

4. COMPARISON WITH FOREIGN COUNTRIES

*The data of foreign countries are from:

The United States of America (and Canada) - Motion Picture Association of America (MPAA)'s "Theatrical Market Statistics"

France - Centre National du Cinema et de l'Image Animee (CNC)'s "Results"

The United Kingdom - British Film Institute (BFI)'s "Statistical Yearbook"

Germany - Filmförderungsanstalt (FFA)'s "Die FFA-Förderungen"

Australia - Screen Australia's "Fact Finders"

Korea - Korean Film Council (KOFIC)'s "Korean Cinema"

Japan - "Film Almanac 2018"'s "Statistics: Various Film Statistics of the Major Countries of the World" (Kinema Jumbo-sha)

In this section, we will compare Japanese film exhibition at theaters with that in the six foreign countries: the United States of America (USA)/Canada, France, Germany, the United Kingdom (UK), Australia and Korea, whose data are relatively easily obtained. Their film exhibition situation has not been largely changing, and our report below has not changed much compared with that in 2017 and 2016. Some portions may be repetitious.

Attendance

In 2017, attendance in the USA and Canada together was the largest, followed by the attendance of Korea, France, Japan, the UK, Germany and Australia. If you take the country's population into consideration, Japan's attendance has been smaller than others. The number of films a person went to see annually (the attendance divided by the population) in Korea was the highest of 4.3 films. This was followed by 3.4 films of the USA/Canada and Australia; France's 3.2 films, UK's 2.6 films, and Germany's 1.5 films. Japan's number of 1.4 films was the lowest, and was a return to that of the period before 2011 when the Great East Japan Earthquake hit Japan and the number went down to 1.1 films.

During these 10 years, the increase rate of the attendance was highest in Korea with more than 30% increase from 147.43 million in 2008 to 219.87 million. In other countries including Japan, no outstanding changes have been seen. Despite the widened choice of film watching formats outside of theaters, such as online streaming, the attendance numbers have not been largely influenced.

People in Japan do not watch films at theaters as often as people in other countries and there are more theater audiences to be developed. We should consider the reason why this number is low, compared with that in other countries.

The box office income was the largest in the USA/Canada, followed by that in Japan, the UK, Korea, France, Germany, and Australia. The film attendance was low in Japan, however, its box office was the third largest coming after the USA and China. The theater ticket price of Japan was in average 1,310 yen, relatively higher than that of other countries, and this is the reason why its box office income was high while the average annual attendance did not increase. However, the average ticket price in

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Australia was equal to 1,246 yen, not much different from that of Japan, while its average annual film attendance was 3.4, much higher than that of Japan. There should be other reasons why Japanese average annual film attendance was low.

Comparison with Foreign Countries

Attendance 2008-2017

	USA and Canada	Korea	France	UK	Germany	Australia	Japan
Population (2017)	359,560	51,240	64,600	65,640	82,490	24,380	126,930
2008	1,340,000	150,830	190,300	164,200	129,400	84,600	160,491
2009	1,420,000	156,960	201,600	173,500	146,300	90,700	169,297
2010	1,340,000	129,180	207,100	169,200	126,600	92,000	174,358
2011	1,280,000	159,720	217,200	171,600	129,600	85,000	144,726
2012	1,360,000	194,890	203,600	172,500	135,100	85,900	155,159
2013	1,340,000	213,350	193,700	165,500	129,700	82,000	155,888
2014	1,270,000	215,060	209,100	157,500	121,700	78,600	161,116
2015	1,320,000	217,290	205,400	171,900	139,200	90,300	166,630
2016	1,320,000	217,020	213,100	168,300	121,100	91,300	180,189
2017	1,240,000	219,870	209,400	170,600	122,300	85,000	174,483

Comparison with Foreign Countries

Number of Films a Person Went to See Annually 2008-2017

	USA and Canada	Korea	France	UK	Germany	Australia	Japan
2008	4.0	3.0	3.1	2.7	1.6	4.0	1.3
2009	4.2	3.2	3.2	2.8	1.8	4.3	1.3
2010	3.9	3.0	3.3	2.7	1.5	4.1	1.4
2011	3.7	3.2	3.4	2.7	1.6	3.8	1.1
2012	3.9	3.9	3.2	2.7	1.7	3.8	1.2
2013	3.8	4.2	3.0	2.6	1.6	3.5	1.2
2014	3.6	4.3	3.3	2.4	1.5	3.4	1.3
2015	3.7	4.3	3.2	2.6	1.7	3.8	1.3
2016	3.7	4.2	3.3	2.6	1.5	3.8	1.4
2017	3.4	4.3	3.2	2.6	1.5	3.4	1.4

Comparison with Foreign Countries

Theater Ticket Prices and Box Office Income 2017

	Average Admission in Yen	B. O. Income x1 million Yen	Attendance x1 million	# of Screens	B. O. Income per Screen x1000 Yen
USA and Canada	1,012	1,254,300	1,240.0	43,216	2,902
China*	634	794,922	1,253.9	31,627	2,513
UK	1,140	194,496	170.6	4,264	4,561
Korea	848	186,548	219.9	2,766	6,744
France	890	186,298	209.4	5,913	3,151
India*	86	177,339	2,071.9	11,179	1,586
Germany	1,165	142,510	122.3	4,803	2,967
Australia	1,246	105,919	85.0	2,210	4,793
Mexico*	330	94,318	286.0	5,977	1,578
Brazil*	456	77,804	170.7	3,022	2,575
Sweden*	1,418	24,166	17.0	802	3,013
Japan	1,310	228,572	174.5	3,530	6,475

* Data in 2015 from "The World Major Countries Various Film Statistics" (Film Almanac 2018)

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Numbers of Theaters and Screens

The number of screens was highest in the USA, which was 40,393, more than 10 times of that in Japan. In all seven countries, the number of screens during these 10 years increased. Korea's number increased by close to 40%, the UK's increase was 18%, and both France's and Australia's increased by more than 10%. It is considered that the increase of multi-screen theaters is behind these increases, similar to the situation in Japan.

When the population per screen is lower, it means that there are more screens near you. The population per screen in Japan was 35,894, and this means that there were fewer screens compared with those in other countries. In Japan, you do not have movie theaters near you. The USA's number of screens is the highest, and the population per screen was 8,064. In France, the population per screen was 10,959. In all six countries other than Japan, the population per screen is less than 20,000. In Japan, the number of screens is one forth of that in the USA, one third of that in France, and one half of that in Korea. The low average of number of films a person went to see annually in Japan is related to the low number of screens.

Comparison with Foreign Countries

Number of Screens 2008-2017

	USA	France	Germany	UK	Korea	Australia	Japan
2008	38,834	5,332	4,810	3,610	2,004	1,980	3,361
2009	39,233	5,424	4,734	3,651	2,055	1,989	3,398
2010	39,547	5,478	4,699	3,671	2,003	1,994	3,412
2011	39,580	5,467	4,640	3,767	1,974	1,991	3,339
2012	39,662	5,508	4,617	3,817	2,081	1,997	3,290
2013	40,024	5,588	4,610	3,867	2,184	2,057	3,318
2014	39,956	5,647	4,637	3,909	2,281	2,041	3,364
2015	40,006	5,741	4,692	4,046	2,424	2,080	3,437
2016	40,174	5,842	4,739	4,150	2,575	2,121	3,476
2017	40,393	5,913	4,803	4,264	2,766	2,210	3,530
2008→2017	104%	111%	100%	118%	138%	112%	105%

Comparison with Foreign Countries

Population per Screen 2017

	USA	France	Germany	UK	Korea	Australia	Japan
Population x1000	325,719	64,801	82,741	66,040	51,423	24,771	126,706
# of Screens	40,393	5,913	4,803	4,264	2,766	2,210	3,530
Population/# of S.	8,064	10,959	17,227	15,488	18,591	11,208	35,894

Attendance and Box Office Income per Screen

The number of the annual attendance per screen was highest in Korea with 79,490, followed by Japan, which number was 40,429. The number of both countries was lower compared with that in the year before. Particularly in Korea, its number largely decreased from 97,688 of 2013, and this is probably due to the fact that the dramatic increase of the number of screens did not correspond to the attendance. In the UK and Australia, their numbers were each decreased from about 45,000 to 40,000 during the last 10 years. The number of screens in the UK increased by close to 20%, and that in Australia increased by close to 10%. In

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Germany, the number is roughly 25,000 and in France, the number is about 35,000.

Annual box office incomes per screen in 2017 were: about 64.75 million in Japan, about 31.51 million in France, and about 29.67 million in Germany. In Europe, their numbers were more than half of that in Japan. These figures did not change much during these 10 years.

Comparison with Foreign Countries

Attendance per Screen 2008-2017

	USA	France	Germany	UK	Korea	Australia	Japan
2008	–	35,690	26,902	45,485	73,568	42,727	47,751
2009	–	37,168	30,904	47,521	75,620	45,601	49,823
2010	–	37,806	26,942	46,091	73,769	46,138	51,101
2011	–	39,729	27,931	45,553	80,912	42,692	43,344
2012	–	36,964	29,261	45,193	93,652	43,015	47,161
2013	–	34,664	28,134	42,798	97,688	39,864	46,983
2014	–	37,029	26,245	40,292	94,288	38,511	47,894
2015	–	35,778	29,668	42,486	89,645	43,413	48,481
2016	–	36,477	25,554	40,554	84,283	43,046	51,838
2017	–	35,413	25,463	40,009	79,490	38,462	49,429

Various Formats of Movie Theaters

In Europe, not all the movie theaters are conventional theaters (like the theaters in Japan screening 5-6 times every day). Some German theaters we introduced in our “Film Exhibition Activities Almanac 2016” are closed on Mondays and present merely 2 to 3 screenings a day. There are also theaters with screening only once a day or only during the weekend of Friday, Saturday and Sunday operated by volunteer staff. Theaters in small towns have limited numbers of screenings and their attendances are small, however, they can survive thanks to their diverse theater formats.

There are many formats of theater operations not only in Germany, but also in France and the UK. There are support systems for various and unconventional film exhibition maintaining diverse organizations and operations.

Need for the Film Exhibition Support Systems

In the above countries (the USA, France, the UK, Germany, Australia and Korea), there are organizations leading film culture, including the film industry itself, and there are promotion and support system for various forms of theaters and exhibitions as well. There are film promotional policies at the national, local and community levels. In Europe, there is the support system by Europa Cinema, a cultural organization under EU.

Public support and promotional policies should cover more than mere financial support. In general, the theaters receiving public supports are required to present a variety of activities including programming emphasizing the relationship with the community, development of the young audiences, and film educational projects. At the same time, such activities become possible thanks to

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the public support, and it inspires theaters and exhibitors to increase their cultural profiles in their communities.

In Japan, the area with no theaters has been spreading recently, and there have been activities in many areas in order to develop community cinemas where local people gather around film. While these community cinemas are not wide spread and are not having a big impact on the film industry, they are important in energizing local film culture and cultural activities in communities. We must consider employing film exhibition policy in order to make various ways of screenings possible.

The Proportion of Multi-Screen Theaters

The proportion of multi-screen theaters consistently increased from 2010 in each country. The proportion of multi-screen theaters was highest in Korea with 94.2%, 2,605 screens out of Korea's nationwide total of 2,766 screens. The total number of screens of other theaters also increased from 117 screens in 2014 to 161 screens, increasing by 44 in these three years. The number of theaters increased from 82 in 2016 to 91 in 2017. In Japan, the proportion of multi-screen theaters was 88%, smaller than that of Korea, and the number of screens of other types of theaters decreased from 657 to 416 during these 10 years.

Multi-screen theaters have occupied a major place in each country. However, the numbers of these theaters in France and the UK are not so high compared with the numbers in the other three countries. Particularly in France, the proportion of multi-screen theaters has been increasing but still remained at a level of 42.4%. As for the number of theaters, there are 1,827 of other types of theaters, much more than 219 multi-screen theaters. In France, there are theaters 8 times more than that in Japan, making people feel that they are close to theaters even in middle and small-sized cities, towns and villages.

Comparison with Foreign Countries

Portion of Multi-screen Theaters and Their Numbers of Screens 2011-2017

		2011	2012	2013	2014	2015	2016	2017
USA	# of screens	39,580	39,662	40,024	39,957	40,006	40,392	40,393
	that of mst	33,010	33,276	33,537	33,824	35,299	34,316	35,950
	Share	83.4%	83.9%	83.8%	84.7%	88.2%	85.0%	89.0%
France	# of screens	5,467	5,508	5,588	5,647	5,741	5,842	5,913
	that of mst	2,026	2,082	2,171	2,219	2,330	2,405	2,505
	Share	37.1%	37.8%	38.9%	39.3%	40.6%	41.2%	42.4%
UK	# of screens	3,767	3,817	3,867	3,909	4,046	4,150	4,264
	that of mst	2,833	2,851	2,915	2,959	3,096	3,209	3,334
	Share	75.2%	74.7%	75.4%	75.7%	76.5%	77.3%	78.2%
Korea	# of screens	1,974	2,081	2,184	2,281	2,424	2,575	2,766
	that of mst	1,857	1,967	2,072	2,164	2,292	2,428	2,605
	Share	94.1%	94.5%	94.9%	94.9%	94.6%	94.3%	94.2%
Japan	# of screens	3,412	3,290	3,290	3,364	3,364	3,472	3,530
	that of mst	2,774	2,765	2,765	2,911	2,911	3,045	3,109
	Share	81.3%	84.0%	84.0%	86.5%	86.5%	87.7%	88.1%

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Portion of Multi-Screen Theaters and Their Numbers of Theaters 2016-2017

	2016		2017			Total
	mst	Others	Total	mst	Others	
France	209	1,835	2,044	219	1,827	2,046
UK	331	435	766	348	426	774
Korea	335	82	417	361	91	452
Japan	343	236	579	353	230	583

*The definition of Multi-Screen Theaters (MST)

USA Theaters with more than 5 screens (there is no statistics)

France Theaters with more than 8 screens

UK MST: Film exhibition facilities with more than 5 screens Others: Facilities including temporary screenings

Japan Film exhibition facilities with more than 5 screens

Korea CGV, Lotte Cinema, and Megabox theaters chains in addition to 7 theaters

Number of Films Released

In Japan and Korea, their numbers are each more than 1,000 films released in 2017. In Korea, 1,765 films were released, increasing by 245 from 1,520 of 2016. The number has been increasing since 201, to close to 4 times more than the number before 2011. In 2017, compared with 72% of foreign films, 28% of the films released were Korean, increasing its share by close to 10%. It seems that the productions and releases of independent films have been growing in Korea, as in Japan.

Only in France and Japan, the domestic film shares are more than 50% (52% in France and 50% in Japan; and the US statistics on this matter is not available). In Japan, from the late 1980s to the early 2000s, many more foreign films were released than Japanese films. However, since 2008, more Japanese films have been released. This made some people worry that Japanese film audiences may be inwardly oriented, however, recently, more foreign films have been released. In 2018, the ratio between Japanese and foreign films released was 50% to 50%, and their box office incomes were 55% vs. 45%, respectively. This situation is well balanced compared with that of other countries.

Comparison with Foreign Countries

Number of the Films Released 2011-2017

		2011	2012	2013	2014	2015	2016	2017		
									Domestic	Foreign
France	# of Films Released	588	614	654	663	652	716	693	359 52%	334 48%
	Attendance per Film	369,388	331,596	296,177	315,385	315,031	297,626	302,165		
Germany	# of Films Released	532	551	563	570	596	610	587	233 40%	354 60%
	Attendance per Film	243,609	245,191	230,373	213,509	233,557	198,525	208,348		
UK	# of Films Released	558	647	698	712	759	821	760	159 21%	601 79%
	Attendance per Film	307,527	266,615	237,106	221,208	226,482	204,994	224,474		
Korea	# of Films Released	439	631	905	1,095	1,176	1,520	1,765	494 28%	1,271 72%
	Attendance per Film	363,827	308,859	235,746	196,402	184,770	142,776	124,572		
Australia	# of Films Released	342	420	421	505	539	609	694	56 8%	638 92%
	Attendance per Film	248,538	204,524	194,774	155,644	167,532	149,918	122,478		
日本	# of Films Released	799	983	1,117	1,184	1,136	1,149	1,187	594 50%	593 50%
	Attendance per Film	181,134	157,842	139,560	136,078	146,681	156,822	146,995		