# MARCHÉ DU FILM 2011

## FOCUS

World Film Market Trends
Tendances du marché mondial du film

MARCHÉ DU FILM
FESTIVAL DE CANNES

# focus 2011

## 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

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## Editorial

We now find ourselves in an era where all channels of cinematography are undergoing a transformation: VoD has become a realistic medium, the switch to all-digital is simply a matter of time and 3D is becoming more and more ubiquitous. As such, it is more crucial than ever for us, as professionals, to identify major industry tendencies.

I hope that *FOCUS*, now in its 14$^{th}$ year, will serve as an indispensable tool for you in analyzing and anticipating the challenges of tomorrow.

**Jérôme Paillard**
**Executive Director**

À l'heure où toute la filière cinématographique poursuit sa mutation, où la VoD se positionne comme un écran crédible, où le passage au tout numérique n'est plus qu'une question de calendrier, où la 3D commence à se banaliser, il est plus que jamais nécessaire, pour les professionnels que nous sommes, d'appréhender les grands indicateurs du secteur.

Je souhaite que *FOCUS*, qui fête son 14$^{e}$ anniversaire, vous apporte les clefs indispensables pour analyser et anticiper les enjeux de demain.

**Jérôme Paillard**
**Directeur Délégué**

*FOCUS 2011 World Film Market Trends*, appears for the fourteenth consecutive year. We are pleased to collaborate once again with the Marché du Film and value highly our work together.

**Wolfgang CLOSS**
**Executive Director**
**European Audiovisual Observatory**

*FOCUS 2011, Tendances du marché mondial du film*, paraît pour la quatorzième année consécutive. Nous nous réjouissons de cette collaboration avec le Marché du Film, à laquelle nous portons toute l'estime qu'elle mérite.

**Wolfgang CLOSS**
**Directeur exécutif**
**Observatoire européen de l'audiovisuel**

*The European Audiovisual Observatory was set up in December 1992. It is a public-service body whose mission is to gather and distribute information on the audiovisual industry (film, television, video and multimedia) in Europe. 36 European states are members, along with the European Community represented by the European Commission. The Observatory operates within the framework of an extended partial Agreement of the Council of Europe. 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.*

➡ *Internet site (http://www.obs.coe.int)*

*Créé en décembre 1992, l'Observatoire européen de l'audiovisuel est un organisme de service public consacré à la collecte et à la diffusion de l'information sur l'industrie audiovisuelle (cinéma, télévision, vidéo et multimédia) en Europe. 36 Etats européens en sont membres ainsi que la Communauté européenne représentée par la Commission européenne. L'Observatoire fonctionne dans le cadre d'un Accord partiel élargi du Conseil de l'Europe et remplit sa mission avec un réseau de partenaires, de correspondants et d'organismes professionnels. L'Observatoire fournit des services d'informations sur les marchés, les financements et le cadre juridique du secteur audiovisuel.*

➡ *Site Internet (http://www.obs.coe.int)*

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# focus 2011

## Contents

# Cinema and television: Falling in Love Again?

It may appear paradoxical to put the question of the relations between cinema and television back on the agenda when the current industry focus is on the development of the internet as a new delivery vehicle for audiovisual works. More than ever, it is clear that the audiovisual system forms a complete unit and that recent changes in regulations and the practices of economic players and consumers are interacting in an increasingly faster and complex way, so we believe it is worthwhile reconsidering these relations at a time when the digital technologies are reaching maturity and producing ever more perceptible effects.

Contrary to the fears of cinema professionals in the 1960s-80s, television has not killed off cinema-going, nor does the rapid rise of the internet seem to have had a major impact on cinema attendances. According to the MPAA, the worldwide box office increased by 25% between 2006 and 2010. In Europe, even though attendances dropped in 2010 compared with 2009, the trend has actually been upwards since 2005. At the same time, they can be considered to have remained stable in the United States since then. The demographic studies carried out by the MPAA only identify one population category for which regular attendances dropped in 2010, namely women between 40 and 49. The members of the "Y generation", who are big internet consumers, continue to go to the cinema whereas most studies on the development of the television audience tend to show they are consuming less television and more internet.

The range and consumption of films on television has changed. The appearance of pay film channels in the 1980s and 90s gradually led the general-interest channels, both public and private, to reduce the number of films shown, especially during prime time, in favour of audiovisual fiction and other entertainment programmes. However, this trend seems to have stabilised. The analysis carried out on behalf of the European Audiovisual Observatory by Infomedia on the fiction programming of 137 television channels in Europe (feature films, television films, series, animation and short films) shows that the market share of feature films in all fiction programming rose from 34.6% in 2007 to 35% in 2009.

## The wide range available

Film channels are, together with sports channels, the dominant genre in the pay-TV packages, whether on cable, satellite platforms, IPTV networks or digital terrestrial television. At the beginning of 2011, the European Audiovisual Observatory's MAVISE database listed no less 324 film channels in the European Union. They include 108 fully or partly controlled by American companies: 48 by News Corp. (Sky in the United Kingdom, Germany, Austria and Italy), 34 by Time-Warner (the TCM versions throughout the continent and HBO in Central Europe, and since 2010, in Nordic countries, Silver and Showtime) 18 by the Liberty Global group (in Belgium, the Netherlands and Central Europe) and 10 by Sony (MGM).

Among the European groups, Vivendi provides 16 film-only channels (Canal+ Cinéma and the Cinécinemas package in France, Canal+ in Poland and Kinowelt TV in Germany). The Swedish groups are particularly active on the pay-TV market by providing their services in various language versions in the Scandinavian and Baltic countries: MTG offers 39 channels (TV1000, Viasat), and the television group TV4 has taken over the company C More Entertainment, which provides the Nordic Canal+ channels. In Central Europe, the Czech group SPI proposes 15 services.

TV4 is not the only group to have diversified from general-interest television funded by advertising to pay film channels. Others include Mediaset in Italy (Joi and 4 Premium channels), ProSiebenSat.1 Media AG in Germany, (kabel eins classics), MTV in Finland and CME in Bulgaria and the Czech Republic. A number of public broadcasters have also launched film channels: RAI in Italy (2 channels), Channel 4 in the United Kingdom (Film Four), ERT in Greece and TV2 in Denmark. In order to compete with the satellite platforms or simply provide a national offering, the cable operators have often taken the initiative to create or take over film channels, such as ONO in Spain, Kabel Deutschland in Germany, Zon Multimedia in Portugal, Telenet and Voo in Belgium, Melita in Malta and Baltkom TV in Latvia. In countries where pay digital terrestrial television is developing, the services are spearheaded by film and sports channels. In Italy, for example, the DTT services offer no less than 15 pay film channels. As far as cable, satellite or IPTV is concerned, there are, especially in the United Kingdom and France, a number of channels aimed at immigrant cultural minorities, such as channels showing Indian, Chinese, Arabic, African or Russian films. A channel showing French films is available in the United Kingdom. Finally, there are channels specialising in short films, some of them forming part of packages targeting consumers of mobile telephone video.

To all these film channels may be added other special-interest channel genres that show films, such as children's channels, women's channels and entertainment channels with a mixture of films and series. The spread of pay film channels has often prompted the large traditional general-interest channels to reduce the number of films they show, especially during prime time. In the United Kingdom, the number of films broadcast on pay channels and other channels in multi-channel packages rose from 38 865 in 2000 to 69 592 in 2009. At the same time, the number broadcast by the traditional terrestrial channels fell from 2 318 to 2 218. In France, the reduction in the number of films shown by the traditional channels during prime time left a gap that was identified by the new free-to-air channels set up for digital terrestrial television. They were able to mount their expansion by broadcasting library catalogue films, as illustrated by a recent study by Médiamétrie. The mass availability of a range of films tends to reduce the value of the programming and it is interesting to note that an incumbent pay-TV channel such as Canal+ is currently building its image more on the creation of lavish television series than on a premium film service.

The analysis of the film programming of 137 European television channels carried out in 2009 by Infomedia for the European Audiovisual Observatory shows that American films are still hugely dominant. In only two of the fifteen countries analysed (France and Finland) is the proportion of European films (including nationally produced films) above 50%, and in eight countries it is below 40%. In the United Kingdom, where the programming of 29 channels was analysed, it does not exceed 23.8%.

## Broadcasters' investment obligations before the courts

Apart from the place of European films in the programme schedules, the role of television channels in funding national film production is still an important issue for debate. There are various approaches and models: quantified obligations (laid down by the authorities, as in France, by establishing a set of conditions or negotiated with the producers' federations), levies on the channels' revenues transferred to film production support funds or direct contributions to the budget of the film institutes (as it is the case in various Nordic countries). Although the broadcasters' role in the provision of support for film production is generally recognised in Europe, two court cases have recently illustrated that the question remains contentious.

In Germany, cinema operators condemned their alleged unequal treatment compared with the broadcasters. In order to provide funding for the Federal Film Board (Filmförderunganstalt – FFA), the provisions of the Film Support Act (Filmförderungsgesetz – FFG) in force until July 2010 imposed a statutory fixed scale on cinema operators and the video industry, whereas the broadcasters were free to negotiate the amount of their contribution. Following the complaint made by the cinema operators, the Federal Administrative Court, in February 2009, expressed reservations about the constitutionality of this difference in the method of levying the charge and referred the matter to the Federal Constitutional Court. With the aim of responding to the Federal Administrative Court's concerns and providing a sound legal basis for funding the FFA, the federal legislature passed in July 2010 an amendment to the FFG that introduces the obligation for broadcasters to pay a film tax, the amount of which is also laid down by law and is in proportion to the number of films in their programming. Finally, in judgments delivered on 23 February 2011 the Federal Constitutional Court established that the film tax was constitutional and dismissed the appeal lodged by several cinema operators, pointing out in that connection that there was no doubt about the legality of imposing a film tax on cinema operators, video distributors and broadcasters, who derived economic advantages from showing German films produced in Germany with subsidies from the FFA. Consequently, the court considered it justified to ask these players to contribute to the provision of support for the production of audiovisual works.

In Spain, proceedings brought by the private broadcasters could produce contrary outcomes. A law dating from 1999 made it compulsory for broadcasters to invest in film production and this was to be confirmed in a new general law on the audiovisual industry. UTECA, a national association set up by six private broadcasters, lodged an appeal against the General State Administration challenging this obligation, which it considered unconstitutional, even though its members had been complying with it for ten years. The Supreme Court held that the obligation imposed on television operators by the Spanish law to earmark 5% of their revenues for the funding of Spanish and European film productions was contrary to the principle of free enterprise guaranteed by Article 38 of the Spanish constitution, especially as the television operators were obliged

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to invest the money in film and not television production. The Supreme Court did not discount the possibility of encouraging the broadcasters to contribute to film productions (especially by means of tax incentives) even though it held there was no reason to impose an obligation on the television sector or to require it to make any "sacrifice" that would reduce its economic freedom and thus benefit other parties, such as film production companies. The new law passed in March 2010 finally upheld the principle of an obligation to invest in production. The Constitutional Court should now decide if this principle is in conformity with the Constitution as argued by the Supreme Court.

## The emergence of on-demand services is changing the relations between the cinema and television

The emergence of on-demand audiovisual services is an important aspect of the development of the relations between the cinema and television. A number of broadcasters have embraced the strategic option of positioning themselves on this emerging market by taking advantage of their knowledge of the rights market and audiences, their relations with the distribution platforms and their brand awareness, and in many cases also of their experience on the physical video market. Players on the pay-TV market, such as Canal+, CanalSat, BSkyB, Viasat and C More offer catch-up TV services for some of their film channels and/or VoD services in the proper sense. Major free-to-air television broadcasters, such as TF1, the ProSiebenSat.1 Media AG group, Mediaset and RTL (in Germany and the Netherlands) have also set up VoD services that include library catalogue films. Among the public broadcasters, Channel 4 and ARTE (only in France) also offer VoD services with their own catalogues of films.

The development of the VoD market is bringing with it a change in the chronology of distribution windows. The recent development of the idea of a premium VoD service that involves films being made available before they are broadcast on pay-TV is beginning to take hold in the United States, albeit not without some controversy: the announcement by four studios (Warner Bros., Sony, Universal and Fox) of an agreement with DirecTV for a premium VoD service enabling the user to access a film for $30 two months after its cinema release provoked a fierce reaction by cinema operators.

The example of the situation in Germany shows that the principle of compulsory investment is only legitimate if it is applied to the different types of exploitation (cinemas, video, television). The emergence of new distribution channels (especially the distribution of films on the internet and/or as part of on-demand audiovisual services) poses the problem of extending the obligation to pay contributions to include the new economic players, namely the operators of internet services (providers of on-demand services, video exchange services, etc). The extension of the contribution principle to the providers of video-on-demand services was made official in France by the Decree of 12 November 2010 and in Germany by the new Film Support Act passed in July 2010. In Belgium's French-speaking Community, the cable operators' obligation to make investments has been extended to include internet access providers when they act as distributors of audiovisual services. However, the implementation of such regulations quickly becomes highly problematic once cross border services, such as iTunes, XBoxLIVE or Zune, are set up in countries with no such provisions for the payment of levies. Similarly, the idea put forward in France of taxing Google's advertising revenues to finance the creation of works quickly came up against the problem of the location of the service in another European country.

At a time when all the major groups are refining their strategy with the arrival of connected TV – which will permit access on a television instead of only a computer screen to audiovisual content available on the internet – the problems posed by the deterritorialisation of on-demand services are one of the key concerns for the supporters of systems of funding film production by means of levies on the various forms of exploitation.

Finally, the change in the piracy practices of the peer-to-peer networks to embrace streaming (which is easier and makes users feel less guilty) is a further challenge. The rapid availability in the pirates' offerings of both blockbusters and library catalogue films at no cost is tending to gradually erode the value of broadcasting on television. The boom in pay-TV channels in the last few years has shown that, whatever may be said, the public are always prepared to pay to watch films on their television screen, but what will happen when connected TV also enables pirated films distributed over the internet to be watched on the television screen?

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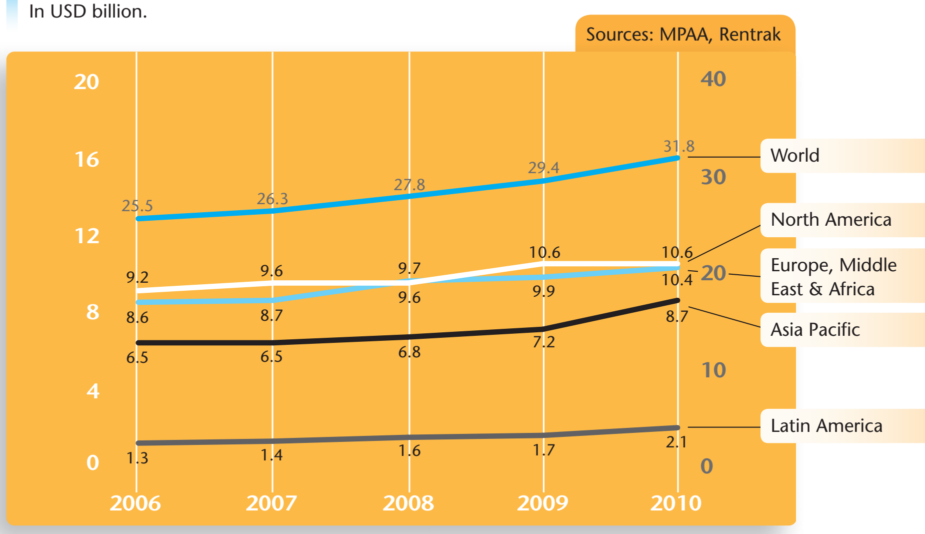
Legal information from IRIS Merlin,
http://merlin.obs.coe.int

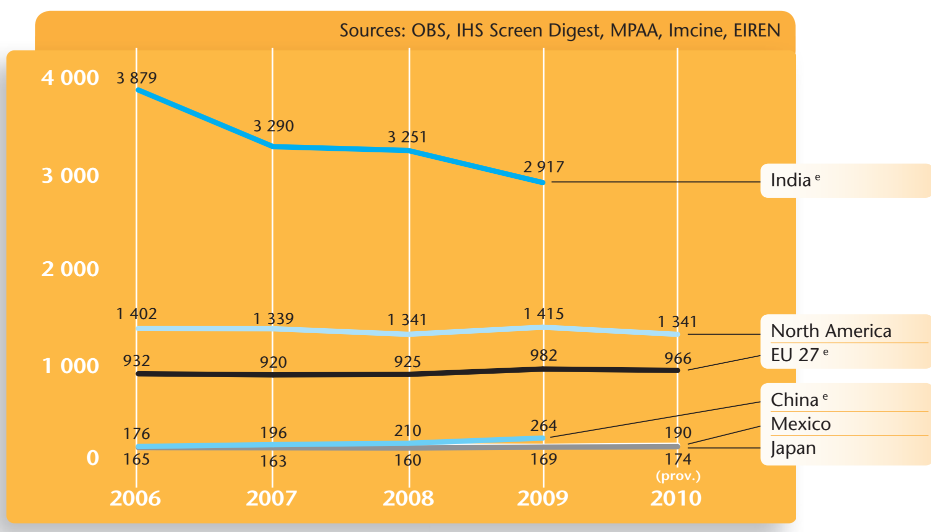
## Worldwide gross box office | 2006-2010 [e]

In USD billion.



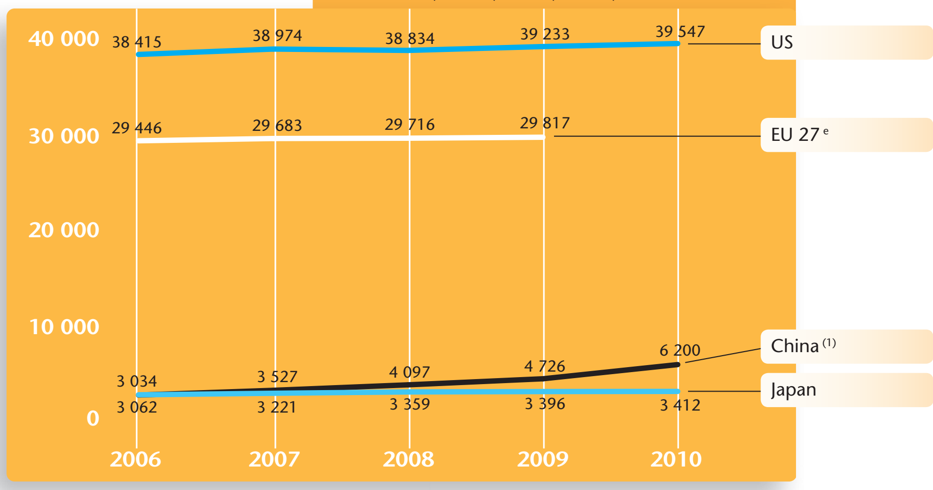

## Admissions in selected major world markets | 2006-2010

In millions.



## Number of screens in selected major world markets | 2006-2010

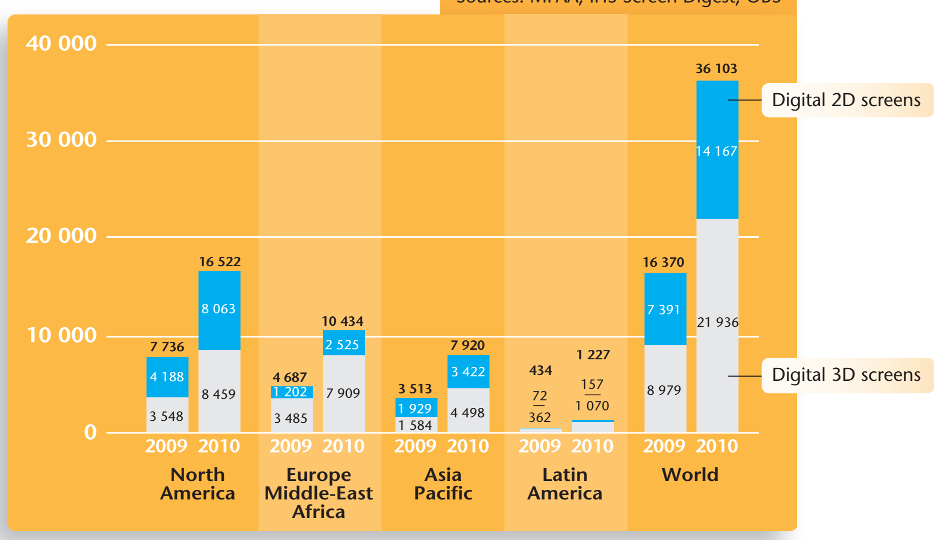
Sources: OBS, MPAA, EIREN, SARFT, *Screen International*




(1) Modern screens.

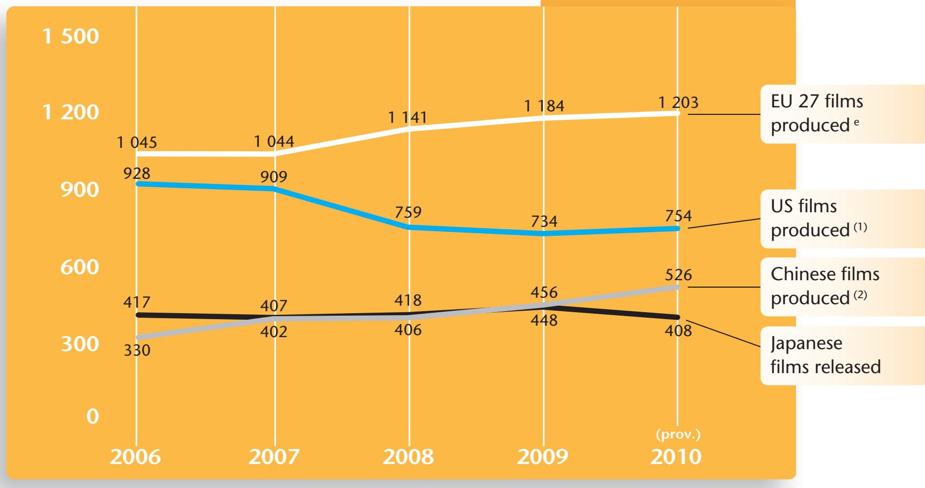
## Worldwide number of digital and 3D screens | 2009-2010 e

Sources: MPAA, IHS Screen Digest, OBS



## Number of feature films produced in selected world major markets | 2006-2010

Sources: OBS, MPAA, EIREN




(1) Revised data for 2008 and 2009.

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

## Top 20 films worldwide by gross box office | 2010

USD million.

| | Original title | Studio | Country of origin | North American box office | International box office | Total |
|---|---|---|---|---|---|---|
| 1 | Avatar (1) (2) | 20th Century Fox | US | ~ | ~ | 1 953 |
| 2 | Toy Story 3 (2) | Walt Disney | US | 415 | 649 | 1 064 |
| 3 | Alice in Wonderland (2) | Walt Disney | US | 334 | 690 | 1 024 |
| 4 | Harry Potter and the Deathly… (1) | Warner Bros. | GB inc/US | 284 | 611 | 895 |
| 5 | Inception (1) | Warner Bros. | US/GB inc | 293 | 531 | 824 |
| 6 | Shrek Forever After (2) | Paramount Pictures | US | 238 | 505 | 743 |
| 7 | The Twilight Saga: Eclipse | Summit Entertainment | US | 301 | 353 | 654 |
| 8 | Iron Man 2 | Paramount Pictures | US | 312 | 311 | 623 |
| 9 | Despicable Me (1) (2) | Universal Pictures | US | 251 | 291 | 542 |
| 10 | How to Train Your Dragon (2) | Paramount Pictures | US | 218 | 278 | 496 |
| 11 | Clash of the Titans (2) | Warner Bros. | US | 163 | 331 | 494 |
| 12 | Sherlock Holmes (1) | Warner Bros. | US/GB inc/DE | ~ | ~ | 372 |
| 13 | The Karate Kid | Sony Pictures | US/CN | 177 | 183 | 360 |
| 14 | Prince of Persia: The Sands… | Walt Disney | US/GB inc | 91 | 245 | 336 |
| 15 | Robin Hood | Universal Pictures | GB inc/US | 105 | 215 | 320 |
| 16 | The Last Airbender (2) | Paramount Pictures | US | 132 | 188 | 320 |
| 17 | Tangled (1) (2) | Walt Disney | US | 168 | 133 | 301 |
| 18 | Resident Evil: Afterlife (2) | Sony Pictures | DE/FR/GB | 60 | 236 | 296 |
| 19 | Shutter Island | Paramount Pictures | US | 128 | 167 | 295 |
| 20 | Salt | Sony Pictures | US | 118 | 176 | 294 |

(1) Still on release in 2011.

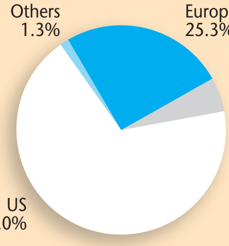
(2) Films available in 3D distribution.

Sources: *Variety*

# European Union

| | |
|---|---|
| Population 2010 e | 501 million |
| GDP per capita 2010 e | 32 143 USD |
| Gross box office 2010 e | 6.45 bn EUR (8.54 bn USD) |
| Admissions 2010 e | 966.5 million |
| Average ticket price 2010 e | 6.67 EUR (8.83 USD) |
| Average admissions per capita 2010 e | 1.93 |
| Screens 2009 I 2010 e | 29 817 I ~ |
| Digital screens 2009 I 2010 e | 4 129 I 8 682 |
| 3D screens 2009 I 2010 e | 2 961 I 6 946 |

**Market shares 2010 e**




## GBO at record high despite fall in admissions

The ongoing interest in 3D films made GBO in the EU reach a new record of estimated EUR 6.4 billion (USD 8.5 billion) in 2010, up 5.1% year-on-year. It failed however to further drive admissions, which decreased slightly by 1.6% to an estimated 966 million tickets sold, still the second highest level since 2004. Boosted by rapid growth in 3D screens, market shares for 3D films increased dramatically in major European markets like France and Germany (16% and 17% of admissions) or the UK and Russia (24% and 20% of GBO). On the level of individual European markets, 2010 cinema-going trends varied significantly with admissions decreasing in 14 and increasing in 13 EU markets, while GBO increased in 18 and decreased in 8 of the EU markets for which provisional data were available. Theatrical markets which performed particularly well were Italy, with admissions up 11%, and France, where GBO rose 5.7%.

## EU production levels keep growing

EU production levels continued to grow to a new record in 2010, though at a slower pace compared to previous years. An estimated 1 203 feature films were produced within the EU member states, 19 films more than 2009. Production growth would have been more pronounced, but for a significant drop in German fiction production which fell from 129 to 84 films, affected by the withholding of support payments by the national funding body FFA, pending proceedings questioning the legal basis of the German public funding system. As a consequence overall EU growth was driven by an increase in feature documentaries (+32 films) while the number of fiction films decreased (-19), raising the share of feature documentaries to 28%, while fiction films accounted for 72% of total production volume in 2010. With 203 feature films receiving official recognition in 2010 France reached a historic high and became again the country with the highest production output in Europe, followed by Spain with 186 films produced.

## European films' share down due to 3D

The dramatic growth in market share of primarily US 3D blockbusters over the past two years seems to have depressed market share for European films to the lowest level of the past five years. Steadily growing up to 28.3% in 2008, estimated market share for European films in the EU decreased to 26.8% in 2009 and 25.3% in 2010. Market share for US films on the other hand grew from 66.9% to an estimated 68.0% in 2010. This compares to levels ranging between 63% and 65% in the years 2006 to 2008. Market share for European films produced in Europe with incoming US investment, such as *Harry Potter and the Deadly Hallows Part 1* and *Robin Hood*, increased from 4.0% to 5.4%. The most successful European films without incoming US investment were French success *Les petits mouchoirs* followed by German 3D horror action film *Resident Evil: Afterlife* which sold 5.3 million tickets across the EU.

## 3D digital screen explosion

According to provisional figures provided by MEDIA Salles the number of digital screens in the European Union more than doubled from 4 129 in 2009 to 8 682 digital screens by the end of 2010. As in 2009, 3D proved to be the single most important force for digital conversion with digital 3D screens accounting for 88% of all new digital screens installed in 2010, bringing the total to 6 946 3D screens. This means that by the end of 2010 an estimated 29% of total EU screens had been converted to digital projection, 80% of which were 3D capable. With 1 860 installations, France confirmed its leading position with regard to digital roll-out in the EU, followed by the UK (1 408) and Germany (1 248).

Sources: OBS, MEDIA Salles

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.

## Number of feature films produced in the European Union | 2006-2010

In units.

| Country | | 2006 | 2007 | 2008 | 2009 | prov. 2010 | Sources |
|---|---|---|---|---|---|---|---|
| **Austria** | 100% national fiction | 8 | 4 | 7 | 7 | 10 | OFI |
| | maj. co-prod. fiction | 8 | 2 | 7 | 5 | 5 | OFI |
| | min. co-prod. fiction | 0 | 6 | 3 | 5 | 6 | OFI |
| | Feature documentaries | 17 | 20 | 13 | 17 | 23 | OFI |
| **Belgium** [e] | 100% national fiction | 11 | 20 | 14 | 13 | 5 | MFB/OBS |
| | maj. co-prod. fiction | 14 | 11 | 14 | 15 | 13 | MFB/OBS |
| | min. co-prod. fiction | 32 | 28 | 30 | 25 | 44 | MFB/OBS |
| | Feature documentaries | 12 | 15 | 20 | 24 | 12 | MFB/OBS |
| **Bulgaria** | 100% national fiction | 4 | 4 | 4 | 5 | 6 | NFC |
| | maj. co-prod. fiction | 3 | 1 | 1 | 0 | 1 | NFC |
| | min. co-prod. fiction | 3 | 0 | 2 | 3 | 3 | NFC |
| | Feature documentaries | 2 | 3 | 2 | 10 | 5 | NFC |
| **Czech Republic** | 100% national fiction | 28 | 18 | 18 | 21 | 16 | Min.Cult. |
| | maj. co-prod. fiction | 1 | 5 | 5 | 8 | 4 | Min.Cult. |
| | min. co-prod. fiction | 6 | 0 | 4 | 4 | 5 | Min.Cult. |
| | Feature documentaries | 10 | 7 | 12 | 12 | 15 | Min.Cult. |
| **Denmark** | 100% national fiction | 13 | 8 | 14 | 14 | 13 | DFI |
| | maj. co-prod. fiction | 7 | 9 | 6 | 7 | 6 | DFI |
| | min. co-prod. fiction | 4 | 7 | 6 | 7 | 3 | DFI |
| | Feature documentaries | 9 | 4 | 4 | 2 | 7 | DFI |
| **Estonia** | 100% national fiction | 5 | 7 | 3 | 2 | 0 | EFSA/OBS |
| | maj. co-prod. fiction | 3 | 2 | 1 | 1 | 3 | EFSA/OBS |
| | min. co-prod. fiction | 2 | 0 | 1 | 3 | 1 | EFSA/OBS |
| | Feature documentaries | 1 | 3 | 9 | 3 | 8 | EFSA/OBS |
| **Finland** | 100% national fiction | 12 | 9 | 9 | 12 | 12 | FFF |
| | maj. co-prod. fiction | 5 | 5 | 4 | 4 | 2 | FFF |
| | min. co-prod. fiction | 6 | 3 | 5 | 4 | 5 | FFF |
| | Feature documentaries | 3 | 4 | 1 | 5 | 9 | FFF |
| **France** | 100% national | 127 | 133 | 145 | 137 | 143 | CNC |
| | maj. co-prod. | 37 | 52 | 51 | 45 | 60 | CNC |
| | min. co-prod. | 39 | 43 | 44 | 48 | 58 | CNC |
| **Germany** | 100% national fiction | 78 | 77 | 81 | 87 | 61 | SPIO |
| | maj. co-prod. fiction | 20 | 16 | 15 | 42 | 23 | SPIO |
| | min. co-prod. fiction | 24 | 29 | 29 | 20 | 35 | SPIO |
| | Feature documentaries | 52 | 50 | 60 | 70 | 74 | SPIO |
| **Greece** [e] | 100% national fiction | 13 | 10 | 12 | 16 | 14 | GFC/OBS |
| | maj. co-prod. fiction | 2 | 0 | 2 | 3 | 1 | GFC/OBS |
| | min. co-prod. fiction | 2 | 5 | 2 | 0 | 1 | GFC/OBS |
| | Feature documentaries | 5 | 10 | 15 | 6 | 2 | GFC/OBS |
| **Hungary** | 100 % national | 37 | 26 | 25 | 22 | 26 | Min.Cult./AHFD/NFO |
| | maj. co-prod. | 9 | 2 | 1 | 1 | 1 | Min.Cult./AHFD/NFO |
| | min. co-prod. | 0 | 0 | 4 | 4 | 9 | Min.Cult./AHFD/NFO |
| **Ireland** | 100% national fiction | ~ | 5 | 7 | 8 | 4 | IFB |
| | maj. co-prod. fiction | ~ | 3 | 6 | 6 | 10 | IFB |
| | min. co-prod. fiction | ~ | 2 | 12 | 6 | 9 | IFB |
| | Feature documentaries | 9 | 13 | 14 | 13 | 15 | IFB |
| **Italy** | 100 % national | 90 | 93 | 128 | 101 | 115 | CCH |
| | maj. co-prod. | 12 | 16 | 18 | 14 | 14 | CCH |
| | min. co-prod | 15 | 14 | 9 | 18 | 13 | CCH |

*Continued overleaf*

*Continued*

## Number of feature films produced in the European Union | 2006-2010

In units.

| Country | | 2006 | 2007 | 2008 | 2009 | *prov.* 2010 | Sources |
|---|---|---|---|---|---|---|---|
| **Latvia** | 100% national fiction | 0 | 5 | 3 | 4 | 2 | NFCL |
| | maj. co-prod. fiction | 2 | 0 | 0 | 1 | 1 | NFCL |
| | min. co-prod. fiction | 2 | 1 | 1 | 1 | 0 | NFCL |
| | Feature documentaries | 2 | 1 | 3 | 9 | 12 | NFCL |
| **Lithuania** | 100% national fiction | 1 | 2 | 6 | 5 | 4 | Min. Cult./Baltic Films |
| | maj. co-prod. fiction | 2 | 0 | 0 | 1 | 1 | Min. Cult./Baltic Films |
| | min. co-prod. fiction | 0 | 1 | 1 | 0 | 0 | Min. Cult./Baltic Films |
| **Luxembourg** | 100% national fiction | 0 | 0 | 0 | 1 | 1 | LFF |
| | maj. co-prod. fiction | 3 | 2 | 0 | 4 | 1 | LFF |
| | min. co-prod. fiction | 9 | 2 | 11 | 12 | 14 | LFF |
| | Feature documentaries | 2 | 4 | 2 | 1 | 5 | LFF |
| **The Netherlands** [e] | 100% national fiction | 16 | 27 | 22 | 28 | 22 | NFF/NVF/OBS |
| | maj. co-prod. fiction | 6 | 4 | 6 | 5 | 10 | NFF/NVF/OBS |
| | min. co-prod. fiction | 8 | 8 | 18 | 6 | 12 | NFF/NVF/OBS |
| | Feature documentaries | 17 | 10 | 17 | 14 | 15 | NFF/NVF/OBS |
| **Poland** | 100% national fiction | 23 | 30 | 28 | 31 | 38 | PISF/OBS |
| | maj. co-prod. fiction | 1 | 4 | 4 | 7 | 4 | PISF/OBS |
| | min. co-prod. fiction | 2 | 5 | 8 | 4 | 2 | PISF/OBS |
| | Feature documentaries | 1 | 1 | 5 | 7 | 2 | PISF/OBS |
| **Portugal** | 100% national fiction | 3 | 8 | 7 | 9 | 12 | ICA |
| | maj. co-prod. fiction | 11 | 4 | 6 | 3 | 6 | ICA |
| | min. co-prod. fiction | 7 | 0 | 1 | 2 | 4 | ICA |
| | Feature documentaries | 13 | 3 | 2 | 9 | 15 | ICA |
| **Romania** | 100% national fiction | 14 | 9 | 7 | 11 | 9 | CNC |
| | maj. co-prod. fiction | 1 | 0 | 2 | 3 | 8 | CNC |
| | min. co-prod. fiction | 3 | 3 | 2 | 4 | 2 | CNC |
| | Feature documentaries | 0 | 2 | 2 | 1 | 2 | CNC/OBS |
| **Slovakia** | 100% national fiction | 0 | 3 | 1 | 1 | 1 | SKFI |
| | maj. co-prod. fiction | 0 | 2 | 3 | 5 | 1 | SKFI |
| | min. co-prod. fiction | 2 | 3 | 3 | 7 | 2 | SKFI |
| | Feature documentaries | 1 | 2 | 5 | 5 | 4 | SKFI |
| **Slovenia** | 100% national fiction | 1 | 4 | 9 | 3 | 4 | SFC |
| | maj. co-prod. fiction | 0 | 4 | 0 | 0 | 0 | SFC |
| | min. co-prod. fiction | 3 | 3 | 3 | 1 | 3 | SFC |
| | Feature documentaries | 0 | 2 | 3 | 2 | 0 | SFC |
| **Spain** | 100 % national | 109 | 115 | 124 | 135 | 152 | ICAA |
| | maj. co-prod. | 23 | 26 | 26 | 22 | 34 | ICAA |
| | min. co-prod. | 18 | 31 | 23 | 29 | 15 | ICAA |
| **Sweden** | 100% national fiction | 29 | 15 | 8 | 30 | 19 | SFI/OBS |
| | maj. co-prod. fiction | 12 | 10 | 13 | 7 | 9 | SFI/OBS |
| | min. co-prod. fiction | 2 | 7 | 1 | 1 | 8 | SFI/OBS |
| | Feature documentaries | 3 | 5 | 14 | 4 | 18 | SFI/OBS |
| **United Kingdom** | 100 % national | 57 | 70 | 81 | 83 | 72 | UKFC/OBS |
| | maj. co-prod. | 18 | 15 | 10 | 6 | 12 | UKFC/OBS |
| | min. co-prod. | 33 | 14 | 13 | 20 | 7 | UKFC/OBS |
| | Inward features (1) | 28 | 26 | 20 | 26 | 28 | UKFC/OBS |
| **Total fiction films EU 27 est (2)** | | **819** | **803** | **847** | **883** | **870** | OBS |
| **Total feat. documentaries EU 27 e (3)** | | **226** | **241** | **294** | **301** | **333** | OBS |
| **Total feature films EU 27 e (3)** | | **1 045** | **1 044** | **1 141** | **1 184** | **1 203** | OBS |

(1) Excluding inward features involving only VFX work in the UK.

(2) May include feature documentaries in ES, IT, GR, HU.

(3) May double count minority co-produced feature documentaries.
No comprehensive data for feature documentaries available for CY, ES, IT, GR, HU, LT, MT, RO.

## Admissions in the European Union | 2006-2010

In millions.

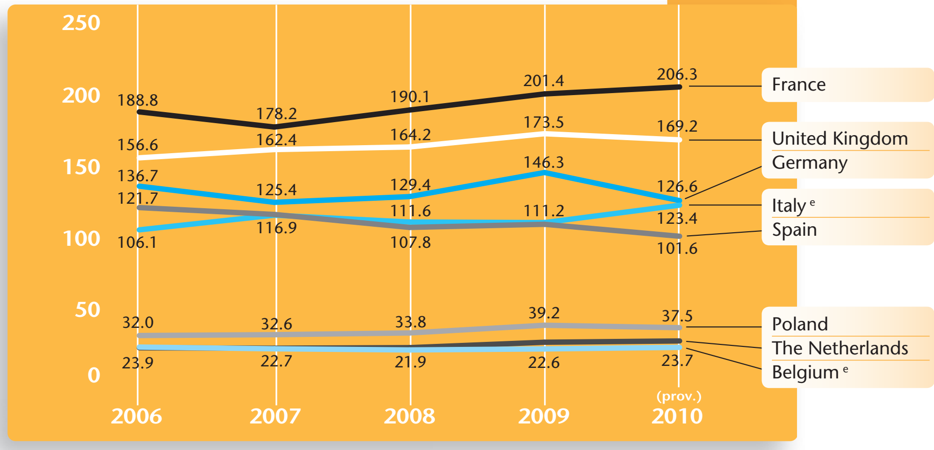
| Country | 2006 | 2007 | 2008 | 2009 | prov. 2010 | 2010/09 | Sources |
|---|---|---|---|---|---|---|---|
| **Austria** | 17.3 | 15.7 | 15.6 | 18.4 | 17.3 | -6.0% | F&MA |
| **Belgium** [e] | 23.9 | 22.7 | 21.9 | 22.6 | 23.7 | 5.1% | INS/MEDIA Salles |
| **Bulgaria** | 2.4 | 2.5 | 2.8 | 3.2 | 4.0 | 25.1% | National Film Center |
| **Cyprus** | 0.8 | 0.9 | 0.9 | 0.9 | 0.9 | -1.8% | Min. Cult./Media Salles |
| **Czech Republic** | 11.5 | 12.8 | 12.9 | 12.5 | 13.5 | 8.6% | Ministry of Culture/UFD |
| **Denmark** | 12.6 | 12.1 | 13.2 | 14.1 | 13.0 | -0.2% | Denmark Statistics |
| **Estonia** | 1.6 | 1.6 | 1.6 | 1.8 | 2.1 | 19.5% | Estonian Film Foundation |
| **Finland** | 6.7 | 6.5 | 6.9 | 6.8 | 7.5 | 9.7% | Finnish Film Foundation |
| **France** | 188.8 | 178.2 | 190.1 | 201.4 | 206.3 | 2.4% | CNC |
| **Germany** | 136.7 | 125.4 | 129.4 | 146.3 | 126.6 | -13.5% | FFA |
| **Greece** | 12.8 | 13.8 | 11.8 | 12.3 | 11.7 | -5.1% | Media Salles/GFC |
| **Hungary** | 11.7 | 11.1 | 10.4 | 10.6 | 11.0 | 3.5% | National Film Office |
| **Ireland** | 17.9 | 18.4 | 18.2 | 17.7 | 16.5 | -6.6% | Carlton Screen Advertising/Rentrak |
| **Italy** [e] | 106.1 | 116.4 | 111.6 | 111.2 | 123.4 | 11.0% | CCH/ANICA/Cinetel/OBS |
| **Latvia** | 2.1 | 2.4 | 2.4 | 1.9 | 2.1 | 8.3% | National Film Centre |
| **Lithuania** | 2.4 | 3.2 | 3.3 | 2.7 | 2.6 | -2.9% | Baltic Films |
| **Luxembourg** [e] | 1.3 | 1.2 | 1.1 | 1.3 | 1.2 | -5.6% | CNA/Media Salles |
| **Malta** [e] | 0.9 | 1.0 | 1.0 | 1.0 | 0.9 | -3.1% | MFC/Media Salles |
| **Poland** | 32.0 | 32.6 | 33.8 | 39.2 | 37.5 | -4.3% | boxoffice.pl |
| **Portugal** | 16.4 | 16.3 | 16.0 | 15.7 | 16.6 | 5.4% | Instituto do Cinema e do Audiovisual |
| **Romania** | 2.8 | 2.9 | 3.8 | 5.3 | 6.5 | 23.3% | Centrul National al Cinematografiei |
| **Slovakia** | 3.4 | 2.8 | 3.4 | 4.1 | 3.9 | -5.7% | Slovak Film Institute |
| **Slovenia** | 2.7 | 2.4 | 2.4 | 2.7 | 2.9 | 8.7% | Slovenian Film Centre |
| **Spain** | 121.7 | 116.9 | 107.8 | 110.0 | 101.6 | -7.6% | ICAA/OBS |
| **Sweden** | 15.3 | 14.9 | 15.3 | 17.4 | 15.8 | -9.1% | Swedish Film Institute |
| **The Netherlands** | 23.4 | 23.1 | 23.5 | 27.3 | 28.2 | 3.2% | NFC/NFF/MaccsBox - NVB & NVF |
| **United Kingdom** | 156.6 | 162.4 | 164.2 | 173.5 | 169.2 | -2.5% | Digital Cinema Media/ CAA/Rentrak |
| **EU 27** [e] | **932** | **920** | **925** | **982** | **966** | **-1.6%** | European Audiovisual Observatory |

Source: OBS

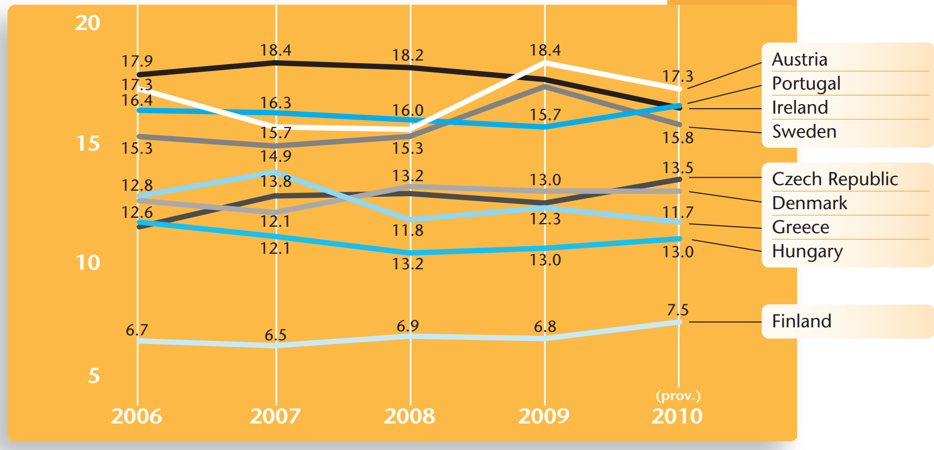
## Admissions in the European Union | 2006-2010

In millions.

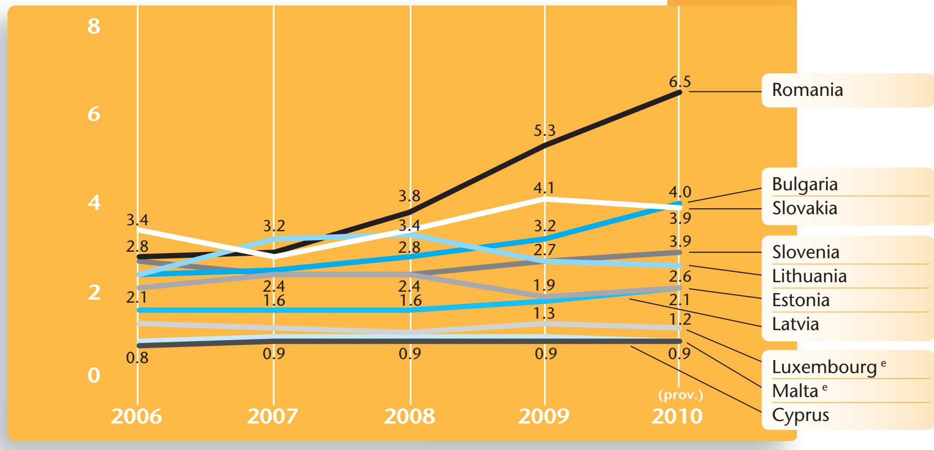
Source: OBS




Source: OBS

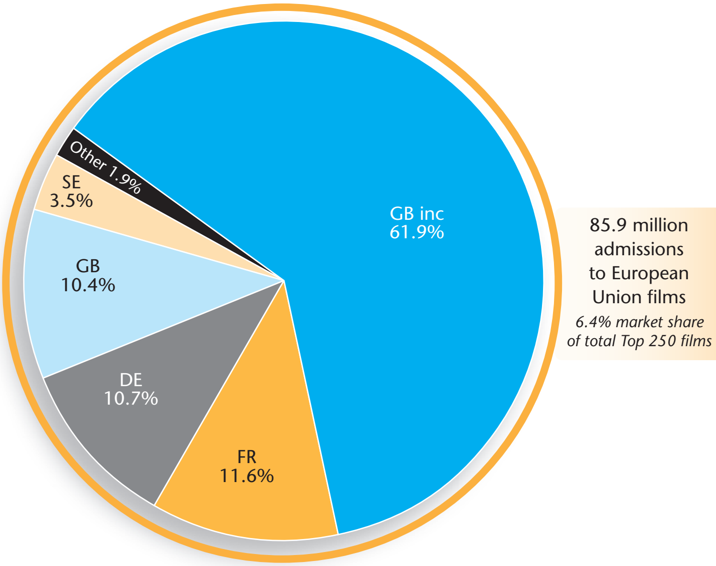



Source: OBS



## Breakdown of admissions to European Union films on the North American market | 2010 e

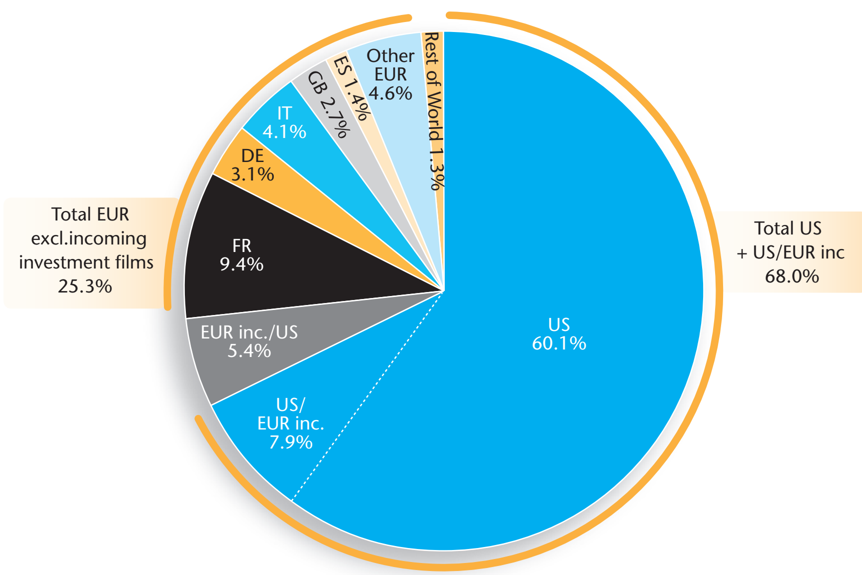
Percentage share of admissions in the United States and Canada.
Admissions estimated based on average ticket price of 7.89 USD.




Note: Based on Top 250 films in the United States of America and Canada.
'Inc' refers to films produced in Europe with US incoming investment.

Sources: *Variety*, OBS

## Breakdown of European Union admissions by the origin of films | 2010 *prov.*




Note: 'inc' refers to films produced in Europe with incoming investment from the US.

Sources: OBS, LUMIERE

# European Union

The tables below are provisional rankings on the basis of partial data from 23 European Union member states – around 88% of total admissions in the European Union are analysed.

## Top 25 films by admissions in the European Union | 2010 e

| | Original title | Country of origin | Year | Director | Admissions e |
|---|---|---|---|---|---|
| 1 | Avatar (1) | US/GB | 2009 | James Cameron | 43 309 016 |
| 2 | Harry Potter and the Deathly Hallows: Part 1 | GB inc/US | 2010 | David Yates | 31 275 121 |
| 3 | Toy Story 3 | US | 2010 | Lee Unkrich | 27 511 206 |
| 4 | Alice in Wonderland | US | 2010 | Tim Burton | 26 703 665 |
| 5 | inception | US/GB inc | 2010 | Christopher Nolan | 25 504 921 |
| 6 | Shrek Forever After | US | 2010 | Mike Mitchell | 25 130 938 |
| 7 | The Twilight Saga: Eclipse | US | 2010 | David Slade | 23 661 004 |
| 8 | Despicable Me | US | 2010 | P. Coffin, C. Renaud | 14 787 983 |
| 9 | Sherlock Holmes (2) | US/GB inc/DE | 2009 | Guy Ritchie | 13 166 906 |
| 10 | Robin Hood | GB inc/US | 2010 | Ridley Scott | 13 108 518 |
| 11 | How to Train Your Dragon | US | 2010 | D. DeBlois, C. Sanders | 12 406 370 |
| 12 | Sex and the City 2 | US | 2010 | Michael Patrick King | 12 335 567 |
| 13 | Clash of the Titans | US | 2010 | Louis Leterrier | 11 767 222 |
| 14 | Shutter Island | US | 2010 | Martin Scorsese | 11 316 515 |
| 15 | Prince of Persia: The Sands of Time | US/GB inc | 2010 | Mike Newell | 10 960 662 |
| 16 | The Princess and the Frog (3) | US | 2009 | R. Clements, J. Musker | 10 679 895 |
| 17 | Iron Man 2 | US | 2010 | Jon Favreau | 10 372 268 |
| 18 | The Chronicles of Narnia: The Voyage… | US/GB inc | 2010 | Michael Apted | 8 743 094 |
| 19 | Tangled | US | 2010 | B. Howard, N. Greno | 8 383 686 |
| 20 | The Karate Kid | US/CN | 2010 | Harald Zwart | 8 141 197 |
| 21 | Knight and Day | US | 2010 | James Mangold | 7 796 697 |
| 22 | The Sorcerer's Apprentice | US | 2010 | Jon Turteltaub | 6 901 949 |
| 23 | Invictus | US | 2009 | Clint Eastwood | 6 828 917 |
| 24 | Alvin and the Chipmunks: The Squeakquel (4) | US | 2009 | Betty Thomas | 6 793 880 |
| 25 | The Last Airbender | US | 2010 | M. Night Shyamalan | 6 738 456 |

(1) 22 476 323 admissions in the EU in 2009.
(2) 3 588 455 admissions in the EU in 2009.
(3) 2 313 854 admissions in the EU in 2009.
(4) 5 279 352 admissions in the EU in 2009.

Sources: OBS, LUMIERE

## Top 25 European Union films by admissions in the European Union | 2010 e

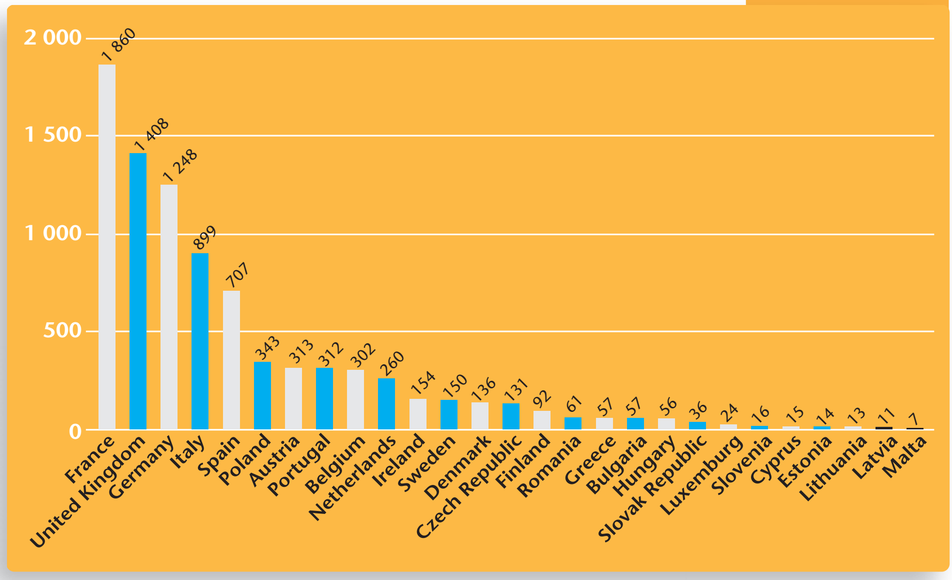
| | Original title | Country of origin | Year | Director | Admissions e |
|---|---|---|---|---|---|
| 1 | Harry Potter and the Deathly Hallows: Part 1 | GB inc/US | 2010 | David Yates | 31 275 121 |
| 2 | Robin Hood | GB inc/US | 2010 | Ridley Scott | 13 108 518 |
| 3 | Les petits mouchoirs | FR | 2010 | Guillaume Canet | 5 401 353 |
| 4 | Resident Evil: Afterlife | DE/FR/GB | 2010 | Paul W.S. Anderson | 5 272 912 |
| 5 | Nanny McPhee and the Big Bang | GB/US/FR | 2010 | Susanna White | 5 011 470 |
| 6 | Benvenuti al Sud | IT | 2010 | Luca Miniero | 4 911 920 |
| 7 | Camping 2 | FR | 2010 | Fabien Onteniente | 4 098 480 |
| 8 | L'arnacoeur | FR/MC | 2010 | Pascal Chaumeil | 4 086 642 |
| 9 | Océans | FR/ES/CH | 2009 | J. Perrin, J. Cluzaud | 3 822 120 |
| 10 | StreetDance 3D | GB | 2010 | M. Giwa, D. Pasquini | 3 805 069 |
| 11 | The Ghost Writer | FR/DE/GB | 2010 | Roman Polanski | 3 603 856 |
| 12 | Des hommes et des dieux | FR | 2010 | Xavier Beauvois | 3 482 157 |
| 13 | Sammy's avonturen: De geheime… | BE/US | 2010 | Ben Stassen | 3 358 816 |
| 14 | Arthur et la guerre des deux mondes | FR | 2010 | Luc Besson | 3 304 428 |
| 15 | La rafle | FR/DE/HU | 2010 | Roselyne Bosch | 3 012 452 |
| 16 | Green Zone | GB/US/ES/FR/JP | 2010 | Paul Greengrass | 2 999 813 |
| 17 | Io, loro e Lara | IT | 2010 | Carlo Verdone | 2 537 203 |
| 18 | Potiche | FR/BE | 2010 | François Ozon | 2 450 142 |
| 19 | Planet 51 (1) | ES/GB | 2009 | Jorge Blanco, Javier Abad | 2 192 977 |
| 20 | Natale in Sud Africa | IT | 2010 | Neri Parenti | 2 173 332 |
| 21 | Maschi contro femmine | IT | 2010 | Fausto Brizzi | 2 148 807 |
| 22 | Les aventures extraordinaires d'Adèle… | FR | 2010 | Luc Besson | 2 063 350 |
| 23 | La banda dei babbi natale | IT | 2010 | Paolo Genovese | 2 015 124 |
| 24 | Die Konferenz der Tiere | DE | 2010 | H. Tappe, R. Klooss | 1 901 234 |
| 25 | Mine vaganti | IT | 2010 | Ferzan Ozpetek | 1 869 806 |

(1) 3 315 734 admissions in the EU in 2009.
Note: 'inc' refers to films produced in Europe with incoming investment from the US.

Sources: OBS, LUMIERE

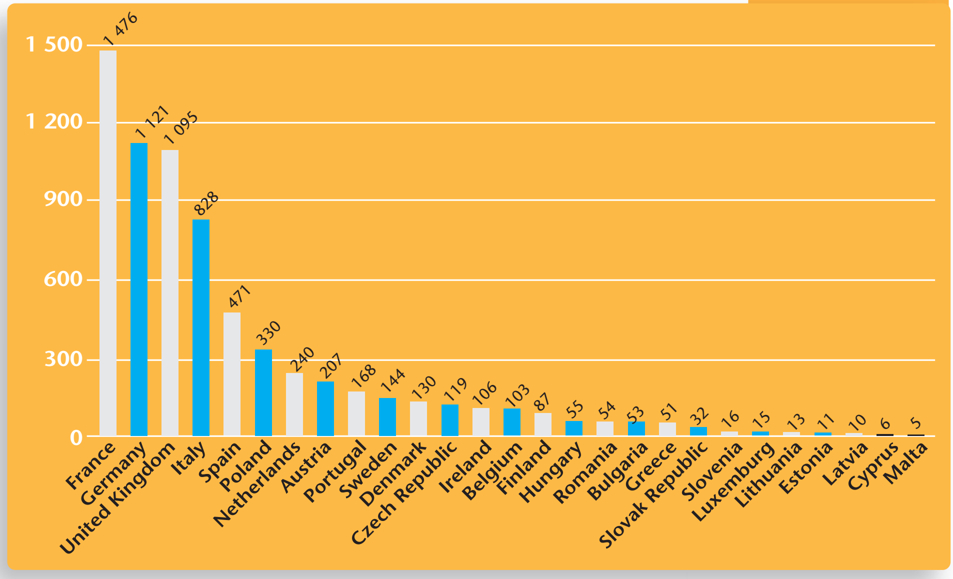
**Number of digital screens in the European Union by country** | December 2010 *prov.*

Source: MEDIA Salles




**Number of digital 3D screens in the European Union by country** | December 2010 *prov.*

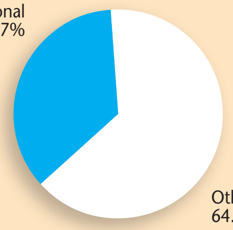
Source: MEDIA Salles



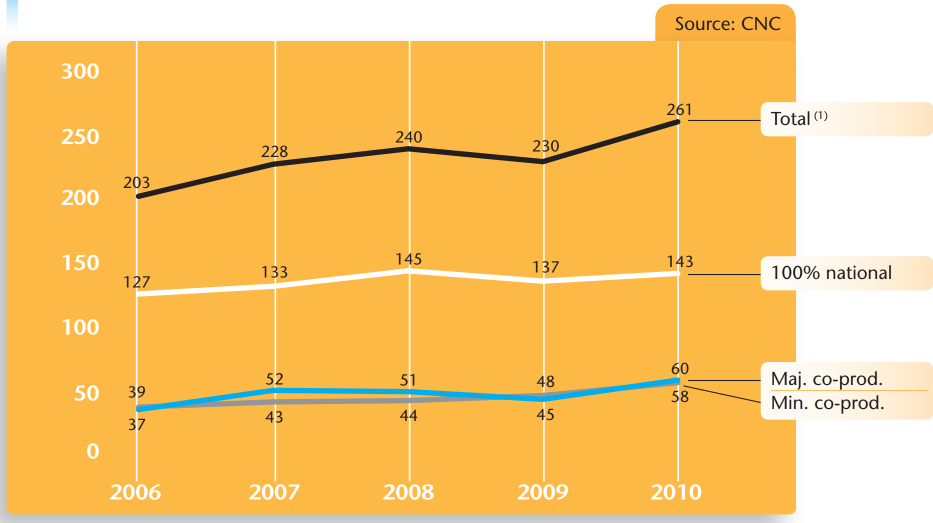
# France

| | |
|---|---|
| Population 2010 e | 63.0 million |
| GDP per capita 2010 e | 40 591 USD |
| Gross box office 2010 | 1.30 bn EUR (1.73 bn USD) |
| Admissions 2010 | 206.3 million |
| Average ticket price 2010 | 6.32 EUR (8.38 USD) |
| Average admissions per capita 2010 e | 3.28 |
| Screens 2009 \| 2010 | 5 470 \| 5 481 |
| Digital screens 2009 \| 2010 | 904 \| 1 860 |
| Digital 3D screens 2009 \| 2010 | 477 \| 1 476 |

**Market shares 2010**

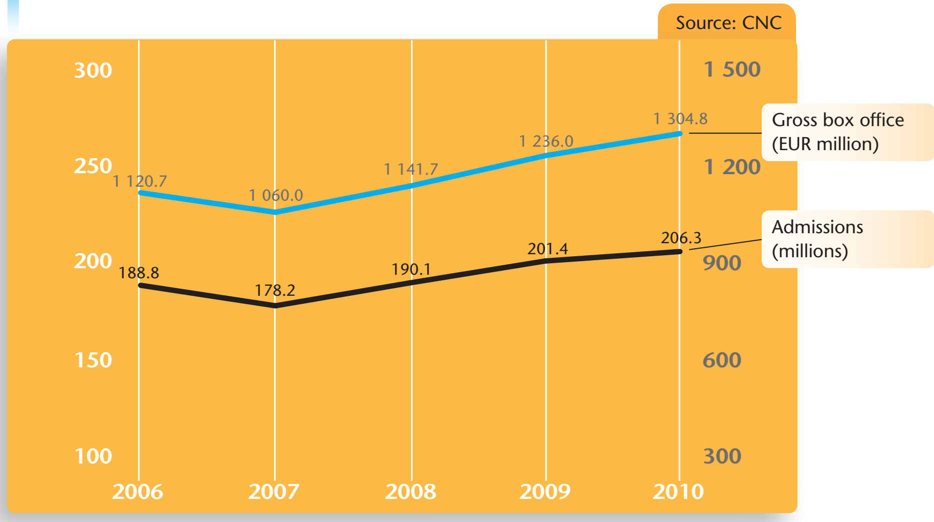



## Number of feature films produced | 2006-2010




(1) Officially recognised films.

## Admissions and gross box office | 2006-2010



## Top 20 films by admissions in France | 2010

| | Original title | Country of origin | Director | Distributor | Admissions |
|---|---|---|---|---|---|
| 1 | Harry Potter and the Deathly... | GB inc/US | David Yates | Warner Bros. | 5 506 304 |
| 2 | Les petits mouchoirs | FR | Guillaume Canet | EuropaCorp | 5 249 345 |
| 3 | Inception | US/GB inc | Christopher Nolan | Warner Bros. | 4 933 551 |
| 4 | Shrek Forever After | US | Mike Mitchell | Paramount Pictures | 4 625 118 |
| 5 | Alice in Wonderland | US | Tim Burton | Walt Disney | 4 533 414 |
| 6 | Toy Story 3 | US | Lee Unkrich | Walt Disney | 4 353 253 |
| 7 | Camping 2 | FR | Fabien Onteniente | Pathé Distribution | 3 978 114 |
| 8 | The Twilight Saga: Eclipse | US | David Slade | SND Films | 3 940 301 |
| 9 | The Princess and the Frog | US | R. Clements, J. Musker | Walt Disney | 3 842 600 |
| 10 | L'arnacoeur | FR/MC | Pascal Chaumeil | Universal Pictures | 3 798 089 |
| 11 | Invictus | US | Clint Eastwood | Warner Bros. | 3 165 259 |
| 12 | Shutter Island | US | Martin Scorsese | Paramount Pictures | 3 113 153 |
| 13 | Des hommes et des dieux | FR | Xavier Beauvois | Mars Dist.(StudioCanal) | 3 082 754 |
| 14 | Arthur et la guerre des deux mondes | FR | Luc Besson | EuropaCorp | 3 055 000 |
| 15 | Despicable Me | US | P. Coffin, C. Renaud | Universal Pictures | 2 937 925 |
| 16 | La rafle | FR/DE/HU | Roselyne Bosch | Gaumont Distribution | 2 895 810 |
| 17 | Océans | FR/ES/CH | J. Perrin, J. Cluzaud | Pathé Distribution | 2 860 503 |
| 18 | Tangled | US | B. Howard, N. Greno | Walt Disney | 2 781 868 |
| 19 | Iron Man 2 | US | Jon Favreau | Paramount Pictures | 2 575 234 |
| 20 | Robin Hood | GB inc/US | Ridley Scott | Universal Pictures | 2 385 387 |

Source: *Le film français*

## Distribution and Exhibition

2010 saw France breaking box office records for the second year in a row. Cinema attendance increased by 2.4% to 206.3 million tickets sold, the highest level since 1967, and GBO climbed by 5.6% to EUR 1.3 billion (USD 1.7 billion), the highest level in history. The 24 3D films screened in 2010 significantly contributed to this development, accounting for an estimated 16% of total admissions and causing average ticket price to increase by 3.1% to EUR 6.32 (USD 8.4). Market share for French films decreased from 36.8% to 35.7%, the lowest level since 2004 but still the highest national market share in the EU. US films accounted for 47.5% of admissions, down from 49.7% in 2009, as chart topping *Harry Potter and the Deathly Hallows I* is counted as a UK production. Warner Bros. topped distributor rankings with an estimated 12.4% market share, followed by 20th Century Fox (9.3%) and Walt Disney (9.1%). The commercial success of 3D films gave further impetus to the roll-out of digital cinema with all major exhibition chains speeding up the conversion of their screens, driving digital screen count to more than double in 2010. With 1 860 digital screens, 34% of its total screen base, and 1 476 3D screens at the end of 2010, France further extended its leading position in Europe. In order to support smaller theaters in small towns and rural areas, the French government will provide public aid of EUR 125 million over the next three years through a cinema digitisation fund administered by the CNC.

## Production and Funding

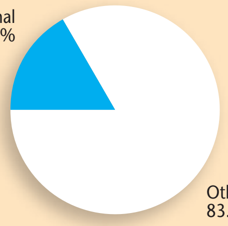
French film production reached a historical record high in 2010 with 261 feature films receiving official recognition, 31 more than in 2009. 203 out of these films were French initiative films whose average production costs increased from EUR 5.1 million to EUR 5.5 million. After having fallen to EUR 1.1 billion in 2009, total production investment bounced back to EUR 1.44 billion. 2010 saw a significant increase in the number of mid-range productions with budgets from EUR 4 to 7 million accounting for 23% of all films as well as of total production spend. About 50% of French film productions had budgets of less than EUR 4 million accounting for some 17% of total production spend. Production growth was primarily driven by an increase in international co-productions, up 25 films and contributing EUR 692 million in production investment.

Sources: CNC, *Le film français*, *Screen International*, *Variety*, OBS

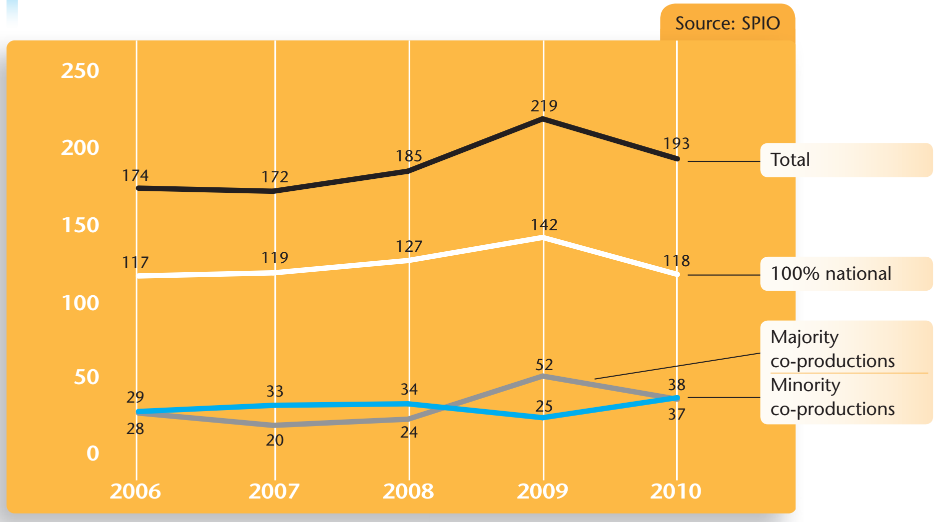
# Germany

| | |
|---|---|
| Population 2010 [e] | 81.8 million |
| GDP per capita 2010 [e] | 40 512 USD |
| Gross box office 2010 | 920.4 M EUR (1 218 M USD) |
| Admissions 2010 | 126.6 million |
| Average ticket price 2010 | 7.27 EUR (9.62 USD) |
| Average admissions per capita 2010 [e] | 1.55 |
| Screens 2009 \| 2010 | 4 734 \| 4 699 |
| Digital screens 2009 \| 2010 | 566 \| 1 248 |
| Digital 3D screens 2009 \| 2010 | 369 \| 1 121 |

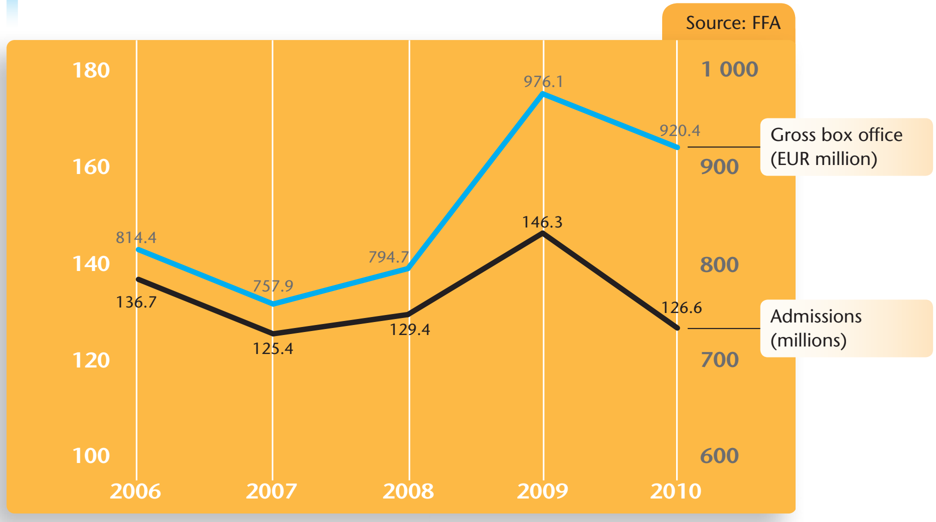
**Market shares 2010**




## Number of German films on first release | 2006-2010




## Admissions and gross box office | 2006-2010



## Top 20 films by admissions in Germany | 2010

| | Original title | Country of origin | Director | Distributor | Admissions |
|---|---|---|---|---|---|
| 1 | Avatar | US/GB | James Cameron | 20th Century Fox | 7 872 509 |
| 2 | Harry Potter and the Deathly… | GB inc/US | David Yates | Warner Bros. | 5 187 790 |
| 3 | The Twilight Saga: Eclipse | US | David Slade | Concorde Filmverleih | 3 710 149 |
| 4 | Inception | US/GB inc | Christopher Nolan | Warner Bros. | 3 423 479 |
| 5 | Alice in Wonderland | US | Tim Burton | Walt Disney Studios | 2 968 430 |
| 6 | Tangled | US | B. Howard, N. Greno | Walt Disney Studios | 2 588 600 |
| 7 | Sex and the City 2 | US | Michael Patrick King | Warner Bros. | 2 569 498 |
| 8 | Despicable Me | US | P. Coffin, C. Renaud | Universal Pictures | 2 466 275 |
| 9 | Shrek Forever After | US | Mike Mitchell | Paramount | 2 431 818 |
| 10 | Grown Ups | US | Dennis Dugan | Sony Pict. Releasing | 2 097 177 |
| 11 | Sherlock Holmes | US/GB inc/DE | Guy Ritchie | Warner Bros. | 1 731 301 |
| 12 | Prince of Persia: The Sands of… | US/GB inc | Mike Newell | Walt Disney Studios | 1 610 233 |
| 13 | How to Train Your Dragon | US | D. DeBlois, C. Sanders | Paramount | 1 605 205 |
| 14 | Friendship! | DE/US | Markus Goller | Sony Pict. Releasing | 1 597 193 |
| 15 | Toy Story 3 | US | Lee Unkrich | Walt Disney Studios | 1 591 518 |
| 16 | Robin Hood | GB INC/US | Ridley Scott | Universal Pictures | 1 524 773 |
| 17 | Shutter Island | US | Martin Scorsese | Concorde Filmverleih | 1 484 491 |
| 18 | The Karate Kid | US/CN | Harald Zwart | Sony Pict. Releasing | 1 452 703 |
| 19 | Alvin and the Chipmunks 2 | US | Betty Thomas | 20th Century Fox | 1 422 775 |
| 20 | Konferenz… (Animals United) | DE | H. Tappe, R. Klooss | Constantin Film | 1 409 397 |

Source: FFA

## Distribution and Exhibition

After breaking all sorts of records in 2009, the German theatrical market faced a significant downturn in 2010. Admissions fell by 13.5% from 146 million to 126.6 million and even the ongoing 3D boom – which brought average ticket prices to a new record high of EUR 7.3 (USD 9.6) compared to EUR 6.1 just two years ago – could not compensate for the strong decline in cinema attendance causing GBO to fall 6% from EUR 976 million to EUR 920 million. In contrast to the past two years it was particularly German films which failed to attract audiences with admissions almost halving from 40 million to 21 million, thereby accounting for practically the entire fall in overall admissions. National market share consequently dropped from 27.4% to 16.8%. The strong impact of 3D films on the German theatrical market in 2010 is also illustrated by the fact that 11 out of the 32 films which passed the 1 million admissions threshold were 3D films. The overall market share of 3D films in terms of admissions increased from 5% to 17% and should be significantly larger in terms of GBO. Germany's screen base continued to shrink for the fifth consecutive year, with screens falling to 4 699 and the number of towns offering a local cinema decreasing further to 954, compared to 1 035 in 2005. More than a quarter of all German screens had been converted to digital projection systems by the end of 2010. After failing to agree on an all-industry solution for a nationwide digital roll-out, a state support scheme for digitising screens in smaller cinemas, operated by the FFA and the BKM was launched in February 2011.

## Production and Funding

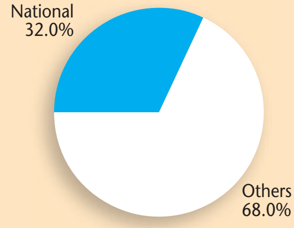
After shooting to a record high of 219 film productions in 2009, German production activity dropped to 193 feature film releases, primarily due to a decrease in the number of 100% national and majority fiction co-productions. The drop may have been influenced by the uncertainty about the legal basis of the German public funding system in 2009, which had been found unconstitutional after a complaint had been brought forward by several exhibitors who criticised the unequal treatment in comparison with broadcasters and refused to pay their contributions to the FFA. Good news came earlier this year from a ruling of the Federal Administrative Court, which approved an amended version of the film funding law obliging broadcasters to contribute to the fund.

Sources: FFA, SPIO, *Blickpunkt Film*, *Screen International*, *Variety*, Cineuropa, OBS

# Italy

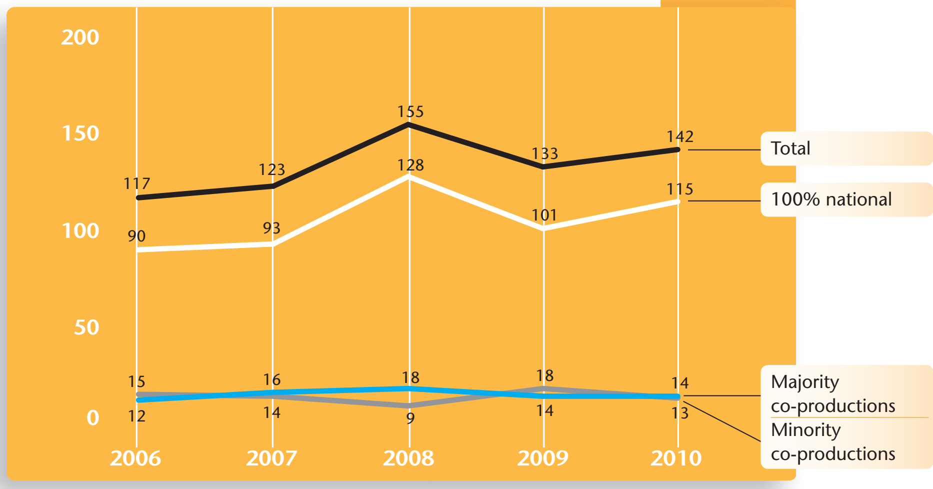
| | |
|---|---|
| Population 2010 e | 60.2 million |
| GDP per capita 2010 e | 33 829 USD |
| Gross box office 2010 e | 797.2 M EUR (1 055 M USD) |
| Admissions 2010 e | 123.4 million |
| Average ticket price 2010 e | 6.46 EUR (8.55 USD) |
| Average admissions per capita 2010 e | 2.05 |
| Screens 2009 I 2010 | 3 208 I 3 217 |
| Digital screens 2009 I 2010 | 434 I 899 |
| Digital 3D screens 209 I 2010 | 392 I 828 |

**Market shares 2010 e**



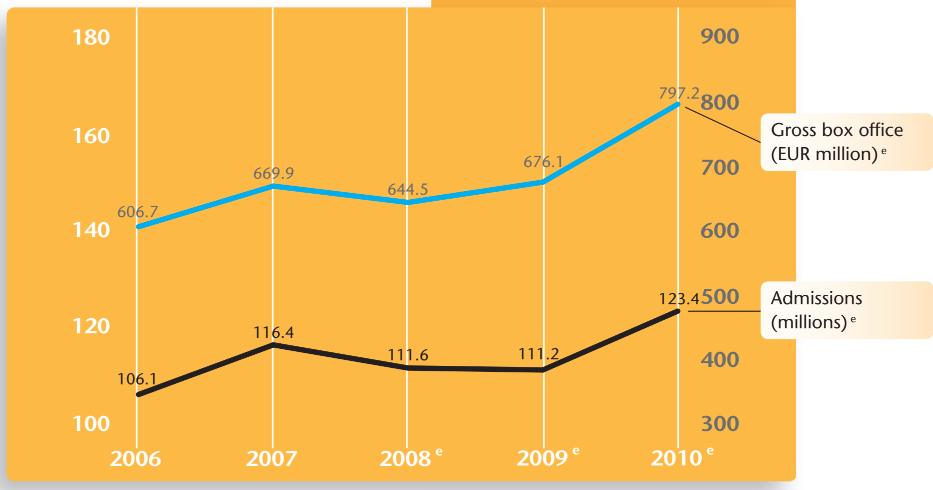

## Number of feature films produced in Italy I 2006-2010

Source: CCH




## Admissions and gross box office I 2006-2010 e

Sources: OBS, ANICA, Cinetel, SIAE, CCH



## Top 20 films by admissions in Italy | 2010

| | Original title | Country of origin | Director | Distributor | Admissions |
|---|---|---|---|---|---|
| 1 | Avatar | US/GB | James Cameron | 20th Century Fox | 7 493 785 |
| 2 | Benvenuti al Sud | IT | Luca Miniero | Medusa Film | 4 889 239 |
| 3 | Alice in Wonderland | US | Tim Burton | Walt Disney | 3 511 206 |
| 4 | Harry Potter and the Deathly… | GB inc/US | David Yates | Warner Bros | 2 710 408 |
| 5 | Io, loro e Lara | IT | Carlo Verdone | Warner Bros | 2 537 203 |
| 6 | The Twilight Saga: Eclipse | US | David Slade | Eagle Pictures | 2 509 107 |
| 7 | Shrek Forever After | US | Mike Mitchell | Universal | 2 199 696 |
| 8 | Natale in Sudafrica | IT | Neri Parenti | Filmauro | 2 173 332 |
| 9 | Maschi contro femmine | IT | Fausto Brizzi | 01 Distribution | 2 148 807 |
| 10 | La banda dei babbi natale | IT | Paolo Genovese | Medusa Film | 2 015 124 |
| 11 | Sherlock Holmes | US/GB inc/DE | Guy Ritchie | Warner Bros | 1 898 482 |
| 12 | Robin Hood | GB inc/US | Ridley Scott | Universal | 1 775 739 |
| 13 | Inception | US/GB inc | Christopher Nolan | Warner Bros | 1 688 234 |
| 14 | Toy Story 3 | US | Lee Unkrich | Walt Disney | 1 688 047 |
| 15 | Despicable Me | US | P. Coffin, C. Renaud | Universal | 1 534 161 |
| 16 | Baciami ancora | IT/FR | Gabriele Muccino | Medusa Film | 1 493 998 |
| 17 | Genitori & figli:) - Agitare bene… | IT | Giovanni Veronesi | Filmauro | 1 402 616 |
| 18 | Mine vaganti | IT | Ferzan Ozpetek | 01 Distribution | 1 399 954 |
| 19 | A Natale mi sposo | IT | Paolo Costella | Medusa Film | 1 354 935 |
| 20 | Iron Man 2 | US | Jon Favreau | Universal | 1 292 406 |

Source: Cinetel

## Distribution and Exhibition

2010 proved to be an exceptionally good year for the Italian theatrical market. Cinema attendance increased by 11% to an estimated 123.4 million admissions, the highest level since 1986. Driven by the ongoing enthusiasm for 3D, gross box office even jumped 18% to a record high of estimated EUR 797 million (USD 1.1 billion). Market growth was driven primarily by blockbusters, particularly 3D titles, as well as the success of local films, mostly light-hearted comedies. *Benvenuti al Sud*, the Italian remake of the French *Bienvenue chez les Ch'tis*, became the top grossing Italian film of all times and was only beaten by *Avatar* at the box office. Italian films accounted for five out of the top 10 films and could significantly increase their market share to 32%, up from 24.4% in 2009. Supported by a tax credit scheme about 28% of Italy's screen base had been converted to digital projection (899 screens) by the end of 2010. Online piracy increased by 5% causing damages worth USD 670 million in 2010 according to a study released by Italy's Audiovisual Anti-Piracy Federation.

## Production and Funding

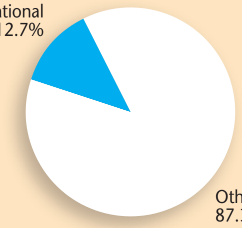
Despite a further drop in public funding, Italian production activity increased again to 142 films after having dropped to 133 in 2009. According to figures from film industry association ANICA, public funding further decreased in 2010 to EUR 35.4 million, representing about 11% of total production investment of EUR 312 million. The tax shelter and tax credit scheme supporting foreign and local film production introduced in 2009 expired at the end of 2010 but was finally extended until 2013 earlier this year, originally to be financed via the introduction of a controversial EUR 1 tax on movie tickets which triggered wide protests among exhibitors. In a wider context, the Italian arts sector was set for a difficult year in 2011 with the government's decision to reduce Italy's single arts fund FUS (Fondo Unico Spettacolo) from EUR 428 to EUR 258 which would have threatened the operations of well established institutions like the Venice Film Festival or the Cinecittà film studios. After protests the Italian government finally decided in March 2011 to reinstate the FUS budget to its 2010 level and to replace the 'cinema ticket tax' with an increase in petrol tax. Also, foreign productions will no longer have to pay VAT when working through an Italian production service company thanks to EU legislation becoming effective in 2011.

Sources: ANICA, *Giornale dello Spettacolo*, *Cinecitta' News*, *Variety*, *Screen International*, OBS

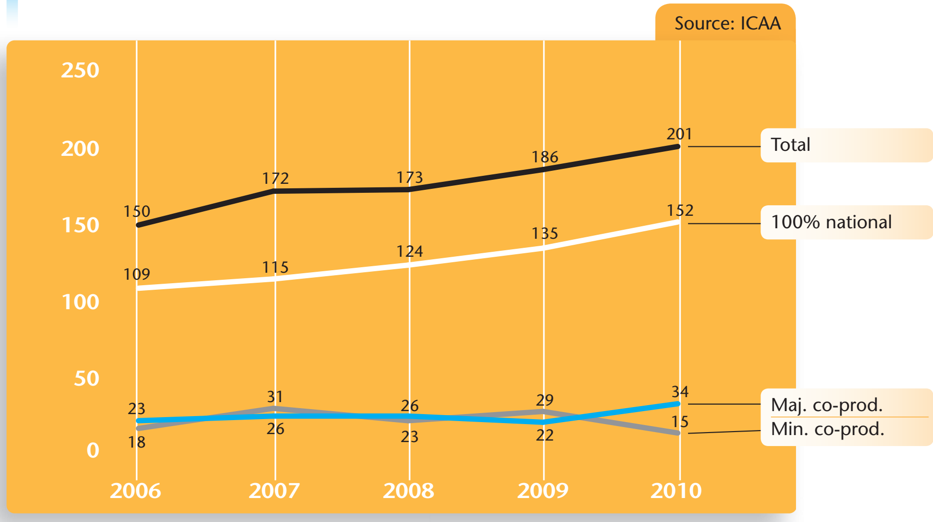
# Spain

| | |
|---|---|
| Population 2010 e | 46.0 million |
| GDP per capita 2010 e | 29 875 USD |
| Gross box office 2010 | 662.3 M EUR (876.6 M USD) |
| Admissions 2010 e | 101.6 million |
| Average ticket price 2010 | 6.52 EUR (8.63 USD) |
| Average admissions per capita 2010 e | 2.21 |
| Screens 2009 I 2010 | 4 082 I 4 080 |
| Digital screens 2009 I 2010 | 252 I 707 |
| Digital 3D screens 2009 I 2010 | 195 I 471 |

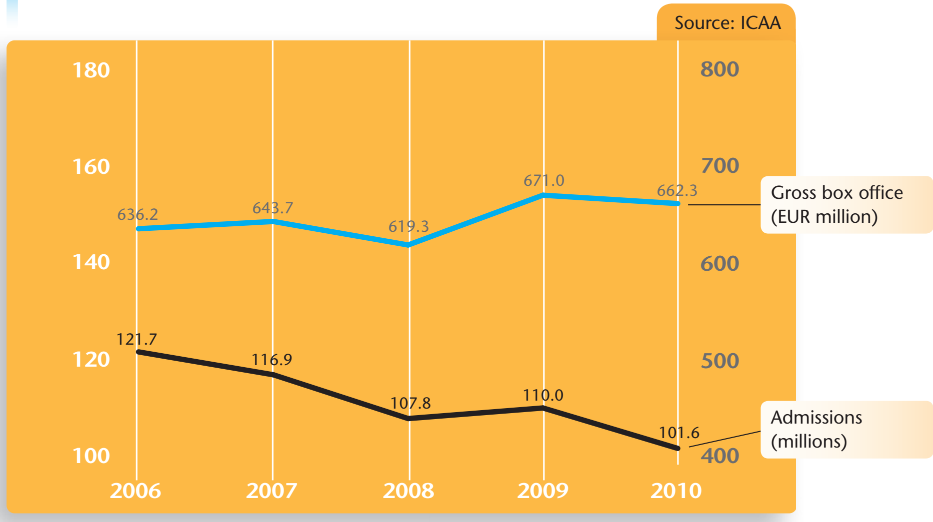
**Market shares 2010**




## Number of feature films produced I 2006-2010




## Admissions and gross box office I 2006-2010



## Top 20 films by admissions in Spain | 2010

| | Original title | Country of origin | Director | Distributor | Admissions |
|---|---|---|---|---|---|
| 1 | Avatar | US/GB | James Cameron | Hispano Foxfilms | 6 018 936 |
| 2 | Toy Story 3 | US | Lee Unkrich | Walt Disney | 3 597 224 |
| 3 | The Twilight Saga: Eclipse | US | David Slade | Aurum Producciones | 3 165 263 |
| 4 | Alice in Wonderland | US | Tim Burton | Walt Disney | 2 861 441 |
| 5 | Inception | US/GB inc | Christopher Nolan | Warner Bros. | 2 712 641 |
| 6 | Shrek Forever After | US | Mike Mitchell | Paramount Spain | 2 318 260 |
| 7 | Harry Potter and the Deathly… | GB inc/US | David Yates | Warner Bros. | 2 044 846 |
| 8 | Prince of Persia: The Sands of Time | US/GB inc | Mike Newell | Walt Disney | 1 704 189 |
| 9 | Robin Hood | GB inc/US | Ridley Scott | UPI | 1 697 874 |
| 10 | Sherlock Holmes | US/GB inc/DE | Guy Ritchie | Warner Bros. | 1 614 714 |
| 11 | Clash of the Titans | US | Louis Leterrier | Warner Bros. | 1 603 443 |
| 12 | The Princess and the Frog | US | R. Clements, J. Musker | Walt Disney | 1 558 151 |
| 13 | The Karate Kid | US/CN | Harald Zwart | Sony Pict. Releasing | 1 506 656 |
| 14 | Despicable Me | US | P. Coffin, C. Renaud | UPI | 1 471 020 |
| 15 | Shutter Island | US | Martin Scorsese | Vértice Cine | 1 384 694 |
| 16 | Tres Metros Sobre El Cielo | ES | Fernando G. Molina | Warner Bros. | 1 331 895 |
| 17 | The Chronicles of Narnia: The… | US/GB inc | Michael Apted | Hispano Foxfilms | 1 309 418 |
| 18 | How to Train Your Dragon | US | D. DeBlois, C. Sanders | Paramount Spain | 1 300 406 |
| 19 | Invictus | US | Clint Eastwood | Warner Bros. | 1 224 390 |
| 20 | The Sorcerer's Apprentice | US | Jon Turteltaub | Walt Disney | 1 170 715 |

Source: ICAA

## Production and Funding

Production levels jumped to another record high with a total of 201 Spanish feature films, including feature documentaries, produced in 2010, up 15 from 2009. Growth was entirely driven by an increasing number of 100% national films and majority co-productions, while the number of minority co-productions halved. The introduction of a new General Audiovisual Law in early 2010 has been contributing to changes in the Spanish film financing landscape. Mandatory production quotas of private broadcasters were cut from 5% to 3% of their annual revenues while telecom companies are now obliged to invest 0.9% of their annual income in film production. In constant dispute with private broadcasters and banks, who are reluctant to invest in film projects, local producers depend heavily on national and regional public funding, which is struggling to keep its film funding budgets in a challenging economic environment. ICAA, Spain's national film agency, saw a 8% decrease of its 2011 budget and had to reduce support from a new funding scheme aimed at stimulating the development of higher-quality projects. Against this background Spanish producers are encouraged to look for international co-productions and private funding which are incentivised by public subsidies and a 18% tax credit.

## Distribution and Exhibition

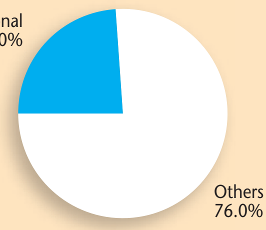
After having been brought to a preliminary halt in 2009, Spanish cinema attendance continued its steady downward trend with admissions dropping by 7.6% to 101.6 million in 2010, the lowest level since 1995. Even another sharp increase in average ticket price from EUR 6.1 to EUR 6.5 (USD 8.6) could not keep GBO from falling 1.3% to EUR 662 million (USD 877 million). Admissions to Spanish films dropped by 26% and made national market share drop to 12.7%, the lowest level in years. The independent sector struggled to compete with US 3D blockbusters, slow TV sales, an ever decreasing DVD market as well as piracy. After several amendments, the Spanish Parliament recently adopted legislation (the *Ley Sinde*) aiming at blocking or closing down websites providing illegal content within a short space of time. With 707 digital screens roughly 17% of all screens had been converted by the end of 2010, making Spain the country with the lowest digital penetration of the 6 major European markets. The Spanish government recently announced its intention to support digital conversion with about EUR 3 million.

Sources: ICAA, *Screen International, Variety,* Cineuropa, IRIS Merlin Database, OBS

# United Kingdom

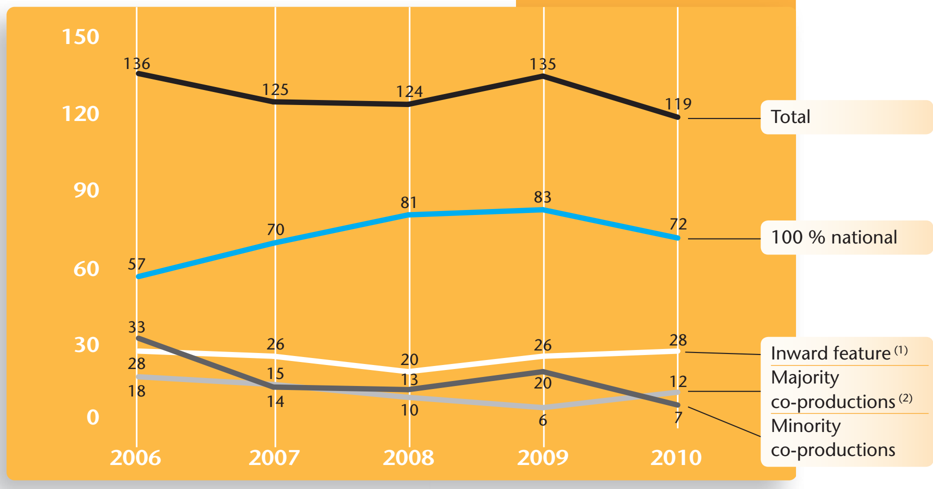
| | |
|---|---|
| Population 2010 e | 62.2 million |
| GDP per capita 2010 e | 36 298 USD |
| Gross box office 2010 | 988.3 M GBP (1 528 M USD) |
| Admissions 2010 e | 169.2 million |
| Average ticket price 2010 | 5.84 GBP (9.03 USD) |
| Average admissions per capita 2010 e | 2.72 |
| Screens 2009 I 2010 | 3 696 I ~ |
| Digital screens 2009 I 2010 | 667 I 1 408 |
| Digital 3D screens 2009 I 2010 e | 473 I 1 095 |

**Market shares 2010**




## Number of films produced in the United Kingdom I 2006-2010

Sources: UK Film Council, OBS

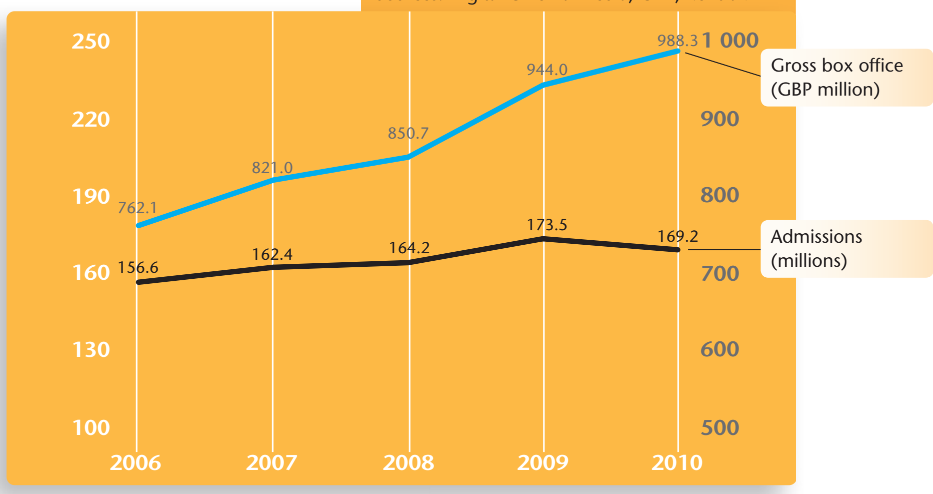



(1) Including Inward Feature Co-productions but excluding inward features involving only VFX work in the UK.

(2) Includes one straight to DVD majority co-production in 2010.

## Admissions and gross box office I 2006-2010

Sources: Digital Cinema Media, CAA, Rentrak EDI



## Top 20 films by admissions in the United Kingdom & Ireland | 2010 e

Estimated admissions based on average ticket price of 5.84 GBP.

| | Original title | Country of origin | Director | Distributor | Admissions e |
|---|---|---|---|---|---|
| 1 | Toy Story 3 | US | Lee Unkrich | Walt Disney | 12 635 504 |
| 2 | Avatar | US/GB | James Cameron | 20th Century Fox | 10 481 167 |
| 3 | Harry Potter and the Deathly… | GB Inc/US | David Yates | Warner Bros. | 8 375 818 |
| 4 | Alice in Wonderland | US | Tim Burton | Walt Disney | 7 283 620 |
| 5 | Inception | US/GB Inc | Christopher Nolan | Warner Bros. | 6 129 536 |
| 6 | Shrek Forever After | US | Mike Mitchell | Paramount | 5 543 493 |
| 7 | The Twilight Saga: Eclipse | US | David Slade | Eone Films | 5 094 765 |
| 8 | Sex and the City 2 | US | Michael Patrick King | Warner Bros. | 3 706 459 |
| 9 | Iron Man 2 | US | Jon Favreau | Paramount | 3 627 295 |
| 10 | Clash of the Titans | US | Louis Leterrier | Warner Bros. | 3 459 669 |
| 11 | Despicable Me | US | P. Coffin, C. Renaud | Universal Pictures | 3 398 820 |
| 12 | How to Train Your Dragon | US | D. DeBlois, C. Sanders | Paramount | 2 954 889 |
| 13 | Nanny McPhee and the Big Bang | GB/US/FR | Susanna White | Universal Pictures | 2 829 681 |
| 14 | Robin Hood | GB Inc/US | Ridley Scott | Universal Pictures | 2 644 153 |
| 15 | Sherlock Holmes | US/GB Inc/DE | Guy Ritchie | Warner Bros. | 2 391 000 |
| 16 | The Karate Kid | US/CN | Harald Zwart | Sony Pictures Intl | 2 119 863 |
| 17 | StreetDance 3D | GB | M. Giwa, D. Pasquini | Vertigo | 1 989 896 |
| 18 | Kick-Ass | US/GB Inc | Matthew Vaughn | Universal Pictures | 1 986 753 |
| 19 | Alvin and the Chipmunks: The… | US | Betty Thomas | 20th Century Fox | 1 940 141 |
| 20 | The Chronicles of Narnia: The… | US/GB Inc | Michael Apted | 20th Century Fox | 1 928 667 |

Sources: OBS, UK Film Council, Rentrak EDI

## Distribution and Exhibition

While admissions decreased in the UK by 2.5% to 169.2 million tickets sold, 3D films helped gross box office to grow 4.7% to GBP 988.3 million (USD 1.53 billion) in 2010. This is the highest level on record. The importance of 3D films is reflected by the fact that 3D films accounted for 3 out of the top 4 and for 9 of the top 20 films. On a cumulative basis 3D films took 24% of total GBO, up from 16% in 2009. Led by top grossing *Toy Story 3* and *Harry Potter and the Deathly Hallows Part One*, sequels and franchise instalments also proved to be a driving force of the market, accounting for ten of the top 20 films. US films dominated the market accounting for 16 out of the top 20 films and taking a market share of 72% according to the UK Film Council. UK films took 24% of total GBO with 18.6% coming from 'inward investment' films wholly or part-financed by US studios. After reaching a decade high of 8.2% a year ago, market share of independent UK films dropped to 5.4% in 2010, the second lowest result in the past six years.

## Production and Funding

Feature film production activity in the UK fell from 144 (1) to 119 films commencing principal photography in 2010 while production spend in the UK reached a record level of GBP 1 155 million (USD 1.8 billion). The increase in production spend was driven by films like the latest instalments of the *Harry Potter*, *Pirates of the Caribbean* and *Sherlock Holmes* series and represents the highest level of inward investments on record (GBP 929 million). Production spend for domestic UK features however dropped by 22% to GBP 174 million for 72 films, 11 films less than in 2009. UK co-productions continued their downward trend of the past years falling to 19 films, compared to 51 five years ago and 105 in 2004. UK production spend of co-productions however increased to GBP 52 million. 2010 proved to be a dramatic year for the public funding system when in July the UK government announced its decision to abolish the UK Film Council as part of its efforts to cut public expenditures. Key activities like Lottery funding of film, tax credit certification, the MEDIA desk and audience development will be moved to the British Film Institute which is meant to become the new "lead strategic body on film and the distributor of Lottery funds to UK film makers". Regional agencies will move under Creative England. The UK Film Council which was created in 2000 is expected to close on 1 July 2011.

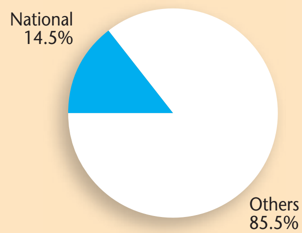
Sources: UK Film Council, Digital Cinema Media, *Screen International*, British Film Institute (BFI), Creative England, OBS

(1) including inward feature involving only VFX work done in the UK.

# Russian Federation

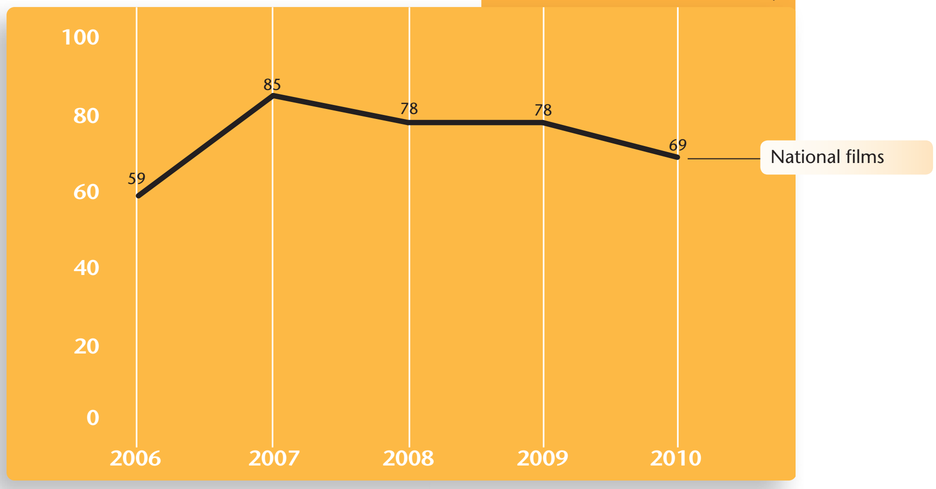
| | |
|---|---|
| Population 2010 e | 140.4 million |
| GDP per capita 2010 e | 10 522 USD |
| Gross box office 2010 e | 32.11 bn RUB (1.06 bn USD) |
| Admissions 2010 e | 165.5 million |
| Average ticket price 2010 e | 194 RUB (6.37 USD) |
| Average admissions per capita 2010 e | 1.18 |
| Screens 2009 \| 2010 | 2 133 \| 2 430 |
| Digital screens 2009 \| 2010 | 350 \| 941 |
| Digital 3D screens 2009 \| 2010 | 346 \| 937 |

**Market shares 2010 e**



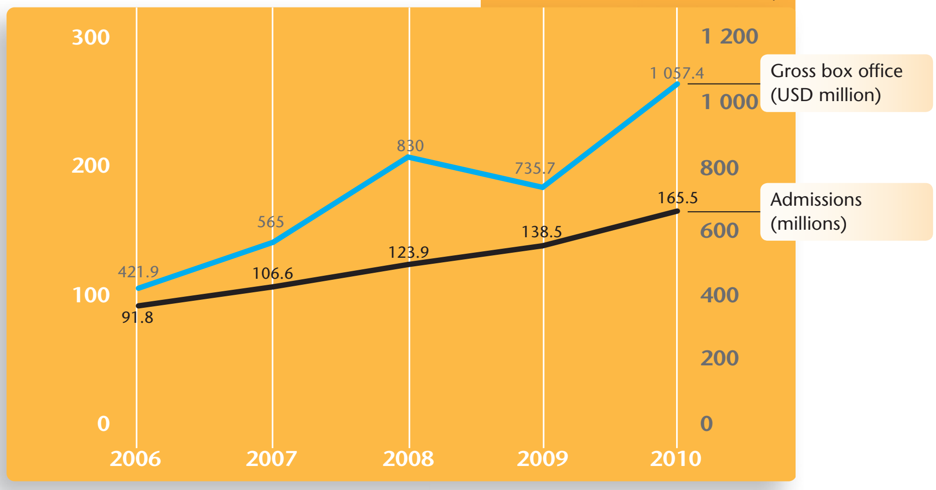

## Number of Russian films on first release | 2006-2010

Source: *Russian Film Business Today*




## Admissions and gross box office | 2006-2010

Source: *Russian Film Business Today*



## Top 20 films by admissions in the Russian Federation & CIS (1) | 2010

| | Original title | Country of origin | Director | Distributor | Admissions |
|---|---|---|---|---|---|
| 1 | Avatar | US/GB | James Cameron | 20th Century Fox | 14 001 359 |
| 2 | Shrek Forever After | US | Mike Mitchell | Central Partnership | 7 828 349 |
| 3 | Alice in Wonderland | US | Tim Burton | WDSSPR | 5 241 138 |
| 4 | The Twilight Saga: Eclipse | US | David Slade | West | 5 060 520 |
| 5 | Harry Potter and the Deathly… | GB inc/US | David Yates | Caro Premier | 4 167 990 |
| 6 | Prince of Persion: The Sands of Time | US/GB inc | Mike Newell | WDSSPR | 3 971 145 |
| 7 | Nasha Russia. Yaytsa sudby. | RU | Gleb Orlov | Central Partnership | 3 943 844 |
| 8 | Inception | US/GB inc | Christopher Nolan | Caro Premier | 3 447 787 |
| 9 | Chernaya Molniya (Black Lightning) | RU | D. Kiselev, A. Voytinskiy | UPI | 3 351 389 |
| 10 | How To Train Your Dragon | US | D. DeBlois, C. Sanders | Central Partnership | 3 350 205 |
| 11 | Megamind | US | Tom McGrath | Central Partnership | 3 295 864 |
| 12 | Tangled | US | B. Howard, N. Greno | WDSSPR | 3 210 374 |
| 13 | Clash of the Titans | US | Louis Leterrier | Caro Premier | 3 137 682 |
| 14 | The Last Airbender | US | M. Night Shyamalan | Central Partnership | 2 689 568 |
| 15 | Kandagar | RU | Andrei Kavun | Central Partnership | 2 676 844 |
| 16 | Sherlock Holmes | US/GB inc/DE | Guy Ritchie | Caro Premier | 2 521 594 |
| 17 | Resident Evil: Afterlife | DE/FR/GB | Paul W.S. Anderson | WDSSPR | 2 515 974 |
| 18 | The Sorcerer's Apprentice | US | Jon Turteltaub | WDSSPR | 2 510 798 |
| 19 | Iron Man 2 | US | Jon Favreau | Central Partnership | 2 409 382 |
| 20 | The Expendables | US | Sylvester Stallone | Central Partnership | 2 349 912 |

(1) Excluding Ukraine.

Source: *Russian Film Business Today*

## Distribution and Exhibition

Adapting rapidly to digital cinema, the theatrical market in the Russian Federation continued its impressive growth trend of the past years with GBO jumping by 44% to USD 1.06 billion. Growth in GBO was driven by a hike in average ticket prices as well as a 19% growth in admissions to 165.5 million making the Russian Federation the third largest cinema market in Europe in terms of cinema attendance. It was the increasing number of 3D screenings as well as the revaluation of the ruble which propelled average ticket prices by 20% from USD 5.3 to USD 6.4. Market growth was enabled by the fast growing digitalization of Russian cinemas. Digital screen count in Russia almost tripled from 346 to 941 with basically every digital screen equipped for 3D projection. This means that by the end of 2010 almost 39% of total modern screens were digital and 3D capable. Digital distribution also gained pace in 2010 with 162 out of a total of 363 film releases being released in digital format and digital copies accounting for about a quarter of the total number of prints in circulation.

## Production and Funding

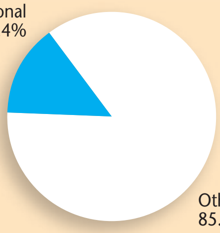
The picture looks less rosy for Russian productions however. Partly due to a temporary freeze on film grants to new film projects in 2009, the number of Russian film releases dropped from 78 to 69 in 2010. GBO to Russian films fell its second consecutive year from USD 176 million to USD 154 million causing national market share to drop from 23.9% to 14.5%. Faced with increasing difficulties to finance their films on the national market Russian producers are increasingly turning to international co-productions with the government planning to increase state support for co-productions, Russia negotiating co-production treaties with major European countries like Italy, France, Spain and Germany and joining Eurimages as of March 2011. With regard to national support, a new public funding system has been put in place in 2010 with the Federal Fund for Social and Economic Support to National Cinematography (Cinema Fund) distributing the majority of a total of the RUB 4.9 billion (USD 161 million) allocated to support film production. The new funding system has provoked criticism from smaller industry players as over 40% of the total funding volume would go straight to the eight leading production companies. The Federal Antimonopoly Service is currently investigating signs of antimonopoly violations by the Cinema Fund and has called for more transparency in its decision making procedures.

Sources: Nevafilm, RF Film, *Russian Film Business Today*, *Screen International*, OBS

# Poland

| | |
|---|---|
| Population 2010 [e] | 38.1 million |
| GDP per capita 2010 [e] | 11 522 USD |
| Gross box office 2010 | 703.0 M PLN (232.6 M USD) |
| Admissions 2010 | 37.5 million |
| Average ticket price 2010 | 18.75 PLN (6.21 USD) |
| Average admissions per capita 2010 [e] | 0.98 |
| Screens 2009 \| 2010 [e] | 1 048 \| 1 048 |
| Digital screens 2009 \| 2010 | 200 \| 343 |
| Digital 3D screens 2009 \| 2010 | 195 \| 330 |

**Market shares 2010**




## Top 10 films by admissions in Poland | 2010

| | Original title | Country of origin | Director | Distributor | Admissions |
|---|---|---|---|---|---|
| 1 | Avatar | US/GB | James Cameron | Imperial Cinepix | 3 084 595 |
| 2 | Shrek Forever After | US | Mike Mitchell | UIP | 2 468 751 |
| 3 | Harry Potter and the Deathly Hallows… | GB inc/US | David Yates | Warner | 1 166 645 |
| 4 | Alice in Wonderland | US | Tim Burton | Forum Film | 1 102 652 |
| 5 | Inception | US/GB inc | Christopher Nolan | Warner | 1 088 427 |
| 6 | Sluby panienskie | PL | Filip Bajon | Kino Swiat | 1 000 373 |
| 7 | Ciacho | PL | Patryk Vega | Syrena Films | 956 395 |
| 8 | The Twilight Saga: Eclipse | US | David Slade | Monolith | 801 539 |
| 9 | How to Train Your Dragon | US | D. DeBlois, C. Sanders | UIP | 762 846 |
| 10 | Tangled | US | B. Howard, N. Greno | Forum Film | 700 947 |

Sources: boxoffice.pl, OBS

## Distribution and Exhibition

In 2010 Polish cinema attendance decreased for the first time since 2005, falling 4.3% to 37.5 million admissions. As in many other markets, premium prices for 3D screenings caused average ticket price to increase significantly from PLN 17.4 in 2009 to PLN 18.8 (USD 6.2). Gross box office consequently continued its upward trend to reach a new record high of PLN 703 million (USD 233 million), up 3.2% from 2009. Reasons for the decline in cinema attendance were seen in high ticket prices, online piracy and economic and political challenges faced by Poland in the past year. Led by chart topping *Avatar* and *Shrek Forever After* US films accounted for an estimated 67% of total admission, up from about 65% in 2009. The market share for Polish films dropped from 21.5% to 14.4%. The Polish distribution market is dominated by US majors and their affiliates with UIP taking the lead (22% of total GBO in 2010), followed by Imperial Cinepix (20th Century Fox; 15%), Forum Film (Buena Vista Int; 12%) and Warner Bros (11%). Kino Swiat and Monolith Films are the two leading independent local distributors with market shares of 13% and 12% respectively. The Polish exhibition sector has seen an increasing number of multiplex screens over the recent years while the number of single screen cinemas declined. Around 33% of the total screen base of well over 1 000 screens had been converted to digital by the end of 2010. Practically all of the 343 digital screens were equipped for 3D screenings.

## Production and Funding

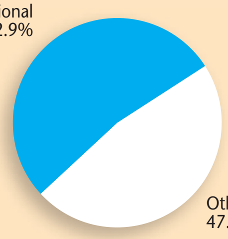
According to figures from the PISF 43 feature films were produced in 2010, 4 less than in 2009. While decreasing significantly between 2000 and 2004 to below 20, local production levels steadily increased over the past five years due to a significant rise in public funding. In 2005 a new film law had established the Polish Film Institute which saw its budget almost doubling from PLN 75 million in 2006 to PLN 140 million (USD 46 million) in 2010. National public support has been complemented by the more recent creation of several regional film funds.

Sources: Polish Film Institute (PISF), boxoffice.pl, *Variety,* Film New Europe, OBS

# Turkey

| | |
|---|---|
| Population 2010 e | 71.4 million |
| GDP per capita 2010 e | 10 207 USD |
| Gross box office 2010 | 380.2 M TRY (266.8 M USD) |
| Admissions 2010 e | 41.1 million |
| Average ticket price 2010 e | 9.26 TRY (6.50 USD) |
| Average admissions per capita 2010 e | 0.57 |
| Screens 2009 I 2010 | 1 780 I 1 874 |
| Digital screens 2009 I 2010 | 62 I 198 |
| Digital 3D screens 2009 I 2010 | 59 I 196 |

**Market shares 2010 e**




## Top 10 films by admissions in Turkey I 2010

| | Original title | Country of origin | Director | Distributor | Admissions |
|---|---|---|---|---|---|
| 1 | New York'ta Bes Minare | TR | Mahsun Kirmizigül | Pinema | 3 455 089 |
| 2 | Recep Ivedik 3 | TR | Togan Gökbakar | Ozen Film | 3 325 842 |
| 3 | Eyyvah eyvah | TR | Hakan Algül | UIP | 2 459 815 |
| 4 | Yahsi bati | TR | Ömer Faruk Sorak | UIP | 2 323 061 |
| 5 | Av mevsimi | TR | Yavuz Turgul | Warner Bros. | 1 800 243 |
| 6 | Avatar | US/GB | James Cameron | Tiglon Film | 1 757 651 |
| 7 | Çok film hareketler bunlar | TR | Ozan Aciktan | Medyavizyon | 1 141 448 |
| 8 | Inception | US/GB inc | Christopher Nolan | Warner Bros. | 1 100 649 |
| 9 | The Twilight Saga: Eclipse | US | David Slade | Tiglon Film | 1 041 920 |
| 10 | Veda | TR | Zülfü Livaneli | Tiglon Film | 1 028 032 |

Source: *Sinema Gazetesi*

## Distribution and Exhibition

With 41.1 million tickets sold in 2010, cinema attendance in Turkey reached a new record high, 11% up from 2009. GBO increased by 23% to TRY 380 million (USD 267 million). Having become the seventh largest European market in terms of admissions, Turkey ranks among markets like Sweden, Austria or Switzerland in terms of GBO volume due to a comparatively low average ticket price of TRY 9.3 (USD 6.5). The number of first releases remained more or less constant at 252. Led by chart topping *New York'ta Bes Minare*, the 65 national films took a market share of 53%, the highest national market share for any European country. US films accounted for 41% of all films on release, taking an estimated market share of 39%. The distribution market in 2010 was led by UIP Türkiye. achieving a market share of 32% of total GBO, followed by Tiglon Film (29%) and Warner Bros. (28%). Turkey's screen base continued to grow to 1 874 screens by year-end 2010, 94 up from the previous year. Digital roll-out remained moderate with 198 digital screens as at year end. With only every second person going to the cinema once a year on average – which is low compared to Western European standards – Turkey seems to be a market with significant further growth potential. However, some industry observers regard piracy as a main obstacle to the further development of the Turkish film industry with the International Intellectual Property Alliance estimating the loss due to film piracy at USD 29 million per year.

## Production and Funding

Driven by increasing demand for local films and public support from the Ministry of Culture and Tourism, Turkish film production has been growing significantly over the past years. While there were only 16 national films released ten years ago, this increased to 69 and 65 in the past two years. The success of local films at the box office has helped to attract funding from broadcasters and even private money, but profitability remains a key issue for many productions with a Ministry representative estimating that only six out of 70 films making profits, another seven films breaking even and the rest suffering losses. The institutional Turkish cinema landscape may change as the Turkish Culture and Tourism Ministry recently called for different institutions of the industry to merge and stated its support for the establishment of an autonomous Turkish Cinema Institution in which the ministry would be represented. Turkey recently signed an agreement with two German regional funds setting up the first German-Turkish Co-production Development Fund.

Sources: *Sinema Gazetesi*, *Variety*, *Hürriyet*, Sarajevo Film Festival, OBS

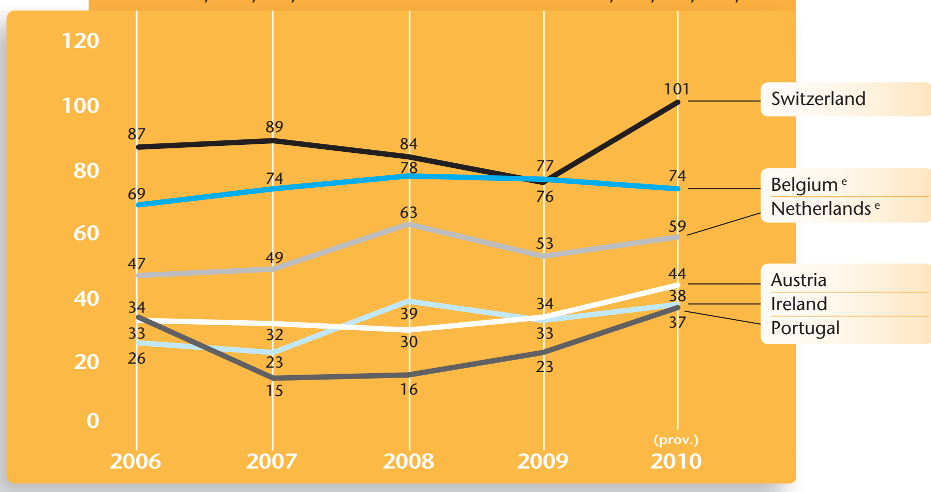
# Other Western Europe

| | Austria | Belgium | Ireland | Netherlands | Portugal | Switzerland |
|---|---|---|---|---|---|---|
| Population 2010 e (millions) | 8.4 | 10.8 | 4.5 | 16.6 | 10.6 | 7.8 |
| GDP per capita 2010 e (USD) | 43 723 | 42 597 | 45 642 | 46 418 | 21 031 | 67 074 |
| Gross box office 2010 e (M USD) | 172.6 | 193.0 (1) | 153.9 | 290.4 | 108.9 | 241.7 |
| Admissions 2010 (millions) | 17.32 | 23.70 | 16.49 | 28.19 | 16.56 | 14.76 |
| Average ticket price 2010 e (USD) | 9.96 | 11.9 (1) | 9.34 | 10.30 | 6.57 | 16.37 |
| Average admissions per capita 2010 e | 2.07 | 2.19 | 3.69 | 1.70 | 1.56 | 1.90 |
| Screens 2010 | 584 | 491 (2) | 446 | 751 (1) | 564 | 558 |
| Digital screens 2009 \| 2010 | 239 \| 313 | 144 \| 302 | 112 \| 154 | 105 \| 260 | 181 \| 312 | 60 \| 130 |
| 3D screens 2009 \| 2010 | 101 \| 207 | 45 \| 103 | 68 \| 106 | 94 \| 240 | 89 \| 168 | 54 \| 125 |
| National market shares 2010 e | 5.0% | 7.9% (1) | 1.3% | 15.9% | 1.9% | 5.4% |

(1) 2009 e (2) 2008

## Number of feature films produced in selected Western European countries | 2006-2010

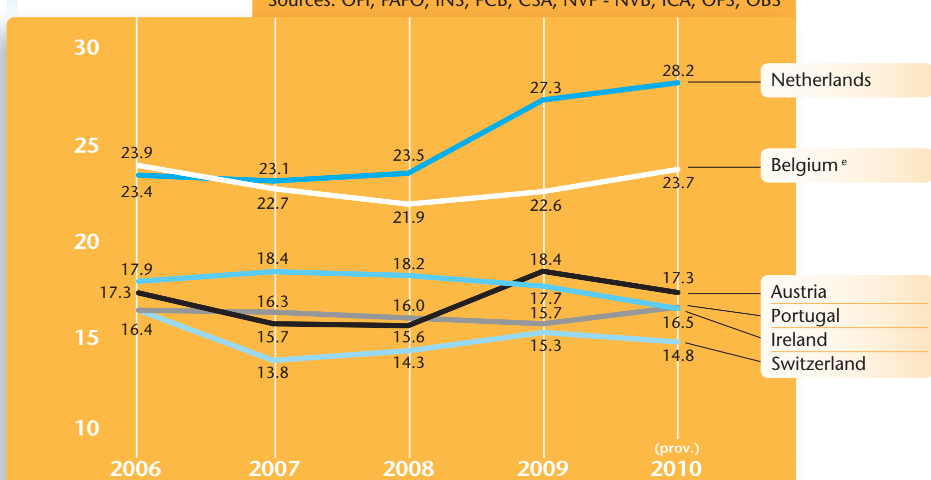
Sources: OFI, MFB, VAF, Centre du Cinéma et de l'Audiovisuel, NFF, ICA, OFS, OBS




## Admissions in selected Western European countries | 2006-2010

In millions.

Sources: OFI, FAFO, INS, FCB, CSA, NVF - NVB, ICA, OFS, OBS



## Top 10 films by admissions in Austria | 2010

| | Original title | Country of origin | Director | Distributor | Admissions |
|---|---|---|---|---|---|
| 1 | Avatar | US/GB | James Cameron | 20th Century Fox | 799 639 |
| 2 | Alice in Wonderland | US | Tim Burton | Walt Disney | 526 814 |
| 3 | Harry Potter and the Deathly Hallows… | GB inc/US | David Yates | Warner Bros. | 496 190 |
| 4 | Shrek Forever After | US | Mike Mitchell | UPI | 445 754 |
| 5 | The Twilight Saga: Eclipse | US | David Slade | Kinostar | 400 032 |
| 6 | Grown Ups | US | Dennis Dugan | Sony Pictures | 364 582 |
| 7 | Inception | US/GB inc | Christopher Nolan | Warner Bros. | 322 890 |
| 8 | Tangled | US | B. Howard, N. Greno | Walt Disney | 321 912 |
| 9 | Sex and the City 2 | US | Michael Patrick King | Warner Bros. | 302 083 |
| 10 | It's Complicated | US | Nancy Meyers | UPI | 289 193 |

Sources: Austrian Film Institute, Rentrak EDI

## Top 10 films by admissions in Switzerland | 2010

| | Original title | Country of origin | Director | Distributor | Admissions |
|---|---|---|---|---|---|
| 1 | Avatar | US/GB | James Cameron | 20th Century Fox | 816 664 |
| 2 | Inception | US/GB inc | Christopher Nolan | Warner Bros. | 438 496 |
| 3 | Harry Potter and the Deathly Hallows… | GB inc/US | David Yates | Warner Bros. | 426 591 |
| 4 | Alice in Wonderland | US | Tim Burton | Walt Disney | 384 864 |
| 5 | Despicable Me | US | P. Coffin, C. Renaud | UIP | 302 768 |
| 6 | The Twilight Saga: Eclipse | US | David Slade | Elite-Film | 294 488 |
| 7 | Shrek Forever After | US | Mike Mitchell | UIP | 275 302 |
| 8 | Sex and the City 2 | US | Michael Patrick King | Warner Bros. | 264 771 |
| 9 | Sherlock Holmes | US/GB inc | Guy Ritchie | Warner Bros. | 263 436 |
| 10 | Robin Hood | GB inc/US | Ridley Scott | UIP | 250 124 |

Source: Office fédéral de la statistique

## Top 10 films by admissions in the Netherlands | 2010

| | Original title | Country of origin | Director | Distributor | Admissions |
|---|---|---|---|---|---|
| 1 | Avatar | US/GB | James Cameron | Warner Bros. | 1 220 253 |
| 2 | Harry Potter and the Deathly Hallows… | GB inc/US | David Yates | Warner Bros. | 1 033 940 |
| 3 | Inception | US/GB inc | Christopher Nolan | Warner Bros. | 830 211 |
| 4 | Alice in Wonderland | US | Tim Burton | Walt Disney | 738 105 |
| 5 | New Kids: Turbo | NL | S. Haars, Flip vD Kuil | Benelux Film Distr. | 729 218 |
| 6 | Shrek Forever After | US | Mike Mitchell | UPI | 617 505 |
| 7 | Toy Story 3 | US | Lee Unkrich | Walt Disney | 564 191 |
| 8 | De gelukkige huisvrouw | NL | Antoinette Beumer | Benelux Film Distr. | 520 649 |
| 9 | Sex and the City 2 | US | Michael Patrick King | Warner Bros. | 483 794 |
| 10 | Despicable Me | US | P. Coffin, C. Renaud | UPI | 472 095 |

Sources: MaccsBox, NVB & NVF

## Top 10 films by admissions in Portugal | 2010

| | Original title | Country of origin | Director | Distributor | Admissions |
|---|---|---|---|---|---|
| 1 | Avatar | US/GB | James Cameron | CLMC Multimedia | 782 074 |
| 2 | Shrek Forever After | US | Mike Mitchell | Lusom. Audiovisuais | 743 525 |
| 3 | The Twilight Saga: Eclipse | US | David Slade | Lusom. Audiovisuais | 523 102 |
| 4 | Alice in Wonderland | US | Tim Burton | Lusom. Audiovisuais | 456 453 |
| 5 | Toy Story 3 | US | Lee Unkrich | Lusom. Audiovisuais | 410 706 |
| 6 | Harry Potter and the Deathly Hallows… | GB inc/US | David Yates | Col. TriStar Warner | 410 530 |
| 7 | Inception | US/GB inc | Christopher Nolan | Col. TriStar Warner | 407 612 |
| 8 | Prince of Persia: The Sands of Time | US/GB inc | Mike Newell | Lusom. Audiovisuais | 342 941 |
| 9 | How to Train Your Dragon | US | D. DeBlois, C. Sanders | Lusom. Audiovisuais | 341 221 |
| 10 | Eat Pray Love | US | Ryan Murphy | Col. TriStar Warner | 314 063 |

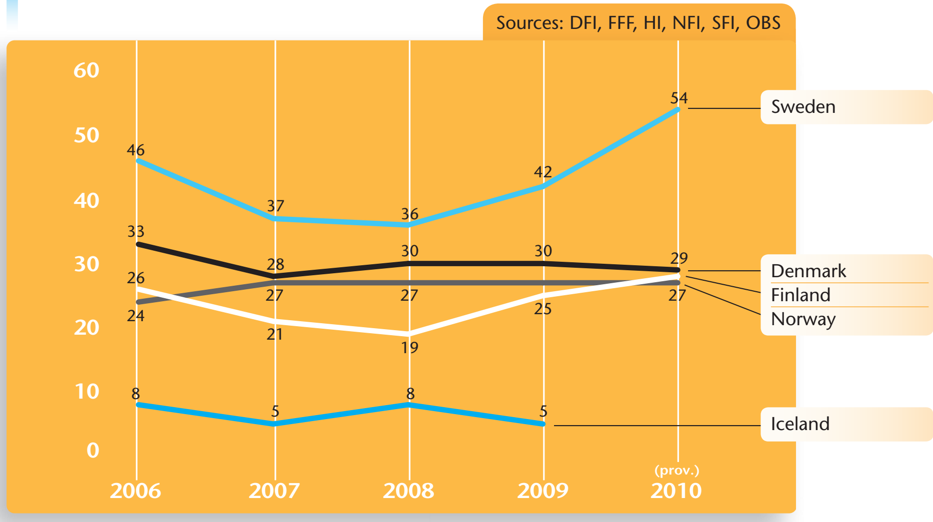
Source: ICA

# Nordic countries

| | Denmark | Finland | Iceland | Norway | Sweden |
|---|---|---|---|---|---|
| Population 2010 e (millions) | 5.5 | 5.4 | 0.3 | 4.9 | 9.3 |
| GDP per capita 2010 e (USD) | 55 112.7 | 43 134.0 | 39 562.9 | 84 543.4 | 47 667.0 |
| Gross box office 2010 e (M USD) | 184.8 | 91.8 | 11.3 (1) | 151.5 | 192.3 |
| Admissions 2010 e (millions) | 13.0 | 7.5 | 1.6 | 11.0 | 15.8 |
| Average ticket price 2010 e (USD) | 14.3 | 12.2 | 6.7 (1) | 13.7 | 12.2 |
| Average admissions per capita 2010 e | 2.34 | 1.39 | 4.95 | 2.25 | 1.70 |
| Screens 2010 | 396 | 306 (1) | 40 (1) | 429 | 830 |
| Digital screens 2009 I 2010 | 25 I 136 | 48 I 92 | 7 I 14 | 61 I 266 | 38 I 150 |
| 3D screens 2009 I 2010 | 23 I 130 | 43 I 87 | 7 I 14 | 28 I 150 | 28 I 144 |
| National market shares 2010 e | 22.0% | 27.0% | 10.3% (1) | 23.3% | 20.8% |

(1) 2009 e

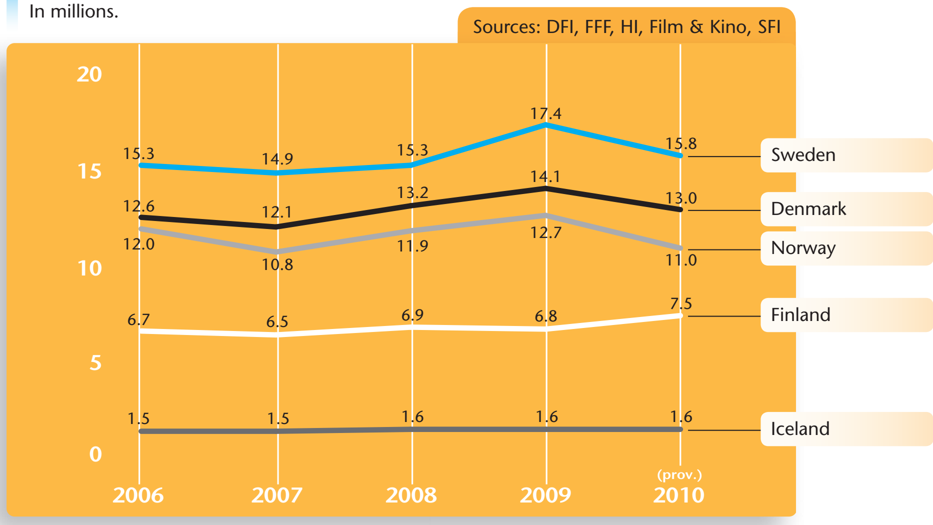
## Number of feature films produced in the Nordic countries I 2006-2010




Note: Danish figures refer to number of feature films receiving public funding in a given year.

## Cinema attendance in Nordic countries I 2006-2010

In millions.



## Top 10 films by admissions in Denmark | 2010

| | Original title | Country of origin | Director | Distributor | Admissions |
|---|---|---|---|---|---|
| 1 | Avatar | US/GB | James Cameron | SF-Film | 835 874 |
| 2 | Klovn: The Movie | DK | Mikkel Nørgaard | Nordisk Film | 554 382 |
| 3 | Harry Potter and the Deathly… | GB inc/US | David Yates | Sandrew Metronome | 521 860 |
| 4 | Inception | US/GB inc | Christopher Nolan | Sandrew Metronome | 514 966 |
| 5 | Far til fire - på japansk | DK | Claus Bjerre | Scanbox Film | 417 343 |
| 6 | Hævnen | DK/SE/DE | Susanne Bier | Nordisk Film | 406 435 |
| 7 | Shrek Forever After | US | Mike Mitchell | UIP | 356 922 |
| 8 | Toy Story 3 | US | Lee Unkrich | Walt Disney | 356 841 |
| 9 | Olsen Banden - pa de bonede gulve | DK | Jørgen Lerdam | Nordisk Film | 327 767 |
| 10 | Sex and the City 2 | US | Michael Patrick King | Sandrew Metronome | 327 473 |

Sources: Statistics Denmark, DFI

## Top 10 films by admissions in Finland | 2010

| | Original title | Country of origin | Director | Distributor | Admissions |
|---|---|---|---|---|---|
| 1 | Napapiirin sankarit | FI/SE/IE | Dome Karukoski | Sandrew Metronome | 334 943 |
| 2 | Sex and the City 2 | US | Michael Patrick King | Sandrew Metronome | 328 286 |
| 3 | Risto Räppääjä ja polkupyörävaras | FI | Mari Rantasila | Nordisk Film | 325 484 |
| 4 | Alice in Wonderland | US | Tim Burton | Walt Disney | 304 844 |
| 5 | Harry Potter and the Deathly… | GB Inc/US | David Yates | Sandrew Metronome | 292 991 |
| 6 | Avatar | US/GB | James Cameron | FS Film | 287 767 |
| 7 | Prinsessa | FI | Arto Halonen | Sandrew Metronome | 279 698 |
| 8 | Inception | US/GB Inc | Christopher Nolan | Sandrew Metronome | 253 098 |
| 9 | Havukka-ahon ajattelija | FI | Kari Väänänen | Nordisk Film | 215 965 |
| 10 | Toy Story 3 | US | Lee Unkrich | Walt Disney | 213 609 |

Source: Finnish Film Foundation

## Top 10 films by admissions in Norway | 2010

| | Original title | Country of origin | Director | Distributor | Admissions |
|---|---|---|---|---|---|
| 1 | Avatar | US/GB | James Cameron | 20th Century Fox | 544 780 |
| 2 | Knerten gifter seg | NO | Martin Lund | Scanbox | 403 654 |
| 3 | Harry Potter and the Deathly… | GB inc/US | David Yates | Sandrew Metronome | 402 071 |
| 4 | Inception | US/GB inc | Christopher Nolan | Sandrew Metronome | 361 687 |
| 5 | The Twilight Saga: Eclipse | US | David Slade | Nordisk Film | 320 528 |
| 6 | Shrek Forever After | US | Mike Mitchell | UIP | 315 177 |
| 7 | Trolljegeren | NO | André Øvredal | SF Norway | 267 229 |
| 8 | Alice in Wonderland | US | Tim Burton | Walt Disney | 266 218 |
| 9 | Sex and the City 2 | US | Michael Patrick King | Sandrew Metronome | 261 064 |
| 10 | Nokas | NO | Erik Skjoldbjærg | Sandrew Metronome | 249 396 |

Source: Film og Kino

## Top 10 films by admissions in Sweden | 2010

| | Original title | Country of origin | Director | Distributor | Admissions |
|---|---|---|---|---|---|
| 1 | Avatar | US/GB | James Cameron | 20th Century Fox | 1 027 977 |
| 2 | Harry Potter and the Deathly… | GB inc/US | David Yates | Sandrew/Warner | 637 980 |
| 3 | Inception | US/GB inc | Christopher Nolan | Sandrew/Warner | 623 040 |
| 4 | Snabba Cash | SE | Daniel Espinosa | Nordisk Film | 600 884 |
| 5 | The Twilight Saga: Eclipse | US | David Slade | Nordisk Film | 542 077 |
| 6 | Alice in Wonderland | US | Tim Burton | Walt Disney | 487 615 |
| 7 | Farsan | SE | Josef Fares | SF Film | 449 107 |
| 8 | Toy Story 3 | US | Lee Unkrich | Walt Disney | 401 266 |
| 9 | Sex and the City 2 | US | Michael Patrick King | Sandrew/Warner | 371 255 |
| 10 | Alvin and the Chipmunks: The… | US | Betty Thomas | 20th Century Fox | 369 563 |

Source: Swedish Film Institute

# Baltics and Central Europe

| | Czech Republic | Estonia | Hungary | Latvia | Lithuania | Slovakia | Slovenia |
|---|---|---|---|---|---|---|---|
| Population 2010 e (millions) | 10.4 | 1.3 | 10.0 | 2.3 | 3.3 | 5.4 | 2.0 |
| GDP per capita 2010 e (USD) | 18 722 | 14 417 | 13 210 | 10 378 | 10 765 | 15 906 | 23 009 |
| Gross box office 2010 (M USD) | 78.3 | 10.3 | 60.7 | 11.1 | 13.0 | 23.9 | 17.0 |
| Admissions 2010 e (millions) | 13.5 | 2.1 | 11.0 | 2.1 | 2.6 | 3.9 | 2.9 |
| Average ticket price 2010 (USD) | 5.79 | 4.83 | 5.53 | 5.26 | 4.96 | 6.11 | 5.88 |
| Average admissions per capita 2010 e | 1.3 | 1.6 | 1.1 | 0.9 | 0.8 | 0.7 | 1.4 |
| Screens 2010 | 688 | 74 | 396 | 63 | 95 | 248 | 108 |
| Digital screens 2009 \| 2010 | 50 \| 132 | 4 \| 14 | 31 \| 56 | 3 \| 11 | 5 \| 13 | 9 \| 36 | 9 \| 16 |
| 3D screens 2009 \| 2010 | 47 \| 119 | 4 \| 11 | 28 \| 55 | 3 \| 10 | 5 \| 13 | 9 \| 32 | 9 \| 16 |
| Films produced 2010 e (1) | 40 | 12 | 36 | 15 | 5 | 8 | 7 |
| National market shares 2010 e | 34.8% | 2.0% | 5.3% | 6.9% | 3.6% | 2.2% | 6.7% |

(1) Including feature documentaries and minority co-productions.

## Top 10 films by admissions in the Czech Republic | 2010

| | Original title | Country of origin | Director | Distributor | Admissions |
|---|---|---|---|---|---|
| 1 | Ženy v pokušení (Women in…) | CZ | Jirí Vejdelek | Falcon | 1 232 299 |
| 2 | Avatar | US/GB | James Cameron | Bontonfilm | 954 108 |
| 3 | Kajínek | CZ | Petr Jákl | Hollywood | 790 792 |
| 4 | Harry Potter and the Deathly… | GB inc/US | David Yates | Warner Bros. | 649 089 |
| 5 | Shrek Forever After | US | Mike Mitchell | Bontonfilm | 615 662 |
| 6 | Román pro muze (Novel for Men) | CZ | Tomás Barina | Bontonfilm | 484 625 |
| 7 | Alice in Wonderland | US | Tim Burton | Falcon | 405 491 |
| 8 | Doktor od Jezera hroch | CZ | Zdenek Troska | Falcon | 358 620 |
| 9 | Kuky se vrací (Kooky) | CZ | Jan Sverák | Falcon | 335 824 |
| 10 | Inception | US/GB inc | Christopher Nolan | Warner Bros. | 328 254 |

Source: Unie Filmovvych Distributoru

## Top 10 films by admissions in Hungary | 2010

| | Original title | Country of origin | Director | Distributor | Admissions |
|---|---|---|---|---|---|
| 1 | Shrek Forever After | US | Mike Mitchell | UIP-Dunafilm | 535 684 |
| 2 | Inception | US/GB inc | Christopher Nolan | Intercom | 445 497 |
| 3 | Harry Potter and the Deathly… | GB inc/US | David Yates | Intercom | 377 111 |
| 4 | The Twilight Saga: Eclipse | US | David Slade | Forum-Hungary | 300 358 |
| 5 | Alice in Wonderland | US | Tim Burton | Forum-Hungary | 260 304 |
| 6 | Sex and the City 2 | US | Michael Patrick King | Intercom | 245 302 |
| 7 | Prince of Persia: The Sands of Time | US/GB inc | Mike Newell | Forum-Hungary | 238 026 |
| 8 | Sherlock Holmes | US/GB inc/DE | Guy Ritchie | Intercom | 227 192 |
| 9 | How to Train Your Dragon | US | D. DeBlois, C. Sanders | UIP-Dunafilm | 203 453 |
| 10 | Toy Story 3 | US | Lee Unkrich | Forum-Hungary | 183 952 |

Source: National Film Office

## Top 10 films by admissions in Lithuania | 2010

| | Original title | Country of origin | Director | Distributor | Admissions |
|---|---|---|---|---|---|
| 1 | Avatar | US/GB | James Cameron | Forum Cinemas | 163 805 |
| 2 | Shrek Forever After | US | Mike Mitchell | Forum Cinemas | 126 018 |
| 3 | Alice in Wonderland | US | Tim Burton | Forum Cinemas | 95 410 |
| 4 | Despicable Me | US | P. Coffin, C. Renaud | Forum Cinemas | 99 914 |
| 5 | Zero 2 | LT | Emilis Velyvis | Meedfilms | 71 743 |
| 6 | Inception | US/GB inc | Christopher Nolan | Garsu pasaulio irašai | 66 777 |
| 7 | How to Train Your Dragon | US | D. DeBlois, C. Sanders | Forum Cinemas | 68 287 |
| 8 | Step Up 3D | US | Jon Chu | ACME | 51 902 |
| 9 | The Twilight Saga: Eclipse | US | David Slade | ACME | 55 587 |
| 10 | The Princess and the Frog | US | R. Clements, J. Musker | Forum Cinemas | 59 741 |

Source: Baltic Films

# South-Eastern Europe

| | Bulgaria | Bosnia-Herzegovina | Croatia | Greece | Romania |
|---|---|---|---|---|---|
| Population 2010 e (millions) | 7.5 | 3.9 | 4.4 | 11.2 | 21.4 |
| GDP per capita 2010 e (USD) | 5 955 | 4 158 | 13 528 | 27 265 | 7 391 |
| Gross box office 2010 (M USD) | 21.9 | 2.4 | 15.9 | 131.7 | 35.0 |
| Admissions 2010 e (millions) | 4.0 | 0.7 | 3.3 | 11.6 | 6.5 |
| Average ticket price 2010 e (USD) | 5.52 | 3.29 | 4.82 | 11.36 | 5.38 |
| Average admissions per capita 2010 e | 0.5 | 0.2 | 0.7 | 1.0 | 0.3 |
| Screens 2010 | 140 | 40 | 117 | 384 (2) | 194 |
| Digital screens 2009 \| 2010 | 23 \| 57 | ~ \| 3 | 8 \| 20 | 31 \| 57 | 40 \| 61 |
| 3D screens 2009 \| 2010 | 12 \| 53 | ~ \| ~ | 8 \| 20 | 21 \| 51 | 25 \| 54 |
| Films produced 2010 e (1) | 15 | 5 | 11 | 18 | 21 |
| National market shares 2010 e | 8.8% | 12.8% | 0.8% | 8.6% | 2.5% |

(1) Including feature documentaries and minority co-productions. (2) 2009

## Top 10 films by admissions in Greece | 2010

| | Original title | Country of origin | Director | Distributor | Admissions |
|---|---|---|---|---|---|
| 1 | Avatar | US/GB | James Cameron | Odeon | 577 281 |
| 2 | Nisos | GR | Christos Dimas | Village | 507 377 |
| 3 | Inception | US/GB inc | Christopher Nolan | Village | 421 883 |
| 4 | Clash of the Titans | US | Louis Leterrier | Village | 378 167 |
| 5 | Harry Potter and the Deathly… | GB inc/US | David Yates | Village | 374 336 |
| 6 | I Love Karditsa | GR | Stratos Markidis | Odeon | 354 394 |
| 7 | Shutter Island | US | Martin Scorsese | UIP | 308 932 |
| 8 | The Twilight Saga: Eclipse | US | David Slade | Odeon | 307 800 |
| 9 | Sex and the City 2 | US | Michael P. King | Village | 303 193 |
| 10 | Sherlock Holmes | US/GB inc/DE | Guy Ritchie | Village | 281 646 |

Source: Greek Film Center

## Top 10 films by admissions in Romania | 2010

| | Original title | Country of origin | Director | Distributor | Admissions |
|---|---|---|---|---|---|
| 1 | Avatar | US/GB | James Cameron | Odeon Cineplex | 610 075 |
| 2 | Inception | US/GB inc | Christopher Nolan | Intercomfilm | 233 444 |
| 3 | Alice in Wonderland | US | Tim Burton | Forum Film | 214 671 |
| 4 | Prince of Persia: The Sands of Time | US/GB inc | Mike Newell | Forum Film | 166 630 |
| 5 | Shrek Forever After | US | Mike Mitchell | Ro-Image 2000 | 159 118 |
| 6 | Clash of the Titans | US | Louis Leterrier | Intercomfilm | 149 361 |
| 7 | Sherlock Holmes | US/GB inc/DE | Guy Ritchie | Intercomfilm | 147 759 |
| 8 | The Twilight Saga: Eclipse | US | David Slade | Media Pro Distrib. | 146 745 |
| 9 | Robin Hood | GB inc/US | Ridley Scott | Ro-Image 2000 | 137 895 |
| 10 | Due Date | US | Todd Phillips | Intercomfilm | 128 340 |

Source: Centrul National al Cinematografiei

## Top 10 films by admissions in Bulgaria | 2010

| | Original title | Country of origin | Director | Distributor | Admissions |
|---|---|---|---|---|---|
| 1 | Mission London | BG/GB/HU/MK/SE | Dimitar Mitovski | Alexandra/A Plus | 376 843 |
| 2 | Avatar | US/GB | James Cameron | Aleksandra | 300 205 |
| 3 | Prince of Persia: The Sands of Time | US/GB inc | Mike Newell | Forum Film/Cine. City | 167 180 |
| 4 | Clash of the Titans | US | Louis Leterrier | Aleksandra | 112 377 |
| 5 | Inception | US/GB inc | Christopher Nolan | Aleksandra | 111 652 |
| 6 | Sex and the City 2 | US | Michael P. King | Aleksandra | 109 607 |
| 7 | Sherlock Holmes | US/GB inc/DE | Guy Ritchie | Aleksandra | 108 192 |
| 8 | The Expendables | US | Sylvester Stallone | Tandem | 100 109 |
| 9 | Shrek Forever After | US | Mike Mitchell | Forum Film/Cine. City | 98 749 |
| 10 | Tangled | US | Howard, Greno | Forum Film | 85 842 |

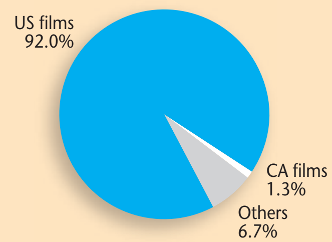
Source: National Film Center

# North America

| | North America | US | Canada |
|---|---|---|---|
| Population 2010 e (millions) | 344.4 | 310.3 | 34.1 |
| GDP per capita 2010 e (USD) | 47 009 | 47 132 | 45 888 |
| Gross box office 2010 (M USD) | 10.58 | 9 740 (1) | 884 (1) |
| Admissions 2010 e (millions) | 1 341 | 1 307 (1) | 108 (1) |
| Average ticket price 2010 (USD) e | 7.89 | 7.50 (1) | 7.92 (1) |
| Average admissions per capita 2010 e | 4.1 | 4.25 (1) | 3.21 (1) |
| Screens 2010 | 42 380 | 39 547 | 2 833 (1) |
| Digital screens 2010 | 16 522 | 15 774 | 748 |
| Digital 3D screens 2010 | 8 459 | 7 837 | 622 |

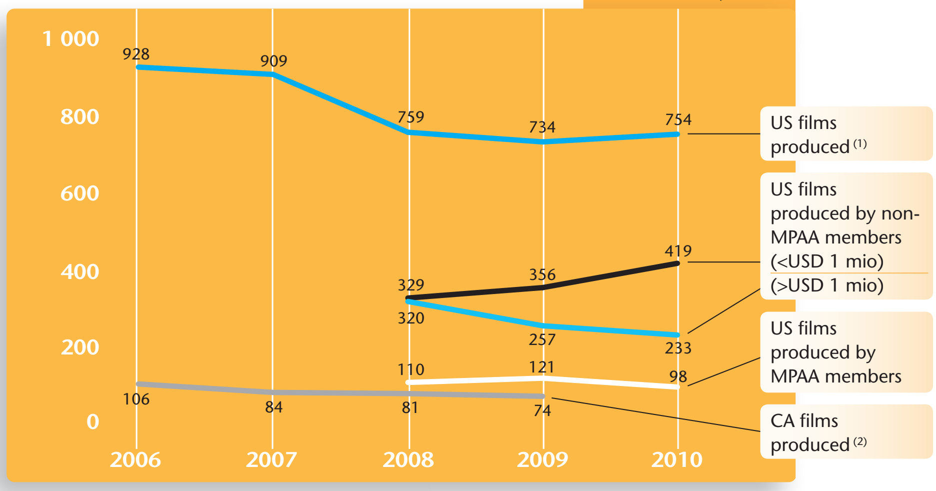
(1) 2009

**Market shares 2010 e**




## Number of feature films produced in the United States and Canada | 2006-2010

Sources: MPAA, CMPA

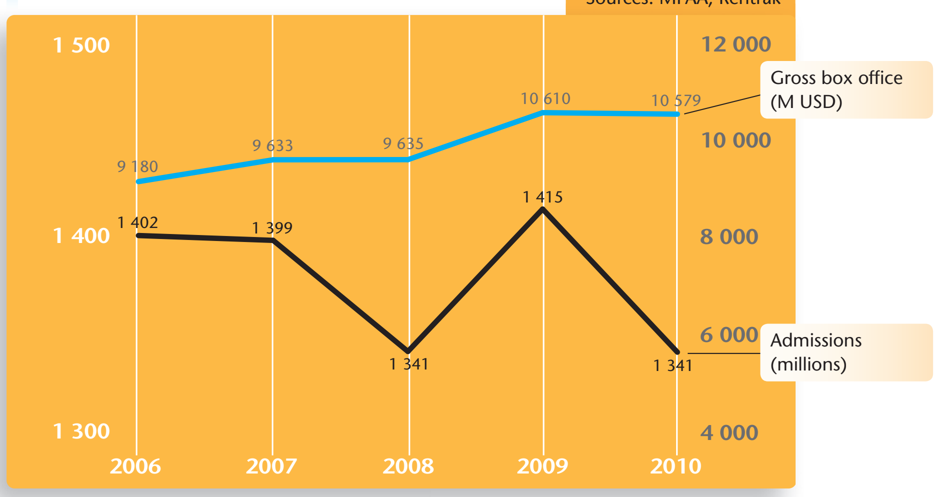



(1) Data have been revised for the years 2008 and 2009. Does not include feature documentaries.

(2) Based on fiscal year April to March, e.g. 2009 data refer to period April 2009 to March 2010.

## Admissions and gross box office in the US & Canada | 2006-2010

Sources: MPAA, Rentrak



## Top 20 films by gross box office in North America | 2010

| | Original title | Country of origin | Director | Distributor | Gross box office (in M USD) |
|---|---|---|---|---|---|
| 1 | Avatar | US/GB | James Cameron | 20th Century Fox | 476.9 |
| 2 | Toy Story 3 | US | Lee Unkrich | Walt Disney Studios | 415.0 |
| 3 | Alice in Wonderland | US | Tim Burton | Walt Disney Studios | 334.2 |
| 4 | Iron Man 2 | US | Jon Favreau | Paramount Pictures | 312.1 |
| 5 | The Twilight Saga: Eclipse | US | David Slade | Summit Entertainment | 300.5 |
| 6 | Inception (1) | US/GB Inc | Christopher Nolan | Warner Bros. | 292.6 |
| 7 | Harry Potter and the Deathly… (1) | GB Inc/US | David Yates | Warner Bros. | 283.5 |
| 8 | Despicable Me (1) | US | P. Coffin, C. Renaud | Universal Pictures | 251.2 |
| 9 | Shrek Forever After | US | Mike Mitchell | Paramount Pictures | 238.4 |
| 10 | How to Train Your Dragon | US | D. DeBlois, C. Sanders | Paramount Pictures | 217.6 |
| 11 | The Karate Kid | US/CN | Harald Zwart | Sony Pictures | 176.6 |
| 12 | Tangled (1) | US | B. Howard, N. Greno | Walt Disney Studios | 167.8 |
| 13 | Clash of the Titans | US | Louis Leterrier | Warner Bros. | 163.2 |
| 14 | Grown Ups | US | Dennis Dugan | Sony Pictures | 162.0 |
| 15 | Megamind (1) | US | Tom McGrath | Paramount Pictures | 144.2 |
| 16 | The Last Airbender | US | M. Night Shyamalan | Paramount Pictures | 131.6 |
| 17 | TRON: Legacy (1) | US | Joseph Kosinski | Walt Disney Studios | 131.3 |
| 18 | Shutter Island | US | Martin Scorsese | Paramount Pictures | 128.0 |
| 19 | The Other Guys | US | Adam McKay | Sony Pictures | 119.2 |
| 20 | Salt | US | Phillip Noyce | Sony Pictures | 118.3 |

(1) Films still on release in 2011.

Source: *Variety*

## Distribution and Exhibition

3D saved the North American box office from decline in 2010 as admissions dropped by 5.2% to 1.34 billion tickets sold, about 74 million less than in 2009. The biggest increase in average ticket prices since 2001, climbing from USD 7.5 to USD 7.9, kept GBO more or less stable at its record level of 2009, declining only marginally by 0.3% to USD 10.58 billion. Box office was once more dominated by 3D films and sequels. The 10 top grossing films included six 3D films and five sequels. Cumulatively 3D screenings accounted for 21% of total GBO, doubling from 2009 levels. The total number of films released remained fairly stable at 560 releases, including 25 3D films. A total of 26 films crossed the USD 100 million benchmark, compared to 32 films in 2009. Once more Warner Bros. became the market leading studio taking an estimated 18% of the total box office, followed by Paramount (16%). Driven by the box office potential of 3D films, North America's 3D screen base more than doubled for the second year in a row, growing to 8 459 screens, accounting for over 50% of the total digital screens, which jumped by 114% to 16 522. Digital screen penetration in the US reached 40% by the end of 2010 and is estimated at some 26% in Canada. The impact of the shortening of theatrical windows, particularly in favour of premium VOD releases, the sustainability of 3D films and profitability issues were much discussed topics in 2010.

## Production

According to revised MPAA figures 754 films involving a US production company began production in 2010, 20 more than in 2009 when US production hit the lowest level in years. Measured in total volume, US film production activity hence remained fairly stable over the past three years, after plummeting in 2008 from previously well above 900 films productions. However the figures indicate fundamental changes in the North American film industry which sees a continuously growing number of independent productions with budgets of less than USD 1 million on the one hand, and a steady decrease in big and mid-budget films, as the major studios focus on producing and distributing big budget blockbusters as well as specifically targeted lower-budget films in order to improve the odds of profitability in the light of shrinking theatrical windows and online piracy. In Canada production activity continued to drop, with 74 feature films produced between April 2009 and March 2010, down from 106 in the period 2006/07.

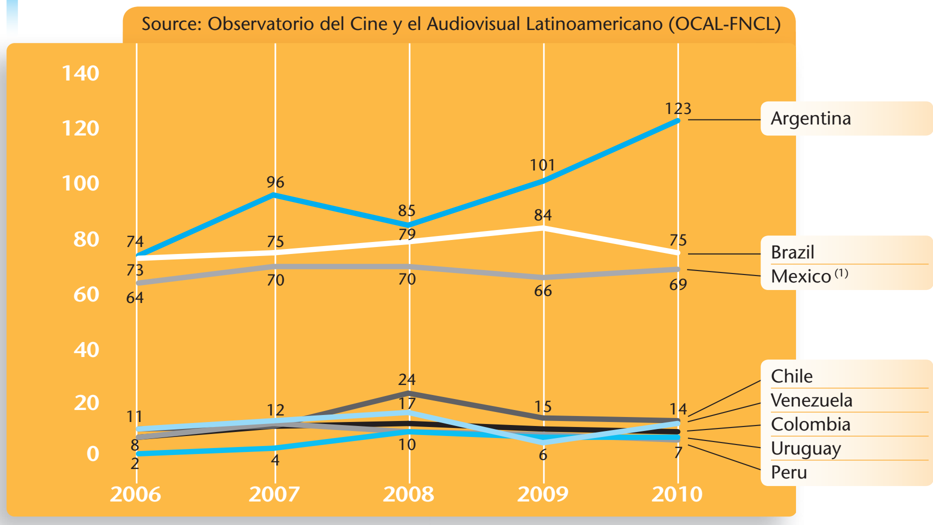
Sources: MPAA, *Screen International*, *Variety*, *The Hollywood Reporter*, Box Office Mojo, CMPA, Telefilm Canada, OBS

# Latin America

| | Argentina | Bolivia e | Brazil | Chile | Colombia | Mexico | Peru | Uruguay | Venezuela |
|---|---|---|---|---|---|---|---|---|---|
| Population 2010 e (millions) | 40.5 | 10.4 | 193.3 | 17.2 | 45.5 | 108.6 | 29.6 | 3.4 | 29.2 |
| GDP per capita 2010 e (USD) | 8 663 | 1 840 | 10 471 | 11 587 | 6 221 | 9 243 | 5 196 | 12 130 | 9 773 |
| Gross box office 2010 (M USD) | 172.9 | 8.9 (1) | 710.9 | 69.2 | 126.7 | 714.2 | 75.4 | 12.0 | 92.2 |
| Admissions 2010 (millions) | 38.0 | 2.3 (1) | 134.4 | 13.3 | 27.3 (1) | 189.6 | 20.7 (1) | 2.4 (1) | 37.4 (1) |
| Average admissions per capita 2010 e | 0.94 | 0.22 (1) | 0.70 | 0.77 | 0.56 (1) | 1.75 | 0.71 (1) | 0.75 (1) | 1.31 (1) |
| Average ticket price 2010 e (USD) | 4.55 | 3.92 (1) | 5.29 | 5.20 | 3.36 (1) | 3.77 | 3.02 (1) | 4.16 (1) | 4.37 (1) |
| Screens 2010 | 944 | 65 (1) | 2 238 | 300 (1) | 593 (1) | 4 900 | 170 (1) | 58 | 439 (1) |
| Digital screens (= 3D screens) 2010 | 100 | 9 | 264 | 45 | 97 | 650 | 35 | 12 | 18 |
| National market shares 2010 e | 9.2% | ~ | 18.8% | 2.1% | 4.5% | 6.1% | 0.4% | 2.2% | 6.2% |

(1) 2009

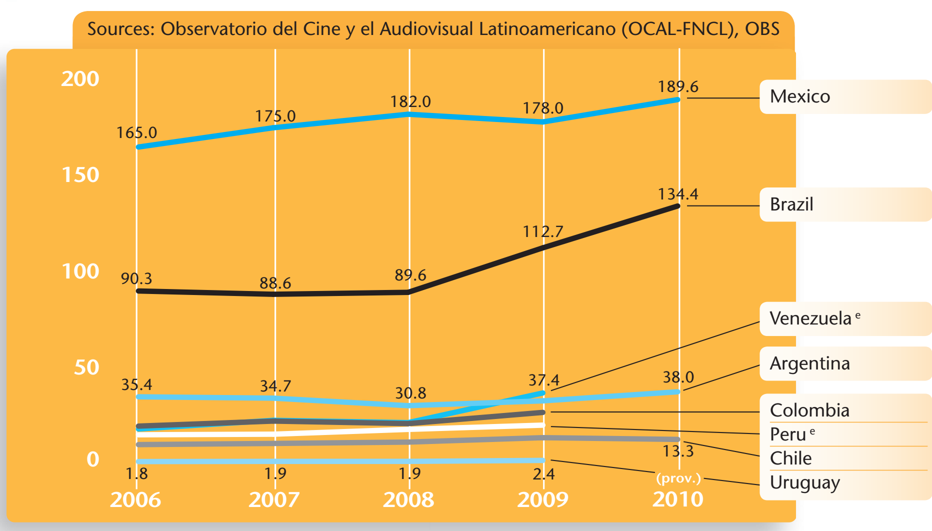
## Number of national feature films released in Latin America | 2006-2010




(1) Films produced.

## Admissions in Latin America | 2006-2010

In millions.



## Mexico

2010 saw both admissions and GBO reach new record heights in the world's fifth largest market in terms of cinema attendance. Driven by US 3D blockbusters and a strong increase in screens, admissions grew by 6.5% to 190 million tickets sold, while GBO jumped by 19% to MXN 9 billion (USD 714 million). US films continued to dominate the market taking 90.5% of total admissions. The recent explosion of digital screens, from 180 to 650 in 2010, enabled blockbusters to open on a larger number of prints, making it difficult for national productions to secure wide exposure, a handicap when theatrical revenues account for 80 to 90% of the Mexican film industry's turnover. None of the 56 Mexican films released made it into the top 20 in 2010 with national market share down from 7.5% to 6.1%. Mexican distribution and exhibition markets are fairly concentrated with the two leading exhibition chains, Cinépolis and Cinemex y MMC, accounting for 87% of total GBO and MPAA studios cumulatively taking a market share of 81%. According to national film agency Imcine about 14% of all screens were equipped with 3D technology, enabling 3D films to take 19% of 2010 GBO. Production levels remained fairly stable over the past five years with 69 theatrical features produced in 2010, about 85% of which received production support from federal agencies. In order to attract big-budget foreign productions the Mexican government introduced in 2010 a new tax incentive programme, refunding 7.5% of local spend for productions with a minimum spend of USD 5.6 million and granting an additional 10% VAT write off.

## Brazil

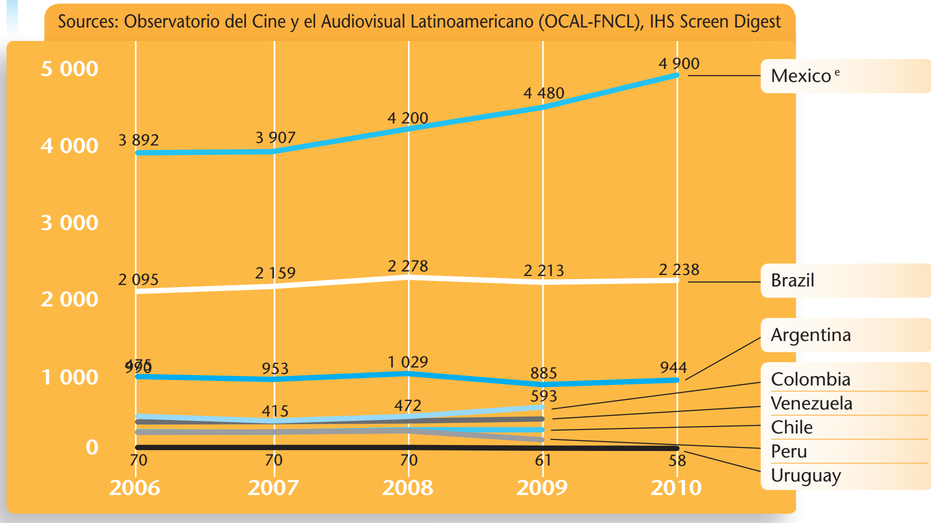
Boosted by a strong economy, a surge in 3D screens as well as a strong performance of national films, Brazilian cinema attendance increased by an impressive 19% to 134.4 million tickets sold, the highest level in 30 years. GBO even surged by 30% to an all time record high of BRL 1.26 billion (USD 711 million) with average ticket price increasing by 9% to BRL 9.4 (USD 5.29). Social programmes of recent years led to a significant increase in disposable income and an expansion of the middle class willing to spend more on entertainment and to pay premium prices for 3D blockbusters. Benefiting from a growth in digital 3D screens which almost tripled from 97 to 264 in 2010, 3D films took 19.4% of total GBO. Besides the traditionally strong US blockbusters, local films contributed significantly to market growth. Led by chart topping *Tropa de Elite 2*, which became the most watched Brazilian film of all time, national films captured a market share of 18.8%, the highest level since 2003. Due to strong public support local production levels have been increasing steadily over the past 15 years, with the number of local film releases growing from virtually zero to well above 70 film releases per year since 2006. However, theatrical distribution is a bottleneck particularly for independent films, as screen numbers have remained fairly stable over the past 7 years, making Brazil one of the most underscreened markets in the world. The low number of screens along with piracy are generally regarded as the main obstacles to the Brazilian market fully exploiting its considerable growth potential. Addressing this issue the Brazilian government launched in 2010 a BRL 500 million credit line scheme called "Cinema Near You" to encourage the construction of cinemas in small and mid-sized towns. Brazil's e-cinema Rain Network with about 200 screens across 63 cities has proven a successful alternative to DCI compatible digital cinema allowing particularly independent films to be released widely across the country.

## Argentina

In Argentina admissions were up 14% to 38 million tickets sold in 2010, the highest level since 2004 and GBO even increased by 44% to ARS 678 million (USD 173 million), the highest level on record. Driven by the success of 3D blockbusters, which accounted for 7 out of the top ten films, average ticket price jumped by 26% to ARS 17.8 (USD 4.6). Boosted by public support Argentina has become the continent's most prolific producing country with 123 local films released in 2010, up from 101 in 2009. Despite the large number of local films and government regulations on their screening, national market share depends heavily on the breakout success of individual films. With US films dominating the market, it dropped from 16% in 2009 to 9.2% in 2010. With Spain, the traditional co-producing partner, increasing budget thresholds for key public support to international co-productions, Argentina intensified its ties with Brazil through the creation of a new co-production fund.

Sources: Observatorio del Cine y el Audiovisual Latinoamericano (OCAL-FNCL), INCAA, Imcine, Ancine, *Screen International*, *Variety*, OBS

## Number of screens in Latin America | 2006-2010




## Top 10 films by gross box office in Mexico | 2010 e

GBO in Mexico has been converted to USD based on an average exchange rate of 1 USD = 12.65 MXN.

| | Original title | Country of origin | Director | Gross box office (in USD) e |
|---|---|---|---|---|
| 1 | Toy Story 3 | US | Lee Unkrich | 59 686 346 |
| 2 | Alice in Wonderland | US | Tim Burton | 31 508 375 |
| 3 | Shrek Forever After | US | Mike Mitchell | 28 529 765 |
| 4 | Harry Potter and the Deathly Hallows (Part One) | GB Inc/US | David Yates | 22 957 040 |
| 5 | The Twilight Saga: Eclipse | US | David Slade | 20 705 728 |
| 6 | Clash of the Titans | US | Louis Leterrier | 20 652 959 |
| 7 | Despicable Me | US | P. Coffin, C. Renaud | 19 891 207 |
| 8 | Iron Man 2 | US | Jon Favreau | 18 490 953 |
| 9 | The Chronicles of Narnia: The Voyage of… | GB Inc/US | Michael Apted | 16 835 291 |
| 10 | How to Train Your Dragon | US | D. DeBlois, C. Sanders | 14 435 988 |

Source: Imcine

## Top 10 films by gross box office in Brazil | 2010 e

GBO in Brasil has been converted to USD based on an average exchange rate of 1 USD = 1.77 BRL.

| | Original title | Country of origin | Director | Gross box office (in USD) e |
|---|---|---|---|---|
| 1 | Tropa de Elite 2 - O Inimigo Agora e… (Elite Squad 2) | BR | José Padilha | 60 881 791 |
| 2 | Shrek Forever After | US | Mike Mitchell | 38 735 762 |
| 3 | The Twilight Saga: Eclipse | US | David Slade | 29 507 489 |
| 4 | Alice in Wonderland | US | Tim Burton | 27 438 369 |
| 5 | Toy Story 3 | US | Lee Unkrich | 24 052 970 |
| 6 | Harry Potter and the Deathly Hallows (Part One) | GB Inc/US | David Yates | 23 132 873 |
| 7 | Alvin and the Chipmunks: The Squeakquel | US | Betty Thomas | 21 263 467 |
| 8 | Nosso Lar | BR | Wagner de Assis | 20 529 109 |
| 9 | De Pernas pro Ar | BR | Roberto Santucci | 18 262 422 |
| 10 | Chico Xavier | BR | Daniel Filho | 16 668 948 |

Source: Ancine

## Top 10 films by gross box office in Argentina | 2010 [e]

GBO in Argentina has been converted to USD based on an average exchange rate of 1 USD = 3.92 ARS.

| | Original title | Country of origin | Director | Gross box office (in USD) [e] |
|---|---|---|---|---|
| 1 | Toy Story 3 | US | Lee Unkrich | 15 819 872 |
| 2 | Shrek Forever After | US | Mike Mitchell | 13 630 670 |
| 3 | Avatar | US | James Cameron | 13 295 046 |
| 4 | Alice in Wonderland | US | Tim Burton | 8 087 686 |
| 5 | Inception | GB Inc/US | Christopher Nolan | 7 343 264 |
| 6 | Harry Potter and the Deathly Hallows (Part One) | GB Inc/US | David Yates | 5 788 768 |
| 7 | The Chronicles of Narnia: The Voyage of the Dawn… | GB Inc/US | Michael Apted | 4 428 824 |
| 8 | The Twilight Saga: Eclipse | US | David Slade | 4 316 827 |
| 9 | Clash of the Titans | US | Louis Leterrier | 3 927 698 |
| 10 | Igualita a mi | AR | Diego Kaplan | 3 494 074 |

Source: Incaa

## Top 10 films by gross box office in Venezuela | 2010 [e]

GBO in Venezuela has been converted to USD based on an average exchange rate of 1 USD = 4.21 VEF.

| | Original title | Country of origin | Director | Gross box office (in USD) [e] |
|---|---|---|---|---|
| 1 | Tangled | US | B. Howard, N. Greno | 5 227 221 |
| 2 | Toy Story 3 | US | Lee Unkrich | 4 827 834 |
| 3 | Shrek Forever After | US | Mike Mitchell | 4 557 260 |
| 4 | Harry Potter and the Deathly Hallows (Part One) | GB Inc/US | David Yates | 3 612 135 |
| 5 | Alice in Wonderland | US | Tim Burton | 3 301 490 |
| 6 | La hora cero | VE | Diego Velasco | 3 006 189 |
| 7 | Tron Legacy | US | Joseph Kosinski | 2 604 370 |
| 8 | The Twilight Saga: Eclipse | US | David Slade | 2 452 757 |
| 9 | Clash of the Titans | US | Louis Leterrier | 2 292 640 |
| 10 | The Karate Kid | US | Harald Zwart | 2 009 045 |

Sources: CNAC, OBS

## Top 10 films by gross box office in Peru | 2010 [e]

GBO in Peru has been converted to USD based on an average exchange rate of 1 USD = 2.87 PEN.

| | Original title | Country of origin | Director | Gross box office (in USD) [e] |
|---|---|---|---|---|
| 1 | Shrek Forever After | US | Mike Mitchell | 4 044 980 |
| 2 | Toy Story 3 | US | Lee Unkrich | 3 692 517 |
| 3 | Clash of the Titans | US | Louis Leterrier | 2 901 985 |
| 4 | The Chronicles of Narnia: The Voyage of the Dawn… | GB Inc/US | Michael Apted | 2 417 691 |
| 5 | Harry Potter and the Deathly Hallows (Part One) | GB Inc/US | David Yates | 2 321 485 |
| 6 | The Twilight Saga: Eclipse | US | David Slade | 2 287 774 |
| 7 | The Last Airbender | US | Michael N. Shyamalan | 2 086 639 |
| 8 | Despicable Me | US | P. Coffin, C. Renaud | 2 058 545 |
| 9 | Iron Man 2 | US | Jon Favreau | 1 832 573 |
| 10 | Prince of Persia: The Sands of Time | GB Inc/US | Mike Newell | 1 815 362 |

Sources: Conacine, OBS

## Top 10 films by gross box office in Chile | 2010 [e]

GBO in Chile has been converted to USD based on an average exchange rate of 1 USD = 519.31 CLP.

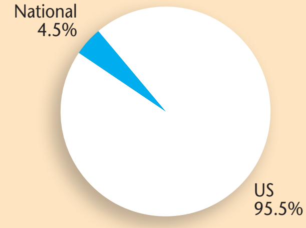
| | Original title | Country of origin | Director | Gross box office (in USD) [e] |
|---|---|---|---|---|
| 1 | Toy Story 3 | US | Lee Unkrich | 8 067 706 |
| 2 | Shrek Forever After | US | Mike Mitchell | 5 730 409 |
| 3 | Harry Potter and the Deathly Hallows (Part One) | GB Inc/US | David Yates | 3 300 921 |
| 4 | Tangled | US | B. Howard, N. Greno | 2 980 712 |
| 5 | Alice in Wonderland | US | Tim Burton | 2 893 857 |
| 6 | The Twilight Saga: Eclipse | US | David Slade | 2 752 137 |
| 7 | Inception | GB Inc/US | Christopher Nolan | 2 361 300 |
| 8 | Clash of the Titans | US | Louis Leterrier | 1 684 576 |
| 9 | The Last Airbender | US | Michael N. Shyamalan | 1 629 948 |
| 10 | How to Train Your Dragon | US | D. DeBlois, C. Sanders | 1 393 245 |

Sources: CNAC, OBS

# Australia

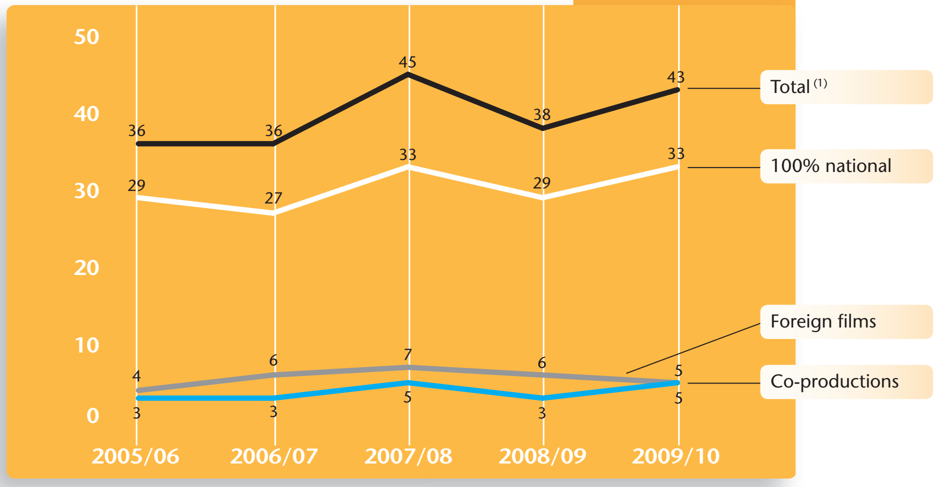
| | |
|---|---|
| Population 2010 e | 22.2 million |
| GDP per capita 2010 e | 61 405 AUD (54 869 USD) |
| Gross box office 2010 | 1.13 bn AUD (1.03 bn USD) |
| Admissions 2010 e | 92.0 million |
| Average ticket price 2010 | 12.3 AUD (11.23 USD) |
| Average admissions per capita 2010 e | 4.14 |
| Screens 2009 I 2010 | 1 989 I 1 992 |
| Digital screens 2009 I 2010 | 311 I 452 |
| 3D screens 2009 I 2010 e | 299 I 376 |

**Market shares 2010 e**




## Number of films produced in Australia I 2005/06-2009/10

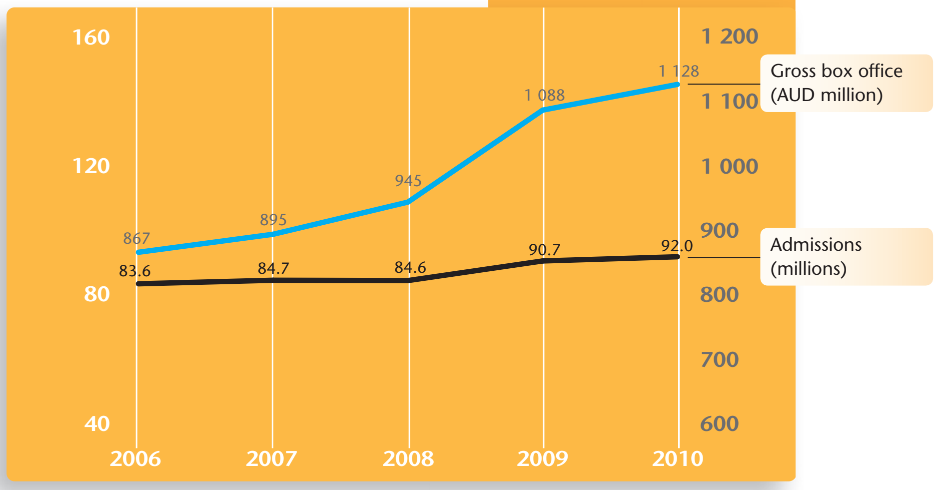
Source: Screen Australia




(1) Includes films under Australian creative control but 100% foreign financed.

## Admissions and gross box office I 2006-2010

Sources: MPDAA, Screen Australia



## Top 20 films by admissions in Australia | 2010 e

Estimated admissions based on average ticket price of 12.26 AUD.

| | Original title | Country of origin | Director | Distributor | Admissions e |
|---|---|---|---|---|---|
| 1 | Avatar | US/GB | James Cameron | Fox | 6 141 155 |
| 2 | Toy Story 3 | US | Lee Unkrich | Walt Disney | 3 459 706 |
| 3 | Harry Potter and the Deathly… | GB Inc/US | David Yates | Warner Bros. | 3 180 212 |
| 4 | Alice in Wonderland | US | Tim Burton | Walt Disney | 3 063 785 |
| 5 | Inception | GB Inc/US | Christopher Nolan | Warner Bros. | 2 905 758 |
| 6 | The Twilight Saga: Eclipse | US | David Slade | Hoyts | 2 790 576 |
| 7 | Shrek Forever After | US | Mike Mitchell | Paramount | 2 242 572 |
| 8 | Iron Man 2 | US | Jon Favreau | Paramount | 2 120 259 |
| 9 | Sex and the City 2 | US | Michael P. King | Roadshow | 1 919 126 |
| 10 | Despicable me | US | P. Coffin, C. Renaud | Universal | 1 813 164 |

Sources: Screen Australia, MPDAA, OBS

## Distribution and Exhibition

In 2010 Australian box office grew to another record high of AUD 1.13 billion (USD 1.03 billion), up 3.7% from its previous record level in 2009. Like in many other markets GBO growth was driven primarily by an increase in average ticket prices due to 3D screenings, up 2.3% from AUD 12.0 to AUD 12.3 (USD 11.23). Admissions grew by 1.4% to an estimated 92 million tickets sold, the highest level since 2002. With an annual average of 4.14 cinema tickets bought per citizen Australia remains one of the countries with highest cinema going rates per person worldwide. In 2010, a total of 325 films were released, 21 less than the previous year. The 41 Australian films screened in 2010 took a market share of 4.5% of total GBO, down from 5% in 2009. Led by *Avatar*, which became the all-time highest grossing film in the territory, box office was once more dominated by US blockbusters, particularly 3D films and sequels. Independent films were reported to be faced with lower box office results due to increasing concentration on the opening weekends. The number of digital screens increased by a comparatively low 45.3% bringing digital screen penetration to just under 23% by the end of 2010. A recent report commissioned by the AFACT estimates that movie piracy cost the Australian film industry lost revenue of USD 1.37 billion in the 12 months up to July 2010.

## Production and Funding

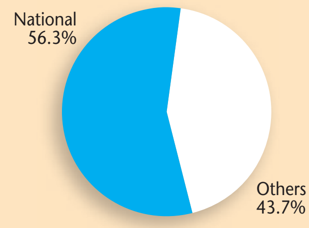
Production activity in Australia increased to 43 feature films starting principal photography in 2009/10, compared to 38 films in the previous year. Though it is too early to clearly evaluate the impact of the producer offset (PO), a 40% tax rebate for qualifying domestic films or official co-productions, which was introduced three years ago, Screen Australia figures indicate that it shifted production activity from small and medium-budget projects towards bigger budget films. Films with budgets of less than AUD 6 million (USD 5.5 million) accounted for 77% of total feature production volume in 2007/08 but accounted for only 59% two years later. While the producer offset with its minimum budget requirements aims to support bigger, more commercial projects, smaller art-house films still depend on Screen Australia's direct subsidies. Some independent filmmakers fear that direct subsidies will be further cut as PO claims rise. Despite location and post-production tax rebates of 15%, the exchange rate of the Australian dollar remains the key element in attracting foreign production budgets to the Australian film industry.

Sources: Screen Australia, MPDAA, *Screen International*, AFACT (Australian Federation Against Copyright Theft), IPSOS, Oxford Economics, OBS

# People's Republic of China

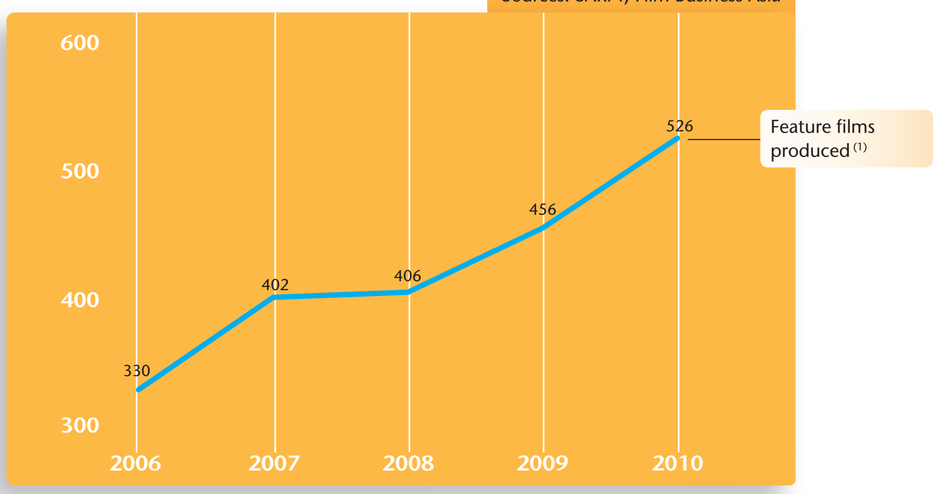
| | |
|---|---|
| Population 2010 e | 1 341 million |
| GDP per capita 2010 e | 4 283 USD |
| Gross box office 2010 | 10.2 bn CNY (1 501 M USD) |
| Admissions 2009 e | 263.8 million |
| Average ticket price 2009 e | 23.5 CNY (3.43 USD) |
| Average admissions per capita 2009 e | 0.20 |
| Screens 2009 I 2010 | 4 726 I 6 200 |
| Digital screens 2009 I 2010 | 1 788 I 3 150 |
| Digital 3D screens 2009 I 2010 | 750 I 1 350 |

**Market shares 2010 e**




## Number of feature films produced in China I 2006-2010

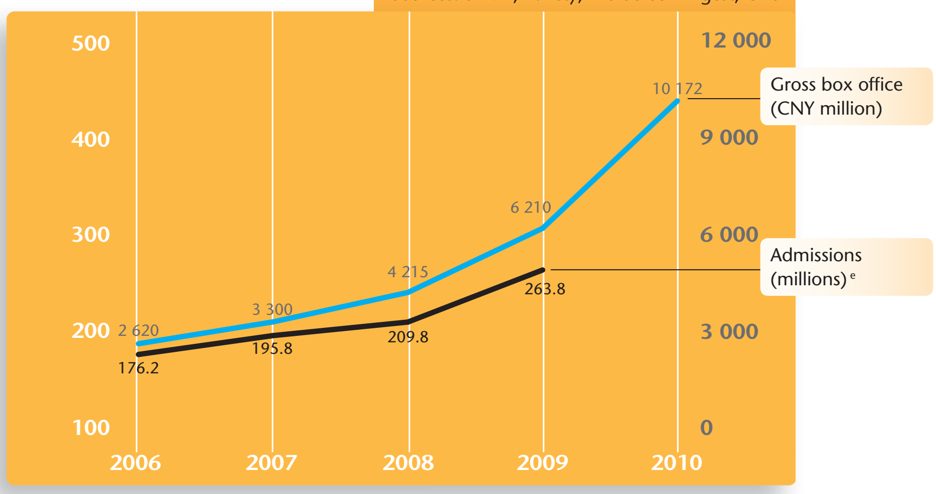
Sources: SARFT, Film Business Asia




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

## Admissions and gross box office I 2006-2010

Sources: SARFT, *Variety*, IHS Screen Digest, OBS



## Top 10 films by gross box office in China | 2010

| | Original title | Country of origin | Director | Distributor | Gross box office (in USD million) |
|---|---|---|---|---|---|
| 1 | Avatar | US/GB | James Cameron | China Film. Huaxia | 203.9 |
| 2 | Tangshan dadizhen (Aftershock) | CN | Xiaogang Feng | Huayi Brothers Media | 98.2 |
| 3 | Rang zidan fei (Let The Bullets Fly) | CN | Wen Jiang | ~ | 84.6 |
| 4 | Inception | US/GB inc | Christopher Nolan | China Film. Huaxia | 69.0 |
| 5 | Fei cheng wu rao 2 (If You Are…) | CN | Xiaogang Feng | ~ | 54.4 |
| 6 | Di Renjie (Detective Dee And The…) | CN/HK | Hark Tsui | ~ | 44.6 |
| 7 | Alice in Wonderland | US | Tim Burton | China Film. Huaxia | 33.8 |
| 8 | Harry Potter and the Deathly… | GB inc/US | David Yates | China Film. Huaxia | 33.4 |
| 9 | Iron Man 2 | US | Jon Favreau | China Film. Huaxia | 33.2 |
| 10 | The Expendables | US | Sylvester Stallone | China Film | 32.2 |

Sources: *Screen International*, OBS

## Top 10 foreign films by gross box office in China | 2010

| | Original title | Country of origin | Director | Distributor | Gross box office (in USD million) |
|---|---|---|---|---|---|
| 1 | Avatar | US/GB | James Cameron | China Film. Huaxia | 203.9 |
| 2 | Inception | US/GB inc | Christopher Nolan | China Film. Huaxia | 69.0 |
| 3 | Alice in Wonderland | US | Tim Burton | China Film. Huaxia | 33.8 |
| 4 | Harry Potter and the Deathly… | GB inc/US | David Yates | China Film. Huaxia | 33.4 |
| 5 | Iron Man 2 | US | Jon Favreau | China Film. Huaxia | 33.2 |
| 6 | The Expendables | US | Sylvester Stallone | China Film | 32.2 |
| 7 | Clash of the Titans | US | Louis Leterrier | China Film | 27.0 |
| 8 | Prince of Persia: The Sands of Time | US/GB inc | Mike Newell | China Film. Huaxia | 26.0 |
| 9 | Resident Evil: Afterlife | DE/FR/GB | Paul W.S. Anderson | DMG | 21.6 |
| 10 | Toy Story 3 | US | Lee Unkrich | China Film Digital | 17.6 |

Sources: *Screen International*, OBS

## Distribution and Exhibition

Driven by the strong growth in new cinema screens and the success of a few blockbusters, GBO rocketed by an incredible 64% to a new record height of CNY 10.2 bn (USD 1.5 bn) in 2010. Despite booming GBO, the Chinese market remains extremely difficult for foreign films as well as for smaller local productions due to a high level of concentration. Box office is dominated by a few blockbusters with the top two films *Avatar* and *Aftershock* taking 20% and the top 10 films accounting for 46% of total GBO, leaving smaller local productions struggling to secure a proper theatrical release. The distribution of foreign films is limited by import quotas and a highly concentrated, state controlled distribution sector. The mandatory usage of state distribution companies has been criticised in a WTO ruling in 2009 asking China to amend legislation by March 2011. In contrast, competition is fierce in the fast growing exhibition sector which saw the opening of 4.2 screens on average per day in 2010. With up to 85% of the country's total area still underscreened, industry players expect growth to continue at high rates. However exhibitors, particularly in major cities, are struggling with rapidly increasing rents stretching their recoupment periods and causing some to falsify box office reports. This has been identified as a major issue by the state regulatory body SARFT which now plans to introduce a transparent box office reporting system. Buoyed by public support, China boasted the second largest digital (3 150) and 3D (1 350) screen base in the world by the end of 2010.

## Production

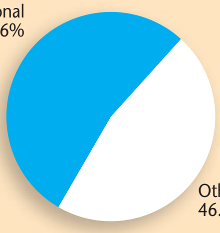
In 2010 China became the world's third largest film producing country with feature fiction film production increasing to 526 productions, up 70 films from 2009. However, according to industry insiders less than 150 of these films were released theatrically and only 30 of these films earned money, implying profitability and quality issues for many local productions. The recent box office boom has nevertheless attracted plenty of national and foreign investments with several larger studios listing on the stock market and local banks financing the industry. According to SARFT more than 600 film investment and production companies were active in 2010, compared to about 200 in previous years. Faced with ever increasing production costs the Chinese film industry is looking to increase revenues from international sales and limit the losses caused by piracy.

Sources: SARFT, *Screen International, Variety, Film Business Asia*, OBS

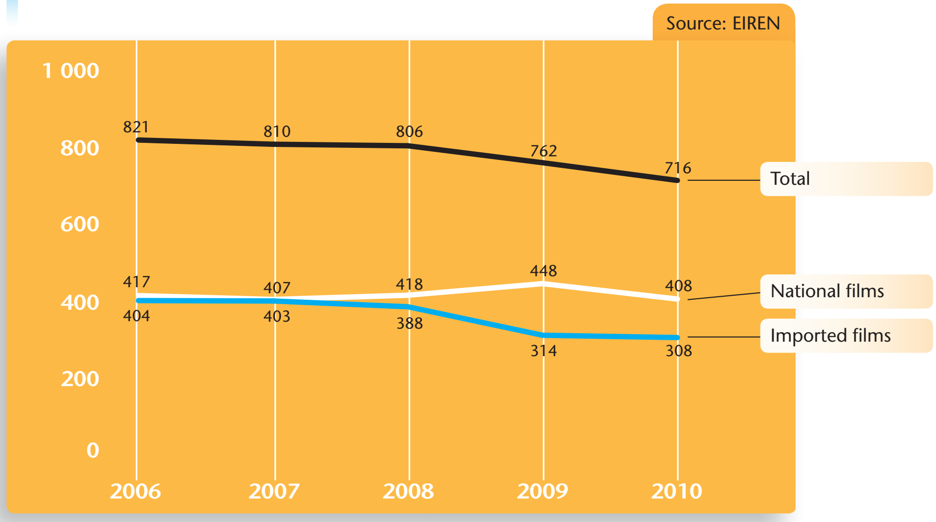
# Japan

| | |
|---|---|
| Population 2010 e | 127.4 million |
| GDP per capita 2010 e | 42 325 USD |
| Gross box office 2010 | 220.7 bn JPY (2.5 bn USD) |
| Admissions 2010 e | 174.4 million |
| Average ticket price 2010 | 1 266 JPY (14.42 USD) |
| Average admissions per capita 2010 e | 1.4 |
| Screens 2009 \| 2010 | 3 396 \| 3 412 |
| Digital screens 2009 \| 2010 e | 440 \| 983 |
| Digital 3D screens 2009 \| 2010 e | 170 \| 763 |

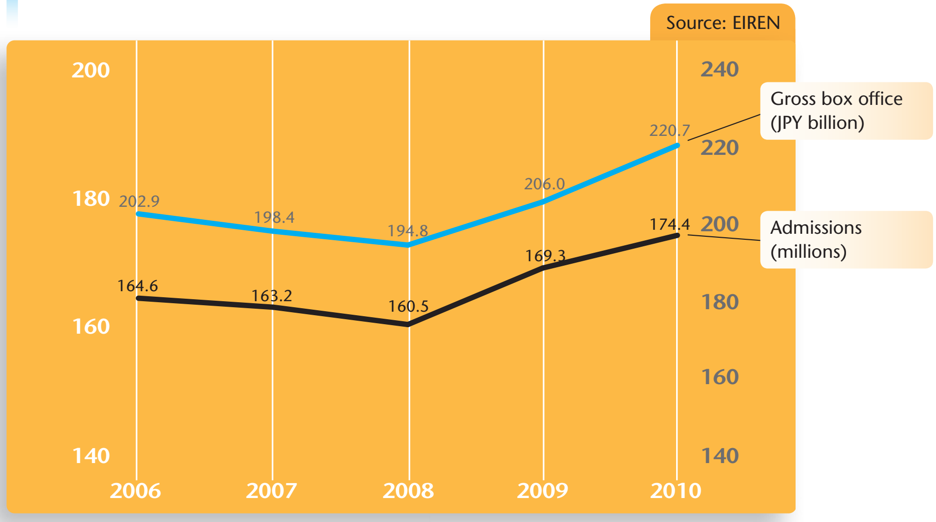
**Market shares 2010**




## Number of films released in Japan | 2006-2010




## Admissions and gross box office | 2006-2010



## Top 20 films by admissions in Japan | 2010[e]

Estimated admissions based on average ticket price of JPY 1 266.

| | Original title | Country of origin | Director | Distributor | Admissions[e] |
|---|---|---|---|---|---|
| 1 | Avatar | US/GB | James Cameron | Fox | 12 322 275 |
| 2 | Alice in Wonderland | US | Tim Burton | Walt Disney | 9 320 695 |
| 3 | Toy Story 3 | US | Lee Unkrich | Walt Disney | 8 530 806 |
| 4 | Kari-gurashi no Arrietti (Arrietty) | JP | Hiromasa Yonebayashi | Toho | 7 306 477 |
| 5 | Za rasuto messêji: Umizaru (Umizaru 3) | JP | Eiichiro Hasumi | Toho | 6 350 711 |
| 6 | Odoru daisousasen the movie 3 | JP | Katsuyuki Motohiro | Toho | 5 774 092 |
| 7 | Up | US | Docter, Peterson | Walt Disney | 3 949 447 |
| 8 | One Piece film - Strong World | JP | Munehisa Sakai | Toei | 3 791 469 |
| 9 | Resident Evil: Afterlife | DE/FR/GB | Paul W.S. Anderson | Spe | 3 712 480 |
| 10 | Zoroark: Master of Illusions | JP | Kunihiko Yuyama | Toho | 3 285 940 |
| 11 | Nodame Kantâbire (The Movie I) | JP | Hideki Takeuchi | Toho | 3 238 547 |
| 12 | Kokuhaku (Confessions) | JP | Tetsuya Nakashima | Toho | 3 041 074 |
| 14 | Nodame Kantâbire (The Movie II) | JP | Kawamura, Takeuchi | Toho | 2 938 389 |
| 15 | SP: The motion picture yabô hen | JP | Takafumi Hatano | Toho | 2 867 299 |
| 13 | Inception | US | Christopher Nolan | Warner Bros. | 2 764 613 |
| 18 | Meitantei Conan: Tenkuu no rosuto shippu | JP | Yasuichiro Yamamoto | Toho | 2 527 646 |
| 16 | Eiga Doraemon: Nobita no ningyo | – | – | Toho | 2 496 051 |
| 19 | Hanamizuki (May your love bloom…) | JP | Kôzô Kusuba | Toho | 2 235 387 |
| 17 | Oceans | FR | Perrin, Cluzaud | Gaga | 1 974 724 |
| 20 | Raiâ gêmu: Za fainaru sutêji (Liar Game) | JP | Hiroaki Matsuyama | Toho | 1 864 139 |

Sources: EIREN, OBS

## Distribution and Exhibition

Driven by a 3D boom Japanese box office grew by 7.1% to JPY 221 billion (USD 2.5 billion) in 2010, the highest level in the country's history. GBO growth was driven by a 3% increase in admissions to 174.4 million, the highest level in the past decade, and a 4% increase in average ticket price to JPY 1 266 (USD 14.4). This marks a significant increase in ticket prices, which were already among the world's most expensive but had remained stable at an average of about JPY 1 215 over the past three years, and shows the effect of premium priced 3D screenings which further re-inforced the polarization between a limited number of big local and Hollywood productions and a large number of independent films struggling for screen space. This development was brought about by moviegoing habits shifting strongly in favour of blockbuster screenings in multiplexes and caused a crisis in Japan's arthouse sector which saw many smaller cinemas and independent distributors go out of business over the past two years. Consequently the number of foreign film imports dropped dramatically from 404 films only five years ago to 308 in 2010. While a total of 1 651 multiplex screens opened over the past decade, over 760 screens in smaller cinemas closed in the same period, raising the share of multiplex screens from 49% to 81%. However, due to stagnating admissions per screen, multiplex construction has been slowing down for two years and earlier this year market leader Toho announced plans to significantly reduce prices in its multiplexes in order to stimulate growth in attendance. This would be the first price cut at multiplexes since their arrival on the market in 1993. No doubt 2011 will prove to be an extraordinarily challenging year for the film industry as Japan faces one of its most difficult periods in recent history.

## Production

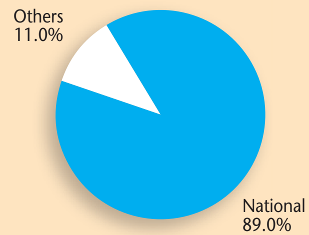
After reaching a record high of 448 films in 2009, Japan's production activity dropped sharply in 2010 to 408 national films released, including 59 adult films. Led by big local blockbusters like *Arrietty* or sea action film *Umizaru 3*, national films took 53.6% of total GBO, down from 56.9% in 2009. Just like in the exhibition and distribution sector a widening gap between major and smaller producers can be observed as smaller productions struggle to recoup their investments and the involvement of a major TV network and its cross-promotion activities have become an essential factor for box office and video success.

Sources: EIREN, UNIJAPAN – *The Guide to Japanese Film Industry & Co-production, Screen International, Variety,* OBS

# India

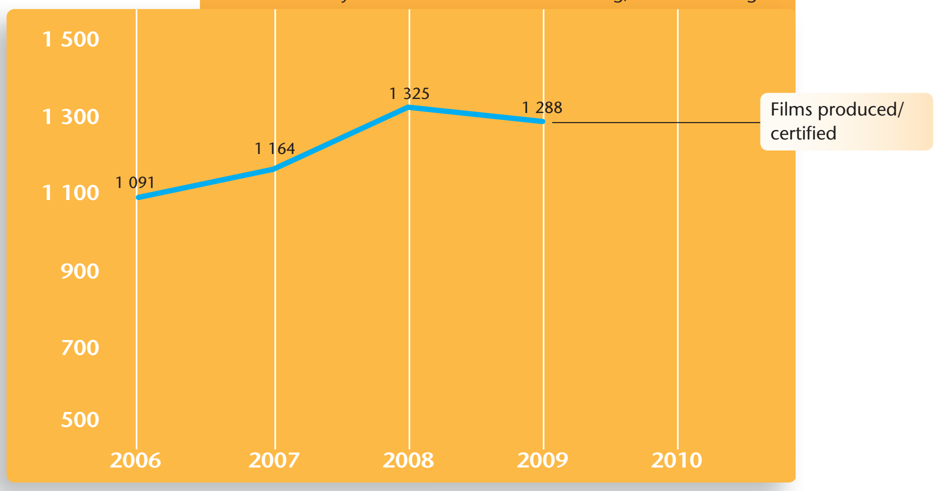
| | |
|---|---|
| Population 2010 e | 1 216 million |
| GDP per capita 2010 e | 1 176 USD |
| Gross box office 2010 e | 62.0 bn INR (1.35 bn USD) |
| Admissions 2009 e | 2 918 million |
| Average ticket price 2009 e | 23.48 INR (0.51 USD) |
| Average admissions per capita 2009 e | 2.42 |
| Screens 2009 \| 2010 e | 10 070 \| ~ |
| E-Cinema screens 2009 \| 2010 e | 2 815 \| 3 600 |
| D-Cinema screens 2009 \| 2010 e | 146 \| 279 |
| 3D screens 2009 \| 2010 e | 50 \| 130 |

**Market shares 2009 e**



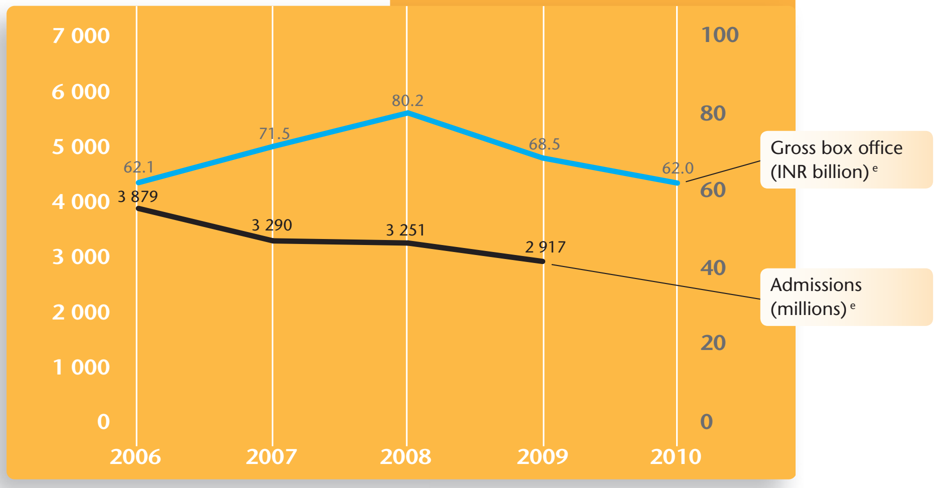

## **Number of Indian feature films produced/certified** | 2006-2010

Sources: Ministry of Information and Broadcasting, IHS Screen Digest




## **Admissions and gross box office** | 2006-2010 e

Sources: FICCI-KPMG, IHS Screen Digest, OBS



## Top 10 Hindi films by gross box office in India | 2010 [e]

GBO in USD calculated using an average exchange rate of 45.94 INR.

| | Original title | Country of origin | Director | Distributor | Gross box office (in M USD) [e] |
|---|---|---|---|---|---|
| 1 | Enthiran (The Robot) | IN | S. Shankar | Sun Pictures | 55.55 |
| 2 | Dabangg | IN | Abhinav Kashyap | Arbaaz Khan Prod./Shree Ashtavin… | 33.61 |
| 3 | Golmaal 3 | IN | Rohit Shetty | Shree Ashtavinayak Cine Vision | 27.25 |
| 4 | Raajneeti | IN | Prakash Jha | ~ | 22.23 |
| 5 | Housefull | IN | Sajid Khan | Eros International | 15.87 |
| 6 | My Name Is Khan | IN | Karan Johar | Fox STAR Studios | 14.54 |
| 7 | Once Upon A Time In Mumbai | IN | Milan Luthria | ~ | 13.00 |
| 8 | Tees Maar Khan | IN | Farah Khan | ~ | 13.02 |
| 9 | Kites | IN | Anurag Basu | ~ | 11.22 |
| 10 | Anjaana Anjaani | IN | Siddharth Anand | ~ | 11.29 |

Sources: IBOS network, IMDB

## Distribution and Exhibition

Despite the ongoing lack of reliable figures on the Indian film industry, it is fair to assume that 2010 proved to be another difficult year for the Indian box office. According to the most recent FICCI – KPMG report, GBO fell for the second consecutive year in 2010, dropping 9.5% to INR 62 billion (USD 1.3 billion). It can be assumed that underlying admissions continued their downward trend of recent years, falling from an estimated 3.9 billion in 2006 to 2.9 billion in 2009. While the decline in 2009 results could be partially blamed on a dispute which saw producers refusing to release any big films until their demands for higher revenue-sharing agreements with multiplex owners had been met, the 2010 downturn was largely attributed to a lack of quality films. Most of the big star-driven Bollywood blockbuster failed to meet expectations. The outlook for 2011 remains challenging with two major cricket events expected to keep audiences out of theatres for over three months between February and May. Few films are generally released during this season and most films will fight for screen space in the remaining 8 months, increasing the risk of cannibalization of box office. The country's exhibition landscape is split between a large number of single screen theatres, particularly in South India, which exclusively screen national and regional films, and a smaller number of multiplex screens in the larger cities. Depending on the source, multiplexes account for something between 50% and 70% of India's box office and are the primary source of revenues for US films. Average ticket prices for multiplexes were around INR 150 (USD 3.3) compared to INR 38 (USD 0.8) for single-screen tickets. KMPG expects multiplex growth to become a key growth driver for market in the years to come. So far there has been limited demand for digital cinema, with only about 279 DCI compatible digital screens out of a total screen base of round 10 000 operational by the end of 2010. This compares to about 3 600 e-cinema screens (1.3K) which come at significantly lower cost and cater to the national films which dominate the market, generally taking more than 90% of GBO. US blockbusters were reported to have slightly increased their market share in 2010 but generally account only for 5% to 7% of the market. This leaves hardly any space for independent foreign films which find a more promising distribution platform in the booming Indian TV landscape.

## Production

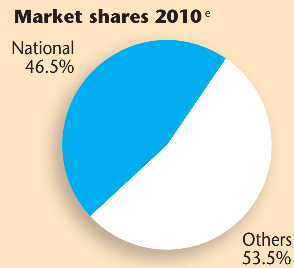
Though there are no official figures for 2010 production levels, industry sources reported a continuing downturn of Indian production activity due to a financing crunch caused by the 2009 recession, which already saw the number of films certified fall to 1 288 in 2009. The Indian film industry heavily depends on local box office, which accounted for an estimated 75% of total industry turnover in 2010, to recoup their investments. Faced with falling box office results and shorter theatrical runs, Indian production companies are continuing their efforts to tackle profitability issues by further reducing production costs, particularly talent cost. KMPG estimates that average production costs for big budget movies dropped by 19% in 2010 to INR 730 million (USD 15.9 million). Marketing costs for theatrical releases were the only cost element to increase and may lead smaller independent production companies to increasingly produce feature films exclusively for non-theatrical distribution platforms like TV, home video and internet, according to an assessment of KPMG.

Sources: FICCI (Federation of Indian Chambers of Commerce and Industry), KPMG, *Screen International, Variety, The Times of India*, IHS Screen Digest, OBS

# South Korea

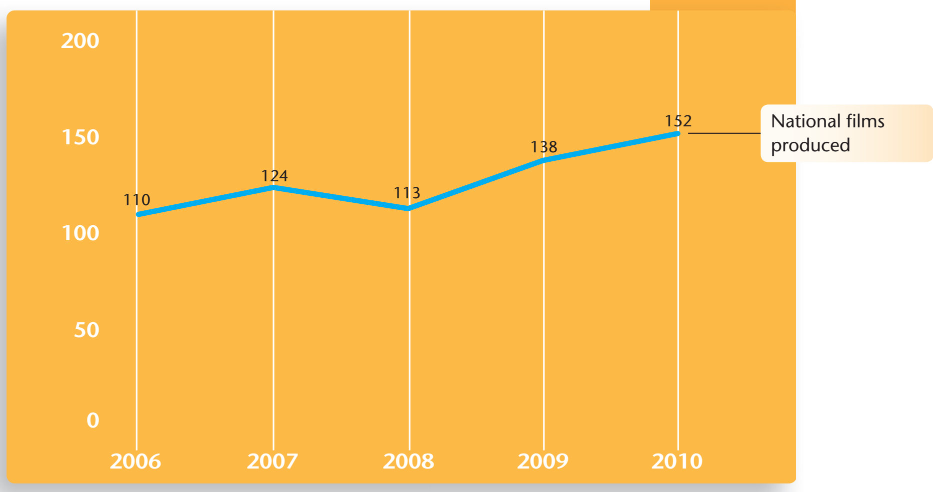
| | |
|---|---|
| Population 2010 e | 50.5 million |
| GDP per capita 2010 e | 20 165 USD |
| Gross box office 2010 | 1 150 bn KRW (992 M USD) |
| Admissions 2010 | 146.8 million |
| Average ticket price 2010 e | 7 834 KRW (6.75 USD) |
| Average admissions per capita 2010 e | 2.92 |
| Screens 2009 I 2010 | 2 055 I 2 003 |
| Digital screens 2009 I 2010 | 566 I 1 221 |
| Digital 3D screens 2009 I 2010 | 129 I 573 |

**Market shares 2010** e



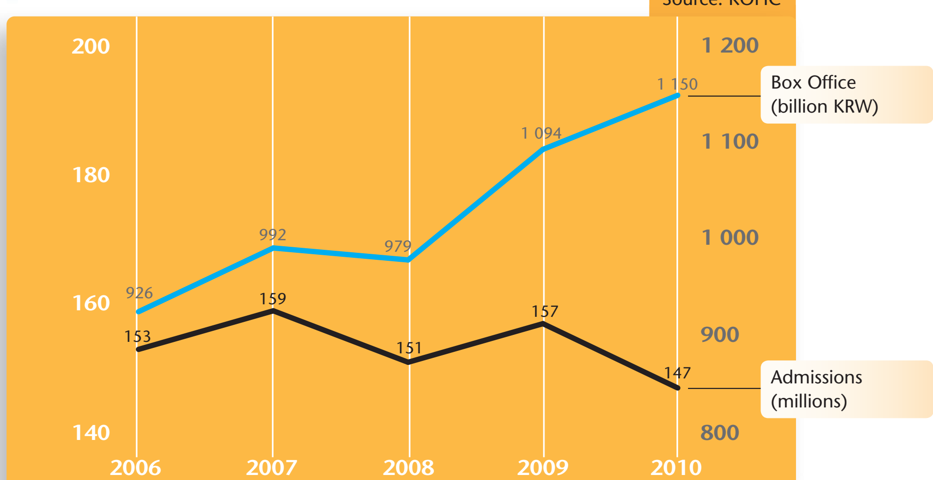

## Number of feature films produced and released | 2006-2010

Source: KOFIC




## Admissions and gross box office | 2006-2010

Source: KOFIC



## Top 20 films by admissions in South Korea | 2010 e

| | Original title | Country of origin | Director | Distributor | Admissions e |
|---|---|---|---|---|---|
| 1 | Avatar | US/GB | James Cameron | 20th Century Fox | 8 301 116 |
| 2 | The Man from Nowhere (Ajeossi) | KR | Jeong-beom Lee | CJ Entertainment | 6 182 772 |
| 3 | Inception | US/GB inc | Christopher Nolan | Warner Bros. | 5 832 610 |
| 4 | Ui-hyeong-je (Secret Reunion) | KR | Hun Jang | Showbox/Mediaplex | 5 419 450 |
| 5 | Iron Man 2 | US | Jon Favreau | CJ Entertainment | 4 426 736 |
| 6 | Jeon Woochi | KR | Dong-hun Choi | Showbox/Mediaplex | 3 612 920 |
| 7 | Iggi (Moss) | KR | Woo-Suk Kang | CJ Entertainment | 3 353 897 |
| 8 | Pohwasogeuro (71: Into the Fire) | KR | John H. Lee | Lotte Entertainment | 3 331 816 |
| 9 | Hamoni (Harmony) | KR | Dae-gyu Kang | CJ Entertainment | 3 019 702 |
| 10 | Bang-ja-jeon (The Servant) | KR | Kim Dae-woo | CJ Entertainment | 2 986 807 |
| 11 | Salt | US | Phillip Noyce | Sony Pictures | 2 874 833 |
| 12 | Bu-dang-geo-rae (The Unjust) | KR | Seung-wan Ryoo | CJ Entertainment | 2 722 403 |
| 13 | Si-ra-no;Yeon-ae-jo-jak-do (Cyrano) | KR | Hyeon-seok Kim | Lotte Ent. | 2 688 346 |
| 14 | Clash of the Titans | US | Louis Leterrier | Warner Bros. | 2 642 763 |
| 15 | How to Train Your Dragon | US | D. DeBlois, C. Sanders | CJ Entertainment | 2 562 412 |
| 16 | Harry Potter and the Deathly… | GB inc/US | David Yates | Warner Bros. | 2 327 168 |
| 17 | Hanyo (The Housemaid) | KR | Sang-soo Im | SidusFNH | 2 267 807 |
| 18 | Knight & Day | US | James Mangold | 20th Century Fox | 2 245 866 |
| 19 | Shrek Forever After | US | Mike Mitchell | CJ Entertainment | 2 225 363 |
| 20 | Alice in Wonderland | US | Tim Burton | Sony Pictures | 2 147 629 |

Sources: KOFIC

## Distribution and Exhibition

After bouncing back in 2009, cinema attendance in South Korea fell to 146.8 million admissions, down 6.5% from 2009 and the lowest level of the past five years. Like in many other countries an increasing number and popularity of 3D screenings drove average ticket prices to increase by 12% over the past two years to KRW 7 834 (USD 6.75) and helped GBO to grow despite falling admissions. GBO increased by 5.1% to KRW 1 150 billion (USD 992 million) which was particularly important for the Korean film industry which depends heavily on theatrical box office, which generates up to 85% of total revenues, and has been struggling with collapsing ancillary markets since 2007. Hoping to benefit from the almost comprehensive broadband penetration distributors are increasing their efforts to revive ancillary markets by growing the VOD offer via IPTV as well as Wi-Fi and 3G streaming services. Films are generally released on premium VOD one month after their theatrical release with ancillary rights deals involving revenue-sharing rather than flat fees. Piracy remains an issue but acknowledgement of illegality of file-sharing has been increasing due to the government and industry-supported “Good Downloader Campaign”. Led by *Avatar*, which broke the all-time Korean admissions record, 3D films took 16.5% of the total box office, compared to only 2.2% in 2009. Korean films secured a market share of 46.5% while US films took the market lead again capturing 47.3% of total admissions. As in the past 8 years CJ Entertainment led the distribution market with a market share of 28% of total admissions, followed by 20th Century Fox (11%) and Lotte Entertainment (10.6%). By the end of 2010 about 60% of the country’s screen base had been converted to digital projection (1 221 screens), including 573 3D screens.

## Production and Funding

Korean production activity continued its growth trend reaching a new record high of 152 films produced in 2010, 14 films more than in 2009. Faced with ongoing profitability problems caused by increasing production budgets on the one hand and declining box office and particularly ancillary revenues on the other, the Korean film industry had to adjust average production costs which almost halved over the past 5 years from KRW 4 billion to KRW 2.16 billion (USD 1.9 million). Due to their strong market share Korean films could keep their earnings rate relatively stable in 2010. The Korean Film Council recently announced new location shooting and post-production incentives for foreign feature films shooting in Korea.

Sources: Korean Film Council (KOFIC), *Screen International*, *Variety*, OBS

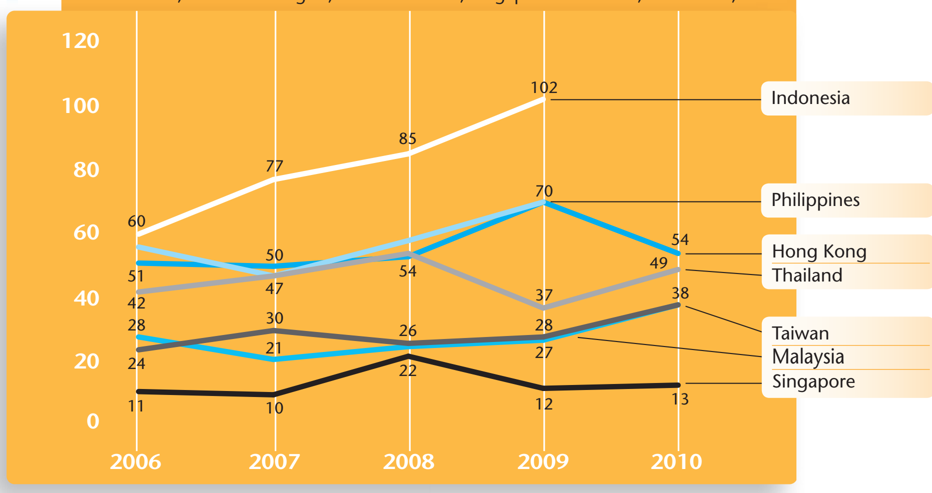
# Other Asia

| | Hong Kong | Indonesia | Malaysia | Philippines | Singapore | Taiwan | Thailand |
|---|---|---|---|---|---|---|---|
| Population 2010 e (millions) | 7.1 | 234.6 | 28.2 | 94.0 | 5.1 | 23.3 | 67.7 |
| GDP per capita 2010 e (USD) | 31 799 | 2 963 | 7 755 | 2 011 | 42 653 | 18 304 | 4 621 |
| Gross box office 2010 e (M USD) | 172.4 | 101.9 (1) | 160.4 | 117.3 (1) | 119.0 | 204.2 | 112.5 (1) |
| Admissions 2010 e (millions) | 20.8 (1) | 52.3 (1) | 54.3 | 69.0 (1) | 20.3 | 23.6 (1) | 29.6 (1) |
| Average ticket price 2010 e (USD) | 7.32 (1) | 1.95 (1) | 2.95 | 1.70 (1) | 5.86 | 7.29 (1) | 3.80 (1) |
| Average admissions per capita 2010 e | 2.93 (1) | 0.23 (1) | 1.93 | 0.75 (1) | 3.98 | 1.02 (1) | 0.44 (1) |
| Screens 2010 e | 198 | 726 (1) | 571 | 770 (1) | 169 | 576 | 752 (1) |
| Digital screens 2009 \| 2010 e | 72 \| 155 | 16 \| 34 | 16 \| 44 | 28 \| 84 | 38 \| 49 | 42 \| 219 | 44 \| 82 |
| 3D screens 2010 e | 108 | ~ | ~ | ~ | 43 | ~ | ~ |
| National market shares 2010 e | 19.0% | 55% (2) | 17.0% | ~ | 2.0% | 7.1% | 37.5% (2) |

(1) 2009 (2) 2008

## Number of feature films produced in selected Asian countries | 2006-2010

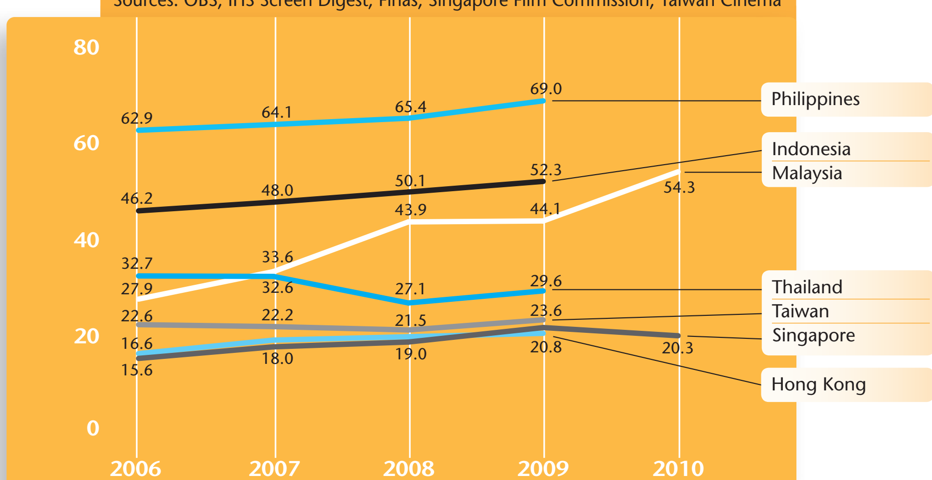
Sources: OBS, IHS Screen Digest, Taiwan Cinema, Singapore Film Com., Screen Intl, Finas




## Cinema attendance in selected Asian countries | 2006-2010 e

In millions.

Sources: OBS, IHS Screen Digest, Finas, Singapore Film Commission, Taiwan Cinema



## Top 10 films by gross box office in Hong Kong | 2010

GBO in Hong Kong has been converted to USD based on an average exchange rate of 1 USD = 7.77 HKD.

| | Original title | Country of origin | Director | Gross box office (in USD million) |
|---|---|---|---|---|
| 1 | Toy Story 3 | US | Lee Unkrich | 11.50 |
| 2 | Inception | US/GB inc | Christopher Nolan | 7.51 |
| 3 | Alice in Wonderland | US | Tim Burton | 5.68 |
| 4 | Harry Potter and the Deadly Hallows: Part 1 | GB inc/US | David Yates | 5.06 |
| 5 | Iron Man 2 | US | Jon Favreau | 3.77 |
| 6 | Shrek Forever After | US | Mike Mitchell | 3.50 |
| 7 | The Chronicles of Narnia: The Voyage of the Dawn… | GB inc/US | Michael Apted | 3.32 |
| 8 | Gulliver's Travels | US | Rob Letterman | 3.15 |
| 9 | Clash of the Titans | US | Louis Leterrier | 2.78 |
| 10 | Step Up 3D | US | Jon Chu | 2.49 |

Source: MPIA

## Top 10 films by gross box office in Singapore | 2010

GBO in Singapore has been converted to USD based on an average exchange rate of 1 USD = 1.36 SGD.

| | Original title | Country of origin | Director | Gross box office (in USD million) |
|---|---|---|---|---|
| 1 | Iron Man 2 | US | Jon Favreau | 4.06 |
| 2 | Harry Potter and the Deadly Hallows: Part 1 | GB inc/US | David Yates | 4.00 |
| 3 | Clash of the Titans | US | Louis Leterrier | 3.88 |
| 4 | Inception | US/GB inc | Christopher Nolan | 3.68 |
| 5 | The Karate Kid | US | Harald Zwart | 3.24 |
| 6 | Yp Man 2 | HK | Wilson Yip | 3.19 |
| 7 | Alice in Wonderland | US | Tim Burton | 3.18 |
| 8 | Toy Story 3 | US | Lee Unkrich | 2.97 |
| 9 | Shrek Forever After | US | Mike Mitchell | 2.89 |
| 10 | How To Train Your Dragon | US | DeBlois, Sanders | 2.79 |

Sources: Singapore Film Commission

## Distribution and Production

Outside of the four major Asian theatrical markets, GBO increased in all markets for which 2010 data were available. Despite the lack of reliable admissions data for most territories, one can assume that 3D premium prices significantly contributed to GBO growth in Hong Kong (+13.3% to USD 172 million), Taiwan (+18.5% to USD 204 million) and Singapore (+3.2% to USD 119 million), where admissions dropped by 11.6%. The highest GBO growth was however registered in Malaysia, up 41% to USD 160 million, driven by a growing number of screens (+48%) and a corresponding increase in admissions, up 23% to 54.3 million. No 2010 data were available for the Philippines, Thailand and Indonesia, where in the past low screen figures, film quotas, censorship and a near-monopoly situation in the distribution market were regarded as handicaps to realise the full market potential of the world's fourth most populous region. Inspired by Indonesia's quota model, which over the years broke the dominance of US films and brought national market share to an estimated 55% in 2008, the Filipino government is considering the introduction of a screen quota for domestic films. On the production side, Indonesia, supported by its quotas, and the Philippines are the most prolific film producers among the smaller Asian film markets, with most of the other territories producing between 40 and 50 feature films a year.

## Digital and E-Cinema

As of 2010, digital cinema plays a market shaping role in six territories, namely China, Japan, South Korea, Hong Kong, Taiwan and Singapore where a significant portion of the total screen bases had converted by the end of 2010. In many other Asian territories exhibitors are cautious about the economics of digital conversion with many consumers not being able to afford premium ticket prices. Lower-cost e-cinema solutions with satellite delivery, like the one proposed by India's digital integrator UFO Moviez, are catering to the screening of local and international independent films and can overcome transportation difficulties in markets like Indonesia or the Philippines with thousands of islands and large distances.

Sources: *Screen International, Variety, Film Journal International, Film Business Asia,* MPIA, FINAS, Taiwan Cinema, IHS Screen Digest, OBS

# Africa

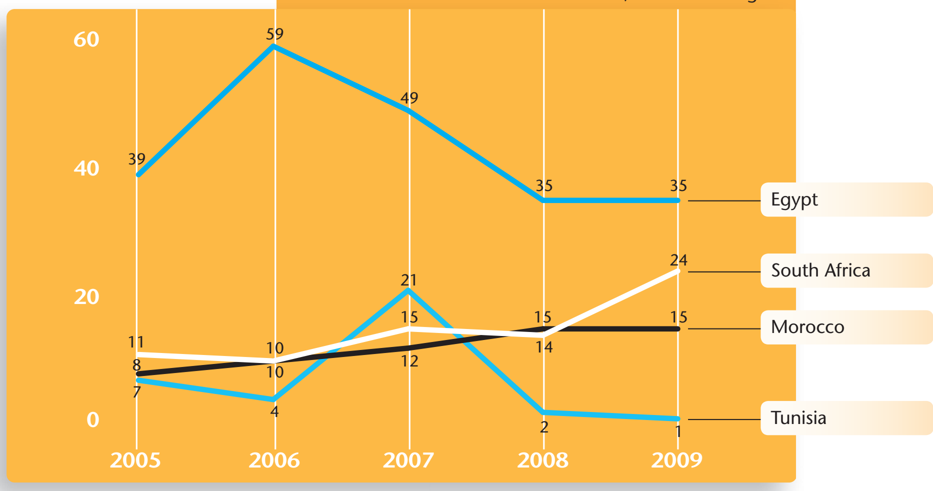
| | Algeria | Egypt | Morocco | South Africa | Tunisia |
|---|---|---|---|---|---|
| Population 2010 e (millions) | 35.5 | 78.2 | 32.0 | 49.9 | 10.5 |
| GDP per capita 2010 e (USD) | 4 477.8 | 2 771.4 | 2 868.2 | 7 100.8 | 4 159.9 |
| Gross box office 2009 e (in M USD) | 0.02 (2) | 63.1 | 8.4 | 53.2 | ~ |
| Admissions 2009 e (millions) | 0.03 (2) | 29.1 | 2.6 | 25.7 | ~ |
| Average ticket price 2009 e (in USD) | 1.33 | 2.17 | 2.35 | 2.07 | 2.32 |
| Average admissions per capita 2009 e | 0.00 (2) | 0.38 | 0.08 | 0.52 | ~ |
| Screens 2009 e | 19 | 400 | 77 | 846 | 18 |
| Digital screens 2010 e | ~ | 28 | ~ | 95 | 3 (1) |
| National market shares 2009 e | ~ | 80% | 15% (2) | ~ | ~ |

(1) 2009 (2) 2008

Sources: Dubai International Film Festival, IHS Screen Digest

## Number of feature films produced in selected African countries | 2005-2009

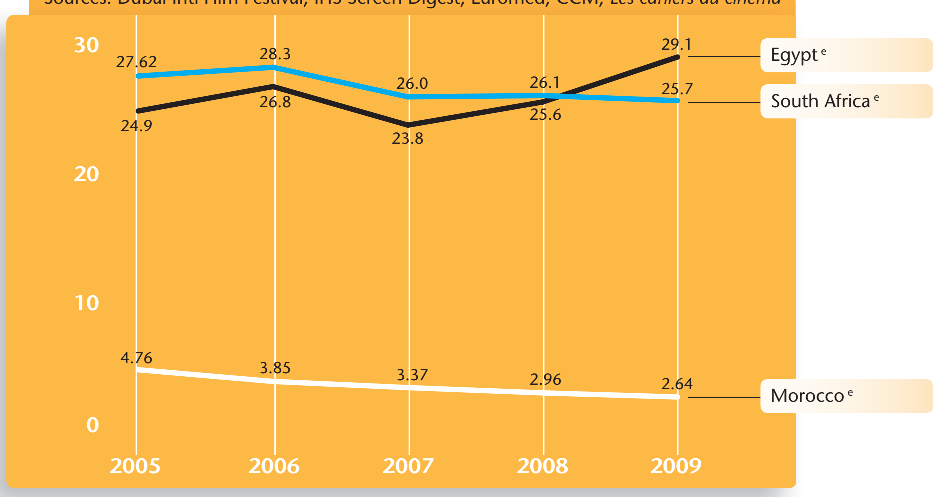
Sources: Dubai International Film Festival, IHS Screen Digest




## Admissions in selected African countries | 2005-2009 e

In millions.

Sources: Dubai Intl Film Festival, IHS Screen Digest, Euromed, CCM, *Les cahiers du cinéma*



## Top 10 films by gross box office in South Africa | 2010

| | Original title | Country of origin | Director | Distributor | Gross box office (in USD) e |
|---|---|---|---|---|---|
| 1 | Schuks Tshabalala's Survival Guide to… | SA | Gray Hofmeyr | ~ | 5 148 841 |
| 2 | The Twilight Saga: Eclipse | US | David Slade | Nu Metro | 3 744 343 |
| 3 | Shrek Forever After | US | Mike Mitchell | UIP | 3 410 775 |
| 4 | Toy Story 3 | US | Lee Unkrich | Disney | 3 344 199 |
| 5 | Alice in Wonderland | US | Tim Burton | Disney | 3 188 348 |
| 6 | Step Up 3D | US | Jon Chu | Nu Metro | 3 040 681 |
| 7 | Iron Man 2 | US | Jon Favreau | PPI | 2 589 816 |
| 8 | Despicable Me | US | P. Coffin, C. Renaud | UIP | 2 345 587 |
| 9 | Spud | SA | Donovan Marsh | Nu Metro | 2 316 147 |
| 10 | Harry Potter and the Deadly Hallows… | US | David Yates | Nu Metro | 2 268 033 |

Source: Box Office Mojo

## Top 10 foreign films by gross box office in Egypt | 2010

| | Original title | Country of origin | Director | Distributor | Gross box office (in USD) e |
|---|---|---|---|---|---|
| 1 | Inception | GB inc/US | Christopher Nolan | Warner Bros. | 860 632 |
| 2 | My name is Khan | IN | Karan Johar | Fox | 517 018 |
| 3 | Clash of the Titans | US | Louis Leterrier | Warner Bros. | 505 075 |
| 4 | Alice in Wonderland | US | Tim Burton | Disney | 503 454 |
| 5 | Knight and Day | US | James Mangold | Fox | 447 547 |
| 6 | The Twilight Saga: Eclipse | US | David Slade | UMP | 440 409 |
| 7 | Toy Story 3 | US | Lee Unkrich | Disney | 435 046 |
| 8 | Harry Potter and the Deadly Hallows… | US | David Yates | Warner Bros. | 403 632 |
| 9 | Robin Hood | GB inc/US | Ridley Scott | UIP | 379 598 |
| 10 | Prince of Persia: the Sands of Time | GB inc/US | Mike Newell | Disney | 345 819 |

Source: Box Office Mojo

## A continent with diverse film industries

Filmmaking and distribution takes very different forms on the African continent. A structured film industry comparable to international markets based on networks of production studios, distribution and exhibitions chains can be found only in South Africa, Egypt and Morocco. Though Egypt and South Africa – by far the continent's two largest theatrical markets - are comparable in terms of market size selling between 25 and 30 million cinema tickets a year, they differ very much in characteristics. Protected by a quota system which limits the distribution of foreign films to 8 prints, Egyptian productions take about 80% of total GBO. Though having reduced its film output from formerly 100 films to about 30 to 40 films a year, Egypt also remains the most prolific African country in terms of theatrical film production. Benefiting from increased funding opportunities through the Gulf's major film festivals as well as European funding, a growing number of independent film productions are supplementing Egypt's mainstream film industry which continues to be a hub of Arabic-language film production, distributing its films into the entire Arab world. The South African box office in contrast is dominated by US blockbusters. By recently doubling its cap for tax rebates to USD 2.9 million, South Africa's government is hoping to spur the number of international and local productions.

On the other hand, a number of video based film industries have been developing in many African countries in recent years. They are characterized by low-budget, high-volume film productions distributed primarily via VHS, DVD and TV networks across all of Africa. Inspired by Nigeria's 'Nollywood', which produces up to 1 000 films and more per year with average budgets typically ranging from USD 5 000 to 10 000, other African countries like Kenya and Ghana are increasingly producing low-budget films focusing on local themes. Many filmmakers are hoping that digital technologies and increased presence in film festivals around the world will help African films to attract more attention outside of their home markets. In March 2011 the European Commission launched its Euromed Audiovisual III programme which supports projects developing the film and audiovisual sector in nine South Mediterranean countries including Algeria, Egypt, Morocco and Tunisia.

Sources: Dubai International Film Festival, IHS Screen Digest, *Screen Daily*, Variety, Euromed Audiovisual, OBS

# Middle East

| | Bahrain | Israel | Kuwait | Lebanon | Qatar | United Arab Emirates |
|---|---|---|---|---|---|---|
| Population 2010 e (millions) | 1.1 | 7.4 | 3.5 | 3.9 | 1.7 | 5.1 |
| GDP per capita 2010 e (USD) | 19 641 | 27 085 | 32 530 | 10 019 | 74 423 | 47 407 |
| Gross box office 2009 (in M USD) | 16.9 (2) | 107.6 | 19.8 (2) | 17.7 | 13.1 (2) | 82.1 |
| Admissions 2009 e (millions) | 2.2 (2) | 10.8 | 2.2 (2) | 2.7 | 1.5 (2) | 10.1 |
| Average admissions per capita 2009 e | 2.8 (2) | 1.5 | 0.6 (2) | 0.7 | 1.4 (2) | 2.1 |
| Average ticket price 2009 e (USD) | 7.95 | 9.96 | 9.5 | 6.56 | 8.85 (2) | 8.5 (1) |
| Screens 2009 | 52 | 393 | 58 | 98 | 43 | 237 |
| Digital screens 2010 e | 1 | 86 | 10 (1) | 12 (1) | ~ | 55 |
| National market shares 2009 e | ~ | 12% (1) | ~ | 4% | ~ | ~ |

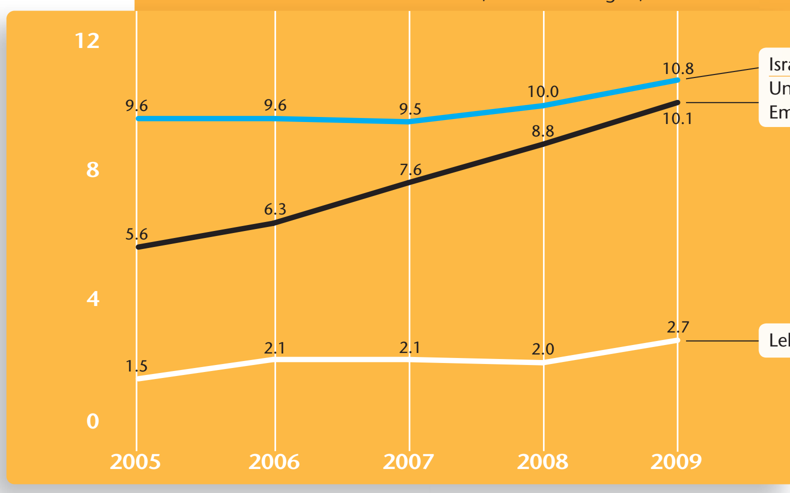
(1) 2009 (2) 2008

Sources: Dubai International Film Festival, IHS Screen Digest

## Admissions in selected Middle Eastern countries | 2005-2009 e

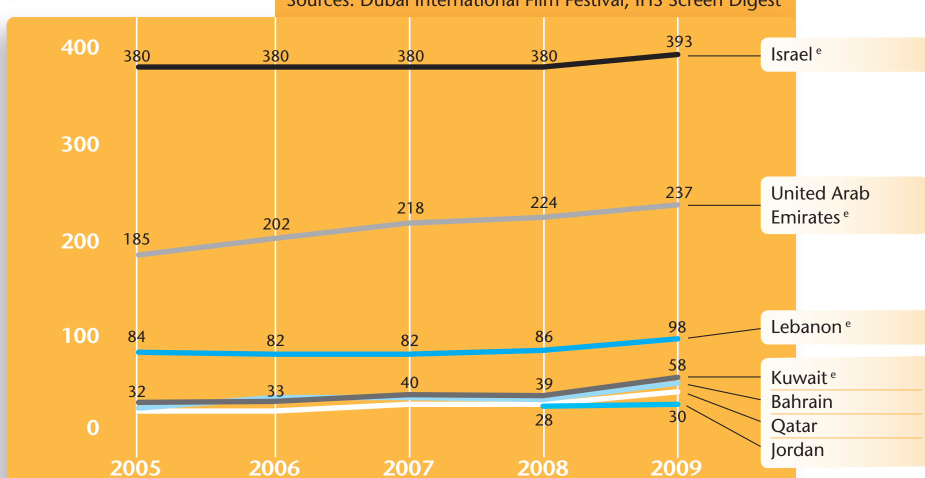
In millions.

Sources: Dubai International Film Festival, IHS Screen Digest, Israel Film Fund




## Screens in selected Middle Eastern countries | 2005-2009

Sources: Dubai International Film Festival, IHS Screen Digest



## Top 10 films by admissions in the United Arab Emirates[1] | 2010

| | Original title | Country of origin | Director | Distributor | Admissions |
|---|---|---|---|---|---|
| 1 | Prince of Persia: the Sands of Time | US | Mike Newell | WDSMP | 276 272 |
| 2 | My Name Is Khan | IN | Karan Johar | Fox | 264 882 |
| 3 | Iron Man 2 | US | Jon Favreau | UIP | 254 883 |
| 4 | Inception | GB inc/US | Christopher Nolan | Warner Bros. | 247 392 |
| 5 | Salt | US | Phillip Noyce | Columbia | 246 034 |
| 6 | Shrek Forever After | US | Mike Mitchell | UIP | 241 272 |
| 7 | The Karate Kid | US | Harald Zwart | Columbia | 229 007 |
| 8 | Alice in Wonderland | US | Tim Burton | WDSMP | 209 487 |
| 9 | The Expendables | US | Sylvester Stallone | Gulf Film | 208 876 |
| 10 | Clash of the Titans | US | Louis Leterrier | Warner Bros. | 167 035 |

(1) as of 25 November 2010.

Source: Dubai International Film Festival

## Top 10 films by gross box office in Lebanon | 2010

| | Original title | Country of origin | Director | Distributor | Gross box office (in USD) e |
|---|---|---|---|---|---|
| 1 | Inception | GB inc/US | Christopher Nolan | Warner Bros. | 558 065 |
| 2 | Step Up 3D | US | Jon Chu | Jaguar | 526 401 |
| 3 | Salt | US | Phillip Noyce | Sony | 493 141 |
| 4 | Nour 3iney | EG | Wael Ehsan | ~ | 473 018 |
| 5 | Tangled | US | B. Howard, N. Greno | Disney | 466 966 |
| 6 | Alice in Wonderland | US | Tim Burton | Disney | 430 952 |
| 7 | The Twilight Saga: Eclipse | US | David Slade | Jaguar | 427 363 |
| 8 | Zhaymer | EG | Adil Imam | ~ | 415 975 |
| 9 | Shrek Forever After | US | Mike Mitchell | UIP | 405 047 |
| 10 | Despicable me | US | P. Coffin, C. Renaud | UIP | 385 768 |

Source: Box Office Mojo

## Israel

With around 10.8 million admissions, GBO of USD 108 million and some 390 screens in 2009, Israel represents the largest cinema market, for which data are available, in the region. Spurred by a series of prize winning films, film production activity increased to 20 feature fiction films in 2009. Film production is characterized by low budget films (average budget of USD 0.5 to USD 1.5 million) and public funding from various state funds, particularly the Israel Film Fund and Cinema Projects. Cumulatively the state funds provide about USD 11 million and generally take the last recoupment position, hence attracting international co-productions which accounted for almost 50% of total production volume in 2009 and covered 35% of total production investment.

## Gulf Co-operation Council (GCC)

Led by the United Arab Emirates, the by far largest market, Kuwait, Bahrain and Qatar cumulatively sell over 16 million cinema tickets generating GBO of over USD 130 million. The GCC markets have registered steady growth over the past years thanks to a surge in multiplex cinemas opening up in shopping malls and the economic wealth of the region. Varying degrees of censorship, piracy and the need for highly localized marketing campaigns remain key challenges for theatrical distribution. In general the region is dominated by US blockbusters and Egyptian films which are distributed across multiple territories primarily by the leading local distributors including Prime, Gulf Film and Empire International. India's Scrabble Entertainment recently signed VPF deals with five US studios to roll out some 400 digital screens in the Middle East throughout 2012.

## Levant

The Levant cinema markets are significantly smaller with Syria and the Palestinian Territories staying well below the 1 million admissions mark, which is crossed by Lebanon (2.7 million) and Jordan (1.7 million). Much like the GCC, film markets are dominated by US and Egyptian films. However, thanks to international co-production and led by Palestine, the region regularly produces some 20 feature films per year. With a digital penetration rate of 15% Lebanon is – together with Israel and the United Arab Emirates – at the forefront of digital cinema in the entire region.

Sources: Dubai International Film Festival, *Variety*, *Screen International*, IHS Screen Digest, OBS

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FOCUS 2011 was prepared by the European Audiovisual Observatory. We would like to thank the following sources:

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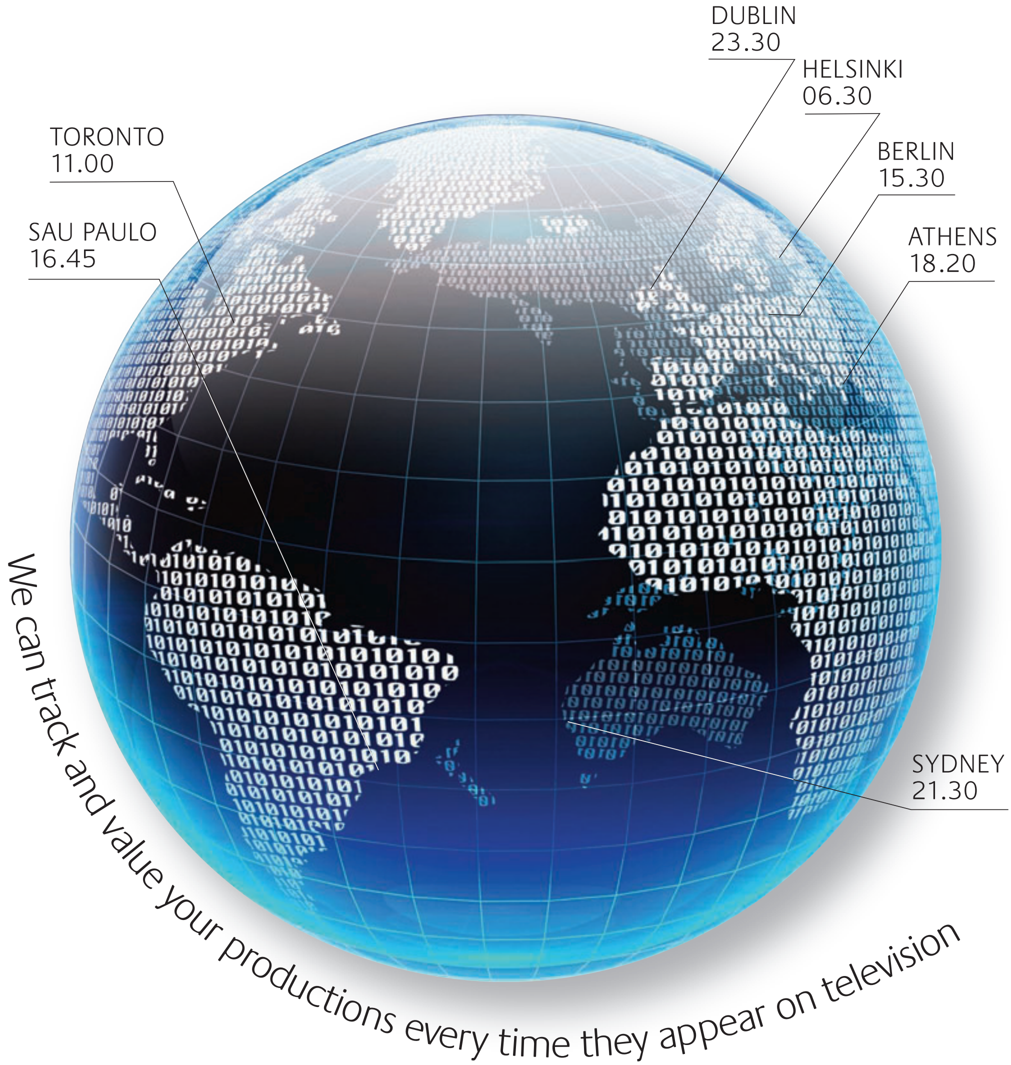
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