

Cinemas - UK - May 2011

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What is this report about?

Although cinema admissions fell back in 2010 after a period of three successive years of growth, the value of the industry continued to grow, reflecting the substantial boost which it has been given by the development of 3D films, which attract a 30-40% price premium over standard 2D movies.

What have we found out?

- The cinema market reached a value of £1.338 billion in 2010, 2.5% higher than in 2009 and 24.1% more than in 2005, reflecting a strong trend towards more expensive 3D movies.
- Although they were 17.4% higher in 2010 than in 2005, cinema admissions at 169.2 million were 2.5% lower than in 2009, reflecting perhaps the first signs that the weakness of the economy is beginning to impact on this area of discretionary leisure spending.
- 3D movies grew their share of box office from 13% to 28% between 2009 and 2010, reflecting both growth in the number of films being released in this format and also an increase in the number of cinema screens which were 3D-enabled.
- Cineworld moved into the position of box office market leader in 2010 with a 26.2% share, although Odeon still has the largest share of cinema sites (14%) and screens (22%) in the UK, ahead of Cineworld and Vue. Although independent operators account for 48% of cinema sites in the UK, they account for just 16.5% of screens, reflecting the fact that independent cinemas tend to have fewer screens per site.
- The core of cinema-goers, who go 2-3 times per month or more often, equates to 14% of the adult internet-using population. Two thirds of people like to buy tickets on arrival, compared to three in ten who book in advance online and just 6% who book in advance by phone.
- Nearly nine out of ten cinema-goers (87%) agree that the food and drink in cinemas is overpriced. This is reflected in the fact that more people now say they bring their own food and drink into the cinema (29%) than say they buy food and drink at the cinema (23%). The impact of pressure on household incomes on secondary spending can be seen by the fact that this figure has declined from 32% just 11 months ago.

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