

3. Comparison with Foreign Countries [2020]

The data of foreign countries are from:

The United States of America (and Canada): Motion Picture Association (MPA)

"Theatrical Home Entertainment Market Environment (THEME) Report"

<https://www.motionpictures.org/research-policy/>

France: Centre National du Cinema et de l'Image Animee (CNC)

"Bilan du CNC"

<https://www.cnc.fr/professionnels/etudes-et-rapports/bilans>

The United Kingdom : British Film Institute (BFI)

"Statistical Yearbook"

<https://www.bfi.org.uk/industry-data-insights/>

Germany : Filmförderungsanstalt (FFA)

"FFA Info"

<http://www.ffa.de/studien-und-publikationen.html>

Australia: Screen Australia

"Fact Finders"

<https://www.screenaustralia.gov.au/fact-finders/>

Korea : Korean Film Council 영화진흥위원회 (KOFIC)

"Korean Film Industry"

<http://www.koreanfilm.or.kr/eng/publications/books.jsp>

Japan: "Film Almanac 2020" "Statistics: Various Statistics of the Major Countries of the World" (Kinema Jumbo-sha)

As of the end of January 2022, the statistics of foreign countries have not been released online. Below is the comparison of the statistics in Japan and other countries (the USA [United States of America]/Canada, France, the UK [United Kingdom], Germany, Korea, and Australia) in 2020. These countries were under the COVID-19 pandemic in 2020-2021.

Attendance

The Japanese film industry was gravely affected by the COVID-19 pandemic, however, movie theater operations in other countries were even more seriously damaged.

In comparison of the attendance in 2020 with that in 2019, the USA and Canada showed the largest damage by an 81% decrease, followed by UK's 75%, Korea's 74%, France's 69%, Germany's 68%, Australia's 67%. In Japan, the decrease was only 46%. In Europe and North America, the situation was severe, where the COVID-19 pandemic spread rapidly and the number of seriously affected increased swiftly. Movie theaters in New York in the USA were closed for almost one year from March 2020 to spring of 2021. In France, the government took lockdown measures in March 2020 causing movie theaters to be closed nationwide. Theaters reopened in June, however, at the end of October, they closed again and did not reopen until mid-May 2021, more than 6 months later. The situations in the UK and Germany were similar. In Korea, not all theaters were closed, however, the

prevention measures caused theater attendance to drop dramatically, some theaters had to close temporarily, and some multi-screen theaters increased their admission prices.

The number of films a person went to see annually (the attendance divided by the population) was in each country largely decreased: in Korea, the number was the highest at 1.1 films (4.4 films in 2019), followed by 1.0 film of France (3.3 films in 2019) and 1.0 film of Australia (3.3 films in 2019), 0.7 film of the UK (2.6 in 2019), and 0.6 films of the USA/Canada (3.4 films in 2019).

fig.17 Comparison with Foreign Countries [Attendance (2011-2020)]

	USA/Canada*	Korea	France	UK	Germany	Australia	Japan
							(x1000)
Population (2020)	369,498	51,829	65,124	67,081	83,167	25,694	125,630
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	213,200	168,300	121,100	91,300	180,189
2017	1,240,000	219,870	209,400	170,600	122,300	85,000	174,483
2018	1,300,000	216,390	201,200	177,000	105,400	89,800	169,210
2019	1,240,000	226,680	213,000	176,100	118,600	84,700	194,910
2020	240,000	59,520	65,200	44,000	38,100	28,200	106,137
2011→2020	19%	37%	30%	26%	29%	33%	73%
2019→2020	19%	26%	31%	25%	32%	33%	54%

fig.18 Comparison with Foreign Countries [Number of Films A Person Went to See Annually (2011-2020)]

	USA/Canada*	Korea	France	UK	Germany	Australia	Japan
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	4.2	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	3.7	1.4
2017	3.4	4.3	3.2	2.6	1.5	3.4	1.4
2018	3.6	4.2	3.1	2.7	1.3	3.6	1.3
2019	3.4	4.4	3.3	2.6	1.4	3.3	1.5
2020	0.6	1.1	1.0	0.7	0.5	1.1	0.8

*Motion Picture Association (MPA) announces the combined attendance of the USA and Canada

Numbers of Theaters and Screens

In all seven countries, the number of screens until 2019 increased because of the increase of multi-screen theaters, however, in 2020, the number in each country decreased (except France and Japan whose number of screens slightly increased). Australia had the highest decrease but it was only 3%. In these countries, the policies in order to support movie theater operations were implemented in various ways.

In Japan, a number of movements began to emerge in order to encourage movie theaters and to ask for public support of the movie theaters and exhibitors such as Mini-Theater Aid Fund, SAVE the CINEMA and Mini-Theater Park. Movie theaters themselves have endeavored to survive by employing virtual cinema or online screenings

and other various measures. The number of screens in 2020 was 40,988 in the USA, which was much higher than those of other countries, followed by 6,127 in France, 4,925 of Germany and 4,682 in the UK.

When the population per screen (the population divided by the number of screen) is lower, it means that there are more screens near you. The population per screen in Japan was 34,241, and this means that there were much fewer screens compared with those in other countries. The USA's population per screen was 9,013, and France's population per screen was 10,629. In all 6 countries other than Japan, the population per screen was roughly between 10,000 and 20,000. In Japan, the number of screens was one fourth of that in the USA, one third of that in France, and one half of that in Germany and Korea.

fig.19 Comparison with Foreign Countries [Number of Screens (2011-2020)]

	USA	France	Germany	UK*	UK(former)	Korea	Australia	Japan
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	4,327	4,150	2,575	2,121	3,476
2017	40,393	5,913	4,803	4,512	4,264	2,766	2,210	3,530
2018	40,837	5,983	4,849	4,640	4,340	2,937	2,278	3,591
2019	41,172	6,114	4,961	4,782	4,480	3,079	2,310	3,627
2020	40,998	6,127	4,926	4,682	-	3,015	2,241	3,669
2011→2020	103.6%	112.1%	106.2%	-	-	152.7%	112.6%	109.9%
2019→2020	99.6%	100.2%	99.3%	97.9%	-	97.9%	97.0%	101.2%

*BFI changed the calculation method of the number of screens and theaters, and announced only the figures after 2015 in the new method. In order to compare the figures during the last 10 years, the data obtained by the old method of calculation is also included here.

fig.20 Comparison with Foreign Countries [Number of Theaters (2016-2020)]

	USA	France	Germany	UK(former)	Korea	Australia	Japan
2016	-	2,044	1,654	918	417	498	584
2017	-	2,046	1,672	977	452	513	587
2018	-	2,040	1,672	1,061	483	520	584
2019	-	2,045	1,734	1,080	513	524	593
2020	-	2,041	1,728	985	474	483	595
2016→2020	-	100.0%	104.8%	117.6%	123.0%	105.2%	101.5%
2019→2020	-	99.8%	99.7%	91.2%	92.4%	92.2%	100.3%

fig.21 Comparison with Foreign Countries [Population per Screen]

	USA	France	Germany	UK(former)	Korea	Australia	Japan
Population (x1000)	369,498	65,124	83,167	67,081	51,829	25,694	125,630
# of Screen	40,998	6,127	4,926	4,682	3,015	2,241	3,669
Population/Screen	9,013	10,629	16,883	14,327	17,190	11,466	34,241

Box Office Income/Admission Price [2019]

In 2019, the box office income in Japan was the third largest, coming after the USA/Canada and China. The theater ticket price in Japan was on average 1,340 yen (1,410 yen in 2021), relatively higher than that of other countries, and this is one reason why box office income in Japan was high. On the other hand, the high admission is also considered to be the reason why the number of films a person went to see at theaters has not increased.

Attendance and Box Office Income Per Screen

In all the countries, the number of the annual attendance per screen (the annual attendance divided by the number of screens) was lower in 2020 compared with that in 2019, becoming 26% to 31% or one fourth to one third. However, in Japan, the number was 28,928, 54% of 53,739 in 2019.

The box office income per screen in 2019 was highest in Japan, whose number was 72,890,000 yen in Japan. This was due to the fact that there was a lower number of screens in Japan compared with those in other countries, and its admission prices were higher than those in other countries, making its attendance and box office income per screen higher. In 2019, the box office income per screen in the USA and Canada together was 28,130,000 yen; in France, it was 28,380,000 yen; in Germany, it was 27,810,000 yen; and these were less than half of that of Japan. The highest in all of Europe and North America was the UK's 37,170,000 yen. In 2020, the box office income per screen in these countries remained 20-30% of that in 2019, and in 2021, these numbers did not increase largely. The operation for movie theaters remained challenging.

fig. 22 Comparison with Foreign Countries [Attendance per Screen 2011-2020]

	France	Germany	Germany	UK(former)	Korea	Australia	Japan
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	94,283	38,511	47,894
2015	35,778	29,668	-	42,486	89,641	43,413	48,481
2016	36,494	25,554	38,895	40,554	84,280	43,046	51,838
2017	35,413	25,463	37,810	40,009	79,490	38,462	49,429
2018	33,629	21,736	38,147	40,783	73,677	39,421	47,121
2019	34,838	23,906	36,826	39,308	73,621	36,667	53,739
2020	10,641	7,734	9,398	-	19,741	12,584	28,928

fig.23 Comparison with Foreign Countries [Theater Admission and Box Office Income (2019)]

	Average Admission (yen)	Box Office Income (x1 million yen)	Attendance (x1 million)	# of Screens	Box Office Income Per Screen (x 10,000 yen)
USA and Canada	992	1,245,852	1,256	44,283	2,813
China	587	1,014,015	1,727.0	60,079	1,688
UK	989	174,211	176.1	4,564	3,817
Korea	790	179,129	226.7	3,079	5,818
France	829	173,502	209.2	6,114	2,838
India	121	176,806	1,460.0	9,527	1,856
Germany	1,054	124,991	118.6	4,495	2,781
Australia	1,099	93,097	84.7	2,310	4,030
Mexico	308	107,861	350.1	7,619	1,416
Brazil	437	76,327	174.6	3,477	2,195
Sweden	1,392	22,135	15.9	842	2,629
Japan	1,340	261,180	194.9	3,583	7,289

Attendance and # of Screens: From The World Major Countries Various Film Statistics (Film Almanac 2021)
 Box Office Income: the above document uses US Dollars for box office income. We obtained the USD/Japanese yen exchange rate from Japan's box office income of 2019 (261.1 billion yen) and used this rate for each country's box office income in order to obtain their figures in Japanese yen.
 Average Admission: We divided box office income by attendance.
 Box office income per screen: We divided box office income by # of screen.

The Ratio of Multi-Screen Theaters

In all the countries, the box office income dramatically dropped due to the COVID-19 pandemic, however, the numbers of theaters and screens have not largely changed. The ratio of multi-screen theaters was highest in Korea with 96.5%, 3% higher than that in the year before; 2,908 screens out of Korea's nationwide total of 3,015 screens. The total number of screens of other types of theaters began to increase from 2014 in Korea, and

became 194 screens in 2019. However, the number decreased by 87 to 107 screens in 2020, and the number of theaters also decreased by 45 to 61 from 106 in 2019.

In Japan, multi-screen theaters share in 2020 was at 88.2%, the second highest ratio after that in Korea. Multi-screen theaters have occupied a major place in each country. However, the number of these theaters in France and the UK are not so high compared with the numbers in the three other countries (the USA, Korea, and Japan). Particularly in France, the ratio of the number of screens of multi-screen theaters was as low as 43.7%, and the number of multi-screen theaters was 233, while that of other types of theaters was 1,808, much more than the former. (In France, the definition of a multi-screen theater is the one with 8 screens and more, while that of other countries is the one with 5-7 screens and more. This difference affects France's statistics.) About 1,200 theaters among the above belong to "Cinema d'art et d'essai (Art house cinema, similar to the mini-theaters in Japan) screening diverse films different from multi-screen theater programming, and financially supported by the national and local governments. In addition, there were 2,041 theaters in France, more than 3 times as many as the 596 theaters in Japan, making people feel that they are close to diverse types of theaters even in middle- and small-sized cities, towns, and villages.

fig.24 Comparison with Foreign Countries

[Ratio of Multi-screen Theaters and Their Number of Screens (2016-2020)]

		2016	2017	2018	2019	2020
USA	# of Screens	40,392	40,393	40,575	-	-
	of Multi-Screen Theaters	35,620	35,950	36,220	-	-
	Ratio	85.0%	89.0%	89.3%	-	-
France	# of Screens	5,842	5,913	5,983	6,114	6,127
	of Multi-Screen Theaters	2,405	2,505	2,582	2,666	2,677
	Ratio	41.2%	42.4%	43.2%	43.6%	43.7%
UK	# of Screens	4,327	4,512	4,640	4,782	4,682
	of Multi-Screen Theaters	3,442	3,564	3,597	3,703	3,697
	Ratio	77.3%	79.0%	77.5%	77.4%	79.0%
Korea	# of Screens	2,575	2,766	2,937	3,079	3,015
	of Multi-Screen Theaters	2,428	2,602	2,756	2,885	2,908
	Ratio	94.3%	94.1%	93.8%	93.7%	96.5%
Japan	# of Screens	3,492	3,531	3,570	3,627	3,672
	of Multi-Screen Theaters	3,064	3,109	3,154	3,197	3,238
	Ratio	87.7%	88.0%	88.3%	88.1%	88.2%

fig.25 Comparison with Foreign Countries

[Ratio of Multi-Screen Theaters and Their Number of Theaters (2019-2020)]

	2019			2020		
	Multi-Screen Theaters	Others	Total	Multi-Screen Theaters	Others	Total
France	232	1,813	2,045	233	1,808	2,041
UK	396	684	1,080	395	590	985
Korea	407	106	513	413	61	474
Japan	356	237	593	361	235	596

Definition of a Multi-Screen Theater

USA a theater with 5 and more screens *there is no date after 2018

France a theater with 8 and more screens

UK a multi-screen theater: a film exhibition facility with 5 and more screens

Japan a facility specialized in film exhibition with 5 and more screens

Korea CJ, CGV, Lotte Cinema, Megabox, Cine Q chain theaters in addition to theaters with 7 and more screens

Number of Films Released

In France, Germany, and Australia, the number of released films in 2020 each became about a half of that in the year before. On the other hand, Korea released 1,693 films, 97% of that in 2019; and in Japan, 1,017 films, 80% of that in 2019 were released. In 2020, many major film releases kept being postponed. In the US, movie theaters kept closing, causing Hollywood films to remain unreleased and some films were released only online. In other countries where Hollywood films were also unreleased and their share was high, the damage to theaters was also high.

In Japan, the ratio between Japanese and foreign films released in 2019 matched the ratio of their box office incomes at 54% vs. 46%. This proportion was well balanced, and dependence on Hollywood films was lower compared with other countries, therefore, when the releases of many Hollywood films were postponed in 2020, its impact was kept low. However, the balance between domestic and foreign box-office incomes was drastically broken, making the ratio of the box office income of Japanese and foreign films 76.3% vs. 23.7% in 2020. In 2021, the gap was widened to 79.3% vs. 20.7%. Some theaters resist (in some cases, even refuse) to screen the titles if they are simultaneously released in theaters and online, and we must keep observing how the situation will go in the future.

fig.26 Comparison with Foreign Countries [Number of Films Released (2012-2020)]

		2012	2014	2016	2018	2020	2020	
							Japanese Films	Foreign Films
France	# of films released	614	663	716	683	365	195	170
							53%	47%
	Attendance (x1,000)	203,600	209,100	213,200	201,200	65,200	45%	55%
	Attendance per Film	331,596	315,385	297,765	294,583	178,630		
Germany	# of films released	551	570	610	576	339	150	189
							44%	56%
	Attendance (x1,000)	135,100	121,700	121,100	105,400	38,100	38%	62%
	Attendance per Film	245,191	213,509	198,525	182,986	112,389		
UK	# of films released	647	712	821	787	381	96	285
							25%	75%
	Attendance (x1,000)	172,500	157,500	168,300	177,000	44,000	-	-
	Attendance per Film	266,615	221,208	204,994	224,905	-		
Korea	# of films released	631	1,095	1,520	1,646	1,693	615	1,078
							36%	64%
	Attendance (x1,000)	194,890	215,060	217,020	216,390	59,520	68%	32%
	Attendance per Film	308,859	196,402	142,776	131,464	35,157		
Australia	# of films released	420	505	609	758	401	39	362
							10%	90%
	Attendance (x1,000)	85,900	78,600	91,300	89,800	28,200	6%*	94%*
	Attendance per Film	204,524	155,644	149,918	118,470	70,324		
Japan	# of films released	983	1,184	1,149	1,192	1,017	506	511
							50%	50%
	Attendance (x1,000)	155,159	161,116	180,189	169,210	106,137	79%*	21%*
	Attendance per Film	157,842	136,078	156,822	141,955	104,363		

*not the ratio of attendance but the ratio of box office income

Long-Term Public Support System to Theaters

In Japan, a movie house is imaged as a theater operation running films 5-6 times daily with no closing days annually. However, in Europe, a film theater is not necessarily a commercial theater. Among the theaters in Germany included in the "Film Exhibition Activities Almanac 2016," there are theaters that close one day per week, and at many theaters, when they are open, they run films only 2-3 times a day. Many run films only from

Friday to Sunday operated by volunteer staff. In France, the UK, the USA, and Korea, movie houses have diverse forms.

In every country outside of Japan, there are organizations administering the film industry and film culture (CNC in France, BFI in the UK, FFA in Germany, KOFIC in Korea, etc.), and they get involved with every sphere in film including production, distribution, theater operation (exhibition), education, and preservation. As for the film exhibition activities, their support systems cover a variety of levels and types of assistance including screenings at big-scale commercial movie houses, multi-screen theaters, mini-theaters, cinematheques, and independent screening, together offering highly diverse films.

Public support and promotional policies should cover more than mere financial support. The movie houses receiving public support are expected to present diverse activities including programs emphasizing their relationship with the community and other cultural organizations, development of young audiences, and film educational projects. Programmers responsible for these projects are also nourished. These policies inspire theaters and film exhibitors to increase their cultural profiles and sustainability in their communities.

During the emergency situation caused by the worldwide COVID-19 pandemic, film administration organizations like CNC, BFI, and KOFIC initiated policies protecting movie houses and exhibitors. First, they handled an urgent situation by paying their grant money earlier than was scheduled. Next, they planned, enacted, and executed support programs needed by movie houses and exhibitors in association with agencies and ministries corresponding to the Japanese Agency of Cultural Affairs, Ministry of Economy, Trade and Industry, and Ministry of Health, Labor and Welfare.

The COVID-19 pandemic acutely exposed the situation in Japan revealing the need for organizations and systems to support the movie houses and public exhibitions like community cinemas. More than 130 mini-theaters nationwide are operated with almost no public support, not only in big cities, but also in mid-sized and small cities, and this situation in Japan is seen abroad as a “miracle.” During the pandemic, the inferior labor conditions and harassments practiced at cultural and art organizations have been increasingly exposed and discussed openly. In some cases, the phrase “exploitation taking advantage of the worker’s sense of devotion” was used in the case of labor situations at mini-theaters. Since the 1980s, small- scaled movie theaters have been operated by the dedication and sacrifices of the people working there, however, their operations have been reaching their limitations. The COVID-19 pandemic is not over yet, and its effects will be long-term. The importance of mini-theaters has been recognized widely and the “ARTS for the future! Project (AFF)” by the Agency of Cultural Affairs has been finally realized and is gravely needed by mini-theaters. This is exactly the time we should start discussing how to fulfill the support programs essential to movie theaters and exhibitors as permanent programs, and not the temporary measures responding to the COVID-19 pandemic.