theatrical market statistics

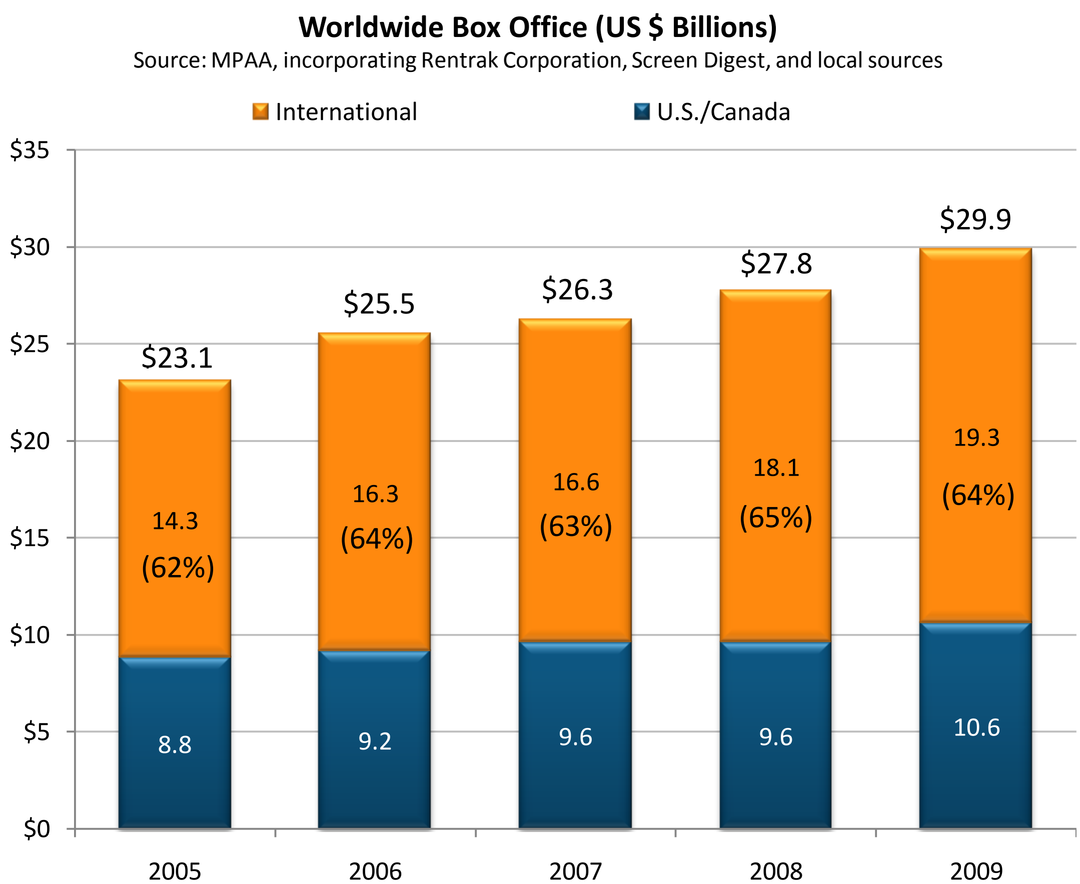
2009

MOTION PICTURE ASSOCIATION OF AMERICA

Table of Contents

Worldwide Box Office

Worldwide box office for all films reached $29.9 billion in 2009, up 7.6% over 2008's total. International box office ($19.3 billion) made up 64% of the worldwide total, while U.S. and Canada ($10.6 billion)[1] made up 36%, a proportion consistent with the last several years. U.S./Canada box office and international box office in U.S. dollars are both up significantly over five years ago.

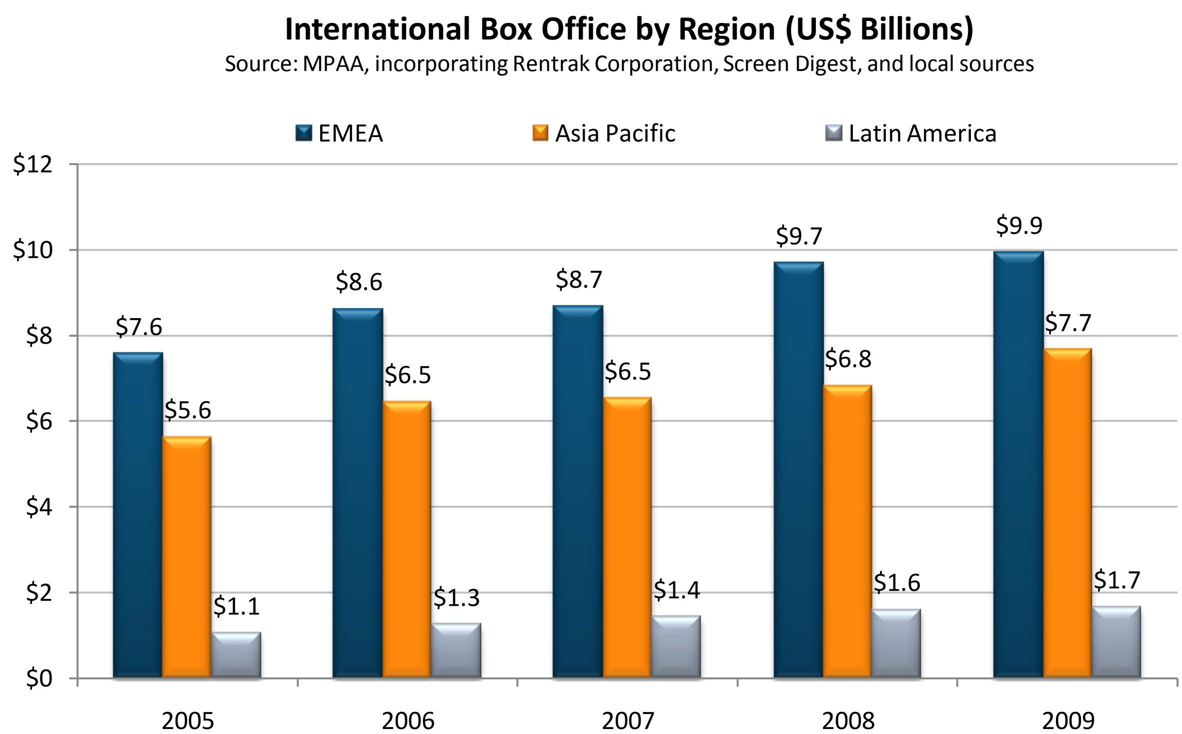


	2005	2006	2007	2008	2009	% Change 09 vs. 08	% Change 09 vs. 05
U.S./Canada[1]	$8.8	$9.2	$9.6	$9.6	$10.6	10.1%	20.3%
International	$14.3	$16.3	$16.6	$18.1	$19.3	6.3%	35.1%
Worldwide	$23.1	$25.5	$26.3	$27.8	$29.9	7.6%	29.4%

[1] Rentrak Corporation completed acquisition of Nielsen EDI in February 2010. MPAA has updated its U.S./Canada box office data to Rentrak Corporation for 2010 and prior years through 1998, using Rentrak's Calendar Year (January 1-December 31) data for clarity and to harmonize with the demographic attendance analysis.

Int'l Box Office By Region

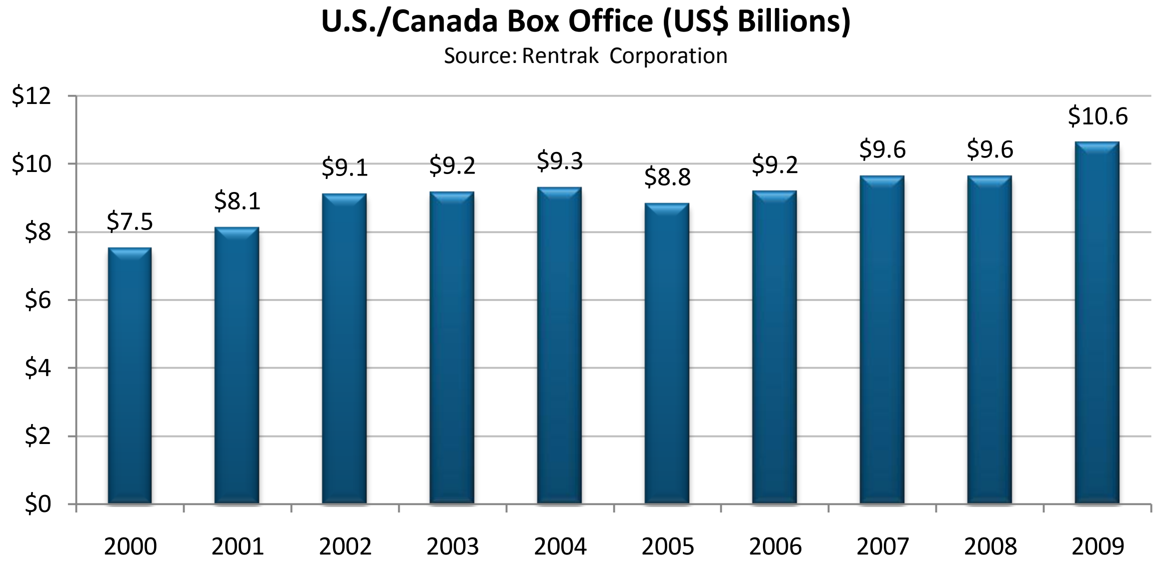
International box office increased 6.3% in 2009, with the largest growth (12.3%) in Asia Pacific. 81% of the Asia Pacific increase occurred in Japan and China. Europe, Middle East & Africa (EMEA) remains more than half (51%) of the international box office total.



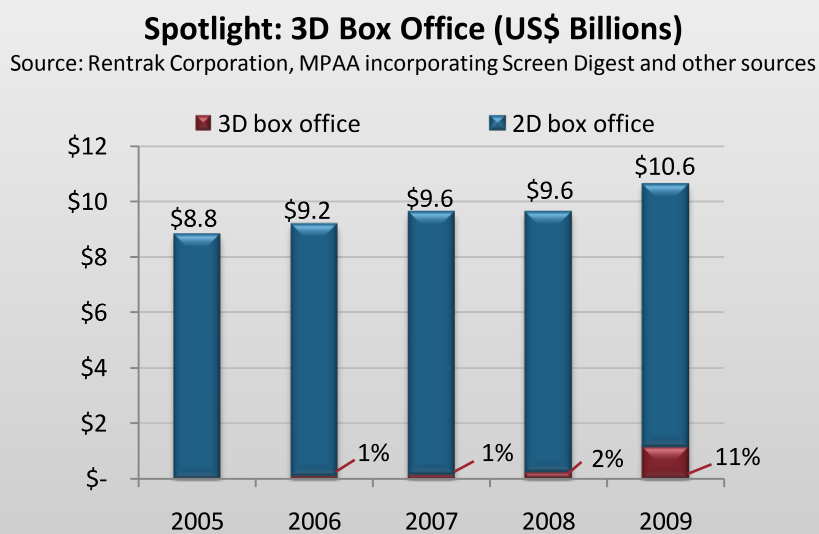
	2005	2006	2007	2008	2009	% Change 09 vs. 08	% Change 09 vs. 05
EMEA	$7.6	$8.6	$8.7	$9.7	$9.9	2.5%	31.2%
Asia Pacific	$5.6	$6.5	$6.5	$6.8	$7.7	12.3%	36.1%
Latin America	$1.1	$1.3	$1.4	$1.6	$1.7	3.6%	58.2%
Total international	$14.3	$16.3	$16.6	$18.1	$19.3	6.3%	35.1%

U.S./Canada Box Office

U.S./Canada box office reached $10.6 billion in 2009, up 10.1% over 2008, and up 20.3% over five years ago. The 3D market was a key growth driver – 11% of 2009 box office, or $1.1 billion, came from 3D showings.



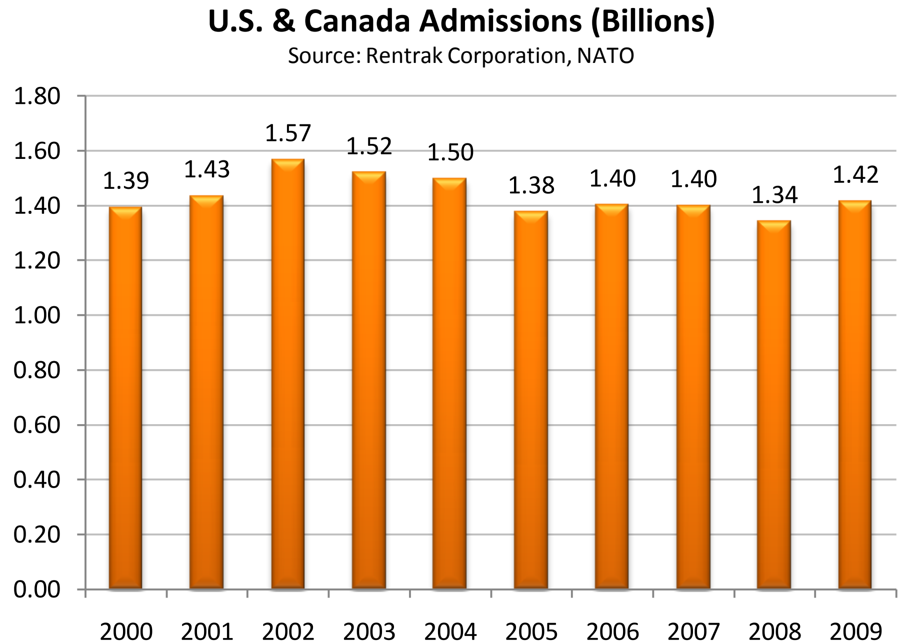
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
U.S./Canada Box Office	$7.5	$8.1	$9.1	$9.2	$9.3	$8.8	$9.2	$9.6	$9.6	$10.6
% Change vs. Prior Year	2.5%	8.0%	12.1%	0.6%	1.5%	-5.1%	4.1%	4.9%	0.0%	10.1%
% Change vs. 2009	41.3%	30.7%	16.6%	15.9%	14.1%	20.3%	15.6%	10.1%	10.1%	n/a



	2005	2006	2007	2008	2009		% Change 09 vs. 08	% Change 09 vs. 05
3D box office	$0.04	$0.09	$0.13	$0.24	$1.14		375.3%	2995.6%
2D box office	$8.78	$9.09	$9.50	$9.40	$9.47		0.8%	7.8%
Total box office	$8.82	$9.18	$9.63	$9.63	$10.61		10.1%	20.3%

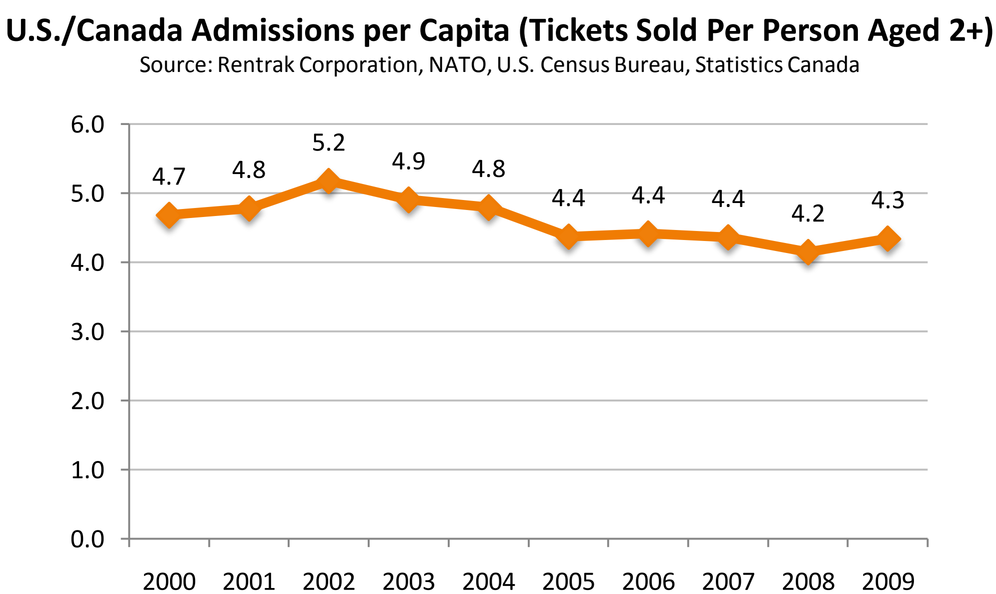
U.S./Canada Attendance

U.S./Canada movie admissions, or tickets sold, reached a five year high at 1.4 billion in 2009. Admissions rose 5.5% from 2008, the first increase in two years. The national average of tickets sold per person (admissions per capita) increased to 4.3 in 2009, the first increase since 2002.



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
U.S./Canada Admissions (Blns)	1.39	1.43	1.57	1.52	1.50	1.38	1.40	1.40	1.34	1.42
% Change vs. Prior Year	-3.4%	3.0%	9.2%	-3.0%	-1.5%	-8.1%	1.8%	-0.2%	-4.1%	5.5%
% Change vs. 2009	1.6%	-1.4%	-9.7%	-6.8%	-5.5%	2.8%	1.0%	1.1%	5.5%	n/a

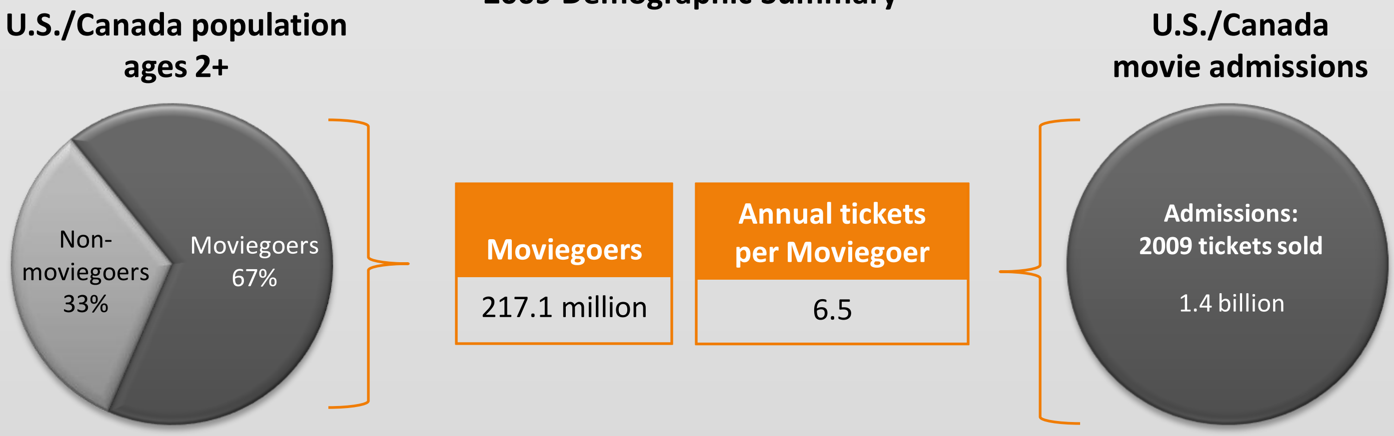
The national average of tickets sold per person (admissions per capita) increased to 4.3 in 2009, the first significant increase since 2002.



Spotlight: Attendance Demographics

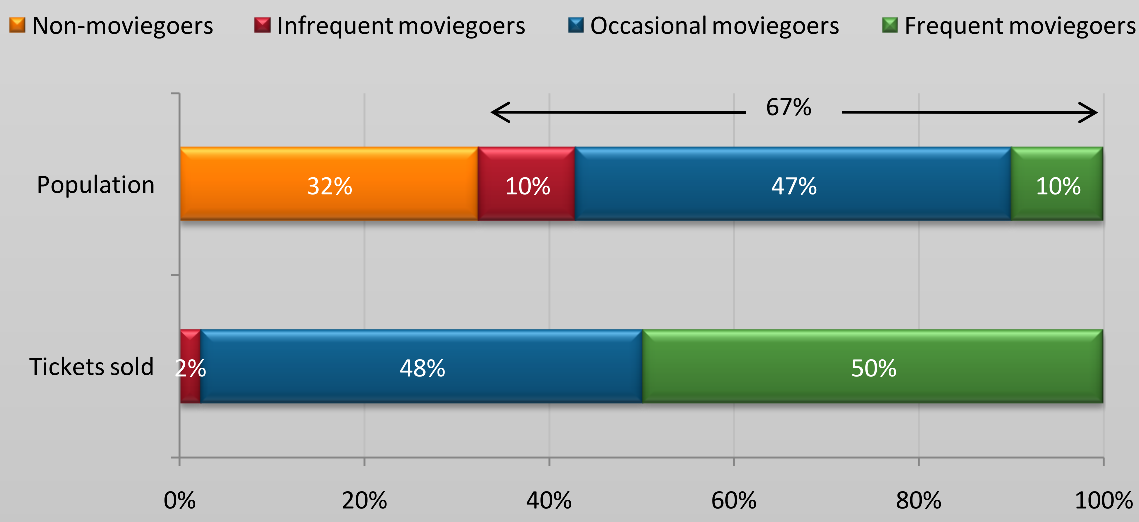
Over two-thirds of the population (67%) – or 217.1 million people – went to the movies in 2009 accounting for the 1.4 billion in admissions (ticket sales). The average amount of times a year that moviegoers attend the movies is 6.5.

2009 Demographic Summary[2]



Frequent moviegoers, the locomotive of the industry, are just 10% of the population – or 32 million people, but bought half of all tickets sold in 2009. The frequent moviegoer proportion of ticket sales holds relatively constant across all demographic groups.

Moviegoer Proportion of Population and Tickets Sold



Frequency definitions:

Frequent=
Once a month or more

Occasional=
Less than once a month

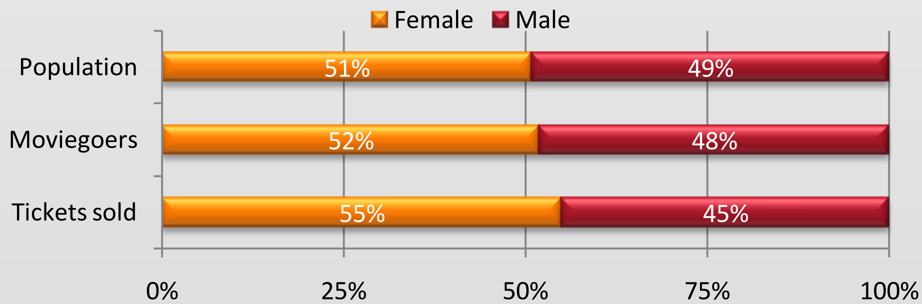
Infrequent=
Once in 12 months

[2] MPAA's demographic attendance analysis is based on survey research and attendance projections by the Opinion Research Corporation. In 2009, the survey research was adjusted to cover (1) calendar year, rather than summer-to-summer; (2) all age groups of movie ticket age (2+), rather than 12+ only; and (3) account for combined U.S./Canada 2+ aged population to correlate with the combined U.S./Canada attendance figure. Due to these changes, the analysis does not contain comparison to prior years. **Note that all demographics are based on U.S. surveying only.**

Spotlight: Attendance Demographics

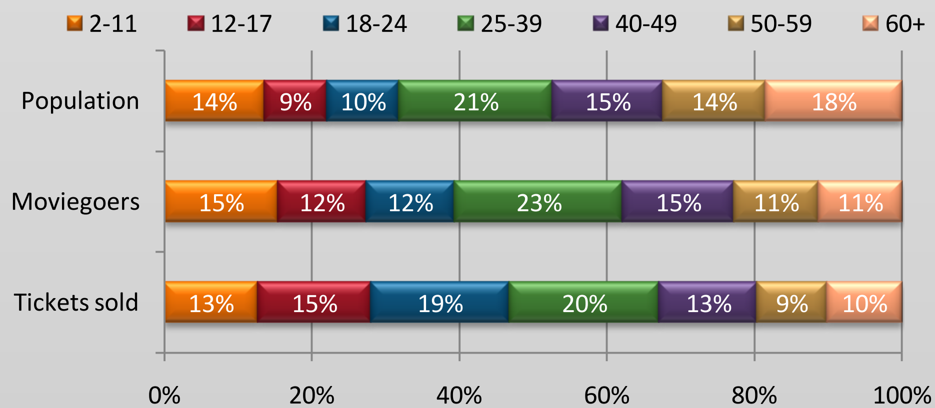
Women buy a higher percentage of movie tickets (55%, or 778 million tickets) than they represent of the population (51%), and more than men buy (45%).

Gender Proportion of Total Population, Moviegoers and Tickets Sold



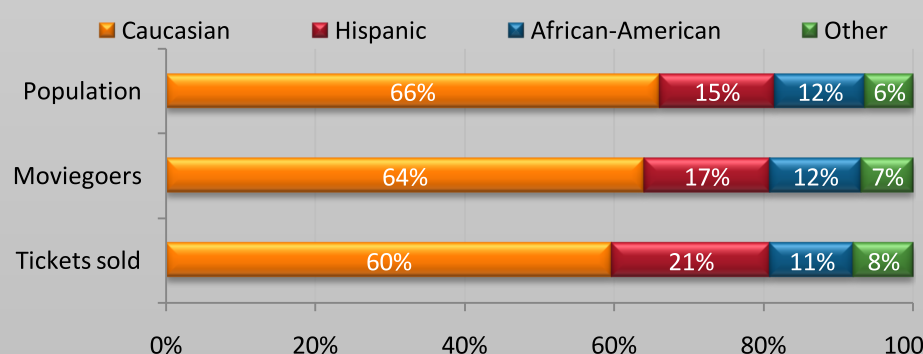
Young people from 12-24 represent about one-quarter of moviegoers, or more than 52 million moviegoers, and one-third of tickets sold, much larger proportions than they represent of the population (19%). In total, moviegoers 24 years old and under buy nearly half of total movie tickets.

Age Group Proportion of Total Population, Moviegoers and Tickets Sold



Although Caucasians make up the majority of the population, moviegoers (140 million), and ticket sales, Hispanics are more likely to go to movies. 37 million Hispanic moviegoers purchased 300 million movie tickets in 2009, a per moviegoer rate of more than 8 tickets a year, the highest rate of any ethnic group.

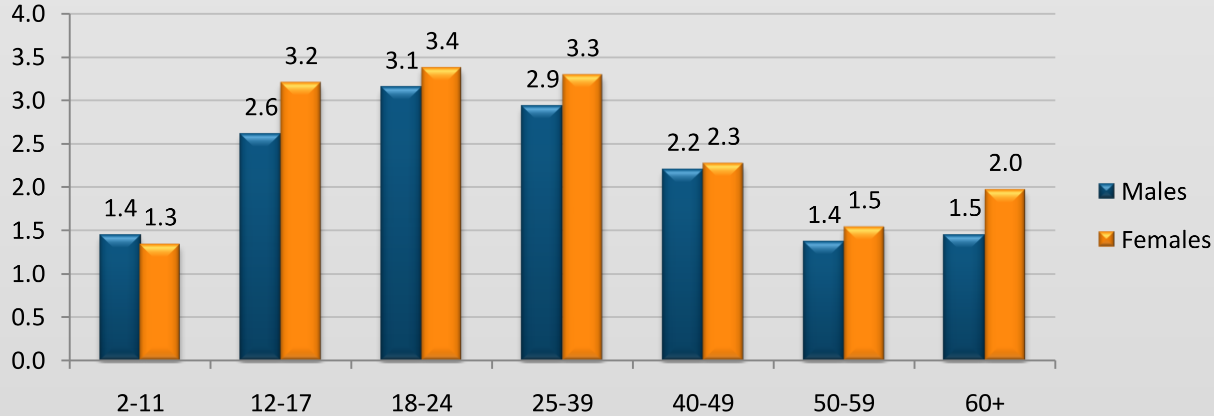
Ethnicity Proportion of Total Population, Moviegoers and Tickets Sold



2009 Moviegoers: 217.1 million | 2009 Total Admissions 1.4 billion

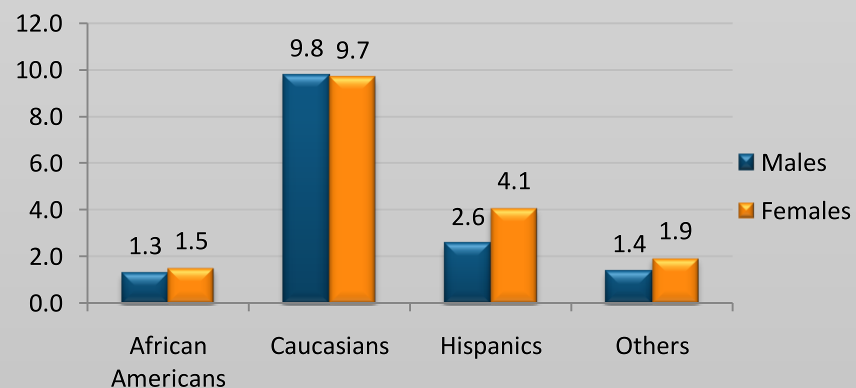
Spotlight: Frequent Moviegoers

There are 32 million total frequent moviegoers – people who attend a movie once a month or more. Frequent movie going peaks between the ages of 18 and 24, with 6.3 million frequent moviegoers in that age group, 20% of the total. Both the 12-17 and 25-39 age groups also represent similar percentages and numbers of the frequent movie going population.



	2-11	12-17	18-24	25-39	40-49	50-59	60+
% of Population	13.6%	8.5%	9.7%	20.8%	15.0%	13.9%	18.5%
% of Frequent Moviegoers	8.7%	18.0%	19.8%	19.7%	14.0%	9.1%	10.7%
No. of Frequent moviegoers (m)	2.8	5.7	6.3	6.3	4.5	2.9	3.4

The male/female split of moviegoers is nearly even for most ethnicities, with the exception of Hispanics. Among Hispanics, there are 1.5 million more frequent moviegoers who are female than male, despite the fact that the Hispanic population is 51% male.*



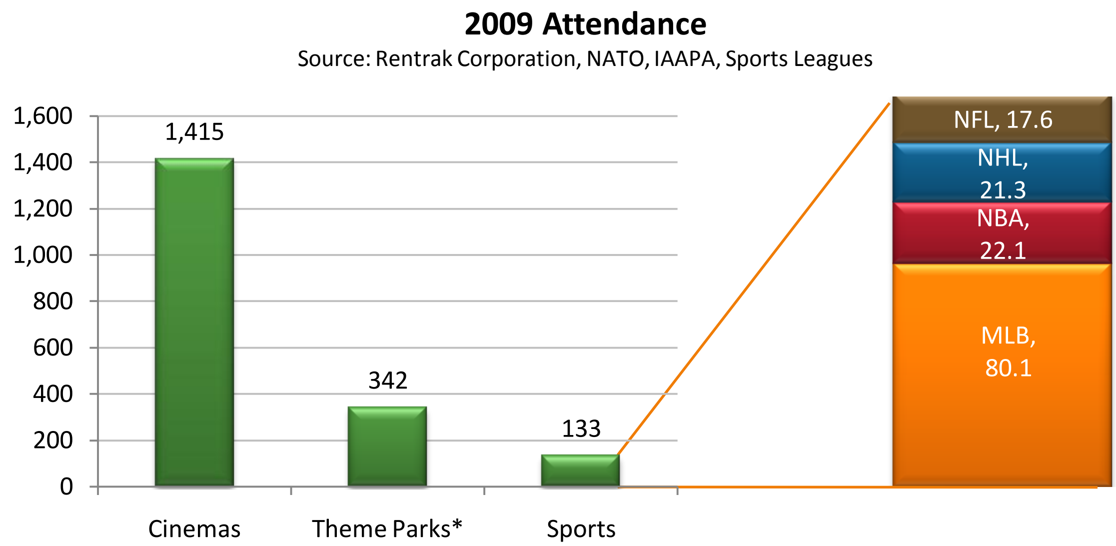
	African American	Caucasian	Hispanic	Other
% of Population	12.1%	66.1%	15.5%	6.3%
% of Frequent Moviegoers	8.8%	60.5%	20.4%	10.3%
No. of Frequent Moviegoers (m)	2.8	19.5	6.6	3.3

*Note: based on small sample size.

Please see appendix for further demographic breakouts.

Theatrical vs. Other Entertainment

Movie theaters continue to draw more people than all theme parks and major U.S. sports combined.

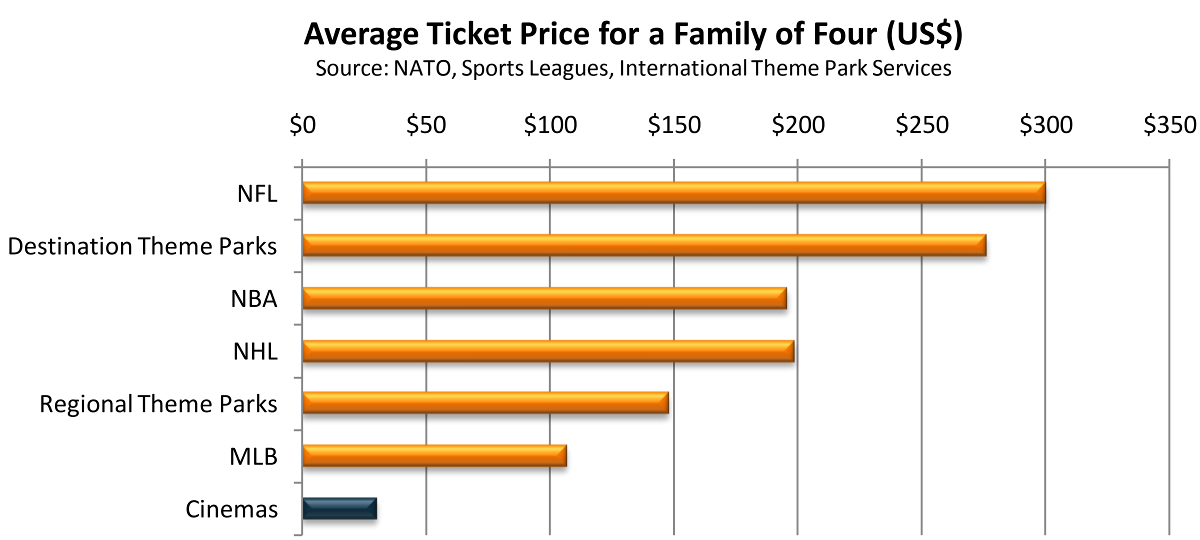


The average ticket price increased by 32 cents in 2009, comparable to the increase in 2008. Movie going remains the most affordable entertainment option, the only option for a family of four under $50 dollars.

Average Annual Cinema Ticket Price (US$)

Source: NATO, Bureau of Labor Statistics

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Average Ticket Prices	$5.39	$5.66	$5.81	$6.03	$6.21	$6.41	$6.55	$6.88	$7.18	$7.50
% Change vs. Previous Year	6.1%	4.9%	2.7%	3.8%	3.0%	3.2%	2.2%	5.1%	4.3%	4.4%
% Change vs. 2009	39.0%	32.6%	29.1%	24.4%	20.7%	17.0%	14.5%	8.9%	4.4%	n/a
CPI % Change	3.4%	2.8%	1.6%	2.3%	2.7%	3.4%	3.2%	2.8%	3.8%	-0.4%



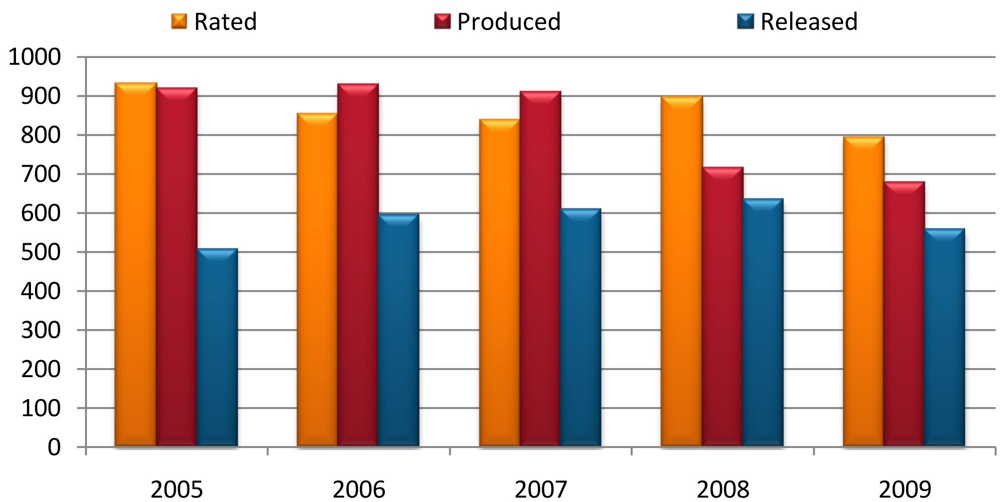
*2008 estimate.

Films

Films produced by U.S. production companies declined over the past three years. In 2009, the number of films released in domestic theaters decreased 12%, the first decline since 2003. This drop, mainly from MPAA member studio subsidiaries and independent distributors, came in the aftermath of labor issues in 2007-2008 and the economic downturn.

Films Rated, Produced and Released Domestically

Source: CARA, MPAA incorporating H.R., Variety, Baseline, and IMDB, Rentrak Corporation



	2005	2006	2007	2008	2009	09 vs. 08	09 vs. 05
Film ratings[3]	931	853	839	896	793	-11.5%	-14.8%
U.S. films produced[4]	920	928	909	716	677	-5.4%	-26.4%
Films released in theaters[5]	507	594	609	633	558	-11.8%	10.1%

Despite a decline in film releases in 2009, non-MPAA-affiliated independents continue to release the most films, with 72% of all films released. MPAA member studios, including specialty divisions (subsidiaries), released 28% of films. 3-D releases are a key growth category; in 2009, 20 films – or 4% of releases – were released with digital 3D versions, more than double the 2008 total.

Spotlight: Films Released Domestically

Source: Rentrak Corporation, MPAA

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	Change
Films released	479	454	475	455	489	507	594	609	633	558	-75
- Digital 3D films	0	0	0	2	2	6	8	6	8	20	+12
MPAA member total	191	183	205	180	179	194	204	189	168	158	-10
- MPAA studios	103	108	123	102	100	113	124	107	108	111	+3
- MPAA studio subsidiaries	88	75	82	78	79	81	80	82	60	47	-13
Non-members	288	271	270	275	310	313	390	420	465	400	-65

[3] Note that films may be rated or re-rated months or even years after production. Includes non-theatrical films.
[4] Historical films produced data has been updated, incorporating unique titles from additional sources to capture the full market of films produced. Films produced is the number of full-length feature films beginning production in a given year, with a U.S. production company involved, including both U.S. productions and co-productions, not including documentaries.
[5] Data updated due to change of source to Rentrak Corporation. Includes all titles released that earned box office in the year.

Top 25 Films in 2009

PG-13 films continue to dominate the top 25, with 13 films in the top 25. PG films were more popular in 2009; two of the top five films, and nine of the top 25 films, were rated PG. Last year, none of the top five films, and only five of the top 25 were rated PG.

Top 25 Films by U.S./Canada Box Office Earned in 2009 (US$ Billions)

Source: Rentrak Corporation, CARA

Rank	Title	Distributor	Box Office (USD MM)	Rating
1	Transformers: Revenge of the Fallen	Paramount	$402.1	PG-13
2	Harry Potter and the Half Blood Prince	Warner Bros.	302.0	PG
3	Up	Disney	293.0	PG
4	The Twilight Saga: New Moon*	Summit	284.5	PG-13
5	Avatar*	Fox	283.6	PG-13
6	The Hangover	Warner Bros.	277.3	R
7	Star Trek	Paramount	257.7	PG-13
8	Monsters vs. Aliens	Paramount	198.4	PG
9	Ice Age: Dawn of the Dinosaurs	Fox	196.6	PG
10	The Blind Side*	Warner Bros.	196.6	PG-13
11	X-Men Origins: Wolverine	Fox	179.9	PG-13
12	Night at the Museum: Battle of the Smithsonian	Fox	177.2	PG
13	The Proposal	Disney	164.0	PG-13
14	2012*	Sony	162.3	PG-13
15	Fast & Furious	Universal	155.2	PG-13
16	G.I. Joe: The Rise of Cobra	Paramount	150.2	PG-13
17	Paul Blart: Mall Cop	Sony	146.3	PG
18	Taken	Fox	145.0	PG-13
19	Gran Torino**	Warner Bros.	142.2	R
20	Disney's A Christmas Carol*	Disney	136.9	PG
21	Angels & Demons	Sony	133.4	PG-13
22	Terminator Salvation	Warner Bros.	125.3	PG-13
23	Cloudy With a Chance of Meatballs*	Sony	123.8	PG
24	Alvin and the Chipmunks: The Squeakquel*	Fox	120.7	PG
25	Inglourious Basterds	TWC	120.5	R

*Film still in theaters in 2010; total reflects box office earned from January 1, 2009 – December 31, 2009

**Film opened in 2008; total reflects box office earned from January 1, 2009 - December 31, 2009

U.S. Screens

There are 6,039 movie theaters in the U.S. The industry continues to shift towards theaters with more screens, with Megaplexes (16 or more screens) representing the main theater growth. An 8% decline in the number of Miniplexes (2-7 screens) means that almost half of the cinema screens in the country are now located in Multiplexes (8-15 screens).

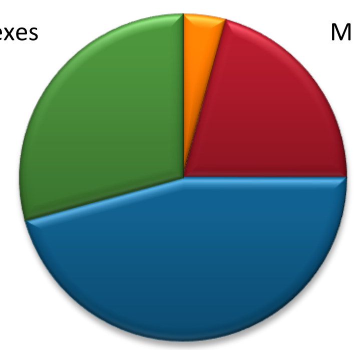
U.S. Theaters by Type

Source: Rentrak Corporation

	2007	2008	2009	% Change 09 vs. 08
Single Screen	1,748	1,747	1,677	-4.0%
Miniplexes (2-7 screens)	2,296	2,215	2,043	-7.8%
Multiplexes (8-15 screens)	1,617	1,679	1,681	0.1%
Megaplexes (16+ screens)	616	628	638	1.6%
Total Theaters	6,277	6,269	6,039	-3.7%

Percentage of U.S. Screens by Theater Type

Source: Rentrak Corporation



U.S. Theater Screens

Source: Rentrak Corporation

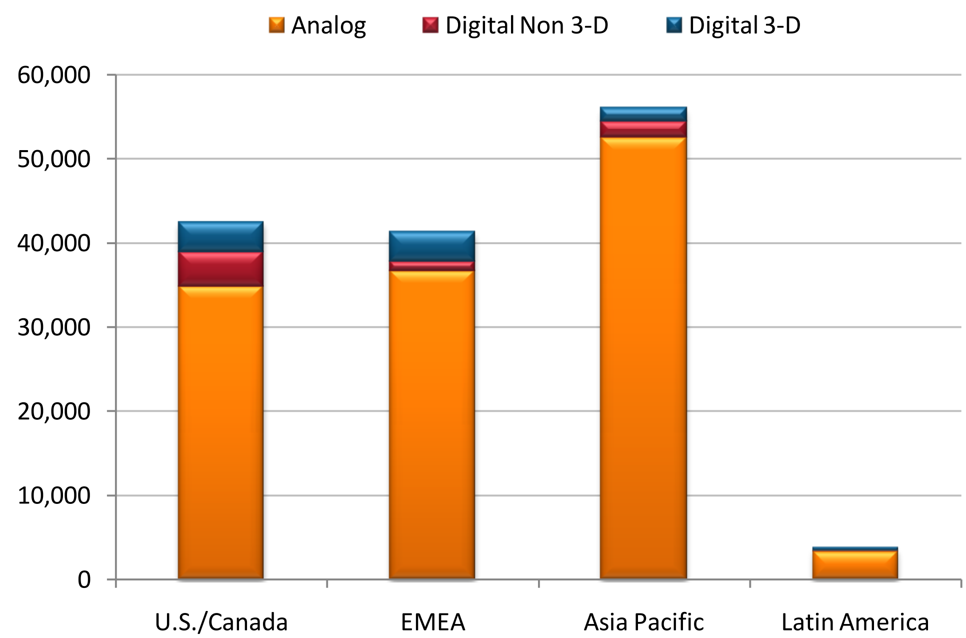
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Indoor Screens	36,679	36,110	34,630	35,499	35,993	38,143	38,943	39,347	39,476	39,028
Drive in Screens	717	654	650	647	601	709	725	730	718	689
Total Screens	37,396	36,764	35,280	36,146	36,594	38,852	39,668	40,077	40,194	39,717
% Change vs. Previous Year	0.6%	-1.7%	-4.0%	2.5%	1.2%	6.2%	2.1%	1.0%	0.3%	-1.2%
% Change vs. 2009	6.2%	8.0%	12.6%	9.9%	8.5%	2.2%	0.1%	-0.9%	-1.2%	n/a

Worldwide Screens

Worldwide cinema screens have remained constant over the past five years at just under 150,000 screens. During that period, however, the growth in digital screens has accelerated. More than 16,000 screens, or 11% of the total, are now digital. International screens – particularly in Europe – constituted the majority of global digital screen growth in 2009. As a result, for the first time ever there are now more digital screens internationally than in the U.S. and Canada.

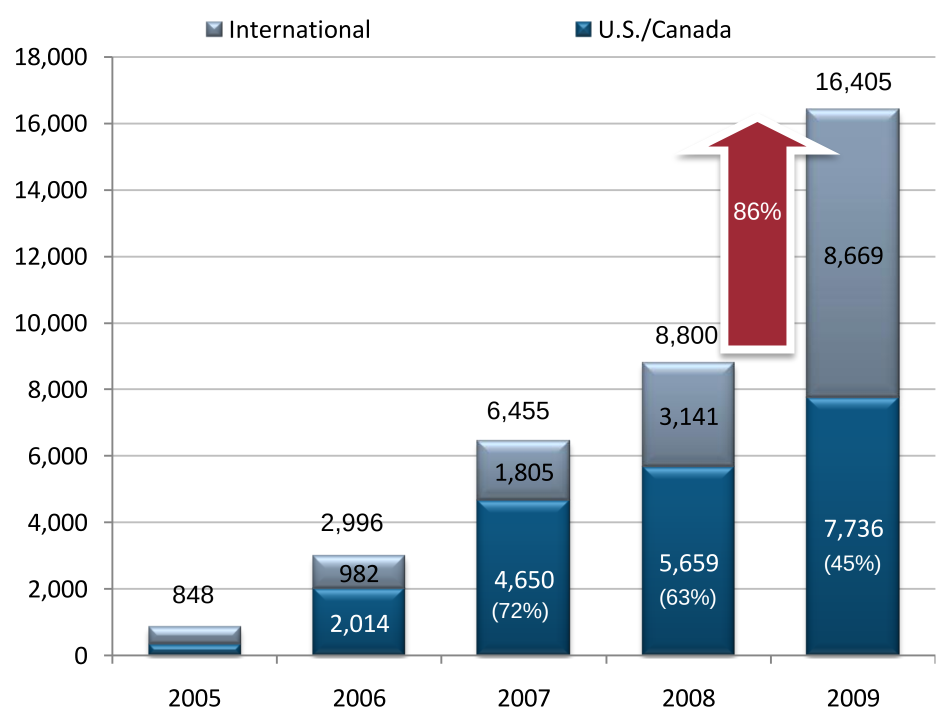
Total 2009 Cinema Screens by Format

Source: Screen Digest, Rentrak Corporation



Digital Screens

Source: Screen Digest



Spotlight: 3D Screens

The fastest growing sector of digital screens is 3D. The number of digital 3D screens worldwide more than tripled in 2009, reaching 8,989, or about 6% of screens in the world. Digital 3D represents about half (55%) of all digital screens in the world, and a higher percentage in certain regions.

Worldwide Digital 3D Screens

Source: Screen Digest

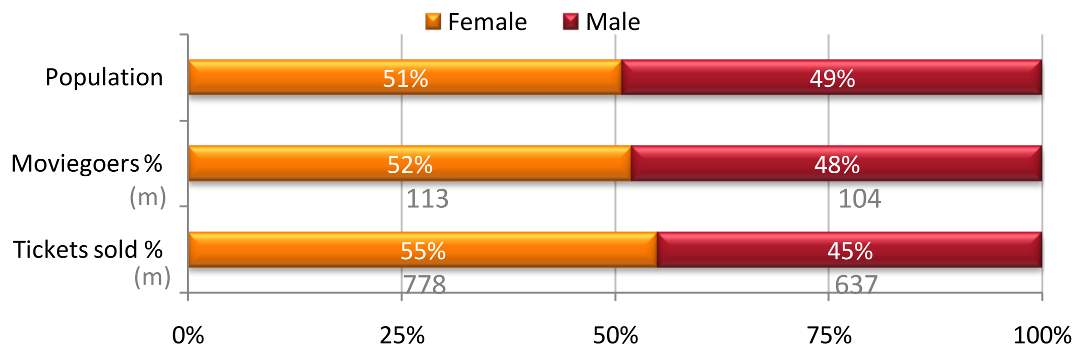
	2005	2006	2007	2008	2009	% of digital
U.S./Canada	84	206	994	1,514	3,548	45.9%
EMEA	0	12	211	594	3,495	74.3%
Asia Pacific	0	35	80	344	1,584	45.0%
Latin America	0	5	14	91	362	80.6%
World Total	84	258	1,299	2,543	8,989	54.8%
% change vs. previous year	n/a	207%	403%	96%	253%	25.9%

Appendix

Breakout: Attendance by Gender

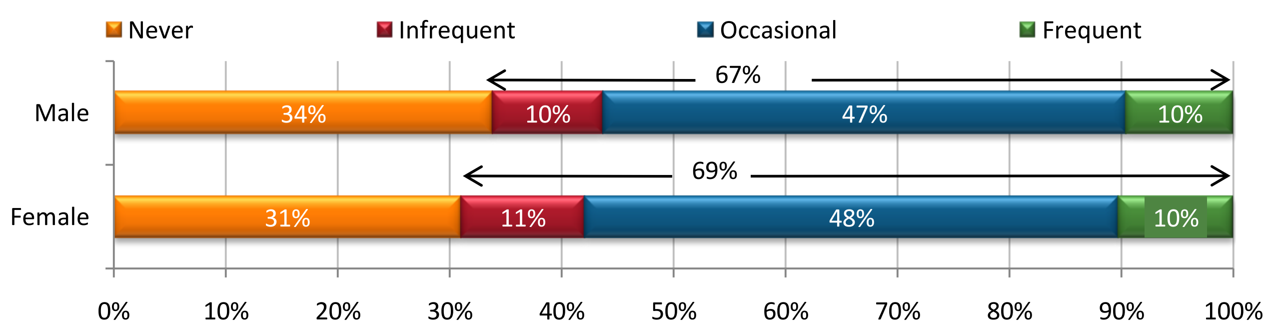
Women buy a higher percentage of movie tickets (55%, or 778 million tickets) than they represent of the population (51%), and more than men buy (45%).

Gender Proportion of Total Population, Moviegoers and Tickets Sold



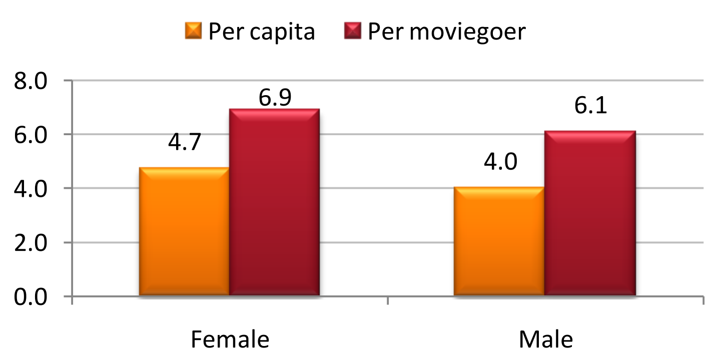
A higher percentage of women than men are moviegoers in all categories of frequency. In total, there are 113 million female moviegoers, compared to 104 million male moviegoers.

Moviegoing Frequency by Gender



Women also have higher attendance per capita (4.7 tickets per year) and attendance per moviegoer (6.9 tickets per year) averages than men.

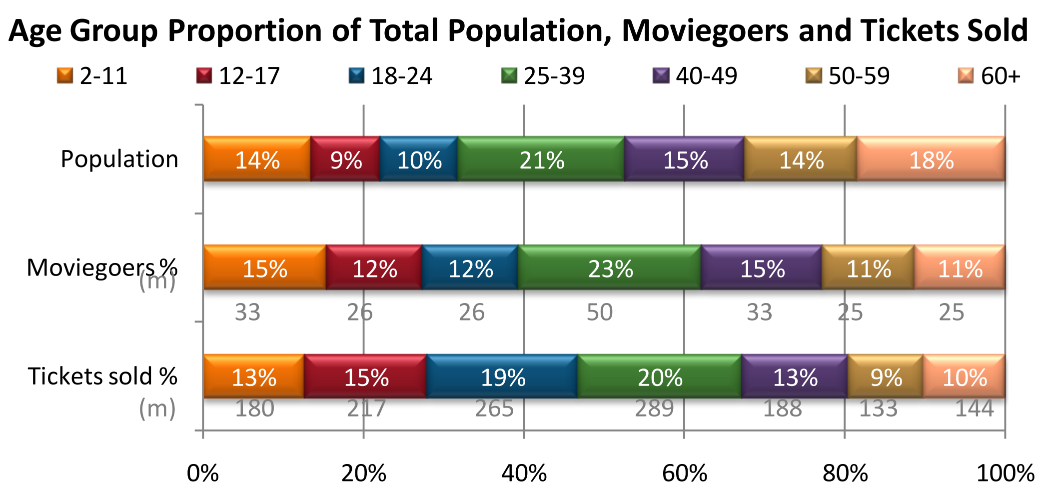
Annual Attendance Averages by Gender

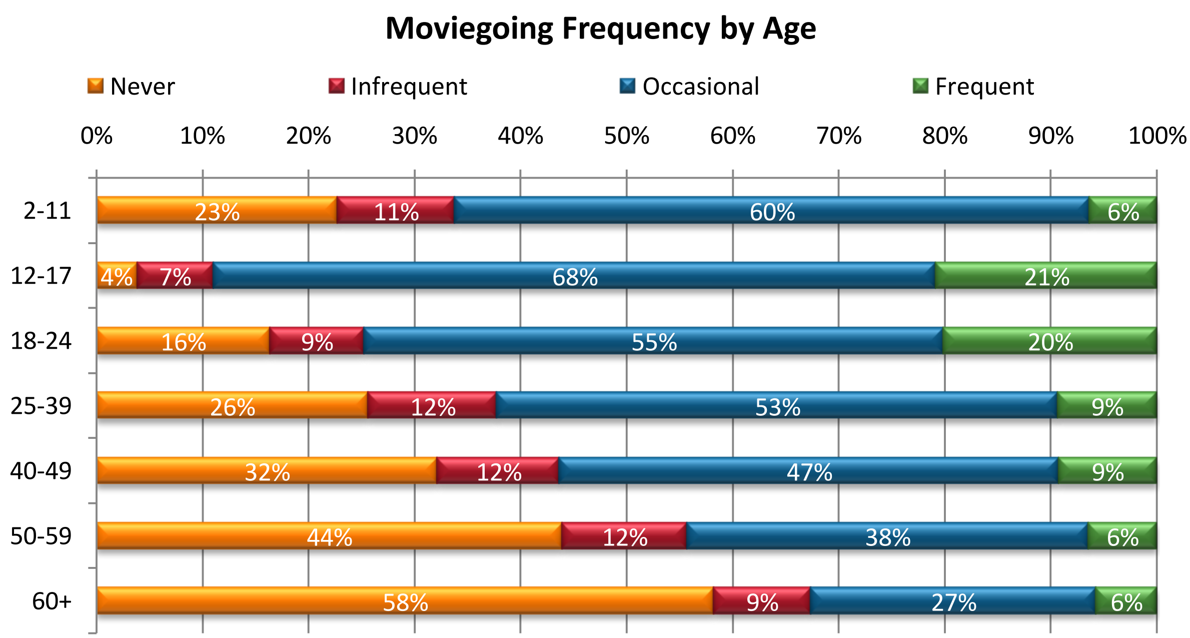


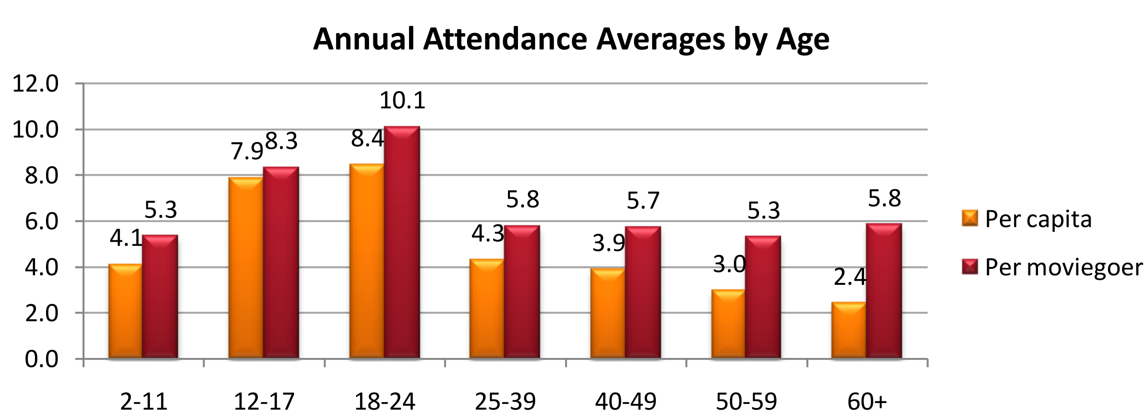
2009 Moviegoers: 217.1 million | 2009 Total Admissions 1.4 billion

Breakout: Attendance by Age

Young people aged 12-24 represent the highest proportions of moviegoers and tickets relative to their population. They also attend the movies eight or more times a year, more than double the national average. In total, people aged 24 and under bought about 47% of tickets.



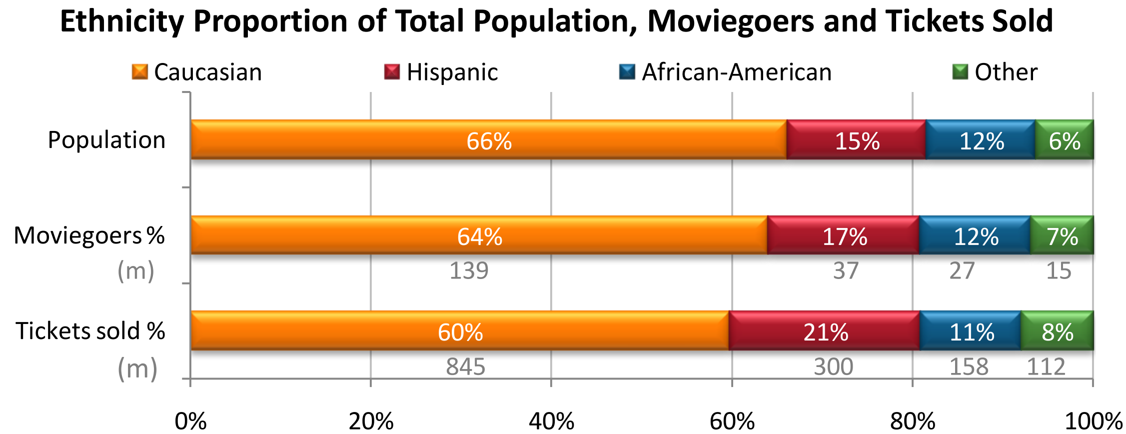




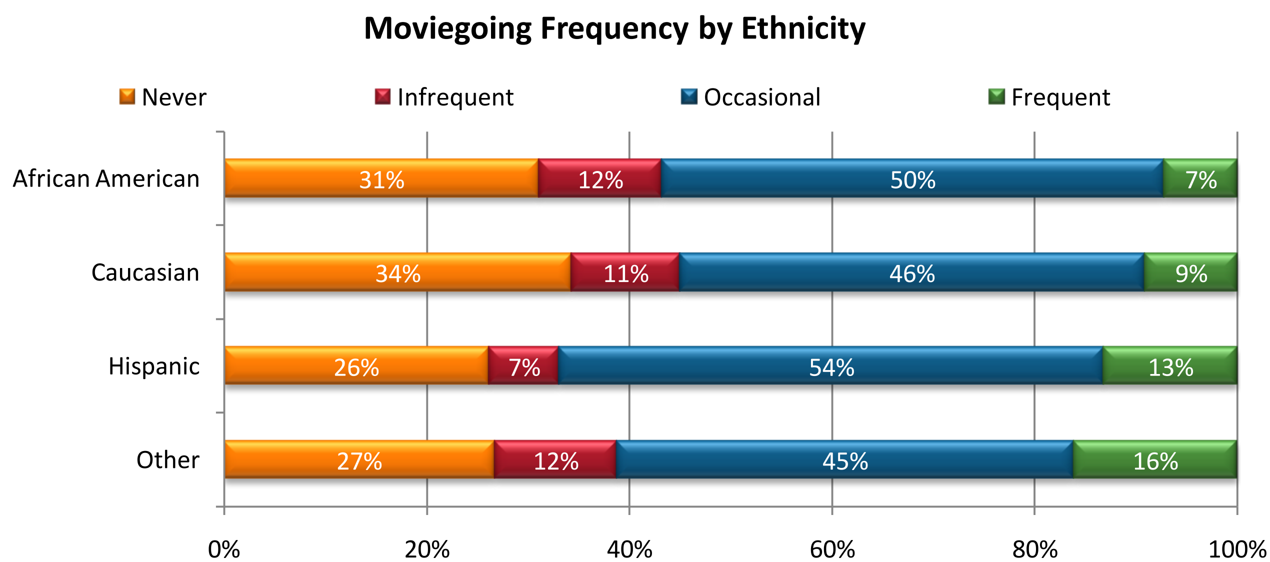
2009 Moviegoers: 217.1 million | 2009 Total Admissions 1.4 billion

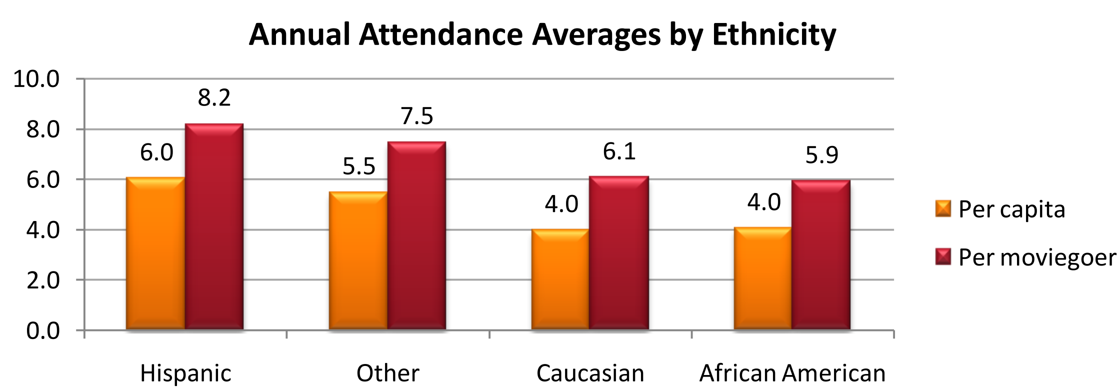
Breakout: Attendance by Ethnicity

Hispanics buy a higher percentage of tickets (21%), relative to their population size (16%), while Caucasians buy a lower percentage. Hispanics also have the highest per capita (6.0) and per moviegoer (8.2) annual attendance averages.



Hispanics and Other ethnicities have the highest percentages of all moviegoers (73-74%) of their populations), and of frequent moviegoers (13-16%).



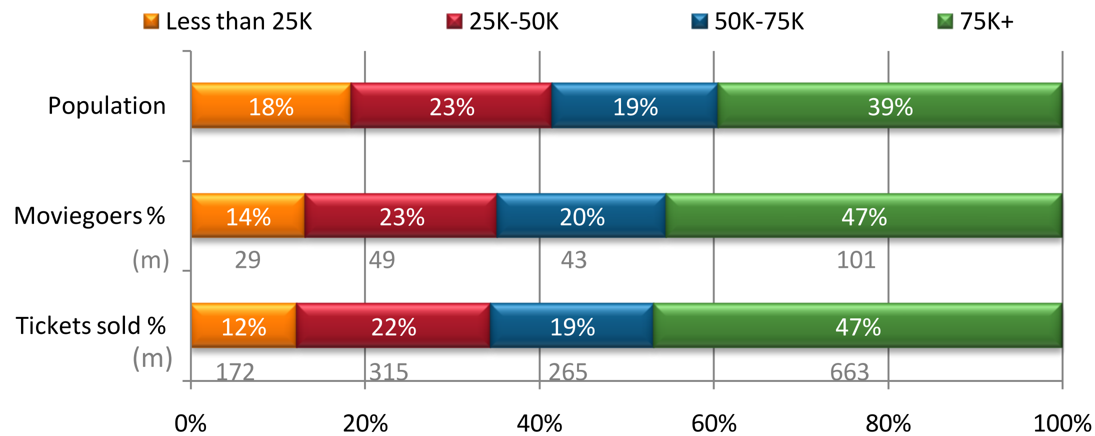


2009 Moviegoers: 217.1 million | 2009 Total Admissions 1.4 billion

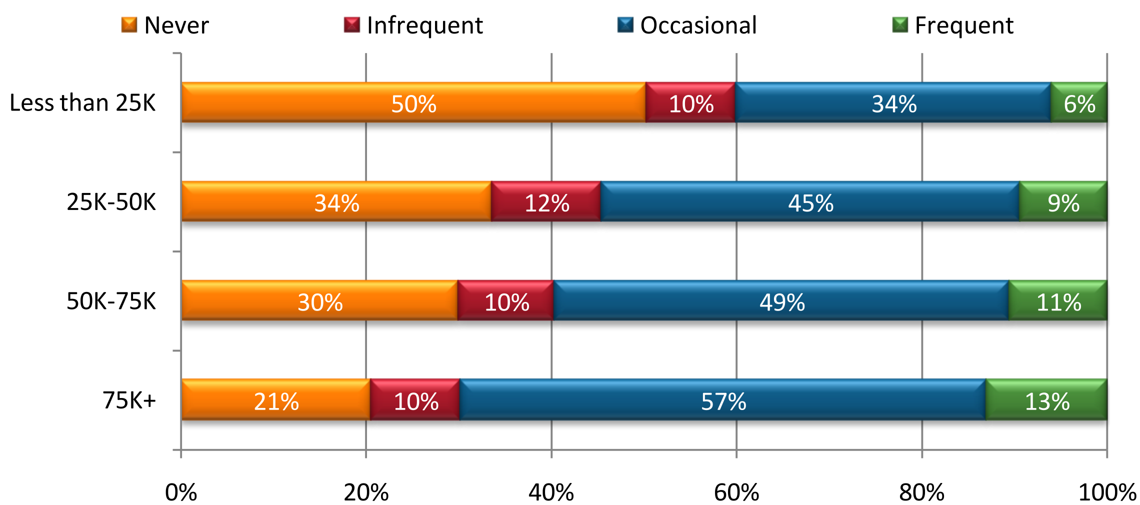
Breakout: Attendance by Income

The highest income group, households of income $75,000 and above, are more likely to be moviegoers and particularly frequent moviegoers. However, among moviegoers in all types of households, there is not a major difference in average annual attendance per moviegoer.

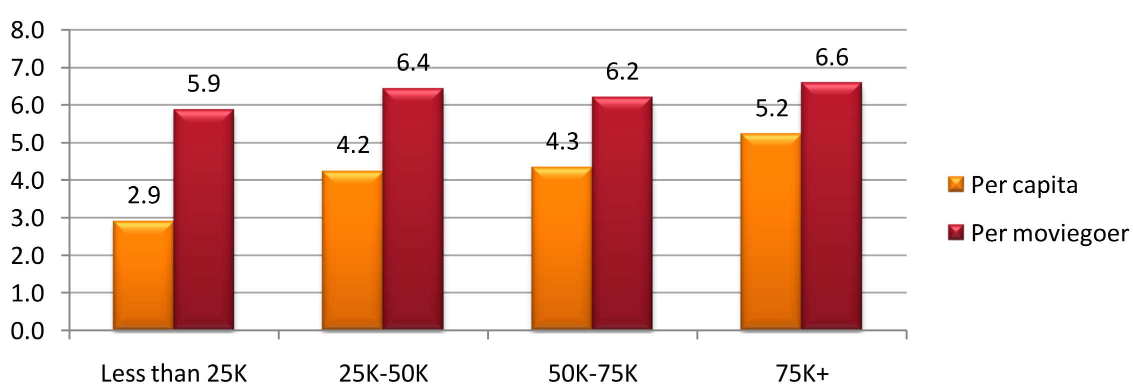
Income Proportion of Total Population, Moviegoers and Tickets Sold



Moviegoing Frequency by Income



Annual Attendance Averages by Income



2009 Moviegoers: 217.1 million | 2009 Total Admissions 1.4 billion