70.4	71.2	-1.1%	0.9	62.9%
Ukraine (UAH)	2,430.0	2,380.0	+2.1%	27.0	28.0	-3.6%	0.6	8.0%
UK (GBP)	1,277.1	1,277.9	-0.1%	177.0	170.6	+3.8%	2.7	11.7% 44.8%**
UNIC (EUR)	n/d	8,580.0	n/d	1,290.00	1,340.0	-3.3%	1.5	n/d
EU (EUR)	n/d	6,990.0	n/d	950.0	980.0	-2.9%	1.6	n/d

* Cinetel: 90 per cent of the market.

** Including UK-qualified films (BFI definition).

Top 5 films per territory (prov.)

Country	TOP 1	TOP 2	TOP 3	TOP 4	TOP 5
Albania	Jumanji: Welcome to the Jungle	Aquaman	Avengers: Infinity War	Fifty Shades Freed	Black Panther
Austria	Avengers: Infinity War	Mamma Mia! Here We Go Again	Fifty Shades Freed	Fantastic Beasts: The Crimes of Grindelwald	Bohemian Rhapsody
Bosnia and Herzegovina	Juzni vetar (RS)	Fifty Shades Freed	Avengers: Infinity War	Venom	Deadpool 2
Bulgaria	Hotel Transylvania 3: Summer Vacation	Avengers: Infinity War	Bohemian Rhapsody	Venom	The Grinch
Croatia	Bohemian Rhapsody	The Grinch	A Star is Born	Avengers: Infinity War	Deadpool 2
Cyprus	Johnny English Strikes Again (UK)	Avengers: Infinity War	Hotel Transylvania 3: Summer Vacation	The Grinch	Aquaman
Czech Republic	Bohemian Rhapsody	Avengers: Infinity War	Po čem muži touží	Fantastic Beasts: The Crimes of Grindelwald	Hotel Transylvania 3: Summer Vacation
Denmark	Journal 64	Avengers: Infinity War	Bohemian Rhapsody	The Incredibles 2	Lykke-Per
Estonia	Bohemian Rhapsody	Klassikokkutulek 2	Eia Jõulud Tondikakul	Seltsimees Laps	The Incredibles 2
Finland	Mamma Mia! Here We Go Again	Ilosia aikoja, Mielensäpahoittaja	Bohemian Rhapsody	Avengers: Infinity War	BlackKkKlansman
France	The Incredibles 2	Les Tuches 3: Liberté Egalité Fraternituche	La ch'tite famille	Avengers: Infinity War	Le grand bain
Germany	Fantastic Beasts: The Crimes of Grindelwald	Avengers: Infinity War	Fifty Shades Freed	The Incredibles 2	Hotel Transylvania 3: Summer Vacation
Greece	Avengers: Infinity War	The Nun	Hotel Transylvania 3: Summer Vacation	Deadpool 2	Fifty Shades Freed
Hungary	Avengers: Infinity War	Bohemian Rhapsody	Mamma Mia! Here We Go Again	Jurassic World: The Fallen Kingdom	Deadpool 2
Ireland	Mamma Mia! Here We Go Again	A Star is Born	Avengers: Infinity War	The Incredibles 2	Jurassic World: Fallen Kingdom
Israel	The Incredibles 2	Hotel Transylvania 3: Summer Vacation	Avengers: Infinity War	Bohemian Rhapsody	Mission Impossible: Fallout
Italy	Bohemian Rhapsody	Avengers: Infinity War	Fifty Shades Freed	Fantastic Beasts: The Crimes of Grindelwald	Hotel Transylvania 3: Summer Vacation
Latvia	Hotel Transylvania 3: Summer Vacation	Homo Novus	Nameja gredzens	Kriminalas ekselences fonds	The Grinch
Lithuania	Tarp pilkų debesų	Klasės susitikimas: berniukai sugrįžta!	Bohemian Rhapsody	The Grinch	Lietuviški svigeriai
Luxembourg	Superjhemp retorns	Avengers: Infinity War	Bohemian Rhapsody	Black Panther	n/d
Macedonia	Avengers: Infinity War	Aquaman	Black Panther	Jumanji: Welcome to the Jungle	Fifty Shades Freed
Montenegro	Juzni vetar (RS)	Fifty Shades Freed	Johnny English Strikes Again (UK)	Ferdinand	Venom
Netherlands	Bohemian Rhapsody	Fantastic Beasts: The Crimes of Grindelwald	Avengers: Infinity War	Mamma Mia! Here We Go Again	Jurassic World: Fallen Kingdom
Norway	Mamma Mia! Here We Go Again	Skjelvet	Mission Impossible: Fallout	Den 12. mann	Avengers: Infinity War
Poland	Kler	Kobiety Mafii	Planeta Singli 2	Fifty Shades Freed	The Incredibles 2
Portugal	The Incredibles 2	Bohemian Rhapsody	Hotel Transylvania 3: Summer Vacation	Fifty Shades Freed	Avengers: Infinity War
Romania	Aquaman	Venom	Avengers: Infinity War	Bohemian Rhapsody	Black Panther
Russia	Dvizhenie vverkh	Venom	Avengers: Infinity War	Fantastic Beasts: The Crimes of Grindelwald	Lyod
Serbia	Juzni vetar	Hotel Transylvania 3: Summer Vacation	Fifty Shades Freed	Avengers: Infinity War	Ferdinand
Slovakia	Bohemian Rhapsody	Hotel Transylvania 3: Summer Vacation	A Star is Born	Avengers: Infinity War	Fifty Shades Freed
Slovenia	Bohemian Rhapsody	Hotel Transylvania 3: Summer Vacation	Mamma Mia! Here We Go Again	The Grinch	Fifty Shades Freed
Spain	Jurassic World: The Fallen Kingdom	Bohemian Rhapsody	The Incredibles 2	Avengers: Infinity War	Campeones
Sweden	Mamma Mia! Here We Go Again	Avengers: Infinity War	A Star is Born	Black Panther	Bohemian Rhapsody
Switzerland	Bohemian Rhapsody	Avengers: Infinity War	Fantastic Beasts: The Crimes of Grindelwald	Mamma Mia! Here We Go Again	A Star is Born
Turkey	Müslüm	Arif v 216	Ailecek Şaşkınız	Yol Arkadaşım 2	Deliha 2
Ukraine	Avengers: Infinity War	Aquaman	Venom	Fantastic Beasts: The Crimes of Grindelwald	Hotel Transylvania 3: Summer Vacation
UK	Avengers: Infinity War	Mamma Mia! Here We Go Again	The Incredibles 2	Black Panther	Bohemian Rhapsody