MARCHÉ DU FILM

FOCUS

WORLD FILM MARKET TRENDS
TENDANCES DU MARCHÉ MONDIAL DU FILM

2016_

OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSSTELLE

MARCHÉ DU FILM
FESTIVAL DE CANNES

focus 2016

World Film Market Trends
Tendances du marché mondial du film

OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSSTELLE

MARCHÉ DU FILM
FESTIVAL DE CANNES

ISSN: 1962-4530

Imprimé sur papier labelisé issu de forêts gérées durablement.
Printed on paper from sustainably managed forests.

Editors

Martin Kanzler (Martin.KANZLER@coe.int)
Julio Talavera Milla (Julio.TALAVERA@coe.int)

Film Analysts, Department for Information on Markets and Financing, European Audiovisual Observatory

Editorial assistants, LUMIERE Database
Laura Ene, Valérie Haessig, Gabriela Karandzhulova

Lay-out: Acom* Europe

Printed: Global Rouge, Les Deux-Ponts

Editorial

As a publication of the Marché du Film, *FOCUS* will be an essential reference for professional attendees this year. Not only will it help you grasp the changing practices of the film industry, but it also provides specific information on production and distribution around the world.

Once again, we are glad to collaborate with Susanne Nikoltchev and her team. With this partnership, we aim to provide you with valuable insight into the world of film market trends.

Jérôme Paillard

Executive Director
Marché du Film

FOCUS, une publication du Marché du Film, sera une référence incontournable pour tous les participants professionnels cette année. Elle vous aidera non seulement à appréhender les pratiques en constante évolution de l'industrie cinématographique, mais elle vous informera également de manière plus spécifique sur les secteurs de la production et de la distribution dans le monde entier.

Nous avons le plaisir de collaborer de nouveau avec Susanne Nikoltchev et son équipe. Grâce à ce partenariat, nous espérons vous fournir des renseignements précieux sur les tendances du marché du film.

Jérôme Paillard

Directeur Délégué
Marché du Film

One recurring theme of the *FOCUS* is the success of films around the globe, both on their domestic as well as outside their domestic markets. Reason enough for the European Audiovisual Observatory's to focus its yearly Cannes Conference on the export of films. If you like to explore with us "What makes European films travel?" supplement your reading of this newest edition of the Focus by joining us! We hope to see you in the Olympia Cinema on 14th May at 9:30!

Susanne Nikoltchev

Executive Director
European Audiovisual Observatory

L'un des thèmes récurrents du *FOCUS* concerne le succès des films à travers le monde, tant sur leur marché national qu'en dehors de celui-ci. C'est pourquoi l'Observatoire européen de l'audiovisuel se focalise sur les films à l'export lors de sa conférence annuelle à Cannes. Vous souhaitez en savoir davantage sur « […] ce qui fait voyager les films européens ? » Alors, prenez vite connaissance de cette toute nouvelle édition du FOCUS et joignez-vous à nous au Cinéma Olympia le 14 mai à 9h30 !

Susanne Nikoltchev

Directrice exécutive
Observatoire européen de l'audiovisuel

The European Audiovisual Observatory, set up in 1992, is a public-service body whose mission is to supply information services (concerning film, television, home video, on demand audiovisual services as well as related public policies) to the audiovisual industry in Europe. The Observatory has 40 member countries, along with the European Union represented by the European Commission. The Observatory is part of the Council of Europe and located in Strasbourg, France. It carries out its mission with the help of a network of partners, correspondents and professional organisations. The Observatory provides information on markets, financing and legal aspects of the audiovisual sector and edits the "FOCUS, World Film Market Trends".

➥ ***http://www.obs.coe.int***

Créé en 1992, l'Observatoire européen de l'audiovisuel est un organisme de service public qui a pour mission de proposer des services d'information au secteur audiovisuel en Europe (concernant le cinéma, la télévision, la vidéo, les services audiovisuels à la demande et les politiques publiques afférentes). Il compte actuellement 40 Etats membres, ainsi que l'Union européenne qui est représentée par la Commission européenne. L'Observatoire fait partie du Conseil de l'Europe et a son siège à Strasbourg en France. Pour accomplir sa mission, il s'appuie sur un réseau de partenaires, de correspondants et d'organisations professionnelles. L'Observatoire propose des informations relatives aux différents marchés audiovisuels, au financement et aux aspects juridiques du secteur ; il édite aussi FOCUS, Tendances du marché mondial du film.

focus 2016

Contents

MARCHÉ DU FILM
FESTIVAL DE CANNES

NEXT

SHAPING TOMORROW'S CINEMA

NEW AUDIENCES

DISRUPTIVE MODELS

SHOWROOM
&
CONFERENCES

VISIT US

VIRTUAL REALITY

VISIONARY

PAVILION 201
Village International, Pantiero-side

INNOVATION

MORE INFORMATION ON **WWW.MARCHEDUFILM.COM/EN/NEXT**

New territories

The analysis of the circulation of films and audiovisual programmes has become one of the main areas of focus in the work of the Observatory. Notably, it has recently analysed two aspects of film circulation: theatrical export and VOD distribution.

The theatrical export of films

The study on the theatrical export of European films [(1)], especially outside Europe, highlighted the importance of admissions outside the domestic market: in 2014, about 40% of admissions to European films were generated outside their national market. Half of these admissions to exported works relate to theatrical exhibition outside Europe, in particular the United States and China, as well as Mexico, South Korea and Brazil. Depending on the year, European films account for 20 to 25% of films exhibited and 3 to 5% of admissions in non-European countries.

This statistical picture does, of course, need to be qualified: only a fraction of films are exported. Broadly speaking, half of all films exhibited in Europe are also exhibited outside their domestic market, but only 10% are shown outside Europe. Moreover, receipts from theatrical exports are concentrated around a small number of films: again according to an Observatory analysis, in 2014 ten films took 60% of admissions to European films outside Europe.

VOD: a reality check

VOD has for many years nurtured the hope that a new source of revenue will gradually fill the gap due to the decline in physical video. Regarding this perspective, 2015 serves as a reality check. Although the market is growing rapidly, for the majority of producers it is still generating low revenues.

The first challenge is the presence of films in the catalogues of on-demand services. At the end of 2015, the Observatory analysed the catalogues of 75 transactional VOD services and 16 SVOD services operating in the European Union [(2)]. The study revealed that although 43% of the films identified at least once in a VOD catalogue were of European origin, European films make up only 27% of the films available over all the services because they are offered by fewer services than American films.

It is also interesting to note that approximately 47% of European films exhibited in cinemas between 2005 and 2014 were actually available as VOD at the end of 2015, compared with 87% in the case of American films. One explanation for this is the complexity in accessing VOD platforms: while the principal rights holders can negotiate directly with the major services, the smaller producers (or their distributors) often have to turn to an aggregator, who will compile a broader catalogue. The fragmentation of European producers naturally forces them to use the services of aggregators more often than their North American competitors.

However the presence of films on VOD platforms is not enough. While the cinema audience can choose from a range of 10 to 20 films, thousands of titles are offered simultaneously to customers of VOD services. The promotion of titles then plays a key role. In October 2015, the Observatory also carried out a study of the titles promoted by the main transactional VOD platforms in Germany, France and the United Kingdom [(3)]. This revealed that a limited number of titles were promoted, with 10 films (8 American and 2 European) together accounting for 40% of promotional space. It also revealed that only the most recent titles were promoted, with 90% of promotional space devoted to films produced less than two years before, and that 28% of promotional space was devoted to European films.

(1) *The Theatrical Market for European Films Outside of Europe - Key Figures 2014*, Martin Kanzler, December 2015, European Audiovisual Observatory.

(2) *Origin of films in VOD catalogues in the EU*, Laura Ene and Christian Grece, November 2015, European Audiovisual Observatory.

(3) *The visibility of film on on-demand platforms: Germany, France and the United Kingdom*, Gilles Fontaine, November 2015, European Audiovisual Observatory.

Number of European films on theatrical release | 2010-2014 [e]

In units.

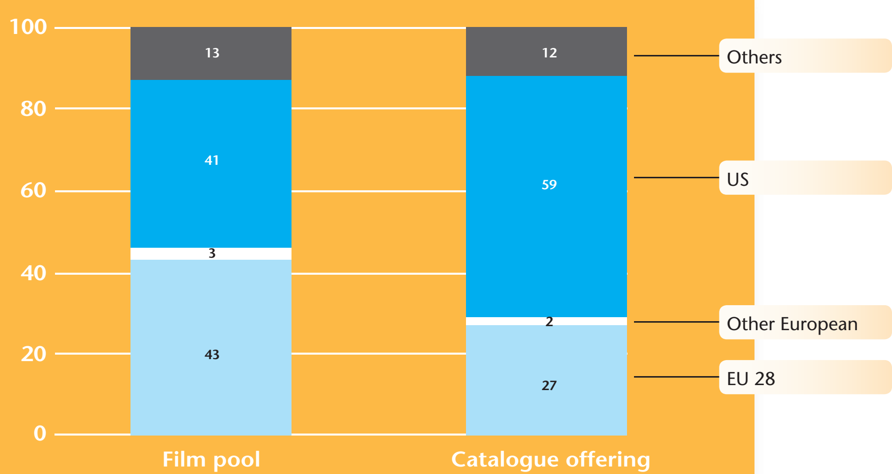
Source: *The Theatrical Market for European Films Outside of Europe - Key Figures 2014, 2015*, OBS

	2010	2011	2012	2013	2014	AVG
Total World	*4 474*	*4 469*	*4 730*	*4 916*	*6 188*	*4 955*
In Europe	*4 385*	*4 384*	*4 622*	*4 762*	*6 061*	*4 843*
Outside of Europe	*448*	*427*	*509*	*566*	*589*	*508*
US & CA	172	221	277	273	218	*232*
Latin America	270	205	216	226	318	*247*
AU & NZ	113	88	101	102	126	*106*
CN & KR	~	~	~	~	155	*155*
CA	~	98	149	133	94	*119*
US	~	183	217	202	188	*198*
AR	93	59	74	58	87	*74*
BR	97	79	93	111	144	*105*
CL	36	35	31	30	40	*34*
CO	63	44	61	63	94	*65*
MX	117	71	87	75	130	*96*
VE	16	21	34	24	23	*24*
AU	86	65	87	75	110	*85*
NZ	76	61	60	70	72	*68*
CN	~	~	~	~	22	*22*
KR	69	63	114	180	142	*114*

Share of EU films in 75 TVoD services across the EU – Film pool and catalogue offering | 2015

In %.

Source: *Origin of films in VOD catalogues in the EU*, 2015, OBS



Cinema exhibition and transactional VOD exploitation are connected

An analysis of the availability of European films on VOD platforms also gives rise to a reconsideration of the relationship between cinema exhibition and exploitation on VOD services, which are sometimes seen as competitors as VOD is thought to be a natural alternative to the ever increasing fight for theatrical screen space. It may indeed be said that a film's theatrical release now constitutes one of the main criteria not only for its presence on on-demand services but also for its promotion. In a world of abundance, the theatrical release is a means of publicising films, just as it affected the value of films with regard to their subsequent exploitation on television or DVD. Furthermore, in the case of films actually exploited as VOD the number of countries where they are available is fairly similar to the number of screens. Nonetheless, a significant proportion of catalogues of VOD services, and especially SVOD services, consists of films that have not been theatrically released in Europe. However, these are typically North American films released in a way similar to direct-to-DVD.

Co-operation between release windows

Hence, promoting the presence (and visibility) of European films on VOD services seems complementary to the promotion of their presence in cinemas, although no experiment has been conducted regarding the direct-to-VOD release of a major film supported by a marketing campaign similar to that for a theatrical release. Regarding each exploitation medium as a silo could in fact have perverse effects: giving VOD priority over cinemas would undermine the latter despite the fact that they are crucial for the access of films to on-demand services. The acquisition of pan-European rights by the leading VOD or SVOD services could also contribute to significantly limiting the theatrical exhibition of films in some countries: a film already available in a country as SVOD would probably not be distributed in cinemas. If films are not released in cinemas, there may then be a risk that their subsequent revenues would be lower, especially regarding their broadcast on television channels.

Various trials, so far on a small scale, are being conducted on the removal of distribution barriers with the aim of creating synergies between release windows, for example Paramount's proposal in 2015 to give exhibitors a share of the revenues from the release of *Paranormal Activity* in return for a shortened release window, the acquisition of theatrical rights or the launch of a DVD label by pure VOD players, or the integration of cinema exhibition, DVD and VOD within the same group.

These developments are also shaking up the distribution value chain. Firstly, each link in the chain explores how to "uberise" the middlemen; secondly, the need to attain a critical size must be combined with a detailed knowledge of national markets and different windows.

These developments are taking place against a background of relative uncertainty: while theatrical admissions are stable overall, the question arises as to how investments in the pre-funding and acquisition of films by TV channels, especially free-to-air channels, will develop. Channels have seen a decline in their advertising revenues and also seem to be giving priority to the original production of TV series. On the other hand, it seems clear that the growth of VOD markets is, for the moment, a long way from compensating for the continuous decline in the DVD and Blu-ray market, although this observation needs to be qualified according to the various countries concerned. Although audiovisual sector revenues bounced back slightly in 2014, they are still 4% lower than in 2010 in constant euros.

These trends may lead to changes in film funding models. However, assessing the right strategies remains a complex undertaking since, with the exception of just a few countries, there is a lack of data when it comes to analysing the entire funding structure and the film exploitation chain. It is precisely the Observatory's task to contribute to greater transparency to enable the authorities and the industry to take decisions based on reliable data.

Gilles Fontaine
Head of the Department for Information on Markets and Financing

Martin Kanzler
Film Analyst

Julio Talavera
Film Analyst

European Audiovisual Observatory

MARCHÉ DU FILM
FESTIVAL DE CANNES

DOC CORNER

THE ONE-STOP VENUE FOR DOCS

VIDEO LIBRARY

MARKET SCREENINGS

LET'S TALK DOCS

RIVIERA - STAND H8

MAY 11-22
9AM-6:30PM

PRESENTATIONS

DOC MEETS

EXHIBITORS

EXPERTS CONSULTING

MORE INFORMATION ON **WWW.MARCHEDUFILM.COM/EN/DOCCORNER**

Top 10 markets worldwide by gross box office | 2011-2015 [e]

In USD billion. Converted at average annual exchange rates.

Source: OBS, MPAA, comScore, IHS

Rank	Market	2011	2012	2013	2014	2015	Annual growth rate 5 years	Annual growth rate 1 year
1	US & Canada	10.19	10.80	10.90	10.40	11.10	2.2%	6.7%
2	China	2.03	2.74	3.54	4.82	6.81	35.4%	41.3%
3	UK	1.67	1.74	1.69	1.74	1.90	3.3%	8.9%
4	Japan	2.26	2.45	1.99	1.70	1.80	-5.6%	5.9%
5	India	1.47	1.59	1.59	1.47	1.50	0.6%	2.2%
6	France	1.91	1.68	1.66	1.77	1.48	-6.2%	-16.5%
7	South Korea	1.11	1.31	1.42	1.49	1.37	5.3%	-8.1%
8	Germany	1.33	1.35	1.36	1.30	1.29	-0.8%	-0.8%
9	Australia	1.13	1.17	1.06	0.87	0.89	-5.9%	1.7%
10	Mexico	0.81	0.78	0.91	0.84	0.84	0.9%	0.5%
	World total [e]	32.6	34.7	35.9	36.4	38.3	4.1%	5.2%
	Growth rate - World [e]	3.2%	6.4%	3.5%	1.4%	5.2%	4.1%	5.2%
	Growth rate - Top 10 [e]	3.0%	7.1%	2.0%	1.1%	9.8%	4.9%	9.8%
	Growth rate - Top 10 [e] without China	0.8%	4.4%	-1.2%	-4.4%	2.7%	0.3%	2.7%

Top 10 markets worldwide by admissions | 2011-2015 [e]

In millions. Ranked by 2015 admissions.

Source: OBS

Rank	Market	2011	2012	2013	2014	prov. 2015	Annual growth rate [e] 5 years	Annual growth rate [e] 1 year
1	India	2 640	2 641	1 978	1 900	2 016	-6.5%	6.1%
2	US & Canada	1 285	1 358	1 340	1 270	1 320	0.7%	3.9%
3	China	370	470	612	830	1 260	35.8%	51.8%
4	Mexico	205	228	248	240	286	8.7%	19.2%
5	South Korea	160	195	213	215	217	8.0%	1.0%
6	France	217	204	194	209	205	-1.3%	-1.8%
7	Russian Federation	160	160	176	176	174	2.1%	-1.1%
8	Brazil	144	149	150	156	173	4.7%	11.1%
9	UK	172	173	166	157	172	0.0%	9.1%
10	Japan	145	155	156	161	167	3.6%	3.4%
	World total [e]	6 800	6 982	6 527	6 678	7 325	1.9%	9.7%
	Growth rate - World [e]	2.5%	2.7%	-6.5%	2.3%	9.7%	1.9%	9.7%
	Growth rate - Top 10 [e]	0.9%	4.3%	-8.7%	1.6%	12.7%	2.2%	12.7%
	Growth rate - Top 10 [e] without China and India	-1.3%	5.4%	0.8%	-2.2%	5.0%	2.2%	5.0%

Top 10 markets worldwide by number of screens | 2011-2015 e

In units.

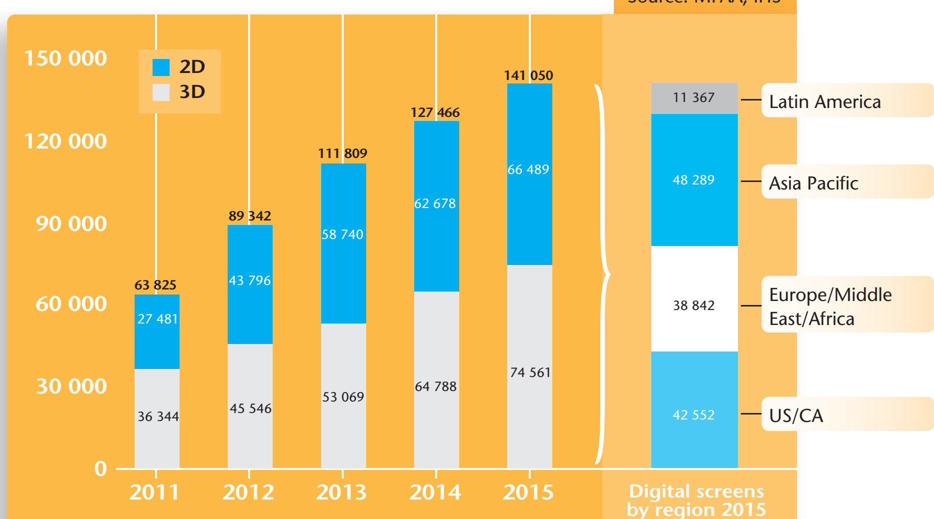
Source: OBS, MPAA, IHS

Rank	Market	2011	2012	2013	2014	2015	Annual growth rate 5 years	Annual growth rate 1 year
1	US & Canada	39 580	39 662	39 783	40 158	43 661	2.5%	8.7%
2	China	9 286	13 118	18 195	24 607	31 627	35.8%	28.5%
3	India	10 020	11 065	11 081	11 109	11 100	2.6%	-0.1%
4	Mexico	5 166	5 360	5 547	5 678	5 977	3.7%	5.3%
5	France	5 464	5 508	5 587	5 653	5 741	1.2%	1.6%
6	Germany	4 640	4 617	4 610	4 637	4 692	0.3%	1.2%
7	UK	3 767	3 817	3 867	3 909	4 046	1.8%	3.5%
8	Russia	2 704	3 100	3 479	3 829	4 021	10.4%	5.0%
9	Italy	4 058	3 945	3 866	3 852	-	-1.3%	-
10	Spain	4 044	4 003	3 908	3 694	3 588	-2.9%	-2.9%
World total e		123 740	129 866	134 588	142 215	152 142	5.3%	7.0%
Growth rate - World e		0.6%	5.0%	3.6%	5.7%	7.0%	5.3%	7.0%
Growth rate - Top 10 e		4.9%	6.2%	6.1%	7.2%	10.4%	7.5%	10.4%
Growth rate - Top 10 e without China and India		1.7%	0.8%	0.9%	1.1%	5.8%	2.1%	5.8%

Worldwide number of digital and 3D screens | 2011-2015 e

In units.

Source: MPAA, IHS



Top 10 markets worldwide by feature film production (1) | 2011-2015 e

In units.

Source: OBS, IHS

Rank	Market	2011	2012	2013	2014	2015	Annual growth rate 5 years	Annual growth rate 1 year
1	India (2)	1 255	1 602	1 724	1 966	–	12.4%	–
2	US (3)	818	728	738	707	791	-0.8%	11.9%
3	China (4)	588	745	638	618	686	3.9%	11.0%
4	Japan (5)	441	554	591	615	581	7.1%	-5.5%
5	France	272	279	270	258	300	2.5%	16.3%
6	South Korea	186	204	207	248	269	9.7%	8.5%
7	Germany (5)	205	241	236	234	236	3.6%	0.9%
8	Spain	200	182	235	224	254	6.2%	13.4%
9	UK (6)	358	369	347	310	201	-4.7%	~
10	Italy	155	166	167	201	185	4.5%	-8.0%
World total e		6 098	6 334	6 345	6 503	6 762	2.6%	4.0%
Growth rate - World e		4.3%	3.9%	0.2%	2.5%	4.0%	2.6%	4.0%
Growth rate - Top 10 e		3.6%	13.2%	1.6%	4.4%	4.1%	5.8%	4.1%

(1) Country data include minority co-productions.

(2) Films certified.

(3) Does not include feature documentaries or student films.

(4) Does not include films produced outside the SAPPRFT's system of script and final print approval.

(5) Feature films released.

(6) The apparent decline of film productions in 2015 is linked to a time lag in identifying film productions with budgets below GBP 500 000. Includes inward feature co-productions but not inward features involving only VFX work in the UK.

Top 20 films by gross box office worldwide | 2015

In USD million. Only includes GBO revenues generated in 2015.

	Original title	Country of origin	Studio	North American box office	International box office	Total
1	Jurassic World	US/CN	Universal Pictures	652	945	1 597
2	Furious Seven	US/JP/CN	Universal Pictures	353	1 079	1 432
3	Avengers: Age of Ultron	US	Walt Disney Studios	459	907	1 366
4	Star Wars: Episode VII - The Force Awakens	US	Walt Disney Studios	652	660	1 312
5	Minions	US	Universal Pictures	336	774	1 110
6	Inside Out	US	Walt Disney Studios	356	527	883
7	Spectre (1)	GB inc/US	Sony Pictures	197	625	822
8	Mission: Impossible - Rogue Nation	US/CN/HK	Paramount Pictures	195	457	652
9	The Hunger Games: Mockingjay - P. 2 (1)	US/DE	Lionsgate	270	345	615
10	The Martian	US	20th Century Fox	225	353	579
11	Fifty Shades of Grey	US	Universal Pictures	166	388	554
12	Cinderella	US/GB	Walt Disney Studios	201	340	542
13	Ant-Man	US	Walt Disney Studios	180	325	505
14	Hotel Transylvania 2	US	Sony Pictures	168	302	471
15	San Andreas	US/AU/CA	Warner Bros.	155	292	447
16	Terminator Genisys	US	Paramount Pictures	90	327	416
17	Monster Hunt	CN/HK	Edko Films	–	407	407
18	Kingsman: The Secret Service	GB inc/US	20th Century Fox	128	267	395
19	Big Hero 6	US	Walt Disney Studios	18	288	306
20	Lost in Hong Kong	HK/CN	Luck Road C. Comm.	1	257	258

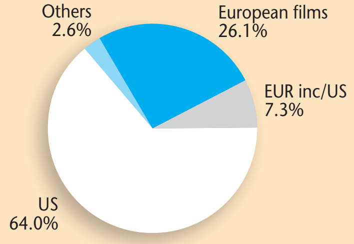
(1) Still on release in 2016.

Source: *Variety*, comScore, OBS

European Union

Population 2015 [e]	508.2 million
GDP per capita 2015 [e]	32 005 USD
Gross box office 2015	7.35 bn EUR (8.15 bn USD)
Admissions 2015	976.5 million
Average ticket price 2015	7.5 EUR (8.3 USD)
Average admissions per capita 2015	1.9
Screens 2014 | 2015	30 111 | 30 621
Digital screens 2014 | 2015	28 093 | 29 075
Digital 3D screens 2014 | 2015	13 750 | 14 241

Market shares 2015 [e]



2015 sees EU break gross box office record

The European Audiovisual Observatory estimates that gross box office revenues in the 28 EU Member States jumped to EUR 7.35 billion, 16.2% higher than in 2014 and the highest level on record. Underlying admissions increased by 7.4% to 976 million tickets sold. This is 67.5 million more than in 2014 and represents the second highest level registered in the EU in the past ten years. Only in 2009 did cinemas in the EU sell more tickets boosted by *Avatar* and the novelty factor of 3D. It is remarkable to note that in 2015 all EU markets, with the exception of France, registered an increase in cinema attendance. This represents the most homogenous growth trend across territories observed in at least the past ten years. Geographically speaking the growth in EU cinema attendance was primarily driven by the strong year-on-year performance of Germany (+17.5 million, +14.4%) and UK (+14.4 million, +9.2%) followed by Italy (+8.7 million, +8.9%) and Spain (+7.1 million, +8.2%).

Box office growth driven by US studio titles

In contrast to 2014, admissions growth was driven primarily by the strong performances of a number of US studio titles such as *Star Wars: The Force Awakens, Minions, Spectre* or *Jurassic World*, all of which sold more than 30 million tickets in the EU in 2015. Not a single film managed to reach this benchmark in 2013 or 2014. On a cumulative basis, admissions to US films increased by around 50 million leading to an estimated market share of 64.0%, while the biggest box office boost came from the renewed strength of UK incoming investment films such as *Spectre* or *Kingsman: The Secret Service* which cumulatively sold around 70 million tickets, compared to just over 3 million in 2014. The market share of European films produced in Europe with incoming US investment (EUR inc) therefore rose from 0.4% to 7.3%. Admissions for European films on the other hand, declined by around 50 million causing European market share in the EU to drop from its exceptional 2014 record level of 33.5% to an estimated 26.1%.

Nevertheless, European films continued to perform well on several national markets, mostly thanks to the success of a couple of local blockbusters. Boosted by the success of UK qualifying films such as *Star Wars* or *Spectre* (GB inc/US) UK films captured a record market share of 44.5% making the UK the EU market with the highest national market share in 2015. UK independent films as defined by the BFI (i.e. excluding inward investment films with US studio backing) accounted for 10.6%. But national films also showed a strong performance e.g. in France (35.5%), Denmark (29.9%), Finland (29.0%) and Germany (27.5%).

EU production grows again

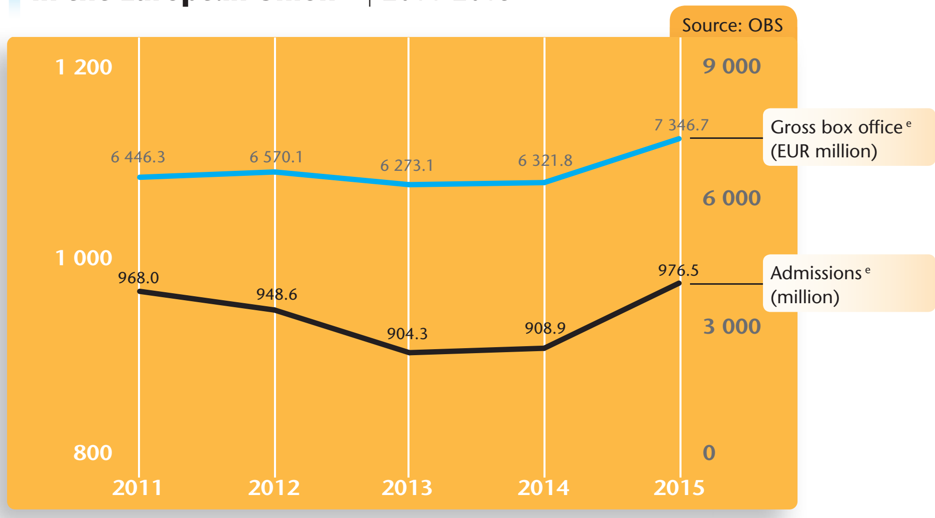
After having come to a temporary halt in 2014 EU production levels continued their growth trend of recent years, as the estimated number of European feature films productions increased from 1 593 to 1 643 theatrical films. This figure breaks down into an estimated 1 127 fiction films (69%) and 516 feature documentaries (31%). The increase in production activity was primarily linked to an increasing number of co-productions which accounted for 24% of total production volume in 2015.

Source: OBS, MEDIA Salles

Please note that all 2015 figures for the EU are provisional estimates. "Inc" refers to films produced in a "host" country with US incoming investment.

Information on the number of European digital screens is provided by MEDIA Salles and refers uniquely to digital screens equipped with DLP Cinema or SXRD technology.

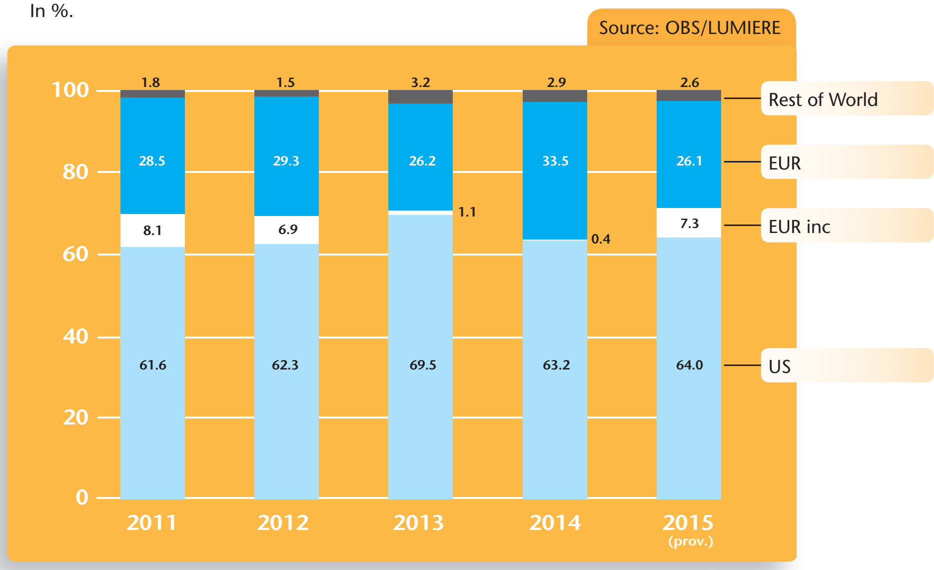
Admissions and gross box office in the European Union [1] | 2011-2015 e



(1) Pro-forma figures for 28 EU Member States. National currencies converted at average annual exchange rates.

Breakdown of European Union admissions by nationality of films | 2011-2015 e

In %.



Note: 'Inc' refers to films produced in Europe with US incoming investment.

Number of feature films produced in the European Union | 2011-2015 *prov.*

In units.

Country		2011	2012	2013	2014	*prov.* 2015	Sources
Austria	100% national fiction	14	9	18	10	15	Austrian Film Institute
	maj. co-prod. fiction	6	6	5	7	1	Austrian Film Institute
	min. co-prod. fiction	15	8	2	3	7	Austrian Film Institute
	Feature documentaries	24	31	21	24	17	Austrian Film Institute
Belgium (1)	100% national fiction	5	6	12	12	13	CFWB / VAF
	maj. co-prod. fiction	12	14	17	20	17	CFWB / VAF
	min. co-prod. fiction	21	27	33	36	31	CFWB / VAF
	Feature documentaries	4	8	5	5	8	CFWB / VAF
Bulgaria	100% national fiction	6	5	0	2	10	National Film Center
	maj. co-prod. fiction	2	1	4	1	2	National Film Center
	min. co-prod. fiction	1	2	0	0	5	National Film Center
	Feature documentaries	6	11	11	10	8	National Film Center
Cyprus e	100 % national fiction	0	0	0	1	2	Min. Cult. / IMDB/ OBS
	maj. co-prod. Fiction	2	1	0	1	1	Min. Cult. / IMDB/ OBS
	min. co-prod. Fiction	0	0	1	1	1	Min. Cult. / IMDB/ OBS
Croatia	100% national fiction	8	9	14	7	5	Croatian Audiovisual Centre
	maj. co-prod. fiction	2	4	2	4	4	Croatian Audiovisual Centre
	min. co-prod. fiction	10	3	8	5	5	Croatian Audiovisual Centre
Czech Rep.	100% national fiction	21	23	19	21	20	State Cinematography Fund
	maj. co-prod. fiction	4	5	8	8	7	State Cinematography Fund
	min. co-prod. fiction	0	4	2	6	9	State Cinematography Fund
	Feature documentaries	20	15	18	26	20	State Cinematography Fund
Denmark (2)	100% national fiction	16	12	13	14	14	Danish Film Institute
	maj. co-prod. fiction	3	6	9	7	9	Danish Film Institute
	min. co-prod. fiction	6	9	9	7	8	Danish Film Institute
	Feature documentaries	37	27	33	27	40	Danish Film Institute
Estonia (2)	100% national fiction	4	5	4	3	1	Estonian Film Institute
	maj. co-prod. fiction	3	0	3	1	3	Estonian Film Institute
	min. co-prod. fiction	0	6	0	2	2	Estonian Film Institute
	Feature documentaries	14	9	12	13	19	Estonian Film Institute
Finland	100% national fiction	15	20	14	15	13	Finnish Film Foundation
	maj. co-prod. fiction	5	4	5	1	3	Finnish Film Foundation
	min. co-prod. fiction	7	4	6	5	4	Finnish Film Foundation
	Feature documentaries	8	16	18	23	24	Finnish Film Foundation
France	100% national fiction	124	116	122	124	126	CNC
	maj. co-prod. fiction	53	55	50	44	66	CNC
	min. co-prod. fiction	59	66	59	53	61	CNC
	Feature documentaries	35	42	38	37	47	CNC
Germany (2)	100% national fiction	63	86	79	84	76	SPIO
	maj. co-prod. fiction	29	32	38	22	24	SPIO
	min. co-prod. fiction	31	36	37	43	45	SPIO
	Feature documentaries	82	87	82	85	91	SPIO
Greece (2) e	100% national fiction	17	12	12	13	21	Greek Film Center / OBS
	maj. co-prod. fiction	10	7	3	0	0	Greek Film Center / OBS
	min. co-prod. fiction	1	3	2	0	0	Greek Film Center / OBS
Hungary	100% national fiction	38	26	27	11	13	National Film Office (NMHH)
	maj. co-prod. fiction	2	0	2	1	2	National Film Office (NMHH)
	min. co-prod. fiction	4	1	3	3	3	National Film Office (NMHH)
Ireland	100% national fiction	4	4	4	6	5	Irish Film Board
	maj. co-prod. fiction	9	9	9	6	6	Irish Film Board
	min. co-prod. fiction	4	10	6	13	6	Irish Film Board
	Feature documentaries	15	16	15	7	8	Irish Film Board
Italy	100% national fiction	132	109	114	150	126	MiBACT
	maj. co-prod. fiction	14	19	14	14	22	MiBACT
	min. co-prod. fiction	9	16	7	7	6	MiBACT

Continued

Number of feature films produced in the European Union | 2011-2015 *prov.*

In units.

Country		2011	2012	2013	2014	*prov.* 2015	Sources
Latvia (2) e	100% national fiction	4	2	2	1	1	National Film Centre of Latvia
	maj. co-prod. fiction	0	4	1	5	2	National Film Centre of Latvia
	min. co-prod. fiction	1	0	1	1	0	National Film Centre of Latvia
	Feature documentaries	9	6	9	17	14	National Film Centre of Latvia
Lithuania (2) e	100% national fiction	2	3	7	8	6	Lithuanian Film Centre
	maj. co-prod. fiction	0	1	1	3	2	Lithuanian Film Centre
	min. co-prod. fiction	0	0	2	1	0	Lithuanian Film Centre
	Feature documentaries	0	5	6	3	1	Lithuanian Film Centre
The Netherlands	100% national fiction	28	26	19	22	24	NFF
	maj. co-prod. fiction	11	17	18	21	20	NFF
	min. co-prod. fiction	16	12	14	19	19	NFF
	Feature documentaries	21	23	16	22	19	NFF
Poland	100% national fiction	24	28	19	30	28	Polish Film Institute
	maj. co-prod. fiction	3	4	3	4	4	Polish Film Institute
	min. co-prod. fiction	8	10	3	3	3	Polish Film Institute
	Feature documentaries	9	5	6	9	14	Polish Film Institute
Portugal	100% national fiction	9	3	2	2	5	ICA
	maj. co-prod. fiction	5	4	1	1	6	ICA
	min. co-prod. fiction	5	1	5	3	2	ICA
	Feature documentaries	11	7	5	7	13	ICA
Romania	100% national fiction	9	10	16	27	27	CNC
	maj. co-prod. fiction	2	8	7	3	8	CNC
	min. co-prod. fiction	1	2	3	7	1	CNC
	Feature documentaries	15	18	11	10	7	CNC
Slovakia	100% national fiction	2	7	3	4	5	Slovak Film Institute
	maj. co-prod. fiction	3	1	4	3	5	Slovak Film Institute
	min. co-prod. fiction	3	5	7	5	5	Slovak Film Institute
	Feature documentaries	4	8	6	15	13	Slovak Film Institute
Slovenia (2) (3)	100% national fiction	2	2	9	5	6	Slovenian Film Center
	maj. co-prod. fiction	4	2	1	1	1	Slovenian Film Center
	min. co-prod. fiction	2	4	2	4	5	Slovenian Film Center
Spain	100% national fiction	55	60	76	26	69	ICAA
	maj. co-prod. fiction	42	33	37	68	58	ICAA
	min. co-prod. fiction	32	22	31	32	16	ICAA
	Feature documentaries	71	67	91	98	111	ICAA
Sweden (2)	100% national fiction	16	27	34	26	21	SFI
	maj. co-prod. fiction	7	3	1	4	7	SFI
	min. co-prod. fiction	5	8	8	7	4	SFI
	Feature documentaries	15	13	18	19	18	SFI
United Kingdom (4)	100 % national	279	280	245	224	124	BFI
	maj. co-prod.	24	24	32	17	15	BFI
	min. co-prod.	23	22	26	20	15	BFI
	Inward features (5)	32	43	44	49	47	BFI
Total fiction films EU 28 (6) e		***1 096***	***1 103***	***1 130***	***1 099***	***1 127***	OBS
Total feature documentaries EU 28 (6) e		***451***	***462***	***477***	***494***	***516***	OBS
Total feature films EU 28 (6) e		***1 547***	***1 565***	***1 607***	***1 593***	***1 643***	OBS

(1) CFWB counts films certified. VAF counts only feature films released which received public support.

(2) Films on first release.

(3) 2011, 2012 data include only data on films receiving national support.

(4) The apparent decline of film productions in 2015 is linked to a time lag in identifying film productions with budgets below GBP 500 000.

(5) Including inward feature co-productions, excluding inward features involving only VFX work in the UK.

(6) Restated pro-forma data series.

Admissions in the European Union | 2011-2015

In millions.

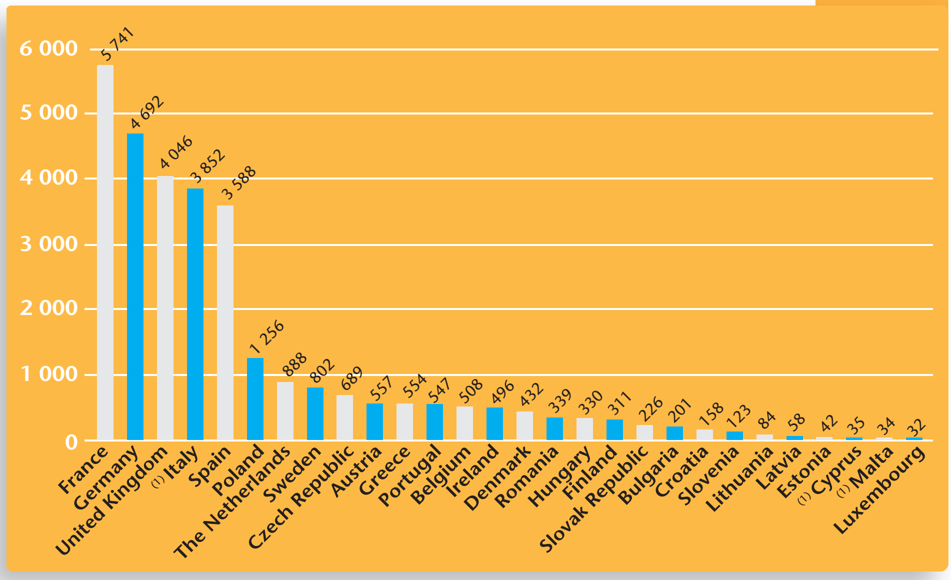
ISO	Country	2011	2012	2013	2014	*prov.* 2015	*2015/14*	Sources
AT	**Austria** e	15.8	16.4	15.2	14.3	15.9	***11.4%***	ÖFI
BE	**Belgium** e	22.3	21.8	20.9	20.4	21.1	***3.5%***	SPF Economie / VAF / CCA / Cinedata / FCB / VFDB
BG	**Bulgaria**	4.7	4.1	4.8	4.9	5.3	***8.8%***	National Film Center
CY	**Cyprus** e	0.9	0.8	0.7	0.7	0.7	***5.9%***	Min. Cult. / Media Salles / OBS
CZ	**Czech Republic**	10.8	11.2	11.1	11.6	13.0	***12.1%***	Czech State Cinematography Fund
DE	**Germany**	129.6	135.1	129.7	121.7	139.2	***14.4%***	FFA
DK	**Denmark**	12.4	13.6	12.8	11.9	13.8	***15.7%***	Danish Film Institute / Statistics Denmark
EE	**Estonia**	2.5	2.6	2.6	2.6	3.1	***19.0%***	Estonian Film Institute
ES	**Spain** e	98.3	94.2	77.0	87.4	94.6	***8.2%***	ICAA
FI	**Finland** e	7.1	8.4	7.7	7.3	8.7	***19.3%***	Finnish Film Foundation
FR	**France**	217.2	203.6	193.7	209.1	205.3	***-1.8%***	CNC
GB	**United Kingdom**	171.6	172.5	165.5	157.5	171.9	***9.2%***	CAA / BFI
GR	**Greece** e	10.9	10.1	9.2	9.0	9.8	***9.3%***	Greek Film Center
HR	**Croatia**	3.3	4.1	4.0	3.8	3.9	***4.7%***	Croatian Audiovisual Center
HU	**Hungary** e	9.8	9.5	10.1	11.0	13.0	***18.4%***	National Film Office (NMHH)
IE	**Ireland** e	16.3	15.4	14.7	14.4	15.2	***5.6%***	MEDIA LIVE
IT	**Italy** e	112.1	102.6	105.7	98.3	107.0	***8.9%***	SIAE / OBS / Cinetel / ANICA
LT	**Lithuania**	3.0	3.0	3.3	3.2	3.3	***3.0%***	Lithuanian Film Centre
LU	**Luxembourg** e	1.3	1.3	1.2	1.1	1.3	***15.0%***	MEDIA Salles
LV	**Latvia**	2.1	2.3	2.4	2.3	2.4	***2.0%***	National Film Centre
MT	**Malta**	0.8	0.7	0.7	0.7	~	~	National Statistics Office
NL	**Netherlands**	30.4	30.7	30.8	30.8	33.0	***7.1%***	NFF / MaccsBox - NVB & NVF
PL	**Poland**	38.7	38.5	36.3	40.5	44.7	***10.5%***	Polish Film Institute / boxoffice.pl
PT	**Portugal**	15.7	13.8	12.5	12.1	14.6	***20.5%***	ICA
RO	**Romania**	7.2	8.3	9.0	10.2	11.2	***9.8%***	Centrul National al Cinematografiei
SE	**Sweden**	16.5	17.9	16.6	16.3	17.0	***4.7%***	Swedish Film Institute
SI	**Slovenia**	2.9	2.7	2.3	1.9	2.1	***8.6%***	Slovenian Film Center
SK	**Slovak Republic**	3.6	3.4	3.7	4.1	4.6	***11.8%***	UFD / Slovak Film Institute AIC
	EU 28 - Total e	***968***	***949***	***904***	***909***	***976***	***7.4%***	European Audiovisual Observatory

Source: OBS

Number of screens in the European Union by country | December 2015 [e]

In units.

Source: OBS

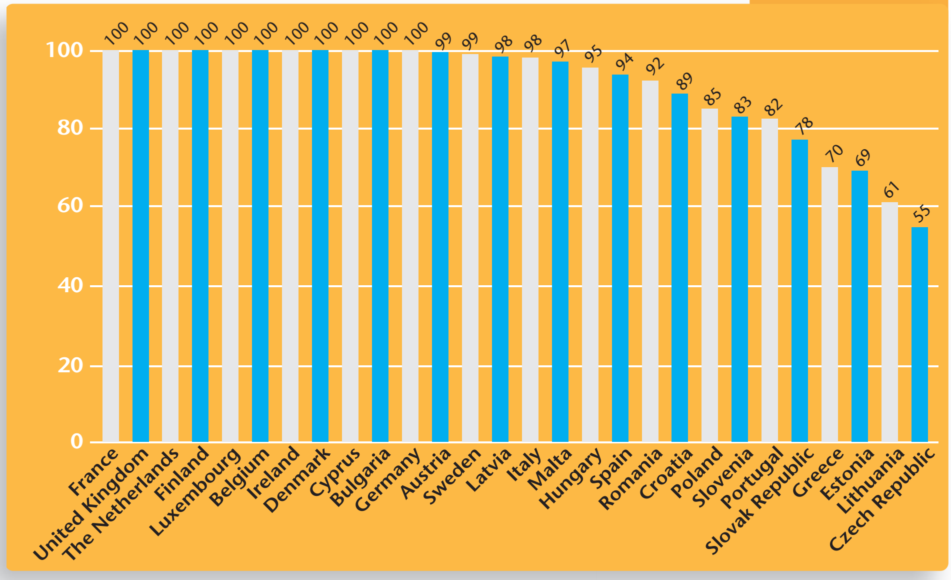


(1) Estimated as of December 2014.

Digital screen penetration in the European Union by country | December 2015 [e]

In %.

Source: MEDIA Salles



The tables below offer provisional rankings based on the analysis of partially fragmentary data from 25 EU member states representing 90% of all admissions in the EU.

Top 25 films by admissions in the European Union | 2015 *prov.*

	Original title	Country of origin	Director	*prov.* Admissions
1	Star Wars: Episode VII - The Force Awakens	US	J.J. Abrams	39 791 061
2	Minions	US	Kyle Balda, Pierre Coffin	39 429 207
3	Spectre	GB inc/US	Sam Mendes	37 866 125
4	Jurassic World	US/CN	Colin Trevorrow	30 383 250
5	Fifty Shades of Grey	US	Sam Taylor-Johnson	27 254 619
6	Furious Seven	US/JP/CN	James Wan	26 861 698
7	Inside Out	US	Pete Docter, Ronnie Del Carmen	26 798 394
8	Avengers: Age of Ultron	US	Joss Whedon	22 320 675
9	The Hunger Games: Mockingjay - Part 2	US/DE	Francis Lawrence	17 019 151
10	Hotel Transylvania 2	US	Genndy Tartakovsky	15 010 178
11	The Martian	US/GB	Ridley Scott	13 674 245
12	American Sniper	US	Clint Eastwood	12 494 177
13	Mission: Impossible - Rogue Nation	US/CN/HK	Christopher McQuarrie	11 790 016
14	Cinderella	US/GB	Kenneth Branagh	11 620 306
15	Big Hero 6 (1)	US	Chris Williams, Don Hall	9 594 697
16	Home	US	Tim Johnson	9 487 157
17	Taken 3	FR	Olivier Megaton	8 937 358
18	Fack ju Göhte 2 (Suck me Shakespeer 2)	DE	Bora Dagtekin	8 640 137
19	The Good Dinosaur	US	Peter Sohn	8 497 787
20	Mad Max: Fury Road	AU inc/US	George Miller	8 472 489
21	Maze Runner: The Scorch Trials	US	Wes Ball	8 260 806
22	The SpongeBob Movie: Sponge Out of Water	US	Paul Tibbitt	8 037 891
23	Ted 2	US	Seth MacFarlane	7 543 990
24	Kingsman: The Secret Service	GB inc/US	Matthew Vaughn	7 337 579
25	Ant-Man	US	Peyton Reed	7 140 549

(1) 2 442 914 admissions in the EU in 2014.

Source: OBS/LUMIERE

Top 25 European films (including EUR inc) by admissions in the European Union | 2015 *prov.*

	Original title	Country of origin	Director	*prov.* Admissions
1	Spectre	GB inc/US	Sam Mendes	37 866 125
2	Taken 3	FR	Olivier Megaton	8 937 358
3	Fack ju Göhte 2	DE	Bora Dagtekin	8 640 137
4	Kingsman: The Secret Service	GB inc/US	Matthew Vaughn	7 337 579
5	Shaun the Sheep Movie	GB	Mark Burton, Richard Starzak	6 568 812
6	Honig im Kopf (1)	DE	Til Schweiger, Lars Gmehling	6 549 967
7	The Theory of Everything (2)	GB inc/US	James Marsh	6 517 084
8	Ocho apellidos catalanes (Spanish Affair 2)	ES	Emilio Martínez Lázaro	5 134 311
9	Paddington (3)	GB/FR	Paul King	4 802 545
10	Les nouvelles aventures d'Aladin	FR/BE	Arthur Benzaquen	4 377 528
11	Les profs 2	FR	Pierre-François Martin-Laval	3 494 230
12	The Little Prince	FR/IT	Mark Osborne	3 492 725
13	The Second Best Exotic Marigold Hotel	GB inc/US	John Madden	3 123 327
14	Papa ou maman (Daddy or Mommy)	FR/BE	Martin Bourboulon	3 038 717
15	Legend	GB inc/US/FR	Brian Helgeland	2 896 794
16	Listy do M. 2 (Letters to Santa 2)	PL	Maciej Dejczer	2 874 420
17	Er ist wieder da (Look Who's Back)	DE	David Wnendt	2 712 179
18	Pourquoi j'ai pas mangé mon père	FR/IT/BE/CN	Jamel Debbouze	2 478 630
19	Babysitting 2	FR	Philippe Lacheau, Nicolas Benamou	2 398 519
20	Qu'est-ce qu'on a fait au Bon Dieu? (4)	FR	Philippe de Chauveron	2 381 641
21	Si accettano miracoli	IT	Alessandro Siani	2 353 256
22	Youth (La giovinezza)	IT/FR/GB/CH	Paolo Sorrentino	2 002 348
23	Regression	ES/CA/US	Alejandro Amenábar	1 952 569
24	Atrapa la bandera (Capture the Flag)	ES	Enrique Gato	1 945 055
25	Ooops! Noah is Gone...	DE/BE/LU/IE	Toby Genkel, Sean McCormack	1 853 246

(1) 1 099 640 admissions in the EU in 2014.
(2) 166 274 admissions in the EU in 2014.
(3) 8 528 827 admissions in the EU in 2014.
(4) 17 475 067 admissions in the EU in 2014.

Source: OBS/LUMIERE

Top 25 EU films by admissions in the Europa Cinemas Network (1) | 2015 e

	Original title	Country of origin (2)	Director	prov. Admissions
1	Youth (La giovinezza)	IT/FR/GB/CH	Paolo Sorrentino	849 316
2	La famille Bélier	FR/BE	Eric Lartigau	740 743
3	The Theory of Everything	GB inc/US	James Marsh	627 638
4	Amy	GB /US	Asif Kapadia	622 363
5	Timbuktu	FR/MR	Abderrahmane Sissako	578 306
6	45 Years	GB	Andrew Haigh	541 789
7	Mia madre	IT/FR	Nanni Moretti	481 933
8	Le tout nouveau testament	BE/LU/FR	Jaco van Dormael	477 929
9	Woman in Gold	GB inc/US	Simon Curtis	448 258
10	Samba	FR	Olivier Nakache, Eric Toledano	431 932
11	Shaun the Sheep Movie	GB	Mark Burton, Richard Starzack	408 243
12	The Second Best Exotic Marigold Hotel	GB inc/US	John Madden	378 488
13	The Lobster	IE/FR/GB/NL/GR	Yorgos Lanthimos	375 439
14	Force Majeure (Turist)	SE/DK/FR/NO	Ruben Östlund	365 512
15	Victoria	DE	Sebastian Schipper	362 562
16	Mr.Turner	GB/DE/FR	Mike Leigh	340 298
17	La Loi du Marché (The Measure of a Man)	FR	Stéphane Brizé	315 115
18	Far from the Madding Crowd	GB inc/US	Thomas Vinterberg	295 518
19	Pride	GB/FR	Matthew Warchus	282 393
20	La isla mínima (Marchland)	ES	Alberto Rodriguez	281 255
21	The Salt of the Earth	FR/BR/IT	W. Wenders, J. Ribeiro Salgado	278 748
22	Qu'est-ce qu'on a fait au Bon Dieu?	FR	Philippe de Chauveron	276 051
23	En duva satt på en gren och funderade…	SE/DE/NO/FR	Roy Andersson	275 772
24	Mustang	FR/DE/TR	Deniz Gamze Ergüven	273 933
25	Frau Müller muss weg	DE	Sönke Wortmann	268 921

(1) Data based on Europa Cinemas members in 30 MEDIA countries, 576 cities, 962 cinemas, 2 320 screens.
(2) Country of origin and production year as allocated in LUMIERE database.

Source: Europa Cinemas, OBS

Top 25 European films by admissions in the US & Canada | 2015 e

Admissions estimated based on average ticket price of USD 8.43.

	Original title	Country of origin	Director	Distributor	Admissions e
1	Spectre	GB inc/US	Sam Mendes	Sony Pictures	23 381 090
2	Kingsman: The Secret Service	GB inc/US	Matthew Vaughn	20th Century Fox	15 214 914
3	Taken 3	FR	Olivier Megaton	20th Century Fox	10 587 951
4	Paddington	GB/FR	Paul King	The Weinstein Comp.	9 041 943
5	Woman in Gold	GB inc/US	Simon Curtis	The Weinstein Comp.	3 951 102
6	The Second Best Exotic Marigold…	GB inc/US	John Madden	Fox Searchlight	3 923 875
7	The Woman in Black 2: Angel of…	GB inc/US/CA	Tom Harper	Relativity Media	3 143 692
8	Ex Machina	GB inc/US	Alex Garland	A24 Films	3 018 144
9	Brooklyn	GB/IE/CA	John Crowley	Fox Searchlight	2 320 758
10	Shaun the Sheep Movie	GB	Burton, Starzak	Lionsgate	2 298 458
11	Mr. Holmes	GB inc/US	Bill Condon	Roadside Attractions	2 104 109
12	Concussion	GB/AU/US	Peter Landesman	Sony Pictures	2 066 473
13	The Transporter Refuelled	FR/CN	C. Delamarre	EuropaCorp	1 901 503
14	Far from the Madding Crowd	GB inc/US	T. Vinterberg	Fox Searchlight	1 451 542
15	The Theory of Everything	GB inc/US	James Marsh	Focus/Focus Features	1 450 477
16	The Gunman	ES/GB/FR/US	Pierre Morel	Open Road	1 265 094
17	Amy	GB/US	Asif Kapadia	A24 Films	997 347
18	Suffragette	GB	Sarah Gavron	Focus Features	552 459
19	The Danish Girl	GB/US/BE/DK/DE	Tom Hooper	Focus Features	534 572
20	Carol	GB/US	Todd Haynes	The Weinstein Comp.	450 905
21	We Are Your Friends	GB/FR/US	Max Joseph	Warner Bros.	426 029
22	Learning to Drive	GB/US	Isabel Coixet	Broad Green Pictures	408 972
23	Mr. Turner	GB/DE/FR	Mike Leigh	Sony Classics	395 208
24	Phoenix	DE/PL	Christian Petzold	IFC Films	372 630
25	Legend	GB inc/US/FR	Brian Helgeland	Universal Pictures	219 707

Note: A total of 149 European films (including 11 EUR inc films) featured among the top 600 films on release in the US and Canada in 2015, generating cumulative admissions of 95.5 million (7.2% market share).

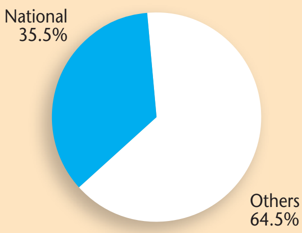
Source: comScore, OBS/LUMIERE

France

Population 2015 e	66.4 million
GDP per capita 2015 e	37 728 USD
Gross box office 2015	1.33 bn EUR (1.48 bn USD)
Admissions 2015	205.3 million
Average ticket price 2015	6.5 EUR (7.2 USD)
Average admissions per capita 2015	3.1
Screens 2014 | 2015 (1)	5 653 | 5 741
Digital screens 2014 | 2015 (2)	5 720 | 5 751
Digital 3D screens 2014 | 2015 (2)	2 988 | 3 000

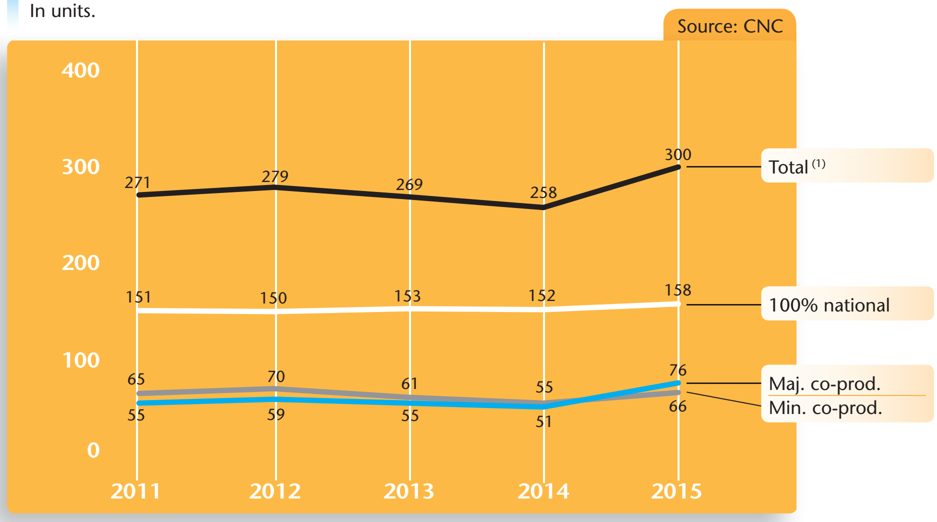
(1) Source: CNC (2) Source: MEDIA Salles

Market shares 2015 e



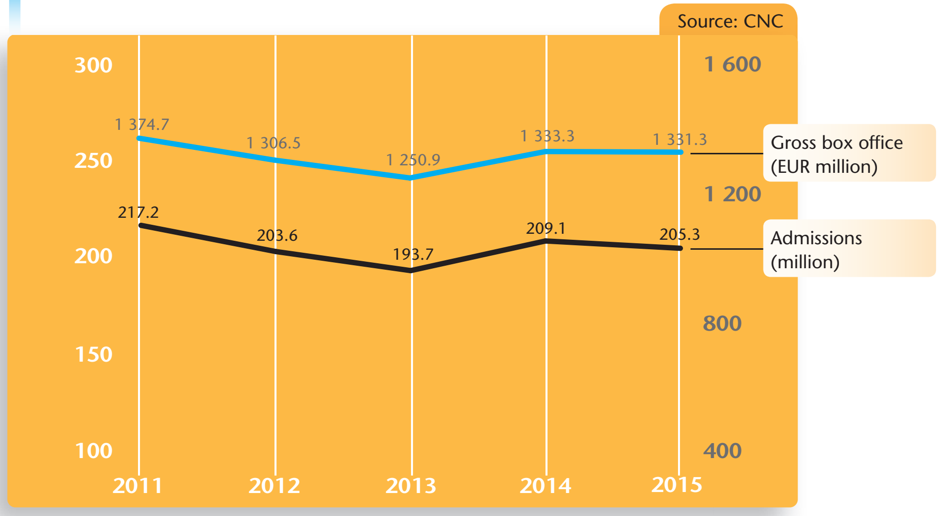
Number of French feature films produced | 2011-2015

In units.



(1) Officially recognised films.

Admissions and gross box office | 2011-2015



Top 20 films by admissions in France | 2015 (1)

	Original title	Country of origin	Director	Distributor	Admissions e
1	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Walt Disney Studios	6 736 551
2	Minions	US	K. Balda, P. Coffin	Universal Pict. Intl	6 588 715
3	Jurassic World	US/CN	Colin Trevorrow	Universal Pict. Intl	5 204 879
4	Spectre	GB inc/US	Sam Mendes	Sony Pict. Releasing	4 770 434
5	Furious Seven	US/JP/CN	James Wan	Universal Pict. Intl	4 637 718
6	Inside Out	US	P. Docter, R. Carmen	Walt Disney Studios	4 458 131
7	Les nouvelles aventures d'Aladin	FR/BE	Arthur Benzaquen	Pathé Distribution	4 377 528
8	Avengers: Age of Ultron	US	Joss Whedon	Walt Disney Studios	4 326 331
9	Fifty Shades of Grey	US	Sam Taylor-Johnson	Universal Pict. Intl	4 068 085
10	Les profs 2	FR	P-F Martin-Laval	UGC Distribution	3 494 099
11	American Sniper	US	Clint Eastwood	Warner Bros.	3 129 900
12	Maze Runner: The Scorch Trials	US	Wes Ball	20th Century Fox	3 126 659
13	Papa ou maman (Daddy or Mommy)	FR/BE	Martin Bourboulon	Pathé Distribution	2 886 476
14	Mission: Impossible - Rogue Nation	US/CN/HK	Christopher McQuarrie	Paramount Pictures	2 798 495
15	The Hunger Games: Mockingjay P. 2	US/DE	Francis Lawrence	Metropolitan Filmexp.	2 761 710
16	Taken 3	FR	Olivier Megaton	EuropaCorp	2 613 428
17	The Martian	US/GB	Ridley Scott	20th Century Fox	2 498 097
18	Insurgent	US	Robert Schwentke	SND Films	2 415 195
19	Pourquoi j'ai pas mangé mon père	FR/IT/BE/CN	Jamel Debbouze	Pathé Distribution	2 409 636
20	Mad Max: Fury Road	AU inc/US	George Miller	Warner Bros.	2 360 586

(1) Covering film releases and admissions between 24/12/2014 and 29/12/2015.

Source: *Le Film Français*

Distribution and exhibition

France was the only EU market which saw its box office decline in 2015, albeit only to a minor extent: Admissions were down 1.8% to 205.3 million tickets sold, still the highest level in Europe. Thanks to a slight increase in ticket prices GBO remained practically stable at EUR 1.33 billion. The strong box office results were secured by the regained strength of US studio titles. Led by *Star Wars - The Force Awakens*, *Minions* and *Jurassic World*, US films accounted for 15 out of the top 20 films and took the highest market share in 15 years (54.5%), up from only 45.4% in 2014.

Lacking a runaway success such as *Qu'est-ce qu'on a fait au bon Dieu?*, admissions to French films dropped by 21.5% to 72.6 million, a level well below the ten-year average. National market share consequently fell from its 2014 record level of 44.4% to 35.5%. The comedies *Les nouvelles aventures d'Aladin* and *Les profs 2* were the year's most successful local productions selling 4.3 and 3.5 million tickets respectively.

The distribution market in 2015 was led by Universal Pictures which released four out of the year's top 10 films and capture market share of 14.3% of total admissions. Walt Disney (13.6%) came in a close second ahead of 20th Century Fox (9.8%), Warner Bros. (7.3%) and Pathé Distribution (6.0%).

Production and funding

After declining for two years in a row, French feature film production rebounded in 2015, with a total of 300 films being approved by the country's national funding body CNC, 42 films more than in 2014. Particularly the level of co-productions increased from 106 to 142 films. After hitting the lowest level in 15 years in 2014, the average production cost of French initiative films increased from EUR 3.94 million to EUR 4.38 million. This is still well below the average value of the past ten years.

After dropping 20% in 2014, total investment in film production grew by 23.1% from EUR 994 million to EUR 1.22 billion in 2015. Driven largely by a 35% increase in broadcaster investments, which were the main financing source accounting for 35.5% of total production investment in 2015, as well as a rebound in foreign investment, which increased by a 118%, the investment in "French initiative" films climbed back to its 2013 level of EUR 1 023 million. Hoping to attract even more foreign film investments, the county's Tax Rebate for International Production (TRIP) was lifted from 20% to 30% on eligible expense in 2016, along with a lifting of the cap on eligible spend from EUR 20 million to EUR 30 million.

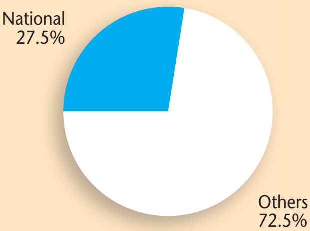
Source: CNC, *Le Film Français, Screen International, Variety,* MEDIA Salles, OBS

Germany

Population 2015 e	81.2 million
GDP per capita 2015 e	41 267 USD
Gross box office 2015	1.17 bn EUR (1.29 bn USD)
Admissions 2015	139.2 million
Average ticket price 2015	8.4 EUR (9.3 USD)
Average admissions per capita 2015	1.7
Screens 2014 | 2015 (1)	4 637 | 4 692
Digital screens 2014 | 2015 (2)	4 544 | 4 692
Digital 3D screens 2014 | 2015 (2)	2 093 | 2 178

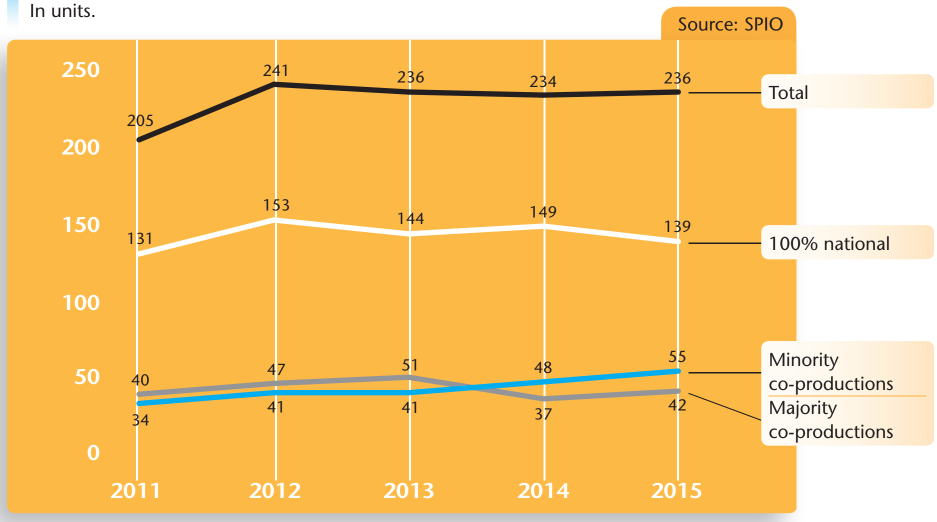
(1) Source: FFA (2) Source: MEDIA Salles

Market shares 2015 e

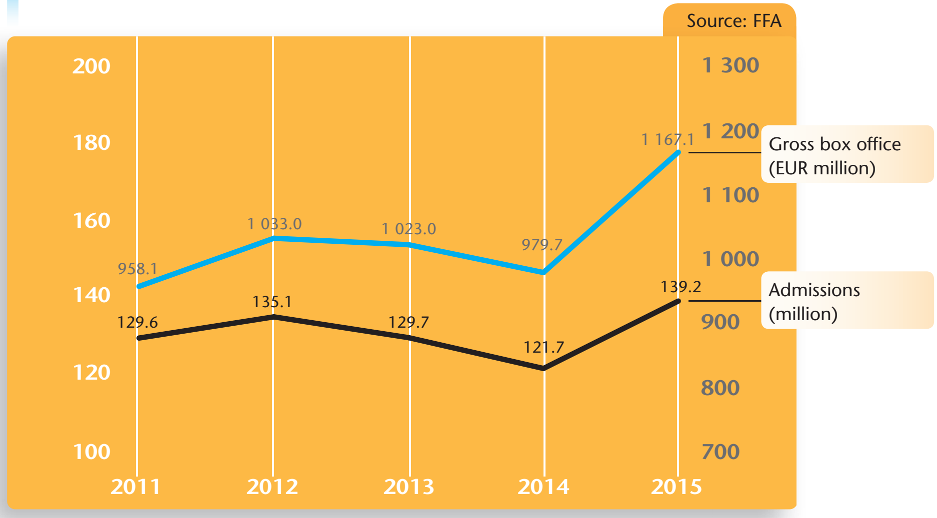


Number of German films on first release | 2011-2015

In units.



Admissions and gross box office | 2011-2015



Top 20 films by admissions in Germany | 2015

	Original title	Country of origin	Director	Distributor	Admissions
1	Fack ju Göhte 2 (Suck me Shakespeer 2)	DE	Bora Dagtekin	Constantin Film	7 653 045
2	Minions	US	Kyle Balda, Pierre Coffin	Universal Pictures	6 928 702
3	Spectre	GB inc/US	Sam Mendes	Sony Pict. Releasing	6 706 102
4	Honig im Kopf (Head Full of Honey)	DE	Schweiger, Gmehling	Warner Bros.	6 201 901
5	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Walt Disney Studios	5 620 716
6	Fifty Shades of Grey	US	Sam Taylor-Johnson	Universal Pictures	4 409 177
7	Furious Seven	US/JP/CN	James Wan	Universal Pictures	4 186 302
8	Jurassic World	US/CN	Colin Trevorrow	Universal Pictures	4 143 321
9	Inside Out	US	P. Docter, R. Del Carmen	Walt Disney Studios	3 275 013
10	The Hunger Games: Mockingjay P. 2	US/DE	Francis Lawrence	StudioCanal	2 709 380
11	Avengers: Age of Ultron	US	Joss Whedon	Walt Disney Studios	2 422 568
12	Er ist wieder da (Look Who's Back)	DE	David Wnendt	Constantin Film	2 395 162
13	Shaun the Sheep Movie	GB	M. Burton, R. Starzak	StudioCanal	1 810 310
14	Traumfrauen	DE	Anika Decker	Warner Bros.	1 706 701
15	Der Nanny	DE	Künstler, Schweighöfer	Warner Bros.	1 663 933
16	Big Hero 6	US	C. Williams, D. Hall	Walt Disney Studios	1 631 955
17	Hotel Transylvania 2	US	Genndy Tartakovsky	Sony Pict. Releasing	1 609 740
18	Mission: Impossible - Rogue Nation	US/CN/HK	C. McQuarrie	Paramount	1 417 775
19	Pitch Perfect 2	US	Elizabeth Banks	Universal Pictures	1 384 651
20	The Hobbit: The Battle of the Five…	US/NZ inc	Peter Jackson	Warner Bros.	1 381 539

Source: FFA

Distribution and exhibition

2015 was a very strong year for the German cinema industry. GBO increased by 19.1% to reach a new record high of EUR 1.17 billion as admissions grew by 14.4% to 139.2 million, the highest level since 2009. A total of 596 films were released in German cinemas, 26 more than in 2014 and the largest number of releases on record.

National films reached an all-time record market share of 27.5%, cumulatively attracting 37.1 million admissions. This is the second highest admissions level on record, beaten only in 2009. The trend was lead by local comedies *Fack Ju Göhte 2*, which – like its predecessor in 2013 – became the most successful film of the year, and *Honig im Kop*f. A total of nine German films managed to sell over 1 million tickets in 2015. Not counting *Spectre* (GB inc/US), the market share for US films decreased from 62.6% to 58.7% despite the strong performance of US blockbusters like *Minions* or *Star Wars Episode VII*.

With four films in the year's top 10 and a market share of 22% Universal Pictures lead the distributor's market, followed by the former leader Warner Bros. (15%), Walt Disney (13%) and Constantin (11%).

Production and funding

A total of 236 German feature films, including minority co-productions, were released in 2015. This is the second highest level in recent history and makes Germany the fourth largest feature film producing country in Europe.

In March 2016 the German government passed the draft of the new German Film Law (FFG) which will come into effect from 2017 for a period of five years. The new draft addresses structural changes in the film industry which are expected to result in lower financial resources of the German Federal Film Board (FFA) which is financed through mandatory contributions from exhibitors, broadcasters, video operators and VOD services. Among other measures, the new draft foresees to allocate more funding to a smaller number of film projects and to restructure the levy system, increasing contribution rates and minimum revenue thresholds at the same time.

The cumulative amount of national and regional public support for film in 2015 amounted to EUR 311 million, EUR 15 million less than in 2014. Good news comes in 2016 with the introduction of the "German Motion Picture Fund" (EUR 10 million) which aims to support big budget international co-productions and TV series, as well as a EUR 15 million increase of the State Ministry for Culture and Media (BKM) funding budget. Despite a significant "overbooking" in 2015, the budget of the German Federal Film Fund (DFFF) remains at EUR 50 million in 2016.

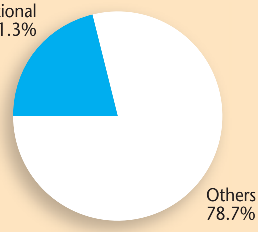
Source: FFA, SPIO, *Blickpunkt Film*, Mediabiz, *Filmecho-Filmwoche*, MEDIA Salles, OBS

Italy

Population 2015 e	60.8 million
GDP per capita 2015 e	29 847 USD
Gross box office 2015 e	665.0 M EUR (738 M USD)
Admissions 2015 e	107.0 million
Average ticket price 2015 e	6.2 EUR (6.9 USD)
Average admissions per capita 2015 e	1.8
Screens 2014 | 2015 (1)	3 852 | ~
Digital screens 2014 | 2015 (2)	3 421 | 3 525
Digital 3D screens 2014 | 2015 (2)	1 334 | 1 360

(1) Source: SIAE (2) Source: MEDIA Salles

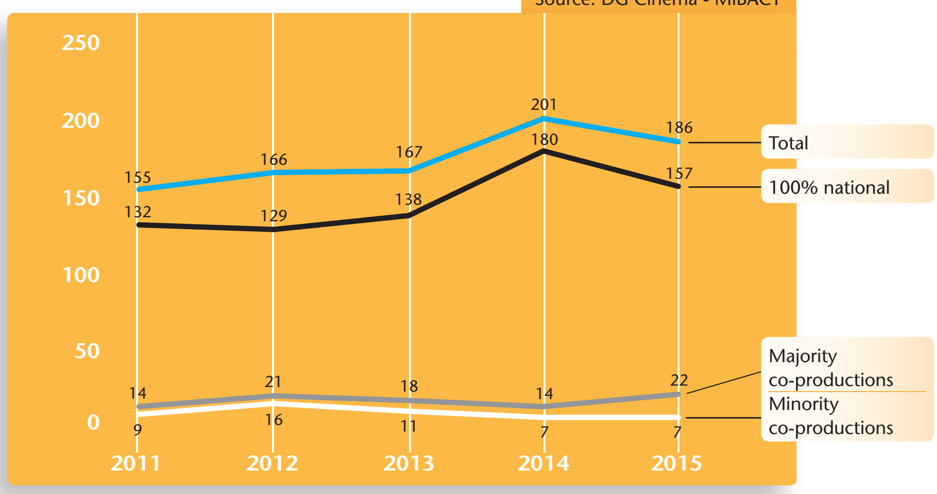
Market shares 2015 e



Number of feature films produced in Italy | 2011-2015

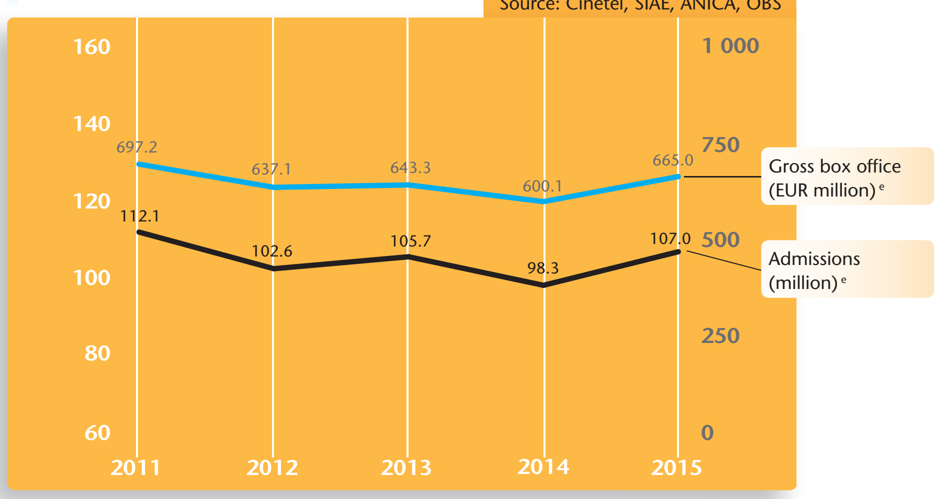
In units.

Source: DG Cinema - MiBACT



Admissions and gross box office | 2011-2015 e

Source: Cinetel, SIAE, ANICA, OBS



Top 20 films by admissions in Italy | 2015

	Original title	Country of origin	Director	Distributor	Admissions
1	Inside Out	US	P. Docter, R. Carmen	Walt Disney	4 062 788
2	Minions	US	K. Balda, P. Coffin	Universal	3 568 348
3	Fifty Shades of Grey	US	Sam Taylor-Johnson	Universal	2 832 587
4	American Sniper	US	Clint Eastwood	Warner Bros.	2 814 462
5	Furious Seven	US/JP/CN	James Wan	Universal	2 696 055
6	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Walt Disney	2 629 969
7	Cinderella	US/GB	Kenneth Branagh	Walt Disney	2 416 987
8	Si accettano miracoli	IT	Alessandro Siani	01 Distribution	2 353 256
9	Avengers: Age of Ultron	US	Joss Whedon	Walt Disney	2 310 509
10	Jurassic World	US/CN	Colin Trevorrow	Universal	2 104 996
11	Spectre	GB inc/US	Sam Mendes	Warner Bros.	1 804 809
12	Hotel Transylvania 2	US	Genndy Tartakovsky	Warner Bros.	1 697 821
13	The Imitation Game	US/GB inc	Morten Tyldum	Videa-CDE	1 315 933
14	The Hunger Games: Mockingjay P. 2	US/DE	Francis Lawrence	Universal	1 191 736
15	The Martian	US/GB	Ridley Scott	20th Century Fox	1 160 769
16	Youth (La giovinezza)	IT/FR/GB/CH	Paolo Sorrentino	Medusa Film	971 493
17	Vacanze ai Caraibi	IT	Neri Parenti	Medusa Film	964 099
18	Natale col boss	IT	Volfango De Biasi	Filmauro/Universal	961 166
19	The Good Dinosaur	US	Peter Sohn	Walt Disney	927 181
20	Night at the Museum: Secret of the…	US	Shawn Levy	20th Century Fox	905 567

Source: Cinetel

Distribution and exhibition

2015 saw Italian box office recovering from the lowest level in almost 20 years: Estimated cinema attendance increased by 8.9% to 107 million admissions. Thanks to a slight increase in ticket prices, GBO grew by 10.8% to EUR 665 million, up EUR 65 million on the previous year. Box office grew thanks to the strong performance of US blockbusters: while only one single film sold more than two million tickets in 2014, a total of 10 films, nine out of which were US films, succeeded to pass this benchmark in 2015 and caused market share for US films jumped from 49.7% to 60.0%. Led by the two animation hits *Inside Out* and *Minions*, US films accounted for 16 out of the year's top 20 titles.

In contrast, most big Italian films did not meet expectations and caused national market share drop from 27.8% to 21.3%. This is the lowest level in over ten years. Some market experts link the poor performance of many titles to the concentrated timing of local releases as well as their perceived comparatively low production value which increasingly fails to attract young audiences. Led by the comedy *Si Acettano Miracoli* a total of four Italian films made it into the top 20.

The distribution market was led by Universal which took a market share of 21%, followed by Warner Bros. (15.1%), Walt Disney (14.6%) and 01 Distribution (11.4%).

Production and funding

After hitting a record high of 201 films productions in 2014, Italian feature film production decreased to 185 films, due to a decline in the production of 100% national films while the number of co-productions actually increased. High production levels on the one hand and relatively stable cumulative production investment of EUR 300 million have led to a drop in the average production budget from EUR 2.2 million in 2012 to EUR 1.3 million.

Earlier in 2016 the Italian government announced a major reform of the country's film financing system which will - among many other measures - lead to the creation of a separate Film and Audiovisual Fund with a budget of at least EUR 400 million. The fund will be financed through an allocation of 12% of IRES (corporation tax) and VAT revenues from companies exploiting film content, including exhibition, distribution, TV broadcasters, ISPs and telecommunication companies. The new regulations are expected to bring 60% more financing to the whole cinema chain and will take effect in 2017. More funding was also made available by the Rome Lazio Film Commission which in October 2015 launched a EUR 10 co-production fund for film and TV with the aim of attracting more – primarily European – mid-range films to shoot in Rome.

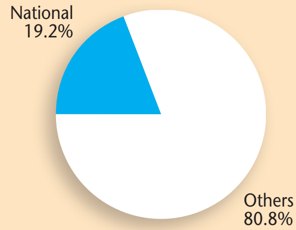
Source: DG Cinema-MiBACT, ANICA, Cinetel, *Cineuropa, Screen International, Variety*, MEDIA Salles

Spain

Population 2015 [e]	46.4 million
GDP per capita 2015 [e]	26 327 USD
Gross box office 2015	572.7 M EUR (635.3 M USD)
Admissions 2015	94.6 million
Average ticket price 2015	6.1 EUR (6.7 USD)
Average admissions per capita 2015	2.0
Screens 2014 | 2015 (1)	3 694 | 3 588
Digital screens 2014 | 2015 (2)	3 157 | 3 302
Digital 3D screens 2014 | 2015 (2)	1 091 | 1 108

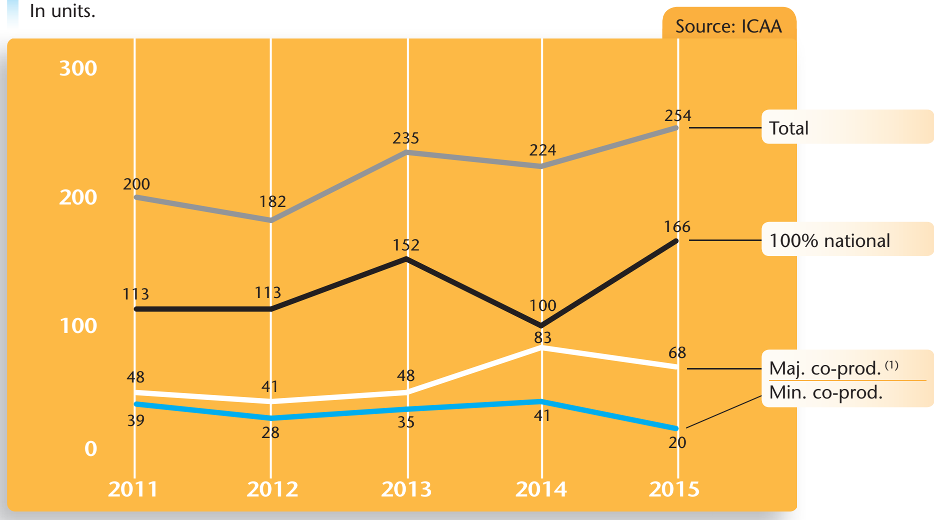
(1) Source: ICAA (2) Source: MEDIA Salles

Market shares 2015 [e]



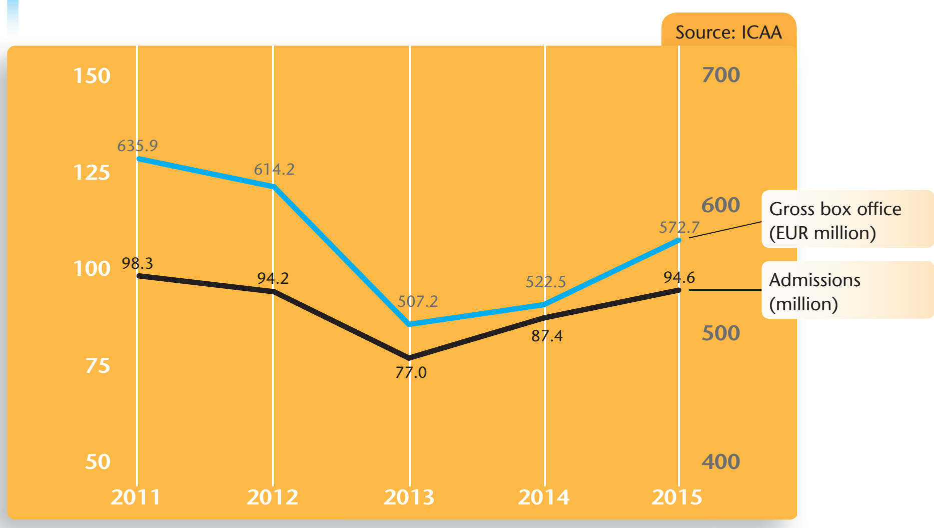
Number of Spanish feature films produced | 2011-2015

In units.



(1) Including parity co-productions.

Admissions and gross box office | 2011-2015 *prov.*



Top 20 films by admissions in Spain | 2015 *prov.*

	Original title	Country of origin	Director	Distributor	Admissions
1	Ocho apellidos catalanes	ES	Emilio Martínez Lázaro	Universal Pict. Intl	5 134 311
2	Minions	US	Kyle Balda, Pierre Coffin	Universal Pict. Intl	4 321 250
3	Inside Out	US	P. Docter, R. Carmen	The Walt Disney Co.	3 831 769
4	Jurassic World	US/CN	Colin Trevorrow	Universal Pict. Intl	3 607 874
5	Star Wars: Episode VII - The Force…	US	J.J. Abrams	The Walt Disney Co.	3 352 435
6	Fifty Shades of Grey	US	Sam Taylor-Johnson	Universal Pict. Intl	3 135 926
7	Furious Seven	US/JP/CN	James Wan	Universal Pict. Intl	2 143 749
8	Avengers: Age of Ultron	US	Joss Whedon	The Walt Disney Co.	2 101 180
9	Hotel Transylvania 2	US	Genndy Tartakovsky	Sony Pict. Releasing	1 995 567
10	Atrapa la bandera	ES	Enrique Gato	Paramount	1 945 055
11	The Martian	US/GB	Ridley Scott	Hispano Foxfilms	1 926 009
12	The Hunger Games: Mockingjay P. 2	US/DE	Francis Lawrence	eOne	1 733 225
13	Perdiendo el norte	ES	Nacho G. Velilla	WBros. Enter. España	1 632 499
14	Regression	ES/CA/US	Alejandro Amenábar	Universal Pict. Intl	1 429 953
15	Ahora o nunca (It's Now or Never)	ES	María Ripoll	Sony Pict. Releasing	1 419 820
16	American Sniper	US	Clint Eastwood	WBros. Enter. España	1 381 327
17	The Good Dinosaur	US	Peter Sohn	The Walt Disney Co.	1 343 011
18	Cinderella	US/GB	Kenneth Branagh	The Walt Disney Co.	1 340 205
19	Home	US	Tim Johnson	Hispano Foxfilms	1 109 268
20	Spectre	GB inc/US	Sam Mendes	Sony Pict. Releasing	1 108 938

Source: ICAA, comScore

Distribution and exhibition

Spanish GBO increased in 2015 by 9.8% to EUR 572.7 million, confirming a trend change that began in 2014 and stopped a continuous fall in cinema attendance which hit a record low of 77 million admissions in 2013, half the admissions level registered in 2004. In 2015 admissions climbed back to 94.6 million, up 8.2% on 2014 but still the third-lowest level since 1994. In contrast to 2014, box office growth was driven by the success of US rather than local blockbusters. Admissions to US films are estimated to have increased from 49 million to 67 million in 2015 with US market share jumping from 56% in 2014 to an estimated 71%.

The fact that box office growth in 2015 was achieved without a further decline in average ticket prices and change in the perception of the audiences vis-à-vis the attractiveness of national films reflect signs of an ongoing recovery. Indeed, Spanish films performed well in 2015: local comedy *Ocho apellidos catalanes (Spanish Affair 2)* was the top grossing film and closed the year with 5.1 million admissions. A total of four local productions made it into the top 20 films securing a national market share of 19.2%, the second best level since 1997. Only in 2014 had Spain registered a higher national market share with *Ocho apellidos vascos (Spanish Affair)* selling a record 9.3 million tickets and driving the national market share to 25.5%, the highest level on record.

Production and funding

Spanish film production levels were up in 2015 with a total of 254 films certified by ICAA, the country's national public funding body, 30 more films than in 2014. Average film budgets remained low at EUR 1.3 million reflecting the difficult economic conditions the industry has been faced with in recent years.

The interim Government introduced a new public funding system which has come into effect as of January 2016. Public support is now foreseen for "economically viable" films with e.g. a minimum budget of EUR 1.3 million and contracts with TV, distribution and international sales companies already in place. Another major change concerns the schedule of payment: unlike the previous system which provided support based on commercial success and came two or more year's after a film's release, producers will be granted support before starting to produce. However, for most in the industry the big question remains whether the foreseen amount of EUR 30 million will be sufficient to provide funding for all eligible projects.

2015 also saw the introduction of a 15% and 35% tax credit for foreign shoots in Spain and the Canary Islands, capped at EUR 2.5 million and EUR 4.5 million respectively.

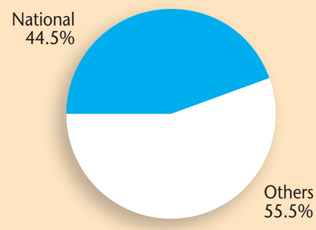
Source: ICAA, *Screen International, Cineuropa, Variety, Hollywood Reporter,* comScore, OBS

United Kingdom

Population 2015 e	64.8 million
GDP per capita 2015 e	44 118 USD
Gross box office 2015	1.24 bn GBP (1.90 bn USD)
Admissions 2015	171.9 million
Average ticket price 2015	7.2 GBP (11.0 USD)
Average admissions per capita 2015	2.7
Screens 2014 | 2015 (1)	3 909 | 4 046
Digital screens 2014 | 2015 (2)	3 944 | 3 954
Digital 3D screens 2014 | 2015 (2)	2 025 | 2 030

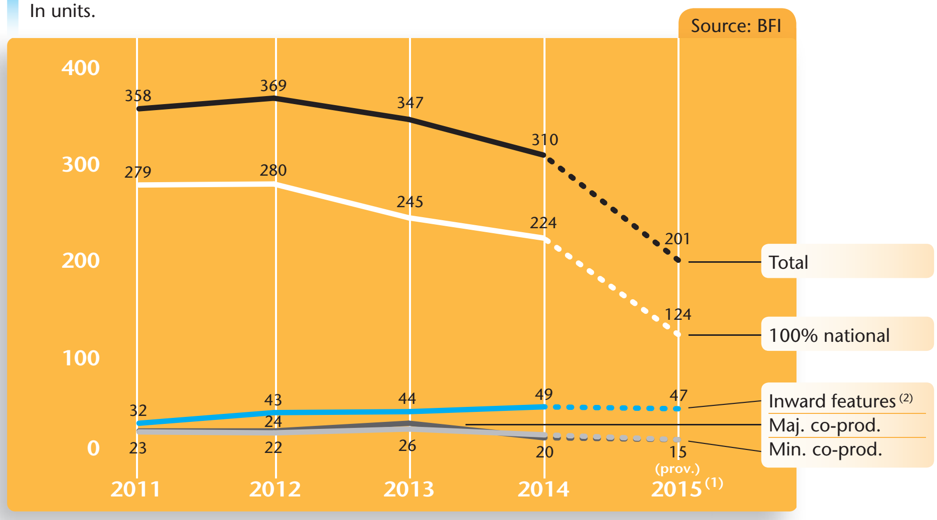
(1) Source: BFI (2) Source: MEDIA Salles

Market shares 2015 e



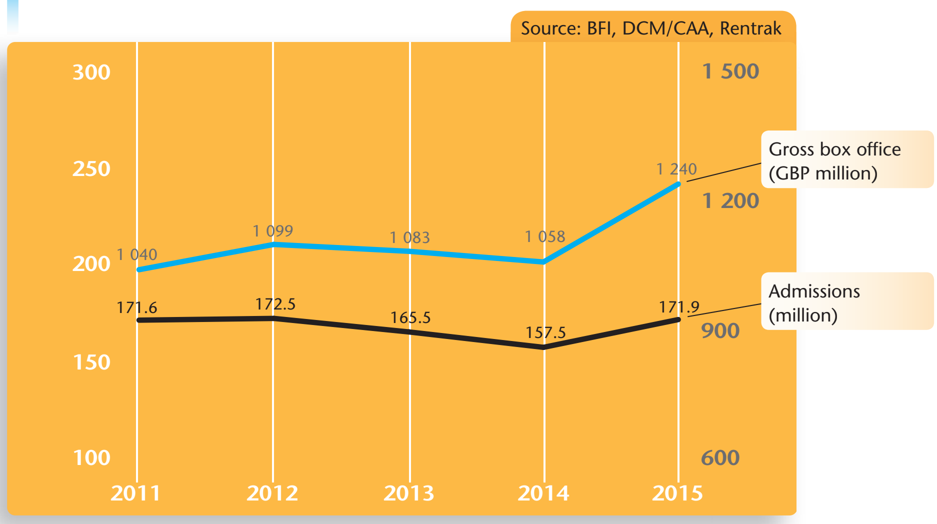
Number of films produced in the United Kingdom | 2011-2015 *prov.* (1)

In units.



(1) The apparent decline of film productions in 2015 is linked to a time lag in identifying film productions with budgets below GBP 500 000.
(2) Including inward feature co-productions but excluding inward features involving only VFX work in the UK.

Admissions and gross box office | 2011-2015



Top 20 films by admissions in the United Kingdom & Ireland | 2015 (1) e

Estimated admissions based on average ticket price of GBP 7.21.

	Original title	Country of origin	Director	Distributor	Admissions e
1	Spectre	GB inc/US	Sam Mendes	Sony Pictures	13 009 239
2	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Walt Disney	12 079 038
3	Jurassic World	US/CN	Colin Trevorrow	Universal Pictures	8 919 342
4	Avengers: Age of Ultron	US	Joss Whedon	Walt Disney	6 704 230
5	Minions	US	K. Balda, P. Coffin	Universal Pictures	6 583 360
6	Inside Out	US	P. Docter, R. Carmen	Walt Disney	5 435 608
7	Furious Seven	US/JP/CN	James Wan	Universal Pictures	5 347 120
8	Fifty Shades of Grey	US	Sam Taylor-Johnson	Universal Pictures	4 830 861
9	The Hunger Games: Mockingjay P. 2	US/DE	Francis Lawrence	Lionsgate	3 898 812
10	Home	US	Tim Johnson	20th Century Fox	3 519 906
11	The Martian	US/GB	Ridley Scott	20th Century Fox	3 257 103
12	The Theory of Everything	GB inc/US	James Marsh	Universal Pictures	3 010 378
13	Cinderella	US/GB	Kenneth Branagh	Walt Disney	2 956 423
14	Mission: Impossible - Rogue Nation	US/CN/HK	C. McQuarrie	Paramount	2 926 881
15	Big Hero 6	US	C. Williams, D. Hall	Walt Disney	2 868 210
16	Hotel Transylvania 2	US	Genndy Tartakovsky	Sony Pictures	2 747 935
17	Legend	GB inc/US/FR	Brian Helgeland	StudioCanal	2 546 125
18	Taken 3	FR	Olivier Megaton	20th Century Fox	2 451 402
19	Pitch Perfect 2	US	Elizabeth Banks	Universal Pictures	2 413 874
20	Mad Max: Fury Road	AU inc/US	George Miller	Warner Bros.	2 413 184

(1) Cumulative admissions up to 17 January 2016.

Source: BFI, comScore

Distribution and exhibition

In 2015, GBO in the UK jumped by 17% to a new historic record of GBP 1.24 billion (USD 1.9 billion). GBO growth was sparked by a 9% increase in admissions, which - after declining for two years in a row - grew by 14.4 million to 171.9 million admissions as well as a 7% increase in the average ticket price. Box office growth was primarily driven by the strong performance of US studio blockbusters like *Spectre, Star Wars Episode VII, Jurassic World, Avengers: Age of Ultron* and *Minions*, all five of which sold more tickets than 2014's top performing film *The Hobbit: The Battle of the Five Armies* (5.9 million).

2015 also saw UK films reach a new record market share of 44.5%. The lion's share, namely 34%, was however contributed by US studio backed UK qualifying films like *Spectre* or *Star Wars*, while UK independent films captured a market share of only 10.6%. Cumulatively US and UK films took an estimated 93% of total admissions while foreign language films continue to struggle: e.g. other European films accounted for only 2.9% of admissions. In response, the BFI Film Audience Network launched in 2016 a new scheme to support the distribution of six foreign language films with GBP 100 000.

Releasing six out of the top 20 titles, Universal Pictures generated GBP 280 million – the largest box office ever taken by a single distributor in the UK and Ireland - and topped the 2015 distributor charts, taking a market share of 21.4%, closely followed by Walt Disney (20%).

Production and funding

According to interim figures released by the BFI in January, a total of 201 UK feature films – including inward investment films – started principal photography in 2015. This compared to 310 films in 2014. A significant part of this seemingly dramatic decline in production activity is due to a time lag in identifying UK productions with a budget of less than GB 500 000 which account for the majority of domestic productions. Production spend decreased by 6% from 2014's record level of GBP 1.50 billion to GBP 1.41 billion in 2015, the second highest level on record. 47 inward investment films cumulatively accounted for 83% of UK production spend in 2015 while 124 domestic UK feature productions spent GBP 198, 7% less than in 2014.

The UK's tax relief system certainly played an important role in attracting such high amounts of inward film investments. After receiving State Aid approval by the EU, the UK implemented its proposed enhancements to its film tax relief including a film tax relief rate of 25% for production expenditure from April 2015.

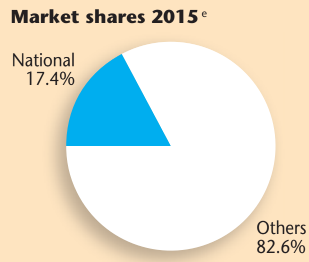
Source: BFI, DCM, *Screen International*, comScore, Media Salles, OBS

Russian Federation

Population 2015 [e]	146.3 million
GDP per capita 2015 [e]	8 447 USD
Gross box office 2015	44.1 bn RUB (728 M USD)
Admissions 2015	174.1 million
Average ticket price 2015	253.5 RUB (4.2 USD)
Average admissions per capita 2015	1.2
Screens 2014 | 2015 (1)	3 829 | 4 021
Digital screens 2014 | 2015 (2)	3 715 | 4 021
Digital 3D screens 2014 | 2015 (2)	3 017 | 3 161

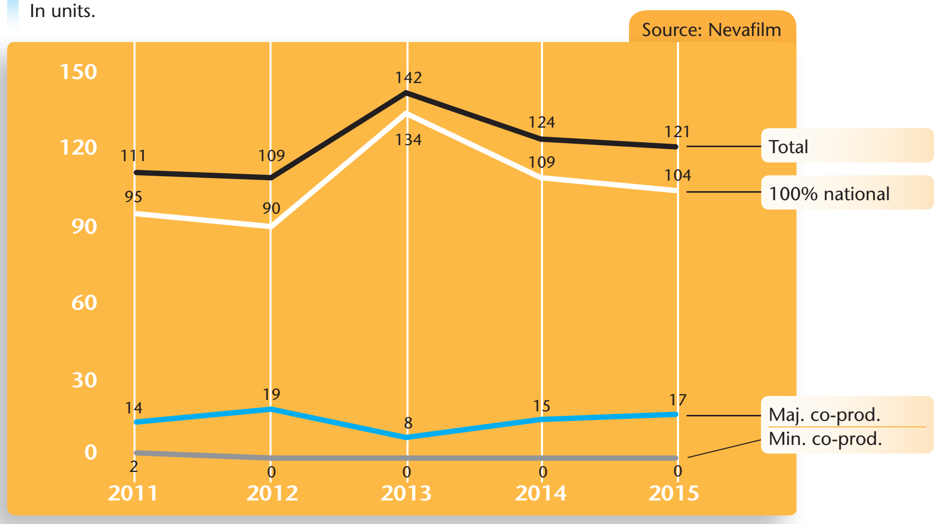
(1) Source: Nevafilm (2) Source: MEDIA Salles

Market shares 2015 [e]

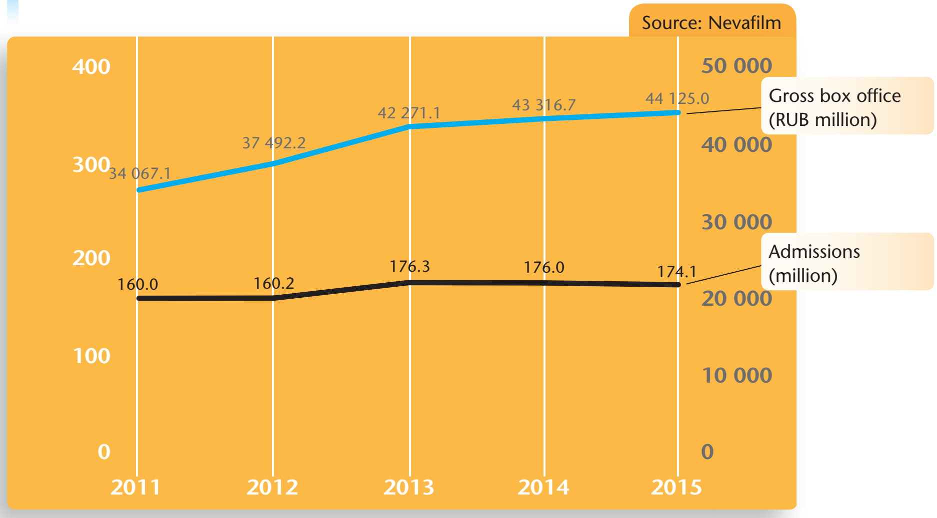


Number of Russian feature films produced | 2011-2015

In units.



Admissions and gross box office in Russia | 2011-2015 (1)



(1) Without alternative content.

Top 20 films by admissions in the Russian Federation | 2015 (1)

	Original title	Country of origin	Director	Distributor	Admissions
1	Minions	US	K. Balda, P. Coffin	UPI	8 425 349
2	Furious Seven	US/JP/CN	James Wan	UPI	6 262 362
3	Avengers: Age of Ultron	US	Joss Whedon	Walt Disney/Sony	6 024 215
4	Hotel Transylvania 2	US	Genndy Tartakovsky	Walt Disney/Sony	5 090 136
5	Inside Out	US	P. Docter, R. Carmen	Walt Disney/Sony	5 008 414
6	Jurassic World	US/CN	Colin Trevorrow	UPI	4 993 602
7	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Walt Disney/Sony	4 426 928
8	The Martian	US/GB	Ridley Scott	20 Century Fox	4 324 170
9	Home	US	Tim Johnson	20 Century Fox	4 186 841
10	Fifty Shades of Grey	US	Sam Taylor-Johnson	UPI	4 170 441
11	Three Bogatyrs: The Horse's Turn	RU	K.Feoktistov	Nashe kino	3 961 498
12	Terminator: Genisys	US	Alan Taylor	Central Partnership	3 913 378
13	Seventh Son	US/GB/CA/CN	Sergey Bodrov	UPI	3 423 850
14	Exodus: Gods and Kings	US/GB inc/ES	Ridley Scott	20 Century Fox	3 032 875
15	Spectre	GB inc/US	Sam Mendes	Walt Disney/Sony	3 000 281
16	The Hunger Games: Mockingjay P. 2	US/DE	Francis Lawrence	Walt Disney/Sony	2 893 247
17	Cinderella	US/GB	Kenneth Branagh	Walt Disney/Sony	2 740 356
18	Ant-Man	US	Peyton Reed	Walt Disney/Sony	2 699 014
19	Everest	US/GB/IS	Baltasar Kormákur	UPI	2 509 777
20	Mad Max: Fury Road	AU inc/US	George Miller	Karo Premier	2 455 917

(1) Data refer to the Commonwealth of Independent States (CIS) excluding Ukraine.

Source: *Russian Film Busimess Today Magazine, Booker's Bulletin Magazine, Nevafilm Research*

Distribution and Exhibition

Thanks to higher ticket prices Russian GBO reached a new record high of RUB 44.1 billion in 2015, 1.9% up on 2014. Admissions, however, declined slightly by 1.1% to 174 million tickets sold, a strong result given the economic conditions. US blockbusters dominated the Russian box office in 2015 accounting for 19 out of the top 20 films. Foreign studios were however affected by the continued depreciation of the Russian ruble which caused GBO to drop by almost 37% to USD 728 million. The strong performance of US titles hit domestic films and caused national market share to decline from 18.7% to 17.4%. Indeed, only one national film made it into the top 20: *Three Bogatyrs: The Horses Turn*, an animation adventure film based on popular Russian fairy tales.

In order to strengthen local films, the Ministry of Culture signed a voluntary agreement with several exhibitors to dedicate at least 20% of their monthly screenings to Russian films. The agreement came into effect as of January 2016 but was not signed by Russia's two leading cinema chains, Cinema Park and Formula Kino, which recently merged to create the country's largest cinema chain operating about 14% of total cinema sites. In this context it is also interesting to note that the Russian Cinema Fund started to support cinemas in small towns granting a cumulative RUB 700 million in 2015. Cinemas benefitting from this public support are obliged to dedicate at least 50% of their quarterly screenings to Russian films. This measure is expected to increase the number of modern screens throughout 2016 and 2017 and thereby stimulate further box office growth as well as positively affect national market share. It is one example of how the Ministry aims to support the local film industry in 2016, which has been declared the "Year of Russian Cinema".

Walt Disney / Sony Pictures was the most successful distributor in 2015, taking a market share of 24% of total GBO, ahead of UPI (20%) and 20th Century Fox CIS (16%).

Production and funding

Russian production levels remained relatively stable at 121 films, only 3 films less than in 2014. Following a RUB 600 million (USD 97 million) cut of the Ministry of Culture's budget for directly supporting "socially significant" films in 2015, the Russian Cinema Fund, which supports local production studios, will be faced with a 7% cut in 2016, reducing its funds from RUB 3 billion to RUB 2.8 billion. Unlike in previous years, grant beneficiaries will no longer have to return the funds should their films not succeed at the box office.

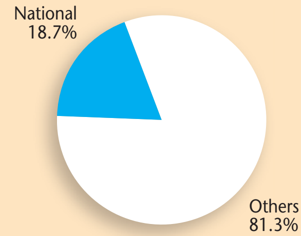
Source: Nevafilm Research, *Russian Film Business Today, The Guardian, Bloomberg, Screen International, The Hollywood Reporter*, OBS

Poland

Population 2015 [e]	38.0 million
GDP per capita 2015 [e]	12 662 USD
Gross box office 2015	822.9 M PLN (218.3 M USD)
Admissions 2015	44.7 million
Average ticket price 2015	18.4 PLN (4.9 USD)
Average admissions per capita 2015	1.2
Screens 2014 | 2015 (1)	1 256 | 1 256
Digital screens 2014 | 2015 (2)	986 | 1 074
Digital 3D screens 2014 | 2015 (2)	670 | 680
Films produced 2014 | 2015	46 | 49

(1) Source: PISF (2) Source: MEDIA Salles

Market shares 2015 [e]



Top 10 films by admissions in Poland | 2015

	Original title	Country of origin	Director	Distributor	Admissions
1	Listy do M.2 (Letters to Santa 2)	PL	Maciej Dejczer	Kino Swiat	2 874 420
2	Star Wars: The Force Awakens	US	J.J. Abrams	Disney	2 058 857
3	Fifty Shades of Grey	US	Sam Taylor-Johnson	UIP	1 814 116
4	Spectre	GB inc/US	Sam Mendes	Forum Film	1 750 671
5	The Minions	US	Kyle Balda, Pierre Coffin	UIP	1 669 881
6	The Pinguins of Madagascar	US	Eric Darnell, Simon J. Smith	Imperial Cinepix	1 634 542
7	Hotel Transylvania 2	US	Genndy Tartakovsky	UIP	1 154 354
8	Fast&Furious 7	US/JP/CN	James Wan	UIP	995 199
9	Inside Out	US	Pete Docter, Ronnie Del Carmen	Disney	952 617
10	The Hobbit: The Battle of Five Armies	US/NZ inc	Peter Jackson	Forum Film	950 232

Source: Polish Film Institute (PISF) / boxoffice.pl

Distribution and exhibition

2015 turned out to be another strong year for the Polish film industry as Pawel Pawlikowski's drama *Ida* won the Oscar as the Best Foreign Language Film and Polish box office reached record levels: Admissions continued to grow by an impressive 10.5% to 44.7 million, the highest level in the past 25 years. Thanks to a slight increase in ticket prices GBO even jumped 13% to PLN 823 million.

In contrast to 2014 box office growth was driven by US blockbusters rather than local films. A total of nine US studio films ranked in the top 10 films of the year and drove US market share to jump to 64.6%, up 15% percentage points from 2014.

The second instalment of local romantic comedy *Listy do M (Letters to Santa)* became Poland's most successful film in 2015. It was the only Polish film to rank among the top 10, compared to six films in 2014. Admissions to national films decreased from the 2014 record level of 11 million to 8.3 million and national market share plunged accordingly from 27.5% to 18.7%.

UIP lead the Polish distribution market with a market share of 24%, followed by Kino Swiat (15.2%), Walt Disney (13.7%), Imperial Cinepix (10.4%) and Forum Film (10%).

Production and funding

A total of 49 Polish films, including four minority co-productions, were produced in 2015, three films more than in 2014. The average budget of local production amounted to PLN 4 - 4.5 million (~USD 1.4 million).

The renewed strength of Polish cinema is largely due to work of the Polish Film Institute, the country's national film funding body, which celebrated its 10th anniversary in 2015. The PISF provided about PLN 102 million (USD 33.8 million) in production support in 2015 making it the largest source of funding with additional funds coming from a network of 13 regional funds, television and private sources. It recently introduced a new funding option for Polish minority co-productions of up to EUR 0.5 million per project and is one of the partners of the new Polish-German Film Fund (budget of EUR 0.3 million).

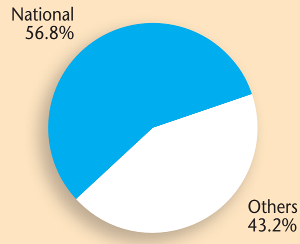
Source: Polish Film Institute (PISF), Film Commission Poland, Cineuropa, FilmNewEurope, MEDIA Salles, OBS

Turkey

Population 2015 [e]	77.7 million
GDP per capita 2015 [e]	9 290 USD
Gross box office 2015	681.4 M TRY (251.4 M USD)
Admissions 2015	60.5 million
Average ticket price 2015	11.3 TRY (4.2 USD)
Average admissions per capita 2015	0.8
Screens 2014 | 2015 (1)	2 483 | 2 648
Digital screens 2014 | 2015 (2)	1 259 | 2 184
Digital 3D screens 2014 | 2015 (2)	467 | 595
National films released 2014 | 2015	109 | 137

(1) Source: Antrakt (2) Source: MEDIA Salles

Market shares 2015 [e]



Top 10 films by admissions in Turkey | 2015

	Original title	Country of origin	Director	Distributor	Admissions
1	Dügün Dernek 2: Sünnet	TR	Selçuk Aydemir	Mars Dagıtım	5 231 330
2	Mucize (The Miracle)	TR	Mahsun Kirmizigül	Pinema	3 737 605
3	Furious Seven	US/JP/CN	James Wan	UIP	2 961 089
4	Kocan Kadar Konus (Husband Factor)	TR	Kivanc Baruonu	UIP	1 930 677
5	Ali Baba ve 7 Cüceler	TR	Cem Yilmaz	Mars Dagıtım	1 827 011
6	Selam: Bahara Yolculuk	TR	Hamdi Alkan	Mars Dagıtım	1 683 497
7	Bana Masal Anlatma (Telling Tales)	TR	Burak Aksak	UIP	1 576 979
8	Ask Sana Benzer	TR	A. Taner Elhan	Mars Dagıtım	1 406 620
9	Avengers: Age of Ultron	US	Joss Whedon	UIP	1 284 848
10	Yapısık Kardesler (Stuck With You!)	TR	Ilker Ayrik	Mars Dagıtım	1 014 630

Source: Antrakt

Distribution and exhibition

In 2015 Turkish GBO reached a new record high of TRY 681 million (USD 251 million), topping the previous year's results by 4%. Compared to the growth rates seen in 2013 and 2014, this is comparatively low and suggests that Turkey's impressive growth trend of recent years has slowed down significantly. Indeed, admissions actually slightly declined by 1.5% to 60.5 million tickets.

A total of 405 films were released in 2015 with local blockbusters continuing to dominate the box office capturing a market share of 56.8%. However, many independent films struggled to secure screen space in a highly concentrated exhibition and distribution market that is geared towards the exploitation of blockbusters. In this context, independent filmmakers regularly criticise the dominating market position of Mars Cinema Group which – besides being active in production – leads both the exhibition as well as the distribution market capturing a market share of around 50% and 30% respectively. Mars was recently acquired by South Korea's largest exhibitor CJ CGV.

Tension over alleged government censorship of festival titles continued in 2015. Following the removal of a documentary due to the lack of a required registration certificate, the Istanbul Film Festival, Turkey's largest film festival, had to cancel its competitions as dozens of Turkish filmmakers withdrew their films in protest. In an open letter more than 300 filmmakers and over 30 institutions consequently called on the Turkish government to amend film regulations and to found a standalone film agency.

Production and funding

Turkish feature film production volume reached a new record high of 137 feature films released in 2015, 29 films more than in 2014. It's worth noting that a further 100 films were produced but did not find a distributor in 2015.

Complementing public film support which is provided exclusively by the Turkish Ministry of Culture and Tourism, the !f Istanbul Independent Film Festival and Anadolu Kültür, a non-profit cultural institution, introduced in February 2015 a new film fund, the Yeni Film Fonu, to support the production of non-fiction films focusing on subjects such as human rights or the freedom of expression.

Source: Antrakt, SE-YAP, *Hürriyet, Screen International, EDN,* Al-Monitor, Bloomberg, DG Sinema

Other Western Europe

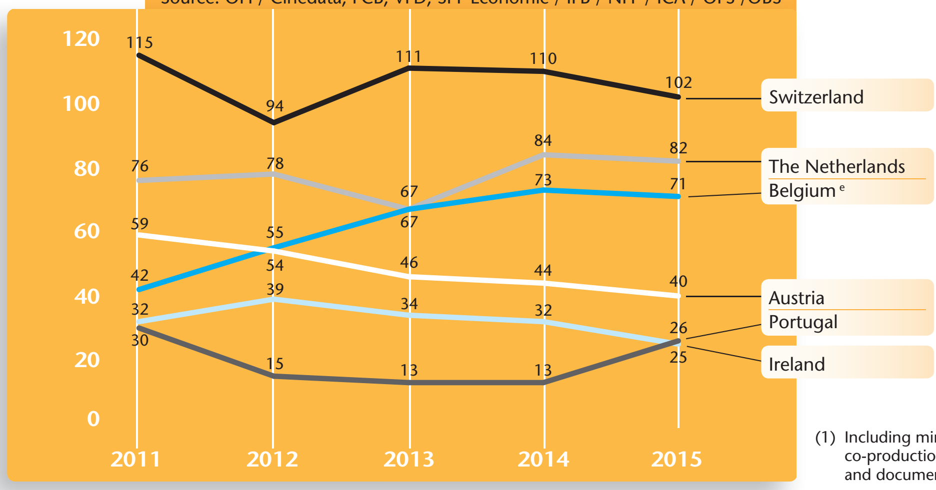
	Austria	Belgium	Ireland	Netherlands	Portugal	Switzerland
Population 2015 e (million)	8.6	11.3	4.6	16.9	10.4	8.2
GDP per capita 2015 e (USD)	43 547	40 456	48 940	44 333	18 984	82 178
Gross box office 2015 (M USD)	152.0	184.6	117.0	306.0	83.3	232.9
Admissions 2015 (million)	15.9	21.1	15.2	33.0	14.6	14.4
Average ticket price 2015 (USD)	9.5	8.7	7.7	9.3	5.7	16.2
Average admissions per capita 2015	1.9	1.9	3.3	1.9	1.4	1.7
Screens 2015 e (1)	557	508	496	888	547	570
Digital screens 2015 (2)	554	516	496	893	449	562
Digital 3D screens 2015 (2)	348	171	250	460	308	297
National market shares 2015 e	5.3%	10.0%	4.1%	18.7%	6.5%	7.7%

(1) National data source (2) Source: MEDIA Salles

Number of feature films produced by selected Western European countries (1) | 2011-2015

In units.

Source: OFI / Cinedata, FCB, VFD, SPF Economie / IFB / NFF / ICA / OFS /OBS

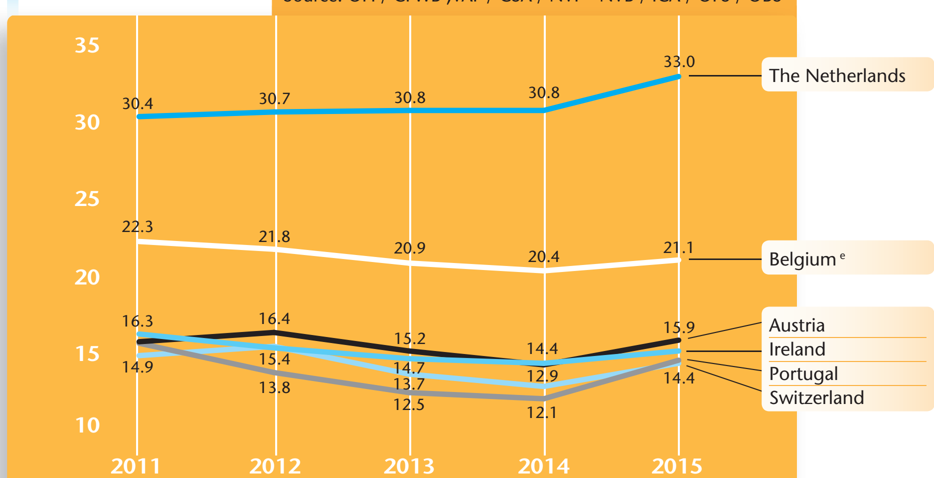


(1) Including minority co-productions and documentaries.

Admissions in selected Western European countries | 2011-2015

In millions.

Source: OFI / CFWB ,VAF / CSA / NVF - NVB / ICA / OFS / OBS



Top 10 films by admissions in the Netherlands | 2015

	Original title	Country of origin	Director	Distributor	Admissions
1	Spectre	GB inc/US	Sam Mendes	UPI	2 038 642
2	Minions	US	K. Balda, P. Coffin	UPI	1 611 463
3	Jurassic World	US/CN	Colin Trevorrow	UPI	1 006 971
4	Furious Seven	US/JP/CN	James Wan	UPI	955 845
5	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Walt Disney	854 782
6	Fifty Shades of Grey	US	Sam Taylor-Johnson	UPI	747 767
7	Michiel de Ruyter (Admiral)	NL/BE	Roel Reiné	A-Film Benelux MSD	693 202
8	The Hunger Games: Mockingjay - P. 2	US/DE	Francis Lawrence	Independent Films	690 630
9	Inside Out	US	P. Docter, R. Carmen	Walt Disney	659 082
10	Avengers: Aget of Ultron	US	Joss Whedon	Walt Disney	493 797

Source: MaccsBox - NVB & NVF

Top 10 films by admissions in Austria | 2015

	Original title	Country of origin	Director	Distributor	Admissions
1	Minions	US	K. Balda, P. Coffin	Universal Pictures	794 357
2	Spectre	GB inc/US	Sam Mendes	SPE	745 595
3	Fack ju Göhte 2 (Suck Me Shakespeer 2)	DE	Bora Dagtekin	Constantin Film	630 955
4	Fifty Shades of Grey	US	Sam Taylor-Johnson	Universal Pictures	600 051
5	Furious Seven	US/JP/CN	James Wan	Universal Pictures	548 414
6	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Walt Disney	540 557
7	The Hunger Games: Mockingjay - P. 2	US/DE	Francis Lawrence	Constantin/Studiocanal	440 588
8	Jurassic World	US/CN	Colin Trevorrow	Universal Pictures	427 391
9	Inside Out	US	P. Docter, R. Carmen	Walt Disney	362 378
10	Honig im Kopf (Head Full of Honey)	DE	Schweiger, Gmehling	Warner Bros.	348 066

Source: Austrian Film Institute (OFI) / comScore

Top 10 films by admissions in Portugal | 2015

	Original title	Country of origin	Director	Distributor	Admissions
1	Minions	US	K. Balda, P. Coffin	NOS Luso. Audiovisuais	937 795
2	Furious Seven	US/JP/CN	James Wan	NOS Luso. Audiovisuais	832 800
3	O Pátio das Cantigas	PT	Leonel Vieira	NOS Luso. Audiovisuais	606 907
4	Fifty Shades of Grey	US	Sam Taylor-Johnson	NOS Luso. Audiovisuais	501 600
5	Spectre	GB inc/US	Sam Mendes	NOS Luso. Audiovisuais	448 503
6	Inside Out	US	P. Docter, R. Carmen	NOS Luso. Audiovisuais	442 235
7	Star Wars: Episode VII - The Force…	US	J.J. Abrams	NOS Luso. Audiovisuais	412 813
8	Jurassic World	US/CN	Colin Trevorrow	NOS Luso. Audiovisuais	329 019
9	Mission: Impossible - Rogue Nation	US/CN/HK	C. McQuarrie	NOS Luso. Audiovisuais	325 393
10	The Hunger Games: Mockingjay - P. 2	US/DE	Francis Lawrence	Pris Audiovisuais	320 910

Source: ICA

Top 10 films by admissions in Switzerland | 2015

	Original title	Country of origin	Director	Distributor	Admissions
1	Spectre	GB inc/US	Sam Mendes	Walt Disney	965 973
2	Minions	US	K. Balda, P. Coffin	Universal Pictures	606 190
3	Furious Seven	US/JP/CN	James Wan	Universal Pictures	491 597
4	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Walt Disney	474 736
5	Fifty Shades of Grey	US	Sam Taylor-Johnson	Universal Pictures	398 580
6	Honig im Kopf	DE	Schweiger, Gmehling	Warner Bros.	379 968
7	Jurassic World	US/CN	Colin Trevorrow	Universal Pictures	352 288
8	Schellen-Ursli (A Bell for Ursli)	CH	Xavier Koller	Frenetic Films	350 453
9	The Hunger Games: Mockingjay - P. 2	US/DE	Francis Lawrence	Impuls Pictures	329 356
10	Fack ju Göhte 2	DE	Bora Dagtekin	Pathé Films	292 291

Source: Office fédéral de la statistique (OFS)

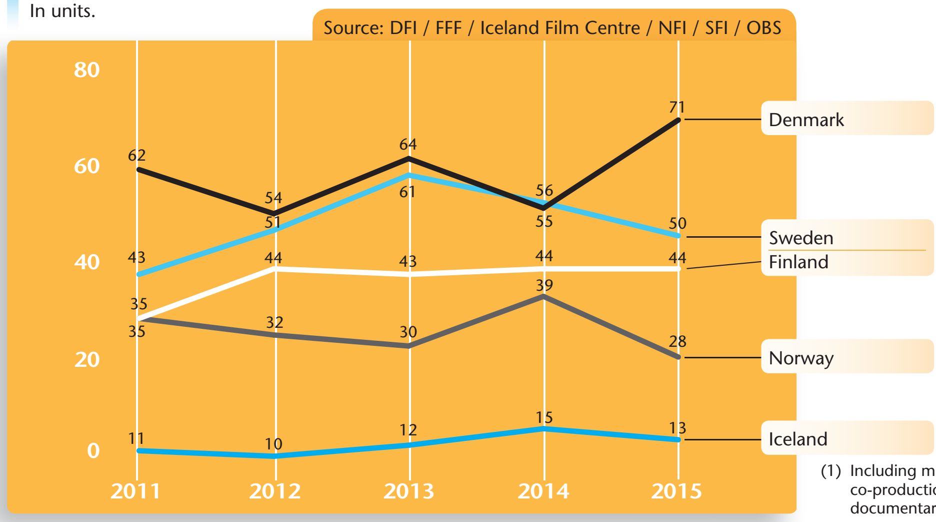
Nordic countries

	Denmark	Finland	Iceland	Norway	Sweden
Population 2015 e (million)	5.7	5.5	0.3	5.2	9.7
GDP per capita 2015 e (USD)	51 424	42 159	51 068	76 266	48 966
Gross box office 2015 (M USD)	175.0	99.6	11.8	152.9	215.5
Admissions 2015 (million)	13.8	8.7	1.4	12.0	17.0
Average ticket price 2015 (USD)	12.7	11.4	8.3	12.7	12.6
Average admissions per capita 2015	2.4	1.6	4.3	2.3	1.7
Screens 2015 e (1)	432	311	40	434	802
Digital screens 2015 (2)	427	311	39	433	790
Digital 3D screens 2015 (2)	255	224	30	298	551
National market shares 2015 e	29.8%	29.9%	4.6%	20.5%	20.7%

(1) National data source (2) Source: MEDIA Salles

Number of feature films produced by Nordic countries (1) | 2011-2015

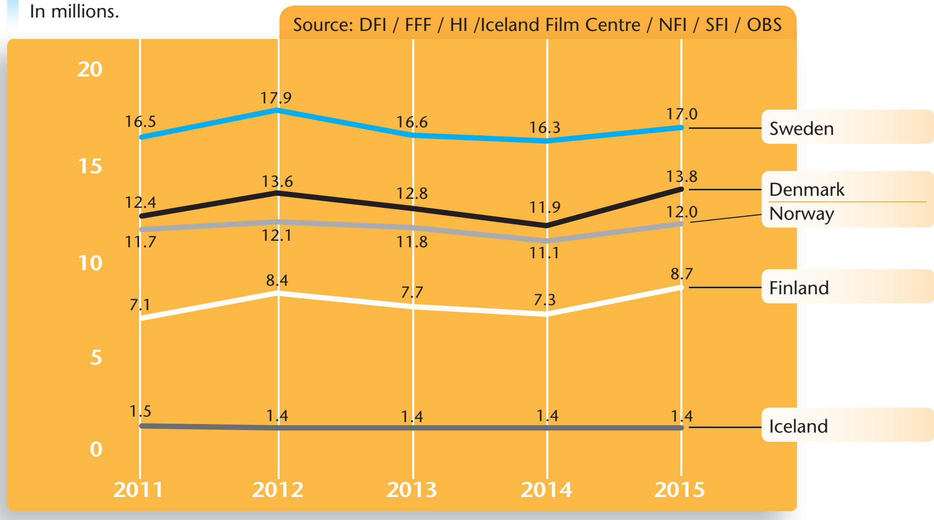
In units.



(1) Including minority co-productions and documentaries.

Admissions in Nordic countries | 2011-2015

In millions.



Top 10 films by admissions in Sweden | 2015

	Original title	Country of origin	Director	Distributor	Admissions
1	Spectre	GB inc/US	Sam Mendes	SF Film	839 669
2	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Walt Disney	830 235
3	Minions	US	K. Balda, P. Coffin	UIP	658 244
4	En underbar jävla jul (Holy Mess)	SE	Helena Bergström	SF Film	600 570
5	Jurassic World	US/CN	Colin Trevorrow	UIP	596 004
6	Fifty Shades of Grey	US	Sam Taylor-Johnson	UIP	524 952
7	Inside Out	US	P. Docter, R. Carmen	Walt Disney	474 262
8	The Hunger Games: Mockingjay - Part 2	US/DE	Francis Lawrence	Nordisk Film	464 806
9	Furious Seven	US/JP/CN	James Wan	UIP	439 444
10	En man som heter Ove (A Man Called Ove)	SE/NO	Hannes Holm	Nordisk Film	429 028

Source: Swedish Film Institute

Top 10 films by admissions in Denmark | 2015

	Original title	Country of origin	Director	Distributor	Admissions
1	Spectre	GB inc/US	Sam Mendes	SF Film	897 834
2	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Walt Disney	530 130
3	Klovn Forever	DK	Mikkel Nørgaard	Nordisk Film Distr.	512 056
4	Inside Out	US	P. Docter, R. Carmen	Walt Disney	495 208
5	Jurassic World	US/CN	Colin Trevorrow	UIP	471 294
6	Minions	US	K. Balda, P. Coffin	UIP	456 182
7	Fifty Shades of Grey	US	Sam Taylor-Johnson	UIP	387 558
8	Furious Seven	US/JP/CN	James Wan	UIP	371 828
9	Mænd & høns (Men % Chicken)	DK/DE	Anders Thomas Jensen	Walt Disney	358 568
10	Min søsters børn og guldgraverne	CA/DK	Niels Nørløv Hansen	All Right Film	324 765

Source: Danmark Statistics / DFI

Top 10 films by admissions in Norway | 2015

	Original title	Country of origin	Director	Distributor	Admissions
1	Bølgen (The Wave)	NO	Roar Uthaug	Nordisk	832 706
2	Spectre	GB inc/US	Sam Mendes	SF Norway	688 327
3	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Walt Disney	473 114
4	Minions	US	K. Balda, P. Coffin	UIP	457 166
5	Furious Seven	US/JP/CN	James Wan	UIP	423 724
6	Jurassic World	US/CN	Colin Trevorrow	UIP	411 991
7	Fifty Shades of Grey	US	Sam Taylor-Johnson	UIP	321 548
8	Inside Out	US	P. Docter, R. Carmen	Walt Disney	285 341
9	Julekongen (The Christmas King…)	NO	Thale Persen	Nordisk	271 393
10	The Hunger Games: Mockingjay - Part 2	US/DE	Francis Lawrence	Nordisk	270 917

Source: Film og Kino

Top 10 films by admissions in Finland | 2015

	Original title	Country of origin	Director	Distributor	Admissions
1	Spectre	GB inc/US	Sam Mendes	FS Film	646 702
2	Luokkakokous (Reunion)	FI	Taneli Mustonen	Nordisk Film	505 376
3	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Walt Disney	424 707
4	Minions	US	K. Balda, P. Coffin	Finnkino	403 526
5	Napapiirin sankarit 2 (Lapland Odyssey 2)	FI	Teppo Airaksinen	Nordisk Film	378 533
6	Risto Räppääjä ja Sevillan saituri	FI	Timo Koivusalo	Walt Disney	315 117
7	Inside Out	US	P. Docter, R. Carmen	Walt Disney	251 322
8	Kätilö (The Midwife)	FI/LT	Antti Jokinen	Nordisk Film	226 203
9	Furious Seven	US/JP/CN	James Wan	Finnkino	226 068
10	Onnelin ja Annelin talvi	FI	Saara Cantell	Nordisk Film	217 263

Source: Finnish Film Foundation

Baltics and Central Europe

	Czech Republic	Estonia	Hungary	Latvia	Lithuania	Slovenia	Slovakia
Population 2015 [e] (million)	10.5	1.3	9.8	2.0	2.9	2.1	5.4
GDP per capita 2015 [e] (USD)	17 330	17 425	12 021	13 729	14 318	20 712	15 893
Gross box office 2015 (M USD)	67.9	17.3	62.8	17.6	17.1	11.5	26.3
Admissions 2015 (million)	13.0	3.1	13.0	2.4	3.3	2.1	4.6
Average ticket price 2015 (USD)	5.2	5.6	4.8	7.5	5.1	5.5	5.7
Average admissions per capita 2015	1.2	2.4	1.3	1.2	1.1	1.0	0.9
Screens 2015 [e (1)]	689	42	330	58	84	123	226
Digital screens 2015 [(2)]	467	56	315	57	58	95	177
Digital 3D screens 2015 [(2)]	280	27	188	35	25	42	102
Films produced 2015	56	25	21	17	9	15	28
National market shares 2015 [e]	18.4%	11.3%	4.2%	4.4%	13.8%	2.4%	6.7%

(1) National data source (2) Source: MEDIA Salles

Top 10 films by admissions in the Czech Republic | 2015

	Original title	Country of origin	Director	Distributor	Admissions
1	Minions	US	Kyle Balda, Pierre Coffin	CinemArt	830 984
2	Fifty Shades of Grey	US	Sam Taylor-Johnson	CinemArt	557 291
3	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Falcon	478 261
4	Spectre	GB inc/US	Sam Mendes	Forum Film	420 420
5	Hotel Transylvania 2	US	Genndy Tartakovsky	Falcon	344 981
6	Jurassic World	US/CN	Colin Trevorrow	CinemArt	344 871
7	Avengers: Age of Ultron	US	Joss Whedon	Falcon	338 170
8	Furious Seven	US/JP/CN	James Wan	CinemArt	309 864
9	Inside Out	US	P. Docter, R. Carmen	Falcon	294 883
10	The Martian	US/GB	Ridley Scott	CinemArt	289 146

Source: Czech State Cinematography Fund / Unie Filmovvych Distributoru

Top 10 films by admissions in Hungary | 2015

	Original title	Country of origin	Director	Distributor	Admissions
1	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Forum	866 357
2	Minions	US	Kyle Balda, Pierre Coffin	UIP-Dunafilm	736 934
3	Jurassic World	US/CN	Colin Trevorrow	UIP-Dunafilm	486 791
4	Furious Seven	US/JP/CN	James Wan	UIP-Dunafilm	405 921
5	Avengers: Age of Ultron	US	Joss Whedon	Forum	385 768
6	Fifty Shades of Grey	US	Sam Taylor-Johnson	UIP-Dunafilm	375 863
7	Hotel Transylvania 2	US	Genndy Tartakovsky	Intercom	304 146
8	The Martian	US/GB	Ridley Scott	Intercom	303 294
9	Spy	US	Paul Feig	Intercom	271 951
10	Taken 3	FR	Olivier Megaton	Freeman Entertainment	269 313

Source: National Film Office

Top 10 films by admissions in Slovakia | 2015

	Original title	Country of origin	Director	Distributor	Admissions
1	Minions	US	Kyle Balda, Pierre Coffin	Barracuda Movie	365 184
2	Fifty Shades of Grey	US	Sam Taylor-Johnson	Barracuda Movie	239 521
3	Hotel Transylvania 2	US	Genndy Tartakovsky	ITA Film	161 466
4	Spectre	GB inc/US	Sam Mendes	Forum Film	149 312
5	Furious Seven	US/JP/CN	James Wan	Barracuda Movie	144 468
6	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Saturn Entertainment	130 976
7	Inside Out	US	P. Docter, R. Carmen	Saturn Entertainment	122 521
8	Jurassic World	US/CN	Colin Trevorrow	Barracuda Movie	115 059
9	The Hunger Games: Mockingjay - Part 2	US/DE	Francis Lawrence	Forum Film	102 526
10	Avengers: Age of Ultron	US	Joss Whedon	Saturn Entertainment	90 344

Source: Slovak Film Institute / UFD

South-Eastern Europe

	Armenia	BA (1)	Bulgaria	Croatia	Cyprus	Greece	FYROM (2)	Romania
Population 2015 e (million)	3.0	3.8	7.2	4.2	0.8	10.8	2.1	19.9
GDP per capita 2015 e (USD)	3 547	4 030	6 582	11 551	21 531	17 657	4 867	8 807
Gross box office 2015 (M USD)	0.9	2.6	26.0	16.7	5.9	70.4	1.4 (3)	30.8
Admissions 2015 (million)	0.2	0.9	5.3	3.9	0.7	9.8	0.4 (3)	11.2
Average ticket price 2015 (USD)	4.9	2.8	4.9	4.2	8.0	7.2	3.8 (3)	2.8
Average admissions per capita 2015	0.1	0.2	0.7	0.9	0.9	0.9	0.2 (3)	0.6
Screens 2015 e (4)	20	34	201	158	35	554	~	339
Digital screens 2015 (5)	20	22	208	152	35	340	~	317
Digital 3D screens 2015 (5)	20	~	155	90	13	130	~	182
Films produced 2015	9	11	25	15	5	38	11 (3)	43
National market shares 2015 e	<5%	1.0%	1.8%	1.9%	~	8.4%	9.8% (3)	1.9%

(1) Bosnia-Herzegovina (2) Former Yugoslav Republic of Macedonia (3) 2014 (4) National data source (5) MEDIA Salles

Top 10 films by admissions in Greece | 2015

	Original title	Country of origin	Director	Distributor	Admissions
1	Spectre	GB inc/US	Sam Mendes	Feelgood	483 098
2	Furious Seven	US/JP/CN	James Wan	UIP	370 599
3	Fifty Shades of Grey	US	Sam Taylor-Johnson	UIP	370 042
4	Enas Allos Kosmos (Worlds Apart)	GR	C. Papakaliatis	Village	312 373
5	Inside Out	US	P. Docter, R. Carmen	Feelgood	309 759
6	Minions	US	K. Balda, P. Coffin	UIP	289 550
7	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Feelgood	226 852
8	Avengers: Age of Ultron	US	Joss Whedon	Feelgood	224 334
9	The Imitation Game	US/GB inc	Morten Tyldum	Spentzos Film	185 827
10	Jurassic World	US/CN	Colin Trevorrow	UIP	181 987

Source: Greek Film Centre

Top 10 films by admissions in Romania | 2015

	Original title	Country of origin	Director	Distributor	Admissions
1	Furious Seven	US/JP/CN	James Wan	Ro-Image 2000	627 016
2	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Forum Film Romania	441 775
3	Minions	US	K. Balda, P. Coffin	Ro-Image 2000	431 201
4	Spectre	GB inc/US	Sam Mendes	Forum Film Romania	328 802
5	Fifty Shades of Grey	US	Sam Taylor-Johnson	Ro-Image 2000	305 995
6	Jurassic World	US/CN	Colin Trevorrow	Ro-Image 2000	229 305
7	Avengers: Age of Ultron	US	Joss Whedon	Forum Film Romania	229 122
8	Hotel Transylvania 2	US	Genndy Tartakovsky	Intercomfilm	216 441
9	The Martian	US/GB	Ridley Scott	Odeon Cineplex	200 051
10	Taken 3	FR	Olivier Megaton	Freeman Entertain.	192 050

Source: Centrul National al Cinematografiei

Top 10 films by admissions in Bulgaria | 2015

	Original title	Country of origin	Director	Distributor	Admissions
1	Furious Seven	US/JP/CN	James Wan	Forum Film	341 914
2	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Forum Film	285 160
3	Minions	US	K. Balda, P. Coffin	Forum Film	263 597
4	Fifty Shades of Grey	US	Sam Taylor-Johnson	Forum Film	183 833
5	Hotel Transylvania 2	US	Genndy Tartakovsky	Aleksandra	162 336
6	Spectre	GB inc/US	Sam Mendes	Forum Film	147 376
7	Jurassic World	US/CN	Colin Trevorrow	Forum Film	142 218
8	Inside Out	US	P. Docter, R. Carmen	Forum Film	132 677
9	Avengers: Age of Ultron	US	Joss Whedon	Forum Film	115 352
10	The Hunger Games: Mockingjay - P. 2	US/DE	Francis Lawrence	Forum Film	111 754

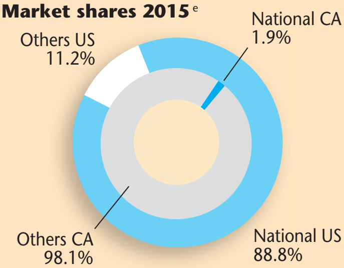
Source: Bulgarian National Film Center

North America

	North America	US	Canada
Population 2015 e (million)	357.2	321.4	35.8
GDP per capita 2015 e (USD)	54 705	55 904	43 935
Gross box office 2015 e (M USD) (1)	11 100	10 093	998
Admissions 2015 e (million) (1)	1 320	1 197	118
Average ticket price 2015 e (USD)	8.4	8.4	8.4
Average admissions per capita 2015 e	3.7	3.7	3.3
Screens 2015 e	43 661	40 547	3 114
Digital screens 2015 e	42 552	39 438	3 114
Digital 3D screens 2015 e	16 441	15 077	1 364

(1) North American figures differ slightly from US and CA combined as different sources were used.

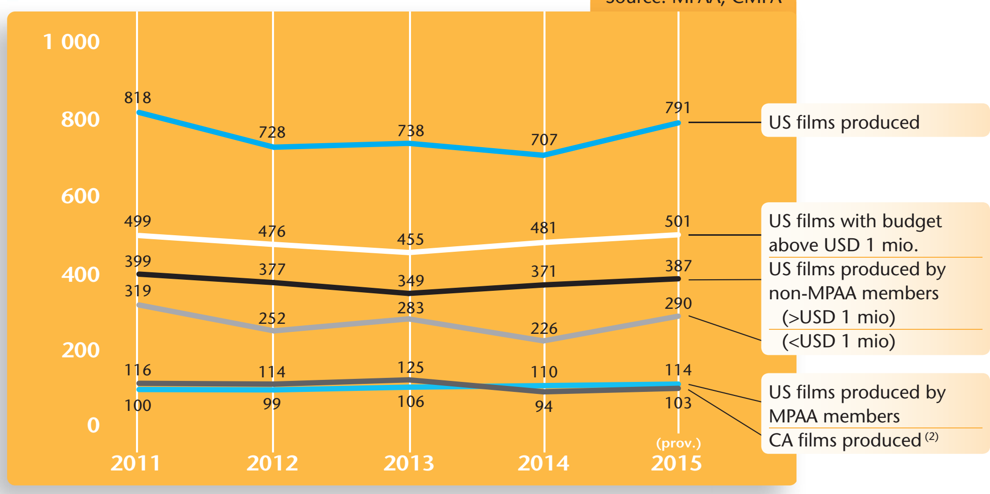
Market shares 2015 e



Number of US (1) and Canadian feature films produced | 2011-2015

In units.

Source: MPAA, CMPA

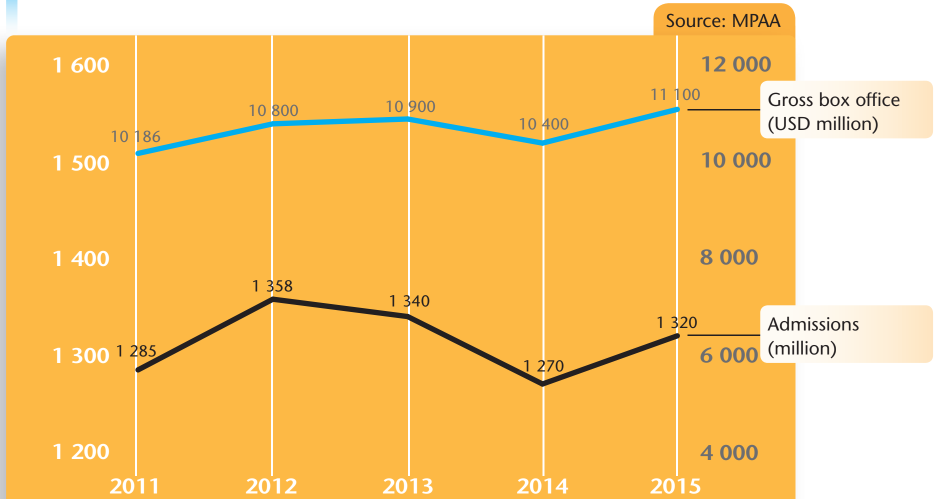


(1) English-language films (Including co-productions). Does not include documentaries, films with budgets below USD 200 000, student films and works not intended for theatrical release.

(2) Restated series. Based on fiscal year ending in March of the stated year.

Admissions and gross box office in the US & Canada | 2011-2015

Source: MPAA



Top 20 films by admissions in North America | 2015 [e]

Estimated admissions based on GBO and average ticket price of USD 8.43.

	Original title	Country of origin	Director	Distributor	Admissions [e]
1	Jurassic World	US/CN	Colin Trevorrow	Universal	77 374 926
2	Star Wars: The Force Awakens	US	J.J. Abrams	Disney	77 338 941
3	Avengers: Age Of Ultron	US	Joss Whedon	Disney	54 449 095
4	Inside Out	US	Pete Docter	Disney	42 284 900
5	Furious 7	US/JP/CN	James Wan	Universal	41 875 091
6	American Sniper	US	Clint Eastwood	Warner Bros.	41 349 228
7	Minions	US	P. Coffin, K. Balda	Universal	39 863 081
8	Hunger Games: Mockingjay Part 2, The	US/DE	Francis Lawrence	Lionsgate	31 977 357
9	Martian, The	US	Ridley Scott	20th Century Fox	26 731 359
10	Cinderella	US/GB	Kenneth Branagh	Disney	23 861 370
11	Spectre	GB inc/US	Sam Mendes	Sony	23 381 090
12	Mission: Impossible Rogue Nation	US/HK/CN	C. McQuarrie	Paramount	23 136 700
13	Pitch Perfect 2	US	Elizabeth Banks	Universal	21 861 949
14	Ant-Man	US	Peyton Reed	Disney	21 376 295
15	Home	US	Tim Johnson	20th Century Fox	21 043 595
16	Hotel Transylvania 2	US	Genndy Tartakovsky	Sony	19 984 700
17	Fifty Shades Of Grey	US	Sam Taylor-Johnson	Universal	19 711 415
18	SpongeBob Movie: Sponge Out Of…	US	Paul Tibbitt	Paramount	19 334 998
19	Straight Outta Compton	US	F. Gary Gray	Universal	19 121 920
20	San Andreas	US/AU/CA	Brad Peyton	Warner Bros.	18 409 351

Source: comScore

Distribution and exhibition

Action and sci-fi franchises boosted the North American box office, which recovered after two consecutive years of declining attendance. The 1 320 million tickets sold in 2015 (a 3.9% increase on 2014) generated USD 11.1 billion in revenues (6.7% more than in the previous year). In the US, the 20 highest-grossing films accounted for more than half of the admissions in 2015 – a concentration well above average; with *Jurassic World* and *Star Wars: Episode VII*, joining the select group of top 10 grossers of the century in the States. The market share of domestic productions in the US dropped (88.8% in 2015), mostly due to the success of British and Australian films like *Spectre* or *Mad Max*.

Although quite marginal, the number of screens grew in 2015. In the US, a meagre 1% increase on 2014 confirmed a stagnating trend - unsurprising in a consolidated market. In Canada, growth was even lower (0.23% on 2014), putting an end to a 5-year surge which has represented a hike of 12% in the number of screens over that period. While Canada completed its digital roll-out in 2014, the US unveiled more than 1 000 d-screens in 2015, increasing its penetration rate up to 97.3%. 3D screens have definitely consolidated, with zero-growth in Canada and two consecutive years of growth at a rate of 2% year-on-year in the US.

Production and funding

The US produced 791 films in 2015 – 84 more than in the previous year. However, most of the surge was due to a rise in the number of off-Hollywood low-budget productions (290 in 2015), which came back to normal levels after plunging in 2014. Production volume within other budget categories grew as well, including MPAA films (114 in 2015), confirming a timid, yet steady upward trend in recent years. With total budgets amounting to CAD 349 million, Canada produced 103 films in fiscal year 2014-2015, 9 more than in the previous exercise, but below the average in recent years. One third of them were French-language productions with an overall budget of CAD 97 million.

The exodus of film and TV production from California in recent years, fuelled by attractive incentives in other states and abroad, made some fear that Los Angeles was doomed to become the new Detroit. 2015 saw shoots coming back to the Golden State, following the tripling of its tax incentive (up to USD 330 million a year) in 2014 to stem the haemorrhage.

The upward trend of TV drama production (US broadcasters aired a record of more than 400 series in 2015, 48 more than the previous year), along with a flight of talent and crews from film to TV drama show the current shifting of the centre of gravity in fiction production.

Source: MPAA, CMPA, *Screen International, Variety,* Telefilm Canada, Bloomberg, OBS

Latin America

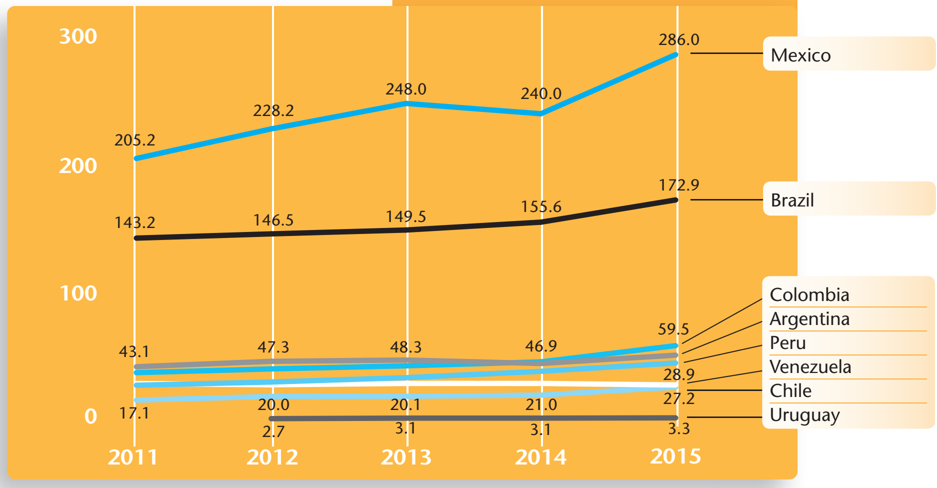
	Argentina	Brazil	Chile	Colombia	Mexico	Peru	Uruguay	Venezuela
Population 2015 (million)	43.1	204.5	18.0	48.2	121.1	31.9	3.4	30.9
GDP per capita 2015 (M USD)	13 428.3	8 802.2	13 330.9	5 687.5	9 592.1	5 637.8	16 091.9	4 262.5
Gross box office 2015 (M USD) e	238.1	705.4	128.4	179.4	843.9	143.8	16.8	59 (1)
Admissions 2015 (million)	52.1	172.9	27.2	59.5	286.0	46.0	3.3	28.9
Average ticket price 2015 (USD)	4.6	4.1	4.7	3.0	3.0	3.1	5.1	2.0 (1)
Average admissions per capita 2015 e	1.2	0.8	1.5	1.2	2.4	1.4	1.0	0.9
Screens 2015	912	3013	359	935	5977	571	109	473
Digital screens 2015 e	689	2775	359	913	5678	571	~	335
Digital 3D screens 2015 e	390	1174	146	410	3665	139	~	121
National market shares 2015	14.5%	13.0%	3.8%	5.8%	6.1%	7.0%	1.3%	3.0%

(1) 2014

Admissions in Latin America | 2011-2015

In millions.

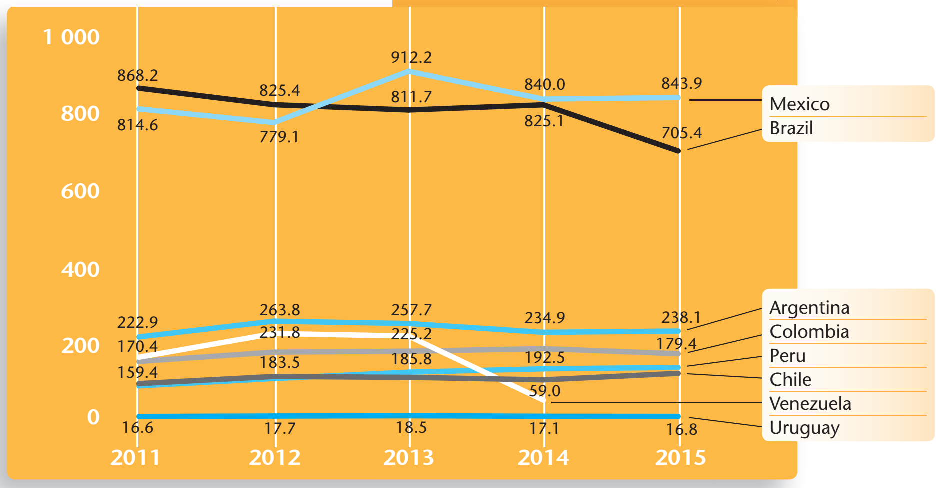
Source: OIA (INCAA, ANCINE, CNCA, DCMC, INCINE, CONACINE, ICAU and CNAC)



Gross box office in Latin America | 2011-2015 e

In USD million.

Source: OIA (INCAA, ANCINE, CNCA, DCMC, INCINE, CONACINE, ICAU and CNAC)



Overview

Latin America as a whole, as well as most countries analysed, experienced a significant increase of production and attendance levels. In 2015, the 8 countries analysed produced 11.9% more films than the previous year (534 in 2015). In turn, admissions grew by 16.2% year on year, reversing a downward trend in evidence since 2011; the surge was particularly acute in Uruguay and Venezuela with a year on year hike of 29.4% and 26.8% respectively, although Colombia and Chile also rose above average, showing that markets other than the traditional big 3 (Mexico, Brazil and Argentina) are developing much quicker than these countries.

The evolution was much more timid in terms of theatrical infrastructure. While the overall number of screens grew by 4.7% (12 349 in 2015), many theatres shut down in Chile and Venezuela, probably as a result of the last steps towards full digitization. All in all, the penetration rate in the countries covered grew dramatically from 78% in 2014 to 93% in 2015.

Although there is not much circulation of non-national Latin American films in the region, let alone a Pan-Latin-American cinema, a constant throughout these markets can be observed: the prevalence of American productions at the box office.

Mexico

After a slight decrease in 2014, Mexican theatrical attendance grew by 19.2% year on year, up to 286 million admissions, a high point this century. In turn, attendance for Mexican films sank to 17.5 million admissions (6.1% of the market), following three years of double-digit market share for domestic films. In a box office list topped by Hollywood productions, we have to go down to #19 to find *Un gallo con muchos huevos,* the highest grossing domestic production with 4.1 million admissions.

2015 saw production volume breaking the historical record of the golden years of Mexican cinema in the 1950's with 140 features produced – 10 more than the previous year and twice the figure of 2011 after 4 years of skyrocketing growth. 44 of these were international co-productions, mostly with Spain and the US. However, only 80 Mexican films were released in 2015, 40% by the National Cinema Centre.

Brazil

The slowing-down economy, political scandals and social unrest do not seem to have taken a toll on the theatrical market; the 172.9 million admissions in 2015 (11.1% more than the previous year) show a recovery after the stagnation which followed the attendance boom at the beginning of the decade. Brazilian films accounted for 13% of a market monopolized by American production, a result well in line with recent figures. Only one local production *Loucas pra casar* made it into the top 10 box office list with 3.7 million admissions.

With 235 new screens unveiled in 2015, the country made an important step towards full-digitation, going from a 65% penetration rate in 2014 to 92% in 2015. The theatrical market still has a lot of scope for growth as admissions per capita remain one of the lowest in the continent (0.8 in 2015).

2015 saw production volume increase by 12.3% year on year, up to 128 films. National Film Agency ANCINE launched a BZR 5 million scheme to fund Brazilian minority co-productions with 19 countries in the region.

Argentina

The theatrical market had been on the up for 5 years before it dropped in 2014 – just a bump on the road in view of the 14.3% increase in 2015, up to 52.1 million admissions, setting a new milestone in recent history. However Argentina still lies slightly behind the average admissions per capita in the region.

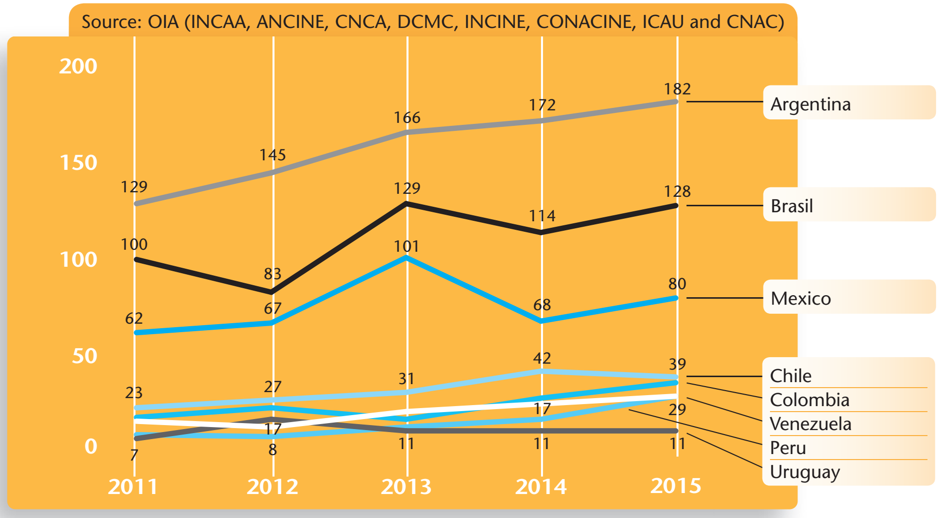
Domestic productions accounted for 14.5% of admissions in 2015; a figure which, although a drop on the previous year, confirms three consecutive years of double-digit market shares. Local production *El Clan* was the only one to make it into the top 10 box office list otherwise full of American blockbusters. Argentina produced 182 feature films in 2015, way more than any other Latin American country (a 5.8% increase on 2014).

In terms of theatrical infrastructure, it seems most efforts were put into the digital roll-out, with the country passing from 50% penetration rate in 2014 to 76% the following year; yet well below the average in the region. In addition, 45 new screens were unveiled in 2015 (a 5.1% year on year hike).

Source: Observatório Iberoamericano do Audiovisual, INCAA, IMCINE, ANCINE, *Screen International,* Variety, OBS

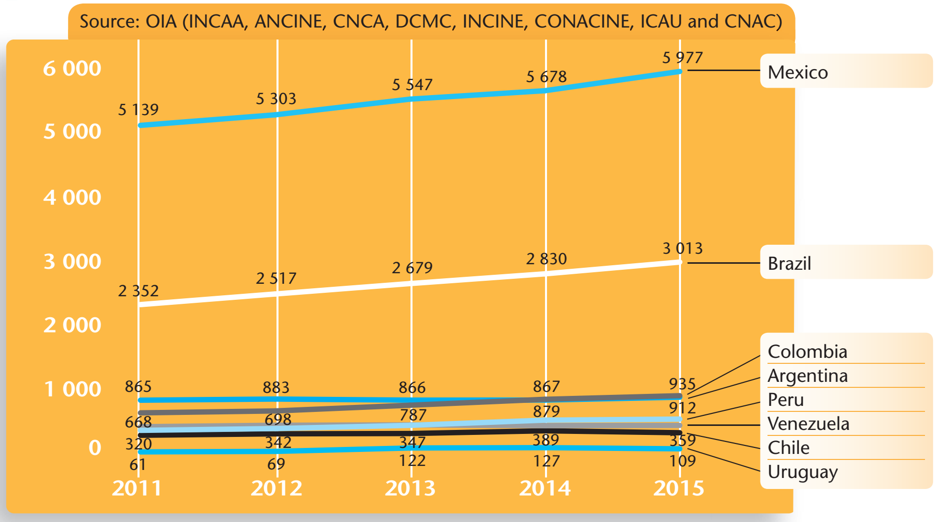
Number of national feature films released in Latin America | 2011-2015

In units.



Number of screens in Latin America | 2011-2015

In units.



Top 10 films by admissions in Argentina | 2015

	Original title	Country of origin	Director	Admissions
1	Minions	US	Kyle Balda, Pierre Coffin	4 947 687
2	Furious Seven	US/JP/CN	James Wan	3 384 173
3	Inside Out	US	Pete Docter, Ronnie del Carmen	2 854 056
4	El Clan	AR/ES	Pablo Trapero	2 643 487
5	Jurassic World	US/CN	Colin Trevorrow	2 043 230
6	Avengers: Age of Ultron	US	Joss Whedon	1 860 634
7	Hotel Transylvania 2	US	Genndy Tartakovsky	1 380 265
8	Fifty Shades of Grey	US	Sam Taylor-Johnson	1 243 976
9	Pixels	US/CN/FR	Chris Columbus	1 039 133
10	The Hunger Games: Mockingjay - Part 2	US/DE	Francis Lawrence	1 006 660

Source: OIA, INCAA

Top 10 films by admissions in Brazil | 2015

	Original title	Country of origin	Director	Admissions
1	Avengers: Age of Ultron	US	Joss Whedon	10 129 071
2	Furious Seven	US/JP/CN	James Wan	9 857 946
3	Minions	US	Kyle Balda, Pierre Coffin	8 912 034
4	Fifty Shades of Grey	US	Sam Taylor-Johnson	6 685 086
5	Jurassic World	US/CN	Colin Trevorrow	6 356 559
6	Star Wars: Episode VII - The Force Awakens	US	J. J. Abrams	5 558 321
7	The Hunger Games: Mockingjay - Part 2	US/DE	Francis Lawrence	4 390 141
8	Cinderella	US/GB	Kenneth Branagh	4 199 697
9	Inside Out	US	Pete Docter, Ronnie del Carmen	3 780 325
10	Loucas pra Casar	BR	Roberto Santucci	3 726 497

Source: OIA, ANCINE

Top 10 films by admissions in Chile | 2015

	Original title	Country of origin	Director	Admissions
1	Minions	US	Kyle Balda, Pierre Coffin	2 076 255
2	Inside Out	US	Pete Docter, Ronnie del Carmen	1 569 389
3	Furious Seven	US/JP/CN	James Wan	1 530 969
4	Avengers: Age of Ultron	US	Joss Whedon	1 217 500
5	The 33	US/ CL	Patricia Riggen	1 046 423
6	Jurassic World	US/CN	Colin Trevorrow	1 025 374
7	San Andreas	US/AU/CA	Brad Peyton	990 033
8	Hotel Transylvania 2	US	Genndy Tartakovsky	934 463
9	Star Wars: Episode VII - The Force Awakens	US	J. J. Abrams	800 145
10	The Hunger Games: Mockingjay - Part 2	US/DE	Francis Lawrence	627 722

Source: OIA, CNCA

Top 10 films by admissions in Mexico | 2015

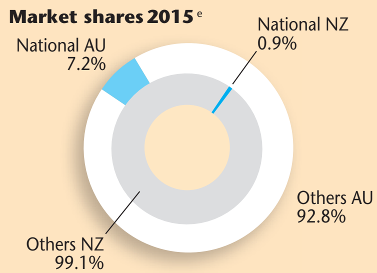
	Original title	Country of origin	Director	Admissions
1	Minions	US	Kyle Balda, Pierre Coffin	16 145 698
2	Avengers: Age of Ultron	US	Joss Whedon	15 735 532
3	Furious Seven	US/JP/CN	James Wan	15 534 041
4	Jurassic World	US/CN	Colin Trevorrow	13 848 736
5	Inside Out	US	Pete Docter, Ronnie del Carmen	10 838 439
6	Hotel Transylvania 2	US	Genndy Tartakovsky	9 815 960
7	San Andreas	US/AU/CA	Brad Peyton	9 561 650
8	The Hunger Games: Mockingjay - Part 2	US/DE	Francis Lawrence	7 001 545
9	Star Wars: Episode VII - The Force Awakens	US	J. J. Abrams	6 736 185
10	The SpongeBob Movie: Sponge Out of Water	US	Paul Tibbitt	5 542 354

Source: OIA, INCINE

Australia and New Zealand

	Australia	New Zealand
Population 2015 e (million)	24.0	4.6
GDP per capita 2015 e (USD)	51 641.6	36 963.5
Gross box office 2015 (M USD)	888.0	131.4
Admissions 2015 (million)	90.2	15.5
Average ticket price 2015 (USD)	9.8	12.5
Average admissions per capita 2015	3.8	8.5
Screens 2015	2 041	408
Digital screens 2015	1 160	408
Digital 3D screens 2015	918	178

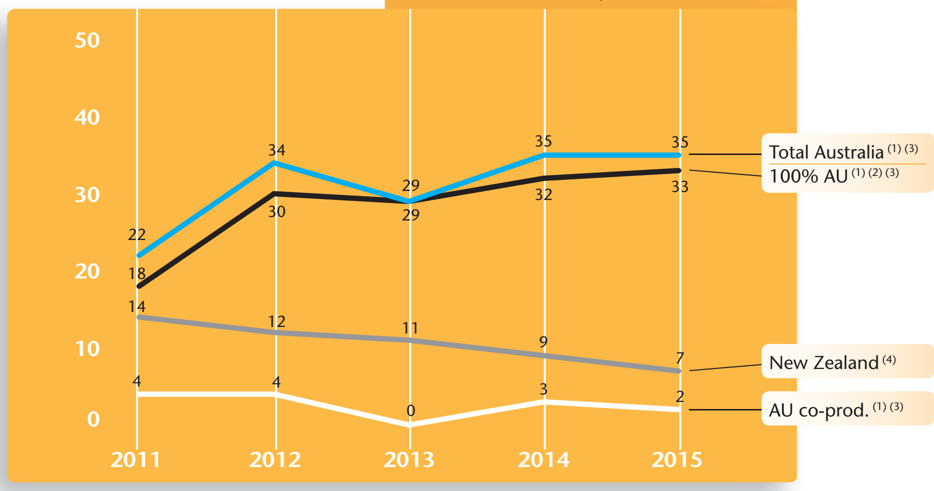
Market shares 2015 e



Number of Australian and New Zealand feature films produced | 2011-2015

In units.

Source: Screen Australia, NZ Film Commission



(1) Films with budgets below AUD 0.5 M are only included if they had a theatrical release or major festival screening.

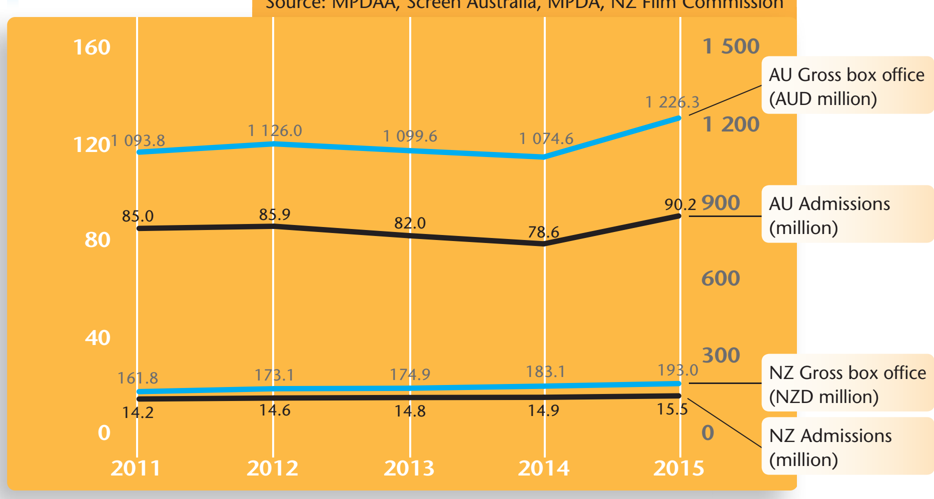
(2) Includes films under Australian creative control that were 100% foreign financed.

(3) Refers to the fiscal year ending that year.

(4) Feature fiction films released.

Admissions and gross box office | 2011-2015

Source: MPDAA, Screen Australia, MPDA, NZ Film Commission



Top 10 films by admissions in Australia | 2015 e

Estimated admissions based on average ticket price of AUD 13.6.

	Original title	Country of origin	Director	Distributor	Admissions e
1	Star Wars: Episode VII - The Force…	US	J. J. Abrams	Walt Disney	4 616 558
2	Jurassic World	US/CN	Colin Trevorrow	Universal	3 892 518
3	Furious 7	US/JP/CN	James Wan	Universal	3 186 551
4	Avengers: Age of Ultron	US	Joss Whedon	Walt Disney	2 949 492
5	Spectre	GB inc/US	Sam Mendes	Sony Pictures	2 542 539
6	Minions	US	Kyle Balda, Pierre Coffin	Universal	2 419 549
7	Inside Out	US	P. Docter, R. Carmen	Walt Disney	2 290 014
8	The Hunger Games: Mockingjay - P. 2	US / DE	Francis Lawrence	Roadshow	2 132 552
9	Pitch Perfect 2	US	Elizabeth Banks	Universal	2 068 078
10	The Martian	US/GB	Ridley Scott	Fox	2 016 761

Source: MPDAA

Top 10 films by admissions in New Zealand | 2015 e

Estimated admissions based on average ticket price of NZD 12.5.

	Original title	Country of origin	Director	Distributor	Admissions (1) e
1	Star Wars: Episode VII - The Force… (2)	US	J. J. Abrams	Walt Disney	732 346
2	Furious 7	US/JP/CN	James Wan	Param/Universal	660 586
3	Jurassic World	US/CN	Colin Trevorrow	Param/Universal	622 425
4	Avengers: Age of Ultron	US	Joss Whedon	Walt Disney	551 036
5	Minions	US	Kyle Balda, Pierre Coffin	Param/Universal	487 428
6	Spectre	GB inc/US	Sam Mendes	Sony Pictures	469 534
7	The Hunger Games: Mockingjay - P. 2	US/DE	Francis Lawrence	Roadshow	400 535
8	Inside Out	US	P. Docter, R. Carmen	Walt Disney	394 828
9	Pitch Perfect 2	US	Elizabeth Banks	Paramount	384 634
10	The Martian	US/GB	Ridley Scott	20th Cent. Fox	315 131

(1) Lifetime admissions as at 31st December 2015. (2) Still on release in 2016.

Source: MPDA

Distribution and exhibition

2015 saw the inversing of a downward attendance trend in Australia during this decade, with 90.2 million tickets sold (a 14.7% increase on 2014). Revenues grew in an almost identical proportion, up to all-time record of AUD 1 226.3 million, in part due to the appeal of local productions, which got 7.2% of the GBO, a peak since 2001. Two Australian films, *Mad Max: Fury Road* and *The Dressmaker*, made it into the top 20.

In turn, New Zealand continued its slow-pace hike in both attendance and GBO, up to 15.5 million admissions and NZD 193 million grossing in 2015. The top 10 box office chart included the same Hollywood blockbusters, along with *Spectre*, in both countries. With New Zealand fully digitized since 2014 and Australia about to be, the number of screens grew marginally in both countries.

Production and funding

On a par with the previous year, Australia produced 35 feature fiction films in 2015. In spite of a much lower inward production volume – only 14 foreign productions came to shoot down under in 2015 compared to 24 in 2014, spend in these productions almost doubled on 2014 (AUD 397 million in 2015), making up for the dramatic drop of spend in domestic production (by 60% on 2014, down to AUD 121 million). In turn, New Zealand's production volume decreased for the fourth consecutive year, down to 7 films in 2015.

Following 2014's extensive budgetary cuts concerning Screen Australia, the country's film fund, the federal government announced further constraints in 2015, together amounting to AUD 51.9 million to be cut over a 4-year period; In turn, the government earmarked AUD 47.3 million through the location offset to attract foreign productions to shoot in the country for *Alien: Covenant* and *Thor* over the next 2 years. Moreover, Queensland's government unveiled plans to build a 4000-m² soundstage, the largest in the southern hemisphere.

In 2015 Australia inked a co-production treaty with Malaysia, while New Zealand signed one with Poland.

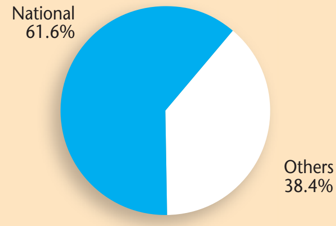
Source: Screen Australia, MPDAA, MPDA, NZ Film Commission, Variety, Screen International, IHS, OBS

People's Republic of China

Population 2015 e	1 375.0 million
GDP per capita 2015 e	8 280.1 USD
Gross box office 2015 e	44 092.04 M CNY (6 813 M USD)
Admissions 2015 e	1 260.0 million
Average ticket price 2015 e	35.0 CNY (5.4 USD)
Average admissions per capita 2015 e	0.9
Screens 2014 | 2015 e	24 607 | 31 627
Digital screens 2014 | 2015 e	24 607 | 28 968 (1)
Digital 3D screens 2014 | 2015 e	21 176 | 25 983 (1)

(1) As of September 2015.

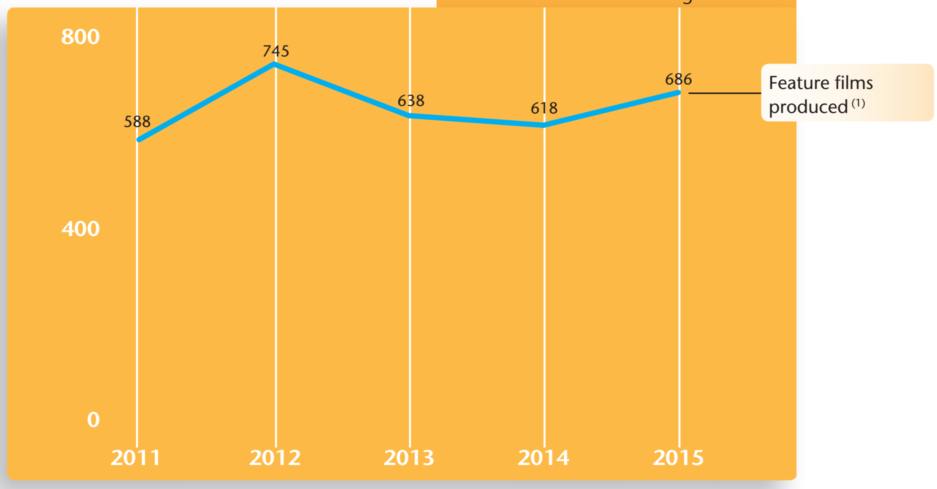
Market shares 2015



Number of feature films produced in China | 2011-2015 e

In units.

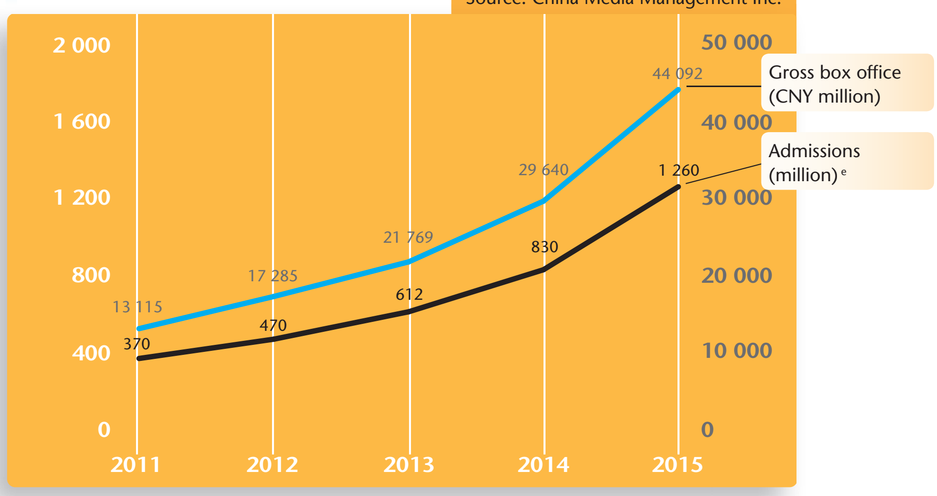
Source: China Media Management Inc.



(1) Does not include films produced outside the official system of script and final print approval.

Admissions and gross box office | 2011-2015

Source: China Media Management Inc.



Top 20 films by admissions in China | 2015

	Original title	Country of origin	Director	Exhibitor	Admissions
1	Monster Hunt	CN/HK	Raman Hui	Edko	63 912 320
2	Furious Seven	US/JP/CN	James Wan	Universal	61 821 626
3	Lost in Hong Kong	HK/CN	Zheng Xu	Multiple	48 455 740
4	Goodbye Mr. Loser	CN	Da-Mo Peng, Fei Yan	Multiple	44 103 778
5	The Ghouls	CN	Wuershan	Multiple	36 860 458
6	Jurassic World	US/CN	Colin Trevorrow	Universal	36 515 082
7	Avengers: Age of Ultron	US	Joss Whedon	Walt Disney	35 132 030
8	Pancake Man	CN	Chengpeng Dong	Multiple	34 861 280
9	Monkey King: Hero is Back	CN	Tian Xiao Peng	Multiple	27 004 001
10	Mission: Impossible - Rogue Nation	US/CN/HK	C. McQuarrie	Paramount	26 122 162
11	The Man from Macau II	CN/HK	Jing Wong	Bona Film	23 970 416
12	Chronicles of the Ghostly Tribe	CN	Chuan Lu	Multiple	19 585 341
13	Terminator Genisys	US	Alan Taylor	Paramount	19 300 255
14	Devil and Angel	CN	Yu Baimei, Chao Deng	Beijing Enlight	19 248 670
15	The Hobbit: The Battle of the Five Armies	US/NZ inc	Peter Jackson	Warner Bros	18 413 934
16	Ant-Man	US	Peyton Reed	Walt Disney	18 176 393
17	Dragon Blade	CN/HK	Daniel Lee	Multiple	17 637 038
18	Wolf Totem	CN/FR	Jean-Jacques Annaud	China Film Group	17 280 555
19	Spectre	GB inc/US	Sam Mendes	Sony	16 771 406
20	San Andreas	US/AU/CA	Brad Peyton	Warner Bros	16 636 457

Source: comScore

Distribution and Exhibition

China broke all its historical records for the second consecutive year; not only did attendance figures peaked at 1.26 billion in 2015, but year-on-year growth was also the highest ever (51.8% on 2014). Equally, box office revenues increased as never before, by 48.8% year on year, amounting to more than CNY 44 bn. As a result, average ticket prices decreased slightly (by 2% on 2014), to CNY 35, confirming a stable 6-year trend.

Although fully digitized since 2014, most indicators suggest that the development of theatrical infrastructure has still plenty of scope for growth; beyond the impressive hike in attendance, 2015 saw outstanding growth of the number of screens, up to 31 627 (a 28.5% year on year increase) – in other words, 7 000 new screens opened during the year (approximately the total number of screens in the UK and Japan combined). The foreseeable hike in purchasing power, along with the ongoing rural exodus and the government's intention to foster internal consumption, mean that it is more than likely that screens will continue to proliferate throughout the country at a double-digit inter-annual growth rate, especially in tier 2 and 3 cities.

With a 61.8% market share by GBO in 2015, the performance of domestic production set another record, albeit close to some of the best results in recent years. As usual, most revenues for foreign films went to action and sci-fi Hollywood blockbusters. Eleven local productions made it into the top 20 and, more importantly, 8 films in that list were international projects with China as major or minor co-producer.

Production and funding

The number of local productions increased by 11% on the previous year in 2015, up to 686, in blatant contrast with the roughly 200 domestic productions actually released. With severe restrictions on the import of foreign films, it is no surprise that co-productions with China have boomed in recent years (mostly with the US, but also with South Korea and a few with Europe), as these movies qualify as Chinese.

2015 saw the introduction of a tax rebate for theatres with a high share of revenues from local productions. In addition, a financial incentive was launched to reward performance of Chinese films abroad. Amidst fresh cheating scandals, China's media regulator (SAPPRFT) unveiled new measures to fight against box office fraud.

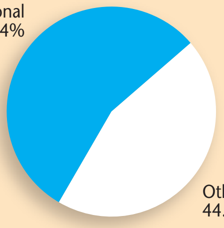
The very much discussed, yet never materialized new film law might be introduced in 2016, as it has been defined as one of the top three priorities of the National People's Congress for the year. This would comprise clear rules on censorship (including a rating system) and financial incentive mechanisms.

Source: Central Media Management Inc., *Variety*, IHS

Japan

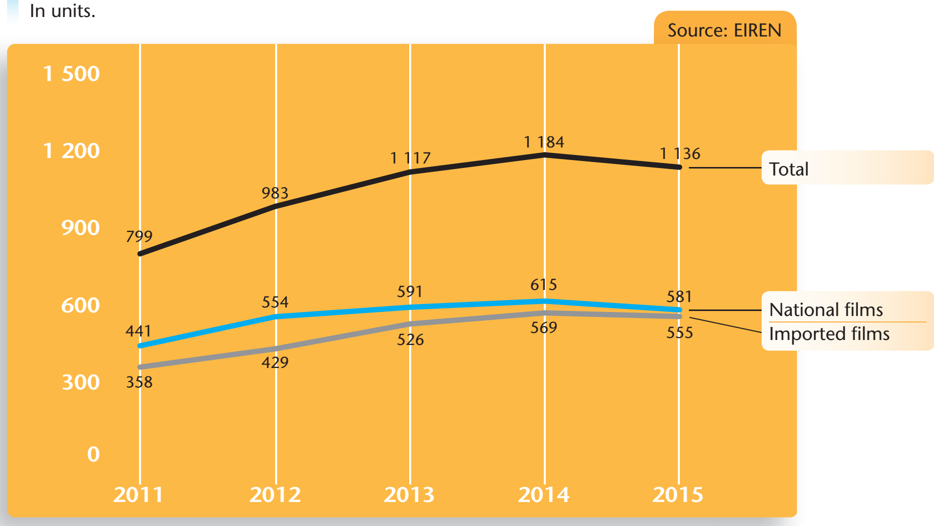
Population 2015 [e]	126.7 million
GDP per capita 2015 [e]	32 480.7 USD
Gross box office 2015	217.1 bn JPY (1.8 bn USD)
Admissions 2015	166.6 million
Average ticket price 2015	1 303 JPY (10.8 USD)
Average admissions per capita 2015	1.3
Screens 2014 | 2015	3 364 | 3 437
Digital screens 2014 | 2015	3 305 | 3 408
Digital 3D screens 2014 | 2015	1 501 | 1 524

Market shares 2015

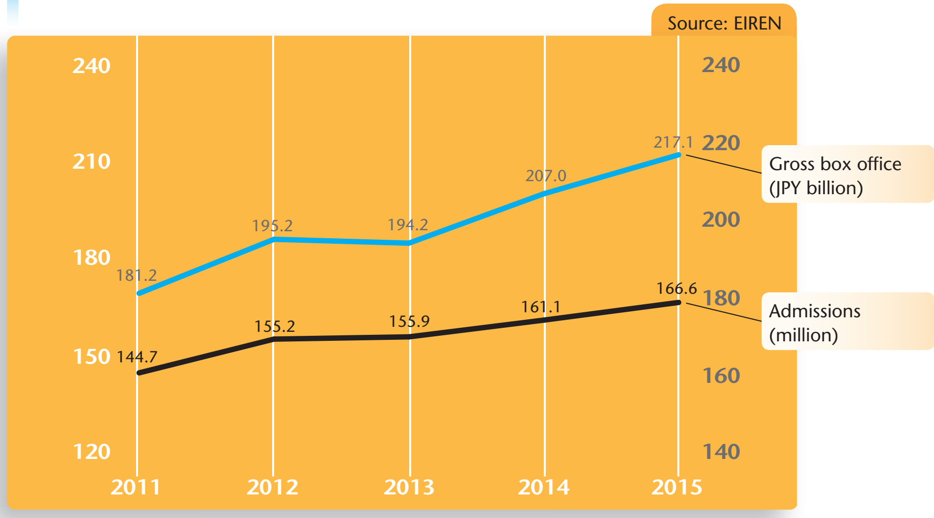


Number of films released in Japan | 2011-2015

In units.



Admissions and gross box office | 2011-2015



Top 20 films by admissions in Japan | 2015 ^e^

Estimated admissions based on average ticket price of JPY 1 303.

	Original title	Country of origin	Director	Distributor	Admissions e
1	Jurassic World	US/CN	Colin Trevorrow	TOHO-TOWA	7 313 891
2	Big Hero 6	US	C. Williams, D. Hall	Walt Disney	7 045 280
3	Yo-kai Watch the Movie: It's the Secret of…	JP	S. Takahashi, S. Ushiro	TOHO	5 986 186
4	The Boy and the Beast	JP	Mamoru Hosoda	TOHO	4 451 266
5	Cinderella	US/GB	Kenneth Branagh	Walt Disney	4 397 544
6	Minions	US	K. Balda, P. Coffin	TOHO-TOWA	3 998 465
7	Mission: Impossible - Rogue Nation	US/CN/HK	C. McQuarrie	Paramount Pict.	3 944 743
8	Hero	JP	Masayuki Suzuki	TOHO	3 584 037
9	Detective Conan: Sunflowers of Inferno	JP	Kobun Shizuno	TOHO	3 438 219
10	Inside Out	US	P. Docter, R. Carmen	Walt Disney	3 100 537
11	Doreamon: Nobita and the Space Heroes	JP	Yoshihiro Osugi	TOHO	3 016 117
12	Dragon Ball Z: Resurrection 'F'	JP	Tadayoshi Yamamuro	TOEI	2 870 299
13	Furious Seven	US/JP/CN	James Wan	TOHO-TOWA	2 716 807
14	Attack on Titan: Part 1	JP	Shinji Higuchi	TOHO	2 494 244
15	Avengers: Age of Ultron	US	Joss Whedon	Walt Disney	2 463 546
16	Flying Colors	JP	Nobuhiro Doi	TOHO	2 179 586
17	Love Live! The School Idol Movie	JP	Takahiko Kyogoku	SHOCHIKU	2 179 586
18	Assassination Classroom	JP	Eiichirô Hasumi	TOHO	2 125 863
19	Terminator Genisys	US	Alan Taylor	Paramount Pict.	2 102 840
20	Boruto: Naruto the Movie	JP	Hiroyuki Yamashita	TOHO	2 010 744

Source: EIREN, OBS

Distribution and Exhibition

2015 saw the number of admissions grow by 3.4% on the previous year, up to a 5-year high of 166.6 million, generating a sharper hike in revenues (JPY 217.1 billion - 4.9% up on 2014) thanks to the higher pricing of tickets.

Theatrical attendance has fluctuated within a rather narrow bracket since the beginning of the century; to Hollywood's disadvantage, Japanese films have been able to conquer a larger and larger share of the domestic market over the years, getting the lion's share ever since 2008. Nevertheless, domestic production in 2015 marked a 4-year low, with a market share of 55.4%.

Compared to the previous year, there was less concentration at the top of 2015's box office list, which accounted for just one third of the total GBO. Hollywood blockbusters *Jurassic World* and *Big Hero 6* topped the list, followed by Japanese animation film *Yo-kai Watch, the Movie: It's the Secret of Birth, Meow!* Furthermore, fewer (eleven) domestic productions made it into this list, out of which only *2* were live action films.

The number of screens has been on the rise for three consecutive years. In 2015, Japan unveiled 103 digital screens, therefore surpassing the 99% penetration rate. 3D seems to have consolidated, with 44% of the country's theatrical infrastructure being 3D-capable.

Production and funding

581 Japanese films got a first release in 2015, marking the first drop in production volume since 2010 (by 5.5% on the previous year), yet quite an impressive volume compared with the 417 domestic productions released just ten years ago.

Japan has been aiming at an entertainment industry deal with China for several years. However, certain rigidity at both ends has so far hindered co-production and adaptation of Japanese content. Furthermore, the only Japanese films to ever get a theatrical release in China have been animation films; although, this is about to change, as live-action feature Flying Colours has been scheduled for release in China in 2016.

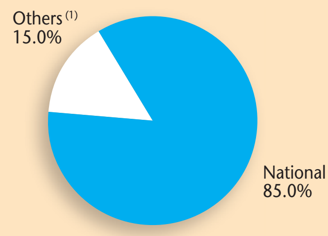
In 2015, the Ministry of Economy, Trade and Industry announced the creation of a centralized database of copyright ownership in order to make it easier for foreign buyers to acquire Japanese creative content. This move is line with 2011's launching of *Cool Japan* to promote Japanese culture around the world, most notably in Asian countries, after the export of domestic creative content became a top priority for the government amidst criticism concerning Japan's low profile vis-à-vis the Korean wave.

Source: EIREN, UNIJAPAN, *Variety, Screen Digest, The Japan Times*

India

Population 2015 e	1 292.7 million
GDP per capita 2015 e	1 688.4 USD
Gross box office 2015 e	101.4 bn INR (1.5 bn USD)
Admissions 2015 e	2 016 million
Average ticket price 2015 e	50.3 INR (0.8 USD)
Average admissions per capita 2015 e	1.6
Screens 2014 | 2015 e	11 109 | 11 100
D-Cinema screens 2014 | 2015 e	2 239 | 2 690
3D screens 2014 | 2015 e	1 068 | 1 153

Market shares 2015

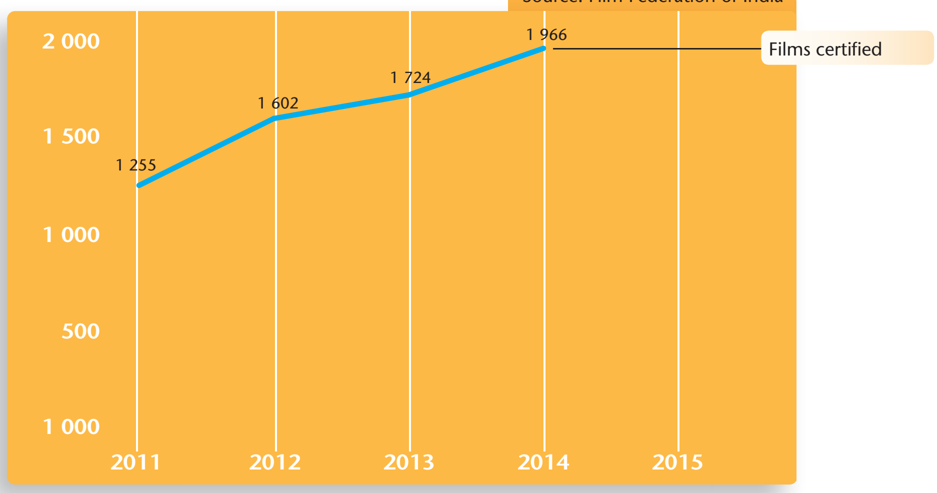


(1) Includes only US studios.

Number of Indian feature films certified | 2011-2015

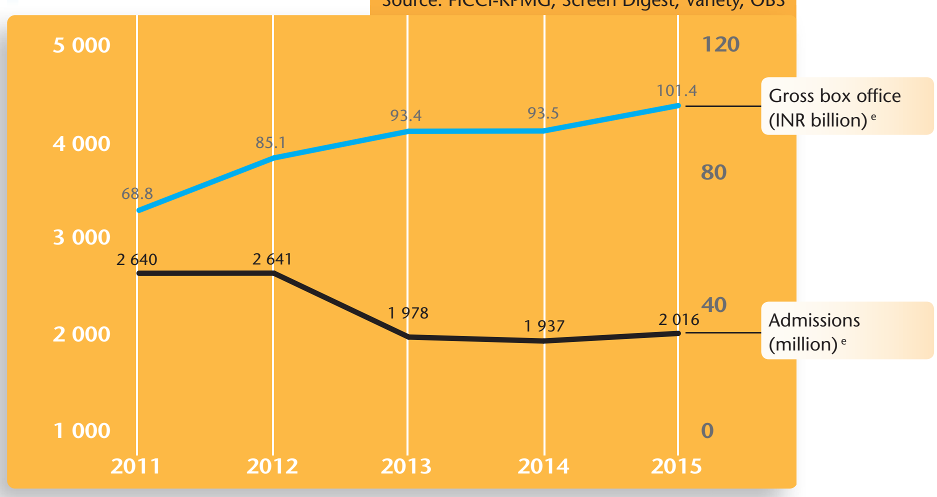
In units.

Source: Film Federation of India



Admissions and gross box office | 2011-2015 e

Source: FICCI-KPMG, Screen Digest, Variety, OBS



Top 10 Bollywood films by gross box office in India [(1)] | 2015

GBO calculated using an average exchange rate of 1 USD= 65.9 INR.

	Original title	Country of origin	Director	Gross box office (in USD million) [e]
1	Bajrangi Bhaijaan	IN	Kabir Khan	48.61
2	Prem Ratan Dhan Payo	IN	Sooraj Barjatya	31.47
3	Bajirao Mastani [(2)]	IN	Sanjay Leela Bhansali	27.39
4	Tanu Weds Manu Returns	IN	Aanand. L. Rai	23.07
5	Dilwale [(2)]	IN	Rohit Shetty	22.36
6	ABCD 2	IN	Remo D'Souza	16.05
7	Welcome Back	IN	Anees Bazmee	14.72
8	Baby	IN	Neeraj Pandey	14.49
9	Singh Is Bliing	IN	Prabhu Deva	13.69
10	Gabbar Is Back	IN	Krish	13.05

(1) Lifetime GBO as at mid-March 2016. (2) Still grossing.

Source: Koimoi.com

Top 10 US films by gross box office in India [(1)] | 2015

GBO calculated using an average exchange rate of 1 USD= 65.9 INR.

	Original title	Country of origin	Director	Gross box office (in USD million) [e]
1	Furious Seven	US/JP/CN	James Wan	23.52
2	Jurassic World	US/CN	Colin Trevorrow	22.09
3	Avengers: Age of Ultron	US	Joss Whedon	16.46
4	Mission: Impossible - Rogue Nation	US/CN/HK	Christopher McQuarrie	11.64
5	Terminator Genisys	US	Alan Taylor	4.99
6	The Martian	US/GB	Ridley Scott	4.76
7	Star Wars: Episode VII - The Force Awakens	US	J. J. Abrams	4.70
8	Spectre	GB inc/US	Sam Mendes	4.46
9	Everest	US/GB/IS	Baltasar Kormákur	3.14
10	Minions	US	Kyle Balda, Pierre Coffin	2.75

(1) Lifetime GBO as at end of February 2016. (2) Still grossing.

Source: KPMG

Distribution and exhibition

GBO was estimated at INR 101.4 billion in 2015 (a 8.5% increase on the previous year), in part due to a moderate hike in attendance and to the inflationary increase in average ticket prices.

2015 was not a good year for Hindi films; this, to the advantage of runners-up Tamil and Telugu industries - deemed to outperform hitherto almighty Bollywood, and Hollywood productions – which doubled their recent market shares, up to 15% in 2015. American success is certainly linked to the decision to dub films in regional languages and make wider releases including e-cinemas. Hindi production *Bajrangi Bhaijaan* topped the box office list, becoming India's second ever highest-grossing film. In turn, Hollywood titles escalated positions, with 2015's #4 *Furious 7* becoming the ever highest-grossing American film by a landslide. Equally, South Indian films improved their performance both nationwide and in foreign markets.

Theatrical infrastructure remains the main hindrance to full-scale development of the sector. Metropolitan areas are close to saturation and investment is focusing on tier 2 and 3 areas. While 451 digital screens were unveiled in 2015, one-screen theatres in remote areas are closing down at a much quicker path, keeping the country heavily under-screened. Besides, the theatrical sector seems to have entered a phase of consolidation, concentrating on raising ancillary revenues; for instance, in-cinema advertisement grew by 28% on 2014, up to INR 6.27 billion in 2015.

Production and funding

Within the plans to reduce red tape in order to foster production in the country, the Indian government announced the setting of the Film Facilitation Office, a national one-stop shop for production clearance and permits. Meanwhile, the local industry continues to advocate for the introduction of more incentives for domestic production.

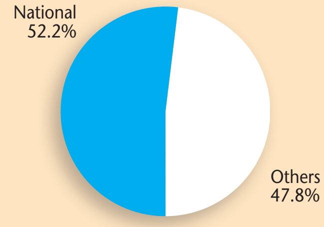
2015 saw principal photography of *Xuan Zang*, the first mega co-production between India and China. Also this year, India signed a co-production agreement with South Korea.

Source: KPMG, FICCI, *Variety*, *Screen International*, IHS, OBS

South Korea

Population 2015 e	50.6 million
GDP per capita 2015 e	27 512.9 USD
Gross box office 2015	1 590 bn KRW (1.37 bn USD)
Admissions 2015 e	217.3 million
Average ticket price 2015 e	7 318 KRW (6.3 USD)
Average admissions per capita 2015 e	4.3
Screens 2014 | 2015	2 381 | 2 492
Digital screens 2014 | 2015	2 381 | 2 492
Digital 3D screens 2014 | 2015	876 | ~

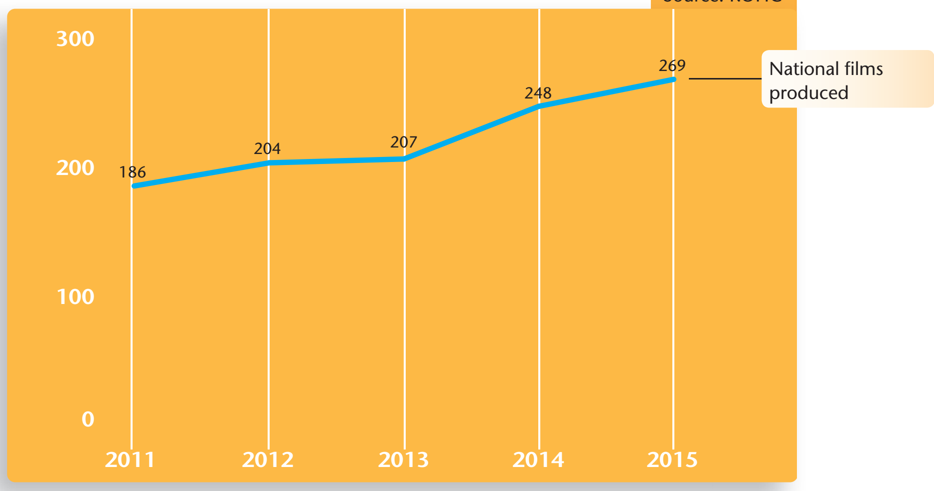
Market shares 2015 e



Number of Korean feature films produced | 2011-2015

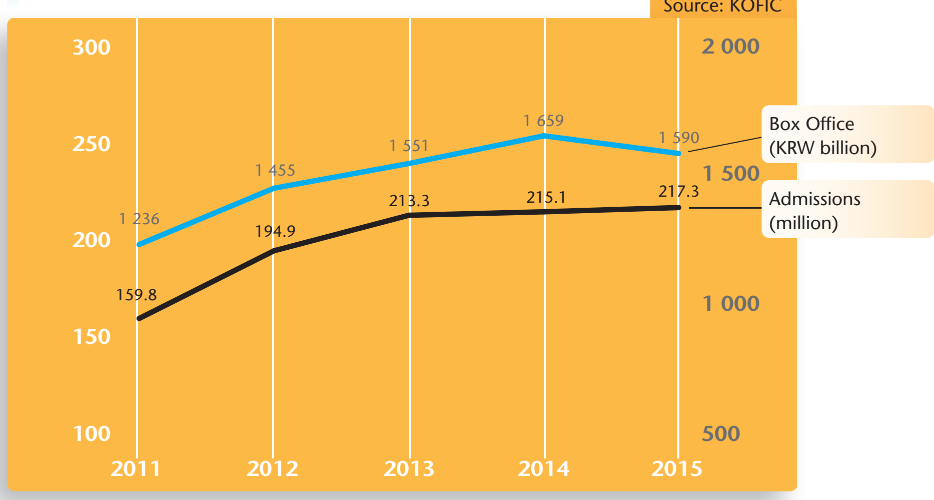
In units.

Source: KOFIC



Admissions and gross box office | 2011-2015

Source: KOFIC



Top 20 films by admissions in South Korea | 2015

	Original title	Country of origin	Director	Distributor	Admissions
1	Veteran	KR	Seung-wan Ryoo	CJ E&M	13 414 009
2	Assassination	KR	Dong-hoon Choi	Showbox	12 705 700
3	Avengers: Age of Ultron	US	Joss Whedon	Walt Disney Co. Korea	10 494 499
4	Ode to My Father	KR	JK Youn	CJ E&M	8 911 437
5	Inside Men	KR	Min-ho Woo	Showbox	7 213 317
6	The Throne	KR	Joon-ik Lee	Showbox	6 246 851
7	Kingsman :The Secret Service	GB inc/US	Matthew Vaughn	20th Century Fox Korea	6 129 681
8	Mission: Impossible - Rogue Nation	US/CN/HK	C. McQuarrie	Lotte Entertainment	6 126 488
9	Northern Limit Line	KR	Hak-sun Kim	Next Entertain. World	6 043 784
10	Jurassic World	US/CN	Colin Trevorrow	Universal Pict. Intl Korea	5 546 792
11	The Priests	KR	Jae-hyun Jang	CJ E&M	5 442 144
12	The Himalayas	KR	Seok-hoon Lee	CJ E&M	5 128 397
13	Inside Out	US	P. Docter, R. Carmen	Walt Disney Co. Korea	4 969 735
14	The Martian	US/GB	Ridley Scott	20th Century Fox Korea	4 880 800
15	Detective K: Secret of the Lost Island	KR	Kim Suk-Yoon	Showbox	3 872 015
16	Mad Max: Fury Road	AU inc/US	George Miller	Warner Bros. Korea	3 842 441
17	The Intern	US	Nancy Meyers	Warner Bros. Korea	3 610 564
18	Furious Seven	US/JP/CN	James Wan	Universal Pict. Intl Korea	3 247 955
19	Terminator Genisys	US	Alan Taylor	Lotte Entertainment	3 240 370
20	Twenty	KR	Byeong-heon Lee	Next Entertain. World	3 044 134

Source: KOFIC

Distribution and exhibition

Korean GBO dropped (by 4.1% on 2014) for the first time since 2008, down to KRW 1 590 billion. In turn, admissions increased, yet just 1% year on year (217.3 million in 2015), confirming the consolidation of the theatrical market after a skyrocketing hike at the beginning of the decade. However, it can also be argued that the attendance is likely to grow next year as it increased in 2015 despite the outbreak of the MERS virus in the country – this idea is also supported by the parallel increase of film consumption in alternative markets such as IPTV or streaming during the year.

The market share by admissions for domestic films went up to 52%, an improvement on last year but far from recent milestones. Korean action-crime comedy *Veteran* topped the BO list, followed by another local production, *Assassination,* an action film about a resistance group set in Japanese-occupied Korea. In total, 10 local titles made it into the top 20 box office list of the year; the remainder being mainly Hollywood blockbusters. South Korea has always had a remarkable BO concentration at the top - in 2015, the 20 highest-grossing films generated 57.1% of the admissions.

The country became fully digitized in 2013; in 2015, the number of screens grew by 4.6% on the previous year, up to 2 492 screens.

Production and funding

269 films were produced in 2015 (21 more than in 2014), amounting to almost twice the figure in 2009. In turn, 232 Korean productions got their first theatrical release during the year. Despite the never-ending rise in production volume, it is also true that some of the films released actually targeting the IPTV market and their release is nothing more than a token theatrical exposure.

For several years there have been concerns about the decline of attendance to local art-house productions; in early 2016 KOFIC announced plans to introduce a quota for these films. Also that year, the city of Busan and film production and distribution company Lotte Entertainment launched the USD 17 million-worth Busan-Lotte Creative Film Fund.

2015 saw the signature of bi-lateral co-production agreements with China and India.

Source: Korean Film Council (KOFIC), *Variety,* *Screen International*, IHS, The Korea Herald, OBS

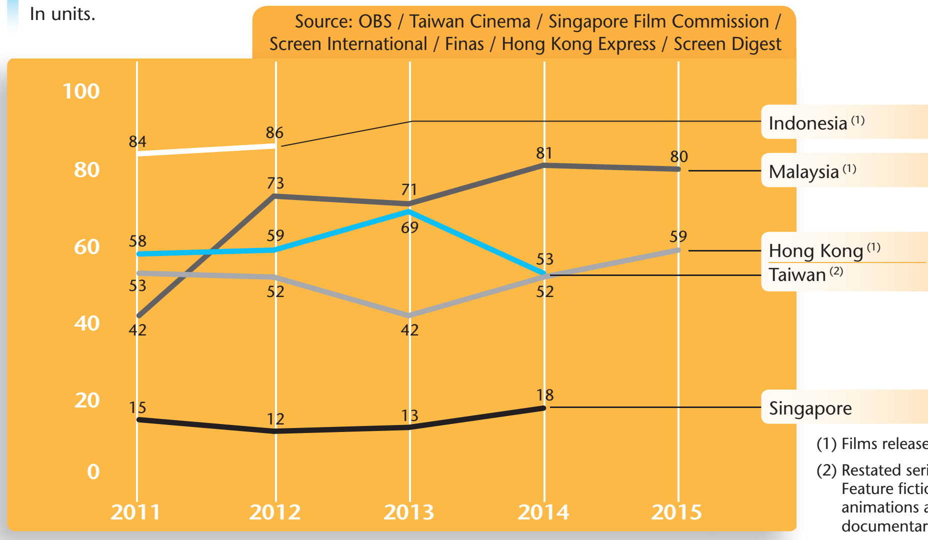
Other Asia

	Hong Kong	Indonesia	Malaysia	Philippines	Singapore	Taiwan	Thailand
Population 2015 e (million)	7.3	255.5	31.1	101.4	5.5	23.5	68.8
GDP per capita 2015 e (USD)	42 096.9	3 415.8	10 073.2	2 951.2	53 224.3	22 082.8	5 426.3
Gross box office 2015 e (M USD)	257.9	249.3 (2)	202.6	175.9 (2)	161.1 (2)	233.8 (2)	150.7 (2)
Admissions 2015 e (million)	24.1 (2)	87.7 (2)	68.1	78.3 (2)	21.6 (2)	26.4 (2)	33.5 (2)
Average ticket price 2015 e (USD)	8.8 (2)	2.8 (2)	3.0	2.2 (2)	7.5 (2)	8.9 (2)	4.5 (2)
Average admissions per capita 2015 e	3.3 (2)	0.3 (2)	2.2	0.8 (2)	3.9 (2)	1.1 (2)	0.5 (2)
Screens 2015 e	221	1 146	944	715(2)	242	723	961 (2)
Digital screens 2015 e	221	1 146	944	734	242	723	1 055
3D screens 2015 e	203	636	310	152	94	414	413
National market shares 2015 e	19.4 (1)	~	6.6%	25.7% (3)	4% (2)	17.46% (2)	~

(1) By GBO (2) 2014 (3) 2011

Number of feature films produced in selected Asian countries | 2011-2015

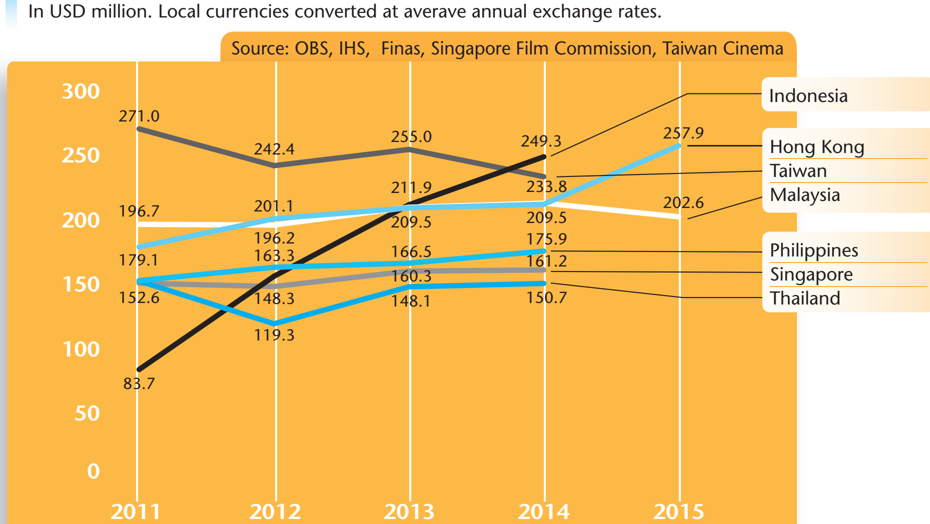
In units.



(1) Films released.
(2) Restated series. Feature fictions, animations and documentaries.

Gross box office in selected Asian countries | 2011-2015 e

In USD million. Local currencies converted at averave annual exchange rates.



Top 10 films by gross box office in Hong Kong | 2015 (1)

	Original title	Country of origin	Director	Gross box office (in USD million)
1	Avengers: Age of Ultron	US	Joss Whedon	18.24
2	Jurassic World	US/CN	Colin Trevorrow	13.14
3	Star Wars: Episode VII - The Force Awakens	US	J.J. Abrams	11.05
4	Minions	US	Kyle Balda, Pierre Coffin	10.76
5	Inside Out	US	Pete Docter, Ronnie del Carmen	8.71
6	Furious Seven	US/JP/CN	James Wan	8.47
7	Ip Man 3	HK	Wilson Yip	8.11
8	Mission: Impossible - Rogue Nation	US/CN/HK	Christopher McQuarrie	7.24
9	Ant-Man	US	Peyton Reed	7.01
10	Stand by Me Doraemon	JP/US	T. Oliver, R. Yagi, T. Yamazaki	6.47

(1) Includes 2015 releases only.

Source: comScore

Top 10 films by gross box office in Singapore | 2015 (1)

	Original title	Country of origin	Director	Gross box office (in USD million)
1	Avengers: Age of Ultron	US	Joss Whedon	9.73
2	Jurassic World	US/CN	Colin Trevorrow	8.77
3	Star Wars: Episode VII - The Force Awakens	US	J.J. Abrams	7.19
4	Furious Seven	US/JP/CN	James Wan	6.77
5	Ip Man 3	HK	Wilson Yip	5.44
6	Ah Boys To Men 3: Frogmen	SG	Jack Neo	5.62
7	Mission: Impossible - Rogue Nation	US/CN/HK	Christopher McQuarrie	5.44
8	Minions	US	Kyle Balda, Pierre Coffin	5.26
9	Spectre	GB INC/US	Sam Mendes	4.63
10	Ant-Man	US	Peyton Reed	4.62

(1) Includes 2015 releases only.

Source: comScore

Distribution and Exhibition

Although attendance figures for several markets were not available at the time of publication, the overall number of admissions in the region is believed to have increased, especially in the less developed, most populated countries.

Singaporean franchise *Ah Boys to Men 3: Frogmen* made it into the top of the domestic box office list; another Asian film, Honk Kong third installment of the successful franchise *Ip Man*, not only ranked among the top 10 grossing films in its country, but also in Singapore. In line with the figure in recent years, Hong Kong local films got 19.4% of the domestic revenues, while Malaysian productions underperformed at home, accounting for just 6.6% of the admissions. In the Philippines, romantic drama sequel *A second chance* broke all-time grossing records for a Filipino film worldwide.

Although not by Chinese standards, the number of screens increased in the region; leaded by Indonesia, with an impressive 19% year-on-year hike in 2015, and followed by Taiwan (8.6%), Malaysia (8%) and Singapore (7.6%). In 2015, the vast majority of screens in the region were digital; however, apart from the Asian Tigers, all territories still have a huge scope for theatrical infrastructure to grow as they are heavily under-screened and have shown a stable inter-annual GDP growth above 5% in recent years.

Production and funding

ASEAN countries launched *Film ASEAN*, a Philippines-based foundation bringing together the national film agencies of ten South Eastern Asian countries - representing a market of 650 million people, in order to foster co-production in the region. Other film forums are developing in the area, such as the Singapore's *Southeast Asian Film Financing* (SAFF) project market or the Southeast Asian Fiction Film Lab (SEAFIC) for script development.

Indonesia removed legal restrictions to foreign investment in the film business towards the end of 2015. In turn, Thailand unveiled a fiscal cash rebate for inward productions of up to 20%, while Hong Kong increased its funding to promote Cantonese-language films in continental China. Moreover, Malaysia inked a co-production agreement with Australia.

Source: MPIA, FINAS, MPAA, Taiwan Cinema, IHS, *Screen International*, *Variety*, OBS

Africa

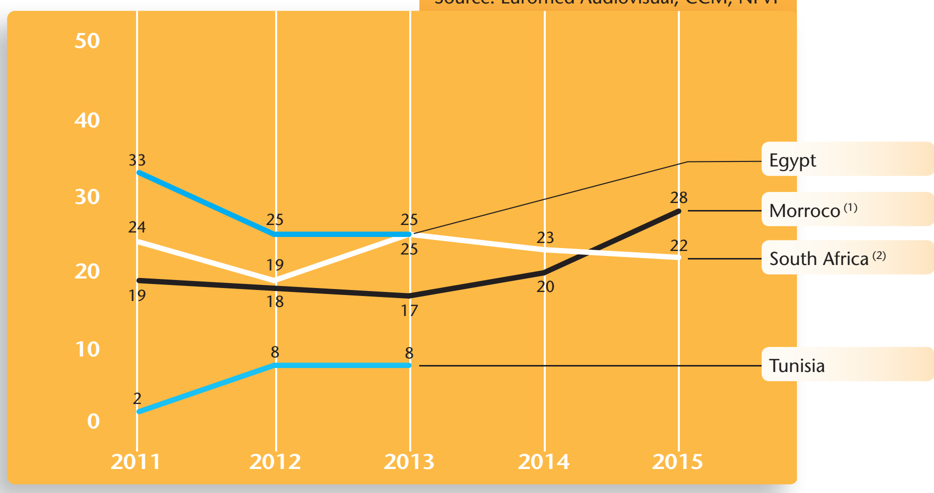
	Algeria	Egypt	Morocco	South Africa	Tunisia
Population 2015 e (million)	40.3	88.4	33.5	54.9	11.1
GDP per capita 2015 e (USD)	4 345.4	3 644.6	3 076.6	5 783.5	3 984.8
Gross box office 2015 e (in M USD)	0.0 (4)	16.8 (1)	7.6	78.9	~
Admissions 2015 e (million)	0.0 (4)	8.1 (1)	1.8	36.9 (1)	0.3 (5)
Admissions per capita 2015 e	0.0 (4)	0.09 (1)	0.05	0.69 (1)	~
Average ticket price 2015 e (in USD)	0.7 (4)	2.07 (1)	4.1	2.46 (1)	2.3 (4)
Screens 2015 e	17 (3)	406 (1)	57	750 (1)	17 (2)
Digital screens 2015 e	~	166	48	710	~
National market shares 2015 e	~	80% (3)	28.8%	5.8%	~

(1) 2014 (2) 2013 (3) 2012 (4) 2009 (5) 2008

Number of feature films produced in selected African countries | 2011-2015

In units.

Source: Euromed Audiovisual, CCM, NFVF

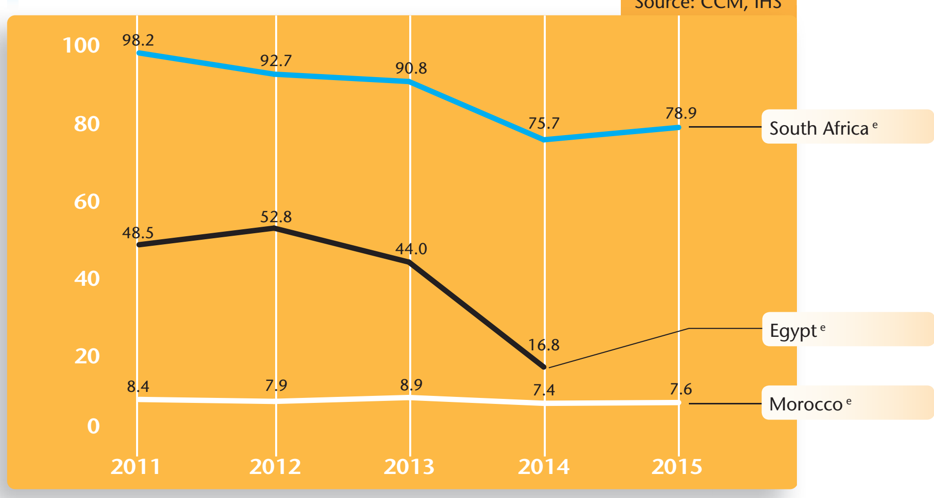


(1) Shooting permits issued by CCM. (2) Films released.

Gross box office in selected African countries | 2011-2015 e

In USD million.

Source: CCM, IHS



Top 10 films by gross box office in South Africa | 2015

	Original title	Country of origin	Director	Distributor	Gross box office (in USD)
1	Furious 7	US/JP/CN	James Wan	UIP	5 909 905
2	Star Wars: Episode VII - The Force…	US	J. J. Abrams	Ster Kinekor	3 392 717
3	Minions	US	Kyle Balda, Pierre Coffin	UIP	3 290 689
4	Avengers: Age of Ultron	US	Joss Whedon	Ster Kinekor	3 105 769
5	Jurassic World	US/CN	Colin Trevorrow	UIP	3 085 064
6	Fifty Shades of Grey	US	Sam Taylor-Johnson	UIP	3 069 604
7	Spectre	GB inc/US	Sam Mendes	Ster Kinekor	2 680 677
8	Pitch Perfect 2	US	Elizabeth Banks	UIP	2 037 054
9	Taken 3	FR	Olivier Megaton	Times Media	1 626 086
10	Inside Out	US	P. Docter, R. Carmen	Ster Kinekor	1 552 194

Source: NFVF

Top 10 films by admissions in Morocco | 2015

	Original title	Country of origin	Director	Admissions
1	Le Coq	MA	Abdellah Ferkous	100 060
2	Les transporteurs	MA	Saïd Naciri	95 535
3	Mission: Impossible -Rogue Nation	US/CN/HK	Christopher McQuarrie	93 692
4	Spectre	GB inc/US	Sam Mendes	66 075
5	L'orchestre des aveugles	MA/FR	Mohamed Mouftakir	47 872
6	Un pari pimenté	MA	Mohamed Karrat	43 802
7	Furious Seven	US/JP/CN	James Wan	43 699
8	L'orchestre de minuit	MA	Jérôme Cohen-Olivar	40 258
9	Les nouvelles aventures d'Aladin	FR/BE	Arthur Benzaquen	33 785
10	Minions	US	Kyle Balda, Pierre Coffin	33 085

Source: Centre Cinématographique Marocain (CCM)

Morocco and Egypt

Morocco experienced growth across all indicators in 2015, most notably in terms of production volume, with 28 feature films shot. Furthermore, after free-falling attendance levels throughout the century, there was a hike in the number of admissions (1.84 million, up by 12.2% on 2014). Local comedies *Le Coq* and *Les transporteurs* topped the box office list in 2015. Overall admissions for domestic films accounted for 28.8 % of the market, slightly lower than in 2014. Effective from 2016, Morocco has a new film law featuring a 20% tax rebate for inward productions.

The Cairo Film Festival appointed a new top managerial and artistic team at the beginning of 2015, though maintaining the recent changes in format, date and sections, as well as re-launching the Cairo Film Connection co-production platform for Arabic filmmakers.

Nigeria

Based on unofficial figures, Nigeria appears to be the second largest industry worldwide by production volume (with circa 2 000 shoots a year); that is, depending on the definition of production, as direct-to-DVD low budget titles sold by street vendors make up the great majority of the industry's output. Nevertheless, the government estimated that Nollywood was worth USD 3.3 billion in 2013.

Despite these rosy prospects, volume does not imply value; domestic production still has a long way to go to unleash its full economic potential. With just 23 theatres in the country by 2015 (although that figure will certainly double by 2017), the hopes for the further development of audiences and monetization of investment rest on distribution of content to other African countries and the Nigerian diaspora in developed countries, notably through VOD.

South Africa

GBO surged by 36% in 2015, up to ZAR 1.2 billion (USD 78.9 million), mostly due to the success of American franchises, leaving just 5.8% of the box office revenues to indigenous productions. *Schuks! Pay Back the Money* was the highest-performing South African film of the year.

The dramatic depreciation of the South African rand against the US dollar (by 25% over 2015) has lured inward investment. Furthermore, South Africa signed a co-production agreement with the Netherlands, and is in negotiations to conclude another with Kenya.

Source: CCM, NFVF, *Variety*, *Screen International*, *Fortune*, OBS

Middle East

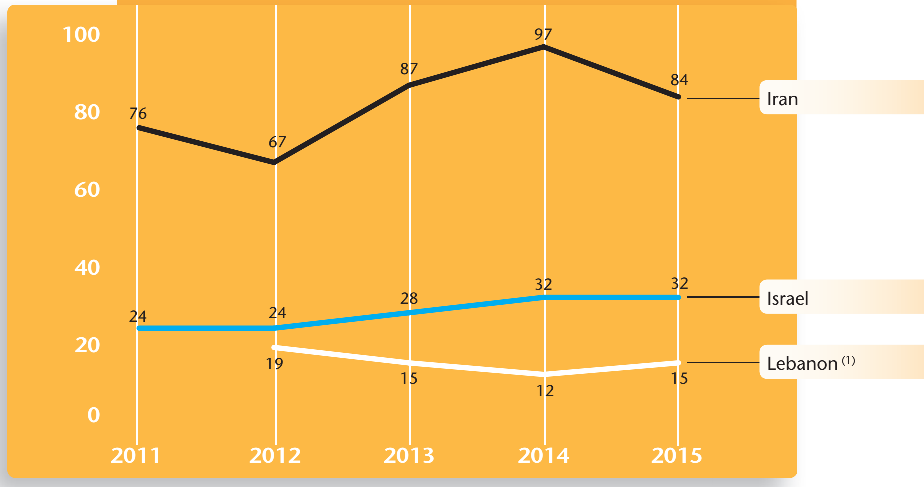
	Iran	Israel	Kuwait	Lebanon	Qatar	United Arab Emirates
Population 2015 e (million)	78.6	8.4	4.1	4.6	2.4	9.6
GDP per capita 2015 e (USD)	5 047.8	35 702.1	29 982.6	11 945.4	78 829.2	35 392.2
Gross box office 2015 e (in M USD)	24.5	131.3	51.5	33.6	34.5	193.3
Admissions 2015 e (million) e	13.4	13.0	4.6	3.8	3.0	16.7
Admissions per capita 2015 e	0.2	1.6	1.1	0.8	1.2	1.7
Average ticket price 2015 e (USD)	1.8	10.1	11.1	8.7	11.5	11.5
Screens 2015 e	380	400	73 (1)	148 (1)	~	356 (1)
Digital screens 2015 e	380	400	~	~	~	356 (1)
National market shares 2015 e	98.6%	8%	~	11%	~	~

(1) 2014

Number of films produced in selected Middle East countries | 2011-2015 e

In units.

Source: Empire Cinemas, Farabi Cinema Foundation, Israel Film Fund, IHS, OBS

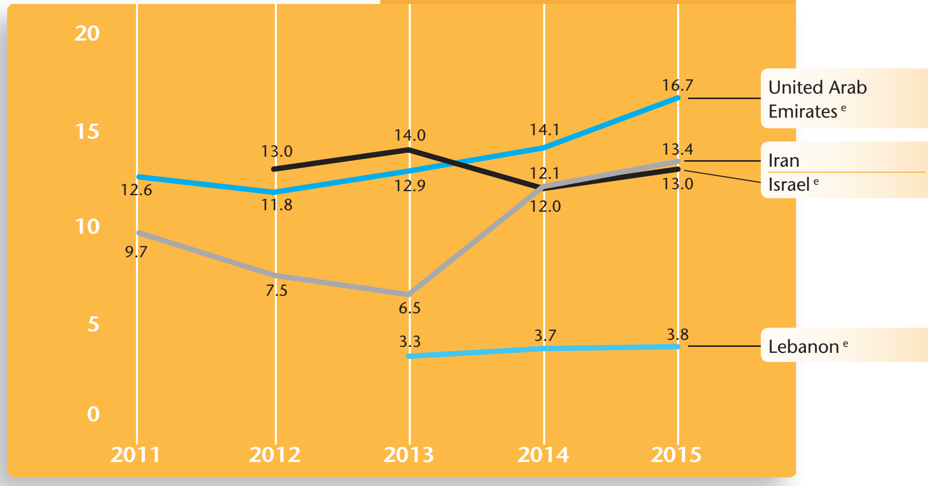


(1) Restated series.

Admissions in selected Middle Eastern countries | 2011-2015 e

In millions.

Source: Israeli Film Fund, Empire Cinemas, Farabi Film Foundation, IHS, Euromed Audiovisual



Top 10 films by admissions in Lebanon | 2015

	Original title	Country of origin	Director	Distributor	Admissions
1	Furious Seven	US/JP/CN	James Wan	Universal	213 074
2	Minions	US	K. Balda, P. Coffin	Universal	63 214
3	Spectre	GB inc/US	Sam Mendes	GF	117 952
4	Mission: Impossible - Rogue Nation	US/CN/HK	C. McQuarrie	Paramount	116 178
5	Vitamin	LB	Elie F. Habib	EAG	86 964
6	Yalla Aa'belkon (Single, Married, Divorced)	LB	Elie Khalifé	OTH/Dream Box	76 585
7	Taken 3	FR	Olivier Megaton	EAG	117 760
8	Spy Kids 2: Island of Lost Dreams	US/NZ	Robert Rodriguez	Fox	47 932
9	Cinderella	US/GB	Kenneth Branagh	Walt Disney	42 260
10	Jurassic World	US/CN	Colin Trevorrow	Universal	33 909

Source: Empire Cinemas

Overview

Despite the heterogeneity of the region, there are some common patterns to be found in the performance of cinema in Middle Eastern countries. The number of admissions rose in 2015 in all countries analysed, with the United Arab Emirates (UAE), Qatar and Iran growing at double-digit rates on 2014. However, aside from in Iran, most GBO in the region goes to American productions. In turn, theatrical infrastructure in the three main markets of the region, UAE, Israel and Iran, seems to have consolidated.

No Arabic-speaking country in the Middle East has a robust domestic film industry. Moreover, in a territory heavily dominated by Hollywood and, to a lesser extent, Egyptian films, only Lebanese productions have high levels of domestic success; in fact, two Lebanese comedies made it to the country's top 10 box office list in 2015 – *Single, Married, Divorced* and last year's topper *The Vitamin*.

Iran

As reported by the official Farabi Film Foundation, the number of admissions grew by 10.7% on 2014, up to 13.4 million. Furthermore, 84 films were shot in the country in 2015 (108 according to *Iranian Independents*). According to the latter, seven of the 97 films released in 2015 were foreign productions, with Iranian films accounting for 92.7% of the market in 2015. Moreover, the lifting of economic sanctions by the international community is expected to have a positive effect on attendance and production.

The domestic high-budget film *Muhammad*, on the life of Islam's prophet, became a huge success and was distributed all over the Islamic world. Although, in compliance with Islamic rule, the film never shows the face of the prophet, Sunni groups around the world have called for a ban of the film.

The director of *Taxi*, Jafar Panahi, could not collect the Golden Bear at the Berlinale after authorities had forbidden him to leave the country. Neither could he release the film in Iran, as he shot it while banned from filmmaking.

Israel

Theatrical attendance rose by 8.3%, up to 13 million admissions in 2015, well in line with the average in recent years. GBO also grew, although more moderately - by 7.3% on 2014, up to USD 131.3 million. The country's production volume remained steady, with 32 films shot in 2015. Furthermore, the market share of indigenous productions went down to 8%, after 2 years of double-digit levels.

In 2015, Israel's Minister of Culture threatened to cut funds for organizations or creators who defame the country and sparked criticism and allegations of attempted censorship. Also this year, the governments of New Zealand and Israel signed a co-production agreement for film, TV animation and digital production.

United Arab Emirates

2015 saw an impressive surge in admissions, up to an all-time high of 16.7 million tickets sold, equivalent to an 18.4% hike since 2014.

The Abu Dhabi Film Festival was permanently cancelled after eight editions, reportedly, to concentrate all the Emirate's resources on production, and on promotion of the city as a shooting location. Nevertheless, the festival's *Sanad Film Fund* for the development and post-production of Arabic films will continue to operate. In turn, the Dubai Film Connection, a co-production platform within the Dubai Film Market, will be re-launched in 2016 after a one-year hiatus.

Source: Empire Cinemas, Farabi Cinema Foundation, Iranian Independents, Israel Film Fund, *Variety*, OBS

Sources

FOCUS 2016 was prepared by the European Audiovisual Observatory. We would like to thank the following sources:

National Cinema Center of Armenia	AM	www.ncca.am
INCAA	AR	www.incaa.gov.ar
Österreichisches Filminstitut (ÖFI)	AT	www.filminstitut.at
MPDAA	AU	www.mpdaa.org.au
Screen Australia	AU	www.screenaustralia.gov.au
Sarajevo Film Festival (SFF)	BA	www.sff.ba
Centre du cinéma et de l'audiovisuel (CFWB)	BE	www.audiovisuel.cfwb.be
Vlaams Audiovisueel Fonds (VAF)	BE	www.vaf.be
Cinedata	BE	
National Film Center (NFC)	BG	www.nfc.bg
ANCINE	BR	www.ancine.gov.br
Canadian Media Prod. Assoc. (CMPA)	CA	www.cmpa.ca
Telefilm Canada	CA	www.telefilm.ca
Office fédéral de la statistique (OFS)	CH	www.admin.ch/bfs
SAPPRFT	CN	
China Media Management Inc.	CN	www.cmmintelligence.com
Ministry of Culture	CY	www.moec.gov.cy
Czech State Cinematography Fund	CZ	www.fondkinematografie.cz
Unie Filmovych Distributoru (UFD)	CZ	www.ufd.cz
Blickpunkt Film	DE	www.mediabiz.de/film
FFA	DE	www.ffa.de
SPIO	DE	www.spio.de
Danish Film Institute (DFI)	DK	www.dfi.dk
Statistics Denmark	DK	www.dst.dk
Estonian Film Institute	EE	www.filmi.ee
Cineinforme	ES	www.cineytele.com
ICAA	ES	www.mcu.es/cine/index.html
Eurostat	EU	ec.europa.eu/eurostat
Europa Cinemas	EU	www.europa-cinemas.org
Cineuropa	EU	www.cineuropa.org
Euromed Audiovisuel III	EU	www.euromedaudiovisuel.net
Finnish Film Foundation (FFF)	FI	www.ses.fi
Centre national du cinéma et de l'image animée (CNC)	FR	www.cnc.fr
Le film français	FR	www.lefilmfrancais.com
British Film Institute (BFI)	GB	www.bfi.org.uk
Digital Cinema Media (DCM)	GB	www.dcm.co.uk
IHS Technology	GB	technology.ihs.com
Screen International	GB	www.screendaily.com
Greek Film Center	GR	www.gfc.gr
Hong Kong Theatres Association Ltd (HKTA)	HK	www.hktaorg.com
Croatian Audiovisual Centre (HAVCR)	HR	www.havcr.hr
National Film Office (NFO)	HU	www.nemzetifilmiroda.hu
Film Indonesia	ID	www.filmindonesia.or.id
Irish Film Board (IFB)	IE	www.irishfilmboard.ie
Israel Film Fund	IL	www.filmfund.org.il
Film Federation of India	IN	www.filmfed.org
Koimoi.com	IN	www.koimoi.com
KPMG India	IN	www.kpmg.com/in
Ministry of Information and Broadcasting	IN	www.mib.nic.in
Farabi Cinema Foundation	IR	www.fcf.ir
Iranian Independents	IR	
Icelandic Film Centre	IS	www.icelandicfilmcentre.is
Hagstofa Islands (HI)	IS	www.statice.is
ANICA	IT	www.anica.it
Cinetel	IT	www.cinetel.it
DGC-MiBACT	IT	www.cinema.beniculturali.it
Giornale dello Spettacolo	IT	www.giornaledellospettacolo.it
MEDIA Salles	IT	www.mediasalles.it
Motion Picture Association of Japan (EIREN)	JP	www.eiren.org
UNIJAPAN	JP	www.unijapan.org
Korean Film Council (KOFIC)	KR	www.koreanfilm.or.kr
Empire Cinemas	LB	www.empire.com.lb
Lithuanian Film Center	LT	www.lkc.lt
Centre national de l'audiovisuel (CNA)	LU	www.cna.public.lu
National Film Centre (NFC)	LV	www.nfc.lv
Centre Cinématographique Marocain (CCM)	MA	www.ccm.ma
Ministry of Culture	ME	www.mku.gov.me
Macedonian Film Agency	MK	www.filmfund.gov.mk
Malta Film Commission	MT	www.maltafilmcommission.com
IMCINE	MX	www.imcine.gob.mx
National Film Development Corp. of Malaysia (FINAS)	MY	www.finas.gov.my
MaccsBox	NL	www.maccsbox.nl
Nederlands Filmfonds (NFF)	NL	www.filmfund.nl
Nederlandse Vereniging van Filmdistributeurs (NVF)	NL	www.filmdistributeurs.nl
Film og Kino	NO	www.filmweb.no/filmogkino
Norsk Filminstitutt (NFI)	NO	www.nfi.no
New Zealand Film Commission	NZ	www.nzfilm.co.nz
MPDA	NZ	www.mpda.org.nz
National Statistical Coordination Board (NSCB)	PH	www.nscb.gov.ph
Boxoffice.pl	PL	www.boxoffice.pl
Film New Europe	PL	www.filmneweurope.com
Polish Film Institute (PISF)	PL	www.pisf.pl
Instituto do Cinema e do Audiovisual (ICA)	PT	www.ica-ip.pt
Observatório Iberoamericano do Audiovisual (OIA)	PT	www.caaci.int/programas-y-proyectos
Centrul National al Cinematografiei (CNC)	RO	www.cncinema.abt.ro
Nevafilm Research	RU	www.nevafilm.ru
Russian Film Business Today	RU	www.kinobusiness.com
Swedish Film Institute (SFI)	SE	www.sfi.se
Media Development Authority	SG	www.sfc.org.sg
Slovenski Filmski Center (SFC)	SI	www.film-center.si
Slovak Film Institute (SKFI)	SK	www.sfu.sk
Antrakt	TR	www.antraktsinema.com
SE-YAP	TR	www.se-yap.org.tr
DG Sinema	TR	www.sinema.gov.tr
Taiwan Cinema	TW	www.taiwancinema.com
International Movie Database (IMDb)	US	www.imdb.com
MPAA	US	www.mpaa.org
ComScore	US	http://www.comscore.com
The Hollywood Reporter	US	www.hollywoodreporter.com
Variety	US	www.variety.com
National Film and Video Fund (NFVF)	ZA	www.nfvf.co.za

LUMIERE Database		www.lumiere.obs.coe.int
International Monetary Fund		www.imf.org

European Audiovisual Observatory

Information products and services
for the audiovisual sector

www.obs.coe.int

Conference

Ticket to Ride!

What makes European Films travel?

9.30 - 11.30, Saturday 14th May, 2016

Olympia Cinema,
7, Rue d'Antibes,
Cannes

Entry free for all market, festival or press accreditees

Come and see us on our stand:
18.02, Level 01
Central Alley
Marché du film
Palais des Festivals

Stand telephone:
04 92 99 81 07

Focus 2016
28 € TTC
Réf FMF16

EUROPEAN
AUDIOVISUAL
OBSERVATORY

COUNCIL OF EUROPE

CONSEIL DE L'EUROPE