MARCHÉ DU FILM

FOCUS

WORLD FILM MARKET TRENDS
TENDANCES DU MARCHÉ MONDIAL DU FILM

2015

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

MARCHÉ DU FILM
FESTIVAL DE CANNES

focus 2015

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Tendances du marché mondial du fil

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Editorial

For its 18th edition, *FOCUS* will accompany you throughout the Cannes Film Festival and beyond. This publication, which provides information on production and distribution around the world, has become an essential tool for Marché du Film professionals and will help you grasp the ever-changing practices of the film industry.

I am delighted to partner once again with Susanne Nikoltchev and her wonderful team from the European Audiovisual Observatory in order to provide you with this overview of world film market trends.

Jérôme Paillard

Executive Director
Marché du Film

Lors de cette 18ème édition, *FOCUS* vous accompagnera pendant le Festival et au-delà. Cette publication, qui fournit de précieuses informations sur la production et la distribution à travers le monde, est devenue un outil essentiel pour les professionnels du Marché du Film et vous aidera à comprendre les mutations constantes de l'industrie cinématographique.

Une fois de plus, je me réjouis de travailler avec Susanne Nikoltchev et la formidable équipe de l'Observatoire afin de vous offrir cette vue d'ensemble des tendances du marché.

Jérôme Paillard

Directeur Délégué
Marché du Film

As every year, the European Audiovisual Observatory has worked hard to supply you with the latest figures on the Film market. In times of austerity we are particularly sensitive to the need for reliable market information and background analysis for the film sector. And we are especially grateful that our information suppliers, national film agencies and correspondents still take the time to join our efforts in putting the spot light on 'dry' figures which cannot compete for any Palme d'or.

We still hope our figures can play a starring role in your future business strategies!

Susanne Nikoltchev

Executive Director
European Audiovisual Observatory

Comme chaque année, l'Observatoire européen de l'audiovisuel a travaillé d'arrache-pied pour vous fournir les dernières données relatives au marché du film. En ces temps de crise économique, nous sommes particulièrement conscients de votre besoin d'informations et d'analyses de fond fiables sur le secteur cinématographique. Nous remercions tout spécialement nos fidèles fournisseurs d'information, les agences nationales du cinéma et nos correspondants, qui nous aident à mettre en lumière des données chiffrées quelque peu monotones qui ne sauraient être en lice pour une Palme d'or.

Nous espérons néanmoins qu'elles joueront le premier rôle dans vos futures stratégies commerciales !

Susanne Nikoltchev
Directrice exécutive
Observatoire européen de l'audiovisuel

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

➥ ***http://www.obs.coe.int***

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

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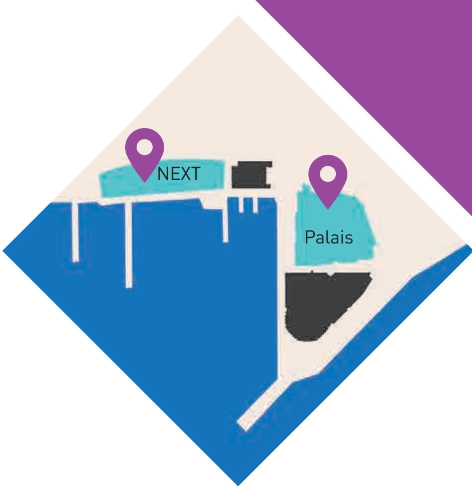

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Mingle at sunset
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Network in a relaxing atmosphere with a stunning view of the harbor.

Broken Hollywood, Fragmented Europe.

On the surface, the global film market is doing well: according to the most recent MPAA report, the number of cinema screens worldwide has increased by 6% to over 142 000 and the global box office is up by 1.4% to USD 36.4 billion, a rise of 15% over five years. Global film production increased by 2.5% to an estimated total of over 6 500 films produced in 2014 with the EU contributing over 1 600 feature films.

These few positive indicators cannot hide the concerns of the professional world, which run so deep that the American magazine *Variety* recently ran a feature under the title *Broken Hollywood*, in which 22 of the top audiovisual executives in the United States expressed their fears about the future of an industry in which the structural upheavals are considered more serious and worrying than ever. The global box office may be up but the number of attendances in the United States and receipts on the North American market are down. The typical filmgoer now only buys an average of 5.5 tickets a years, compared with 5.9 in 2013. The average attendances of filmgoers over forty years of age rose but those of younger age groups fell. This drop in attendances in the United States was accompanied by a decline in the audiences of the networks and the cable channels and the exhaustion of the physical video market. Online audiovisual consumption, whether advertising-financed services, pay-per-view VoD or subscription VoD (not to mention video piracy, which strikes at the heart of the most costly projects), has become the dominant practice and poses a challenge to all the principal balancing factors in the system.

The same conclusion can be found in the statements of various studio directors: no measuring tools are available that would enable a precise analysis of the development of consumption practices and public tastes on the new distribution platforms to be carried out, with the result that it is becoming more and more difficult to create and market films. In the United States, collecting data on successful box office films, TV audience ratings and even video sales and rentals has always been a commercial activity in its own right and essential for a business approach in which the offer made involves a fairly sophisticated quantitative knowledge of previous successes, thus enabling the presumed demand to be gauged. The fragmentation of audience practices and, clearly, the fact that operators of on-demand services are keen to hold on to the data gathered on the successes of works provided by those services leads to the paradoxical situation that, in the era of big data, studios are finding it harder than ever to find out who is actually watching their films. The big subscription VoD operators (Netflix, Amazon) refuse to disclose their rating data while at the same time celebrating their own ability to obtain an in-depth knowledge of their customers' practices, which means they can adopt an even bolder approach and have a bigger competitive edge over the traditional market players.

The troubles experienced by Hollywood are no less serious in Europe but take on other forms. For the first time, the 2013 revenues of the entire audiovisual sector in the European Union (broadcasters, pay-TV distribution platforms, exhibition, physical video, online VoD services and video games) recorded a drop (-0.4%). The rise in online VoD revenues (+46.1%) has not compensated for the prolonged decline in the physical video market (-11.3%) and the fall in box office receipts (-4.4%). In five years, between 2009 and 2013, the proportion of European audiovisual companies on the global market fell from 20.7% to 15.4%: the stagnation of the advertising market and of the revenues of the public service broadcasters weakened the positions of the big European groups, whereas the American groups took advantage of the growth areas on the Old Continent (cable and satellite pay-TV; online video on demand). According to estimates made by the European Audiovisual Observatory, the revenues of subsidiaries of US companies in the European Union rose from EUR 31.8 billion in 2008 to 40.1 billion in 2012. These subsidiaries have strengthened their positions not only with regard to the traditional activities of programme distribution but also pay-TV, TV broadcasting, production, post-production and, of course, on-demand audiovisual services.

The risks posed by the development of on-demand services for the funding of European works have not yet been recognised as clearly in Europe as in the United States. Since the financing of European films is less dependent than the Hollywood film industry on rises in sales and rentals of videos and VoD, it has perhaps initially suffered less from recent developments brought about by the growth of the internet, but in Europe that growth risks producing a much more disastrous effect: the inexorable breakdown of one of the funding support mechanisms, namely the regulated transfer of revenues from distribution and exhibition for the benefit of production. In at least ten EU countries, distributors of pay-TV services and/or operators of video-on-demand services are required by law to contribute to the funding of production, either through contributions to support funds or by means of direct investments in production [(1)]. These arrangements (which, depending on the case, are laid down in film support legislation, tax law or the transposition of Article 13 of the Audiovisual Media Services Directive) are generally complementary to and extend provisions requiring contributions from exhibitors, broadcasters and video distributors: all distribution activities must contribute to the funding of production. In such countries as France, Germany, Poland, Spain, Belgium, Portugal and Croatia, these compulsory contributions are the very backbone of the public support policies and accordingly provide a large proportion of the funding of film production. The development of pan-European on-demand services, such as iTunes, Netflix, Amazon Instant Video or YouTube, established in countries that do not require this type of compulsory contribution may jeopardise all these arrangements. In the long run, it appears hard to imagine lawmakers being able to compel operators established in their country to pay compulsory contributions to which their competitors established abroad are not subject. In two countries (Germany and France), the lawmakers have, incidentally, recently extended the principle of these contributions to services established abroad but targeting their national market. The European Commission is currently examining whether the provisions of the new version of the German law on film funding comply with European law, especially the Audiovisual Media Services Directive. It is not for me to comment in legal terms on this delicate issue, but it seems clear that at stake is the ability of national lawmakers to maintain mechanisms for requiring contributions to the funding of production from all industry players.

The revision of the European Audiovisual Media Services Directive, due to be set in motion shortly by the European Commission, was supposed to provide an opportunity to re-examine the role of on-demand audiovisual services in the promotion of European works, in connection with the question of the territorial jurisdiction over the services. Although the European Audiovisual Observatory's recent report provides interesting information on the importance of the European works in the catalogues of some VoD services, it highlights major difficulties in collecting basic data on the main services: some – and not the least important among them – even refuse to disclose data on the number of films available in their catalogues. In particular, data on the proportion of European works offered by these services are impossible to obtain. Similarly, data on the revenues of services broken down by territory or type of content, are not made public. Although measurement companies in the United States, such as Nielsen or Rentrak, have announced the forthcoming availability of audience measurements for all on-demand services, including subscription services, no mention at all is made of Europe in this area.

In these circumstances, analysing the impact of VoD services on the film market and the funding of works in Europe remains very much a hit or miss affair and there are not many studies that examine this role. The analysis recently carried out by EY for Unifrance [(2)] is one of the few available. In 2013, the revenues of French films exploited on the French transactional and subscription VoD market were estimated at EUR 61 millions. This is a relatively low figure and represents barely a quarter of the French VoD market, which is estimated at EUR 259 million, and the equivalent of 16% of the gross box-office receipts on the French national market. The study highlights the potential for French films on the European and international markets. Nine markets (United States, United Kingdom, Germany, Italy, Spain, Poland, Japan, China, Brazil) are said to have the potential to generate EUR 45 million a year by 2020. Digital sales currently account for just under 5% of the export revenues of the producers

(1) See European Audiovisual Observatory, "The role of providers of VOD services and distribution platforms in the financing of film and audiovisual production" in *The development of the European market for on-demand audiovisual services, Report for the European Commission*, 7 April 2015, http://ec.europa.eu/digital-agenda/en/news/development-european-market-demand-audiovisual-services

(2) http://www.unifrance.org/actualites/13706/unifrance-films-devoile-un-rapport-sur-les-marches-numeriques-pour-les-films-francais-et-europeens

interviewed. The study mentions "the potential of an alternative international platform for SVoD of European origin" that would draw on existing European actors and adopt "as its distinguishing feature an approach focusing on the promotion of arthouse films, cultural-popular films or series of European origin". EY assesses its "potential at 5% of the total market of EUR 20 billion" for VoD/SVoD by 2020, i.e. "potential revenues of EUR 1 billion".

The study emphasises that producers and rightholders still have reservations about VoD, especially with regard to export strategies. The most common practice is to sell all rights (VoD and SVoD) to local distributors and include these rights in a minimum guarantee. Direct sales to platforms (Netflix, Amazon, iTunes, Hulu, Google Play, internet access providers) are in the minority and are reserved for blockbusters that "sell themselves". It emerges from conversations with professionals that SVoD sales are often more difficult and financially less advantageous. The VoD platforms generally offer revenue-sharing of around 50% of the selling price, or even 70% for new productions, for example on iTunes. It may even happen that a minimum guarantee is negotiated – from EUR 3 000 to EUR 60 000 over the entire life of the feature film – whereas in the case of SVoD the practice is more likely to be a "flat fee of EUR 3 000 to EUR 10 000 over a period of 12 to 18 months" and even "EUR 500 for a less attractive film or shorter period", such as 3 to 12 months.

The territorialisation of rights, as applied by producers for distribution on VoD and as in the case of the other forms of exploitation, is often criticised by the big international operators because it results in the practice of "geoblocking" and is one of the factors preventing online services from developing their full potential. Some of them say this territorialisation is an obstacle to the circulation of European works and stress that it encourages consumers to circumvent the rules, for example by using VPNs. The subject of the territorialisation of rights, which was brought up by the new European Commission at its orientation debate on 25 March 2015, and by the provisional report by the MEP Julia Reda on the Digital Single Market, is a new matter for concern for European professionals. The organisations of producers, distributors and exhibitors, the European Film Agency Directors (EFAD), the Society of Audiovisual Authors (SAA), and a group of twenty well-known European scriptwriters and directors recently expressed their concern following statements made by the Commission Vice-President Andrus Ansip criticising the practices of geoblocking. The present system of the territorialisation of rights is perceived as workable with regard to funding practices, which are still organised on a mainly national basis, and with regard to the distribution situation, which is mainly based on national market approaches. For the professional organisations, considering the territorialisation of rights as the principal obstacle to the circulation of works shows ignorance of the specific nature of the European audiovisual market, which was culturally and linguistically fragmented before the introduction of the regulations. Far from increasing the range available to European consumers, the elimination of the territorialisation practices would, they say, only benefit the big international platforms, which are more anxious to promote blockbusters and American series than European variety and diversity. Accordingly, rather than taking on the European rightholders the Commission is urged to consider the inclusion of these big platforms in the contributory tax system.

This opposition between advocates of a big European rights market and professionals committed to the preservation of national ecosystems is not new. In fact, it existed as far back as 1984, when the European Commission published its Green Paper "Television Without Frontiers". Since then, many films have been produced, circulated and watched, but it is regrettable that discussions are still taking place in which dogmatic a priori assumptions are made instead of analyses backed up by figures and based on a detailed knowledge of the conditions of production and the circulation of works. In view of Hollywood's insatiable appetite for statistics, the difficulties that the European film and audiovisual industry faces in developing and establishing its own standards of economic transparency will remain a great mystery to me.

André Lange

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European Audiovisual Observatory

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CHINA SUMMIT
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MARCHÉ DU FILM
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SATURDAY MAY 16

In collaboration with the Centre National du Cinéma et de l'Image Animée (CNC)

- 15:00 **Attractiveness of French and Chinese territories** (Espace CNC)
- 16:30 **Strategies of exhibition of Sino-French coproductions in China and France** (Espace CNC)
- 18:00 **Cocktail Dinner by Bridging the Dragon** (on invitation)

MONDAY MAY 18

- 10:00 **Chinese film market overview** (Cinema Olympia)
- 14:00 **Pitching sessions of Chinese Talents' projects** (Cinema Olympia)

TUESDAY MAY 19

- 10:00 **Video On Demand opportunities in China** (Cinema Olympia)
- 15:00 **International production with China** (Cinema Olympia)
- 22:00 **Marché du Film China Night**
  In partnership with China Movie Channel
  and Champs Lis International (on invitation)

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Top 10 markets worldwide by gross box office | 2010-2014 [e]

In USD billion. Converted at average annual exchange rates.

Source: OBS, MPAA, IHS

Rank	Market	2010	2011	2012	2013	prov. 2014	Annual growth rate [e] 5 years	1 year
1	US & Canada	10.58	10.19	10.80	10.90	10.40	-0.4%	-4.6%
2	China	1.50	2.03	2.74	3.54	4.82	33.9%	36.2%
3	France	1.74	1.91	1.68	1.66	1.77	0.5%	6.7%
4	UK	1.53	1.67	1.74	1.69	1.74	3.4%	3.0%
5	Japan	2.52	2.26	2.45	1.99	1.70	-9.3%	-14.6%
6	South Korea	1.04	1.11	1.31	1.42	1.49	9.5%	5.2%
7	India	1.35	1.47	1.59	1.59	1.47	2.1%	-7.8%
8	Germany	1.22	1.33	1.35	1.36	1.30	1.6%	-4.3%
9	Russian Federation	1.00	1.16	1.20	1.34	1.15	3.5%	-13.9%
10	Australia	1.04	1.13	1.17	1.06	0.87	-4.3%	-17.7%
World total		31.6	32.6	34.7	35.9	36.4	3.6%	1.4%
Growth rate - World		16.2%	3.2%	6.4%	3.5%	1.4%	3.6%	1.4%
Growth rate - Top 10		6.2%	3.2%	7.3%	2.0%	0.6%	3.3%	0.6%
Without India Top 10 [e]		5.7%	3.0%	6.8%	1.7%	0.4%	2.9%	0.4%

Top 10 markets worldwide by admissions | 2010-2014 [e]

In millions. Ranked by 2014 admissions.

Source: OBS

Rank	Market	2010	2011	2012	2013	prov. 2014	Annual growth rate [e] 5 years	1 year
1	India	2 641	2 640	2 641	1 978	1 900	-7.9%	-3.9%
2	US & Canada	1 341	1 285	1 358	1 340	1 270	-1.4%	-5.2%
3	China	290	370	470	612	830	30.1%	35.6%
4	Mexico	190	205	228	248	240	6.1%	-3.2%
5	South Korea	147	160	195	213	215	10.0%	0.8%
6	France	207	217	204	194	209	0.2%	7.6%
7	Russian Federation	156	160	160	176	176	3.1%	-0.6%
8	UK	169	172	173	166	157	-1.8%	-4.9%
9	Japan	174	145	155	156	161	-2.0%	3.3%
10	Brazil	134	144	149	150	156	3.7%	3.7%
World total [e]		6 633	6800	6982	6527	6 558	-0.3%	0.5%
Growth rate - World [e]		-5.3%	-2.1%	5.3%	-4.0%	-6.1%	-0.3%	0.5%
Growth rate - Top 10 [e]		-1.2%	0.9%	4.3%	-8.7%	1.6%	-0.6%	1.6%
Without India Top 10 [e]		2.5%	1.7%	8.2%	5.3%	4.9%	5.0%	4.9%

Top 10 markets worldwide by number of screens | 2010-2014 e

In units.

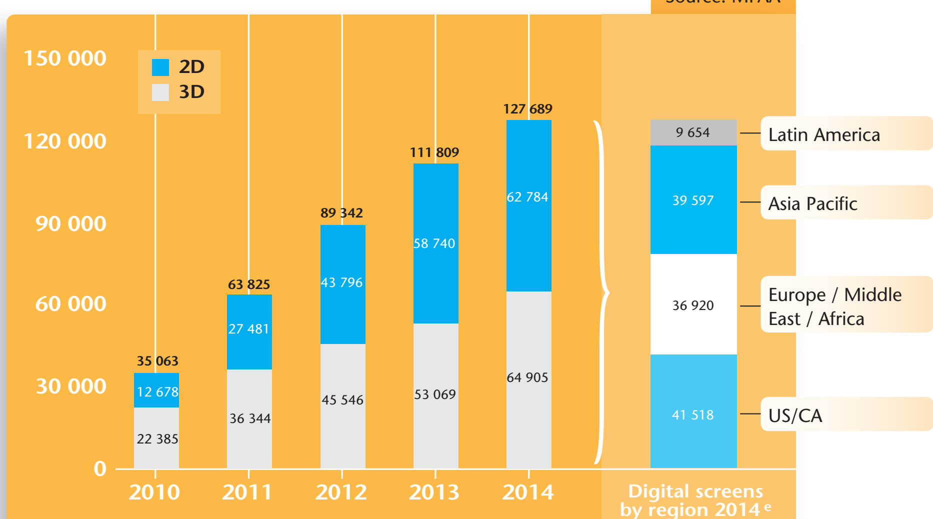
Source: OBS, MPAA, IHS

Rank	Market	2010	2011	2012	2013	prov. 2014	Annual growth rate e 5 years	1 year
1	US	39 547	39 580	39 662	39 783	40 158	0.4%	0.9%
2	China	6 256	9 286	13 118	18 195	24 607	40.8%	35.2%
3	India	10 020	10 020	11 065	11 081	11 139	2.7%	0.5%
4	France	5 478	5 464	5 508	5 587	5 653	0.8%	1.2%
5	Mexico	5 200	5 166	5 360	5 547	5 678	2.2%	2.4%
6	Germany	4 699	4 640	4 617	4 610	4 637	-0.3%	0.6%
7	Spain	4 080	4 040	3 998	3 908	3 694	-2.5%	-5.5%
8	UK	3 671	3 767	3 817	3 867	3 909	1.6%	1.1%
9	Russia	2 395	2 704	3 100	3 479	3 829	12.4%	10.1%
10	Japan	3 412	3 339	3 290	3 318	3 364	-0.4%	1.4%
World total		122 951	123 740	129 866	134 588	142 215	3.7%	5.7%
Growth rate - World e		3.0%	0.6%	5.0%	3.6%	5.7%	3.7%	5.7%
Growth rate - Top 10 e		5.3%	3.8%	6.3%	6.2%	7.3%	5.9%	7.3%
Without China Top 10 e		2.8%	0.3%	2.2%	0.9%	1.1%	1.1%	1.1%

Worldwide number of digital and 3D screens | 2010-2014 e

In units.

Source: MPAA



Top 10 markets worldwide by feature film production (1) | 2010-2014 e

In units.

Source: OBS, IHS, KPMG, China Media Management

Rank	Market	2010	2011	2012	2013	2014	Annual growth rate e 5 years	1 year
1	India (2)	1 274	1 255	1 602	1 724	1 966	11.5%	14.0%
2	US (3)	795	818	728	738	707	-2.9%	-4.2%
3	China (4)	526	588	745	638	618	4.1%	-3.1%
4	Japan (5)	408	441	554	591	615	10.8%	4.1%
5	UK (6)	373	354	356	323	223	-12.1%	-31.0%
6	France	261	272	279	270	258	-0.3%	-4.4%
7	South Korea	152	186	204	207	248	13.0%	19.8%
8	Germany (5)	193	205	241	236	234	4.9%	-0.8%
9	Spain	201	200	182	235	224	2.7%	-4.7%
10	Italy	141	155	166	167	201	9.3%	20.4%
World total e		5 845	6 098	6 334	6 345	6 503	2.7%	2.5%
Growth rate - World e		2.4%	4.3%	3.9%	0.2%	2.5%	2.7%	2.5%
Growth rate - Top 10 e		26.4%	3.5%	13.0%	1.4%	3.2%	5.2%	3.2%

(1) Country data include minority co-productions.

(2) Films certified.

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

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

(5) Feature films released.

(6) The apparent decline of film productions in 2014 is linked to a time lag in identifying film productions with budgets below GBP 500 000. Includes inward feature co-productions but not inward features involving only VFX work in the UK.

Top 20 films worldwide by gross box office | 2014

In USD millions. GBO for 2014 only. Does not include carryovers.

	Original title	Country of origin	Studio	North American box office	International box office	Total
1	Transformers: Age of Extinction	US/CN	Paramount Pictures	245	845	1 091
2	Guardians of the Galaxy (1)	US	Walt Disney Studios	333	441	774
3	Maleficent	US/GB inc	Walt Disney Studios	241	517	758
4	X-Men: Days of Future Past	US	20th Century Fox	234	514	748
5	Captain America: The Winter Soldier	US	Walt Disney Studios	260	455	715
6	The Amazing Spider-Man 2	US	Sony Pictures	203	506	709
7	Dawn of the Planet of the Apes	US	20th Century Fox	209	500	709
8	The Hobbit: The Battle of the Five Armies (1)	US/NZ inc	Warner Bros.	190	505	694
9	The Hunger Games: Mockingjay - Part 1 (1)	US	Lionsgate	313	373	686
10	Frozen	US	Walt Disney Studios	138	507	645
11	Interstellar (1)	US/GB	Paramount Pictures	179	447	627
12	How to Train Your Dragon 2	US	20th Century Fox	177	443	620
13	Godzilla	US/JP	Warner Bros.	201	327	528
14	Rio 2	US	20th Century Fox	132	369	500
15	Teenage Mutant Ninja Turtles	US	Paramount Pictures	191	284	476
16	The Lego Movie	US/AU/DK	Warner Bros.	258	206	464
17	Lucy	FR	C+/EuropaCorp	127	336	462
18	Noah	US	Paramount	101	261	363
19	Gone Girl (1)	US	20th Century Fox	166	196	362
20	Big Hero 6	US	Walt Disney Studios	205	157	362

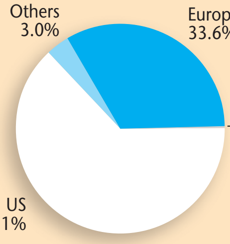
(1) Still in release in 2015.

Source: *Variety*, OBS

European Union

Population 2014 e	507 million
GDP per capita 2014 e	36 700 USD
Gross box office 2014 e	6.32 bn EUR (8.40 bn USD)
Admissions 2014 e	911.1 million
Average ticket price 2014 e	6.9 EUR (9.2 USD)
Average admissions per capita 2014 e	1.8
Screens 2013 | 2014 e	29 920 | 30 051
Digital screens 2013 | 2014 e	26 041 | 27 899
Digital 3D screens 2013 | 2014 e	13 136 | 13 473

Market shares 2014 e



Box office slightly increases in 2014

Total admissions in the European Union increased marginally by 0.7% to 911 million tickets sold, around 6.5 million more than in 2013. Gross box office takings in the 28 EU Member States rose accordingly to an estimated EUR 6.32 billion, though 0.6% higher than in 2013, this still represents the second lowest level in the past five years. Box office growth was primarily ensured by a strong year-on-year performance in France and Spain where cinema attendance recovered from exceptionally weak results in 2013 and increased by 7.9% (+15.2 million) and 13.6% (+10.5 million) respectively. Apart from France and Spain, year-on-year growth in cinema attendance was only achieved in seven Central and Eastern European member states, Belgium and Cyprus while – like in 2013 – almost two thirds of EU markets experienced a decline in cinema attendance.

Market share for European films reaches record high

Box office growth was driven primarily by the success of European films while several US blockbusters did not meet expectations and caused the market share for US films to drop from its record level of 69.5% in 2013 to 63.1%. The estimated market share for European films in the EU on the other hand jumped from 26.2% to 33.6%. This is the highest level since the Observatory started to calculate European market share in 1996. This figure excludes European films produced in Europe with incoming US investment which registered their weakest market share in recent history taking just over 0.3% of total admissions.

It was particularly the strong performance of French films, which sold over 43 million tickets more than in 2013 and registered the highest national admission levels in 30 years, which boosted admissions growth for European films on a cumulative level. French national market share jumped from 33.8% to 44%, making France once more the EU market with the highest national market share. But national films also performed well elsewhere in the EU capturing a market share of above 20% in 11 other EU markets and increasing in 15 out of the 24 EU markets for which data were available.

The EU charts were topped by *The Hobbit: Battle of the Five Armies* and the third instalment of *The Hunger Games* franchise selling 22.7 and 20.1 million tickets respectively. A total of four European films, *Qu'est-ce qu'on a fait au Bon Dieu* (FR), *Lucy* (FR), *Spanish Affair* (ES) *and Paddington* (GB/FR), made it into the 25 top grossing films in 2014.

EU production continues to grow

EU production levels had been steadily increasing over the past decades. This trend continued in 2014, as the estimated number of European feature film productions increased from 1 587 to 1 603 films. This figure breaks down into an estimated 1 118 feature fiction films and 485 feature documentaries. About 32% of European feature films were produced as co-productions while 68% were national productions.

92% of EU screens converted to digital

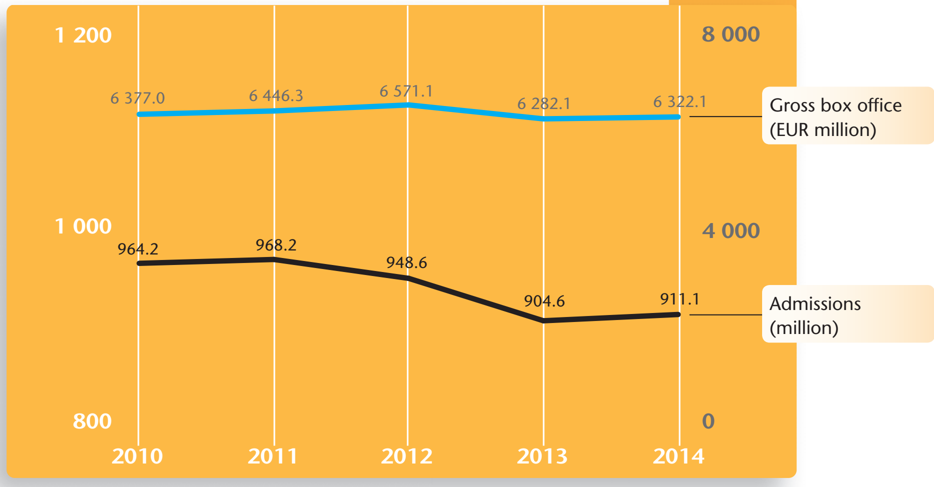
According to figures provided by MEDIA Salles, a total of 1 858 screens were converted to digital projection systems in 2014, bringing the total to 27 899 digital screens. This means that by the end of 2014 over 92% of the EU's total screen base has been digitised. Only five Member States registered digital screen penetration rates below 70%, including the Czech Republic (53%), Greece (38%) and the Baltic States.

Source: OBS, MEDIA Salles

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

Admissions and gross box office in the European Union (1) | 2010-2014

Source: OBS

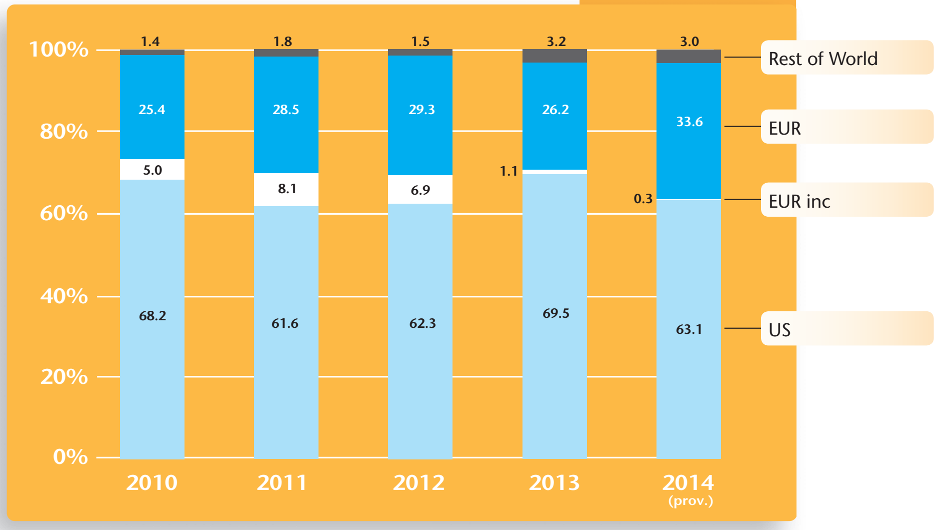


(1) Pro-forma figures for 28 EU Member States. National currencies converted at average annual exchange rates.

Breakdown of European Union admissions by nationality of films | 2010-2014 [e]

In %.

Source: OBS/LUMIERE



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

Number of feature films produced in the European Union | 2010-2014 *prov.*

In units.

Country		2010	2011	2012	2013	2014	Sources
Austria	100% national fiction	10	14	9	18	10	Austrian Film Institute
	maj. co-prod. fiction	4	6	6	5	7	Austrian Film Institute
	min. co-prod. fiction	6	15	8	2	3	Austrian Film Institute
	Feature documentaries	24	24	31	21	24	Austrian Film Institute
Belgium (1)	100% national fiction	2	5	6	12	12	CCA/VAF
	maj. co-prod. fiction	16	12	14	17	20	CCA/VAF
	min. co-prod. fiction	24	21	27	33	33	CCA/VAF
	Feature documentaries	4	4	8	5	5	CCA/VAF
Bulgaria	100% national fiction	6	6	5	0	2	National Film Center
	maj. co-prod. fiction	1	2	1	4	1	National Film Center
	min. co-prod. fiction	3	1	2	0	0	National Film Center
	Feature documentaries	5	6	11	11	10	National Film Center
Cyprus e	100 % national fiction	1	0	0	0	1	Min. Cult./OBS
	maj. co-prod. Fiction	0	2	1	0	1	Min. Cult./OBS
	min. co-prod. Fiction	1	0	0	1	1	Min. Cult./OBS
Croatia	100% national fiction	5	8	9	14	7	Croatian Audiovisual Centre
	maj. co-prod. fiction	4	2	4	2	4	Croatian Audiovisual Centre
	min. co-prod. fiction	2	10	3	8	5	Croatian Audiovisual Centre
Czech Rep.	100% national fiction	16	21	23	19	21	State Cinematography Fund
	maj. co-prod. fiction	4	4	5	8	8	State Cinematography Fund
	min. co-prod. fiction	2	0	4	2	6	State Cinematography Fund
	Feature documentaries	15	20	15	18	26	State Cinematography Fund
Denmark (2)	100% national fiction	16	16	12	13	14	Danish Film Institute
	maj. co-prod. fiction	7	3	6	9	7	Danish Film Institute
	min. co-prod. fiction	7	6	9	9	7	Danish Film Institute
	Feature documentaries	30	37	27	33	27	Danish Film Institute
Estonia (2)	100% national fiction	0	4	5	4	3	Estonian Film Institute
	maj. co-prod. fiction	3	3	0	3	1	Estonian Film Institute
	min. co-prod. fiction	1	0	6	0	2	Estonian Film Institute
	Feature documentaries	19	14	9	12	13	Estonian Film Institute
Finland	100% national fiction	12	15	20	14	17	Finnish Film Foundation
	maj. co-prod. fiction	2	5	4	5	3	Finnish Film Foundation
	min. co-prod. fiction	5	7	4	6	1	Finnish Film Foundation
	Feature documentaries	13	8	16	18	13	Finnish Film Foundation
France	100% national fiction	123	124	116	123	124	CNC
	maj. co-prod. fiction	54	54	55	50	44	CNC
	min. co-prod. fiction	56	58	66	59	53	CNC
	Feature documentaries	28	36	42	38	37	CNC
Germany (2)	100% national fiction	61	63	86	79	84	SPIO
	maj. co-prod. fiction	23	29	32	38	22	SPIO
	min. co-prod. fiction	35	31	36	37	43	SPIO
	Feature documentaries	74	82	87	82	85	SPIO
Greece (2) e	100% national fiction	14	17	12	12	12	GFC/OBS
	maj. co-prod. fiction	1	10	7	3	3	GFC/OBS
	min. co-prod. fiction	1	1	3	2	2	GFC/OBS
Hungary	100% national fiction	26	38	26	27	11	NFO
	maj. co-prod. fiction	1	2	0	2	1	NFO
	min. co-prod. fiction	9	4	1	3	3	NFO
Ireland	100% national fiction	4	4	4	4	6	Irish Film Board
	maj. co-prod. fiction	10	9	9	9	6	Irish Film Board
	min. co-prod. fiction	9	4	10	6	13	Irish Film Board
	Feature documentaries	15	15	16	15	7	Irish Film Board
Italy	100% national fiction	114	132	129	138	180	MiBACT
	maj. co-prod. fiction	14	14	21	18	14	MiBACT
	min. co-prod. fiction	13	9	16	11	7	MiBACT

Continued

Number of feature films produced in the European Union | 2010-2014 *prov.*

In units.

Country		2010	2011	2012	2013	2014	Sources
Latvia (2) e	100% national fiction	2	4	2	2	1	National Film Center of Latvia
	maj. co-prod. fiction	1	0	3	1	5	National Film Center of Latvia
	min. co-prod. fiction	0	1	1	1	1	National Film Center of Latvia
	Feature documentaries	13	9	6	9	17	National Film Center of Latvia
Lithuania (2) e	100% national fiction	4	2	3	7	7	Lithuanian Film Center
	maj. co-prod. fiction	1	0	1	1	3	Lithuanian Film Center
	min. co-prod. fiction	1	0	0	2	1	Lithuanian Film Center
	Feature documentaries	0	0	5	6	3	Lithuanian Film Center
The Netherlands	100% national fiction	22	28	26	19	22	NFF/NVF/OBS
	maj. co-prod. fiction	10	11	17	18	21	NFF/NVF/OBS
	min. co-prod. fiction	15	16	12	14	19	NFF/NVF/OBS
	Feature documentaries	15	21	23	16	22	NFF/NVF/OBS
Poland	100% national fiction	38	24	28	19	30	PISF/Min. Cult./OBS
	maj. co-prod. fiction	4	3	4	3	4	PISF/Min. Cult./OBS
	min. co-prod. fiction	2	8	10	3	3	PISF/Min. Cult./OBS
	Feature documentaries	2	9	5	6	9	PISF/Min. Cult./OBS
Portugal	100% national fiction	9	9	3	2	2	ICA
	maj. co-prod. fiction	6	5	4	1	1	ICA
	min. co-prod. fiction	4	5	1	5	3	ICA
	Feature documentaries	11	11	7	5	7	ICA
Romania	100% national fiction	9	9	10	16	27	CNC
	maj. co-prod. fiction	8	2	8	7	3	CNC
	min. co-prod. fiction	2	1	2	3	7	CNC
	Feature documentaries	21	15	18	11	10	CNC/OBS
Slovakia	100% national fiction	1	2	7	3	4	SFI
	maj. co-prod. fiction	1	3	1	4	3	SFI
	min. co-prod. fiction	2	3	5	7	5	SFI
	Feature documentaries	4	4	8	6	15	SFI
Slovenia (2) (3)	100% national fiction	4	2	2	9	5	SFC
	maj. co-prod. fiction	0	4	2	1	1	SFC
	min. co-prod. fiction	3	2	4	2	4	SFC
Spain	100% national fiction	90	55	60	76	26	ICAA
	maj. co-prod. fiction	26	42	33	37	68	ICAA
	min. co-prod. fiction	19	32	22	31	32	ICAA
	Feature documentaries	66	71	67	91	98	ICAA
Sweden (2)	100% national fiction	20	16	27	34	26	SFI
	maj. co-prod. fiction	10	7	3	1	4	SFI
	min. co-prod. fiction	8	5	8	8	7	SFI
	Feature documentaries	16	15	13	18	19	SFI
United Kingdom (4)	100 % national	306	275	269	225	154	BFI
	maj. co-prod.	27	26	24	31	16	BFI
	min. co-prod.	10	21	22	22	16	BFI
	Inward features (5)	30	32	41	45	37	BFI
Total fiction films EU 28 (6) e		***1 072***	***1 073***	***1 092***	***1 110***	***1 118***	OBS
Total feature documentaries EU 28 (6) e		***427***	***453***	***462***	***477***	***485***	OBS
Total feature films EU 28 (6) e		***1 499***	***1 526***	***1 554***	***1 587***	***1 603***	OBS

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

(2) Films on first release.

(3) 2010 to 2012 data include only films receiving national support.

(4) The apparent decline of film productions in 2014 is linked to a time lag in identifying film productions with budgets below GBP 500 000.

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

(6) Restated pro-forma data series.

Admissions in the European Union | 2010-2014

In millions.

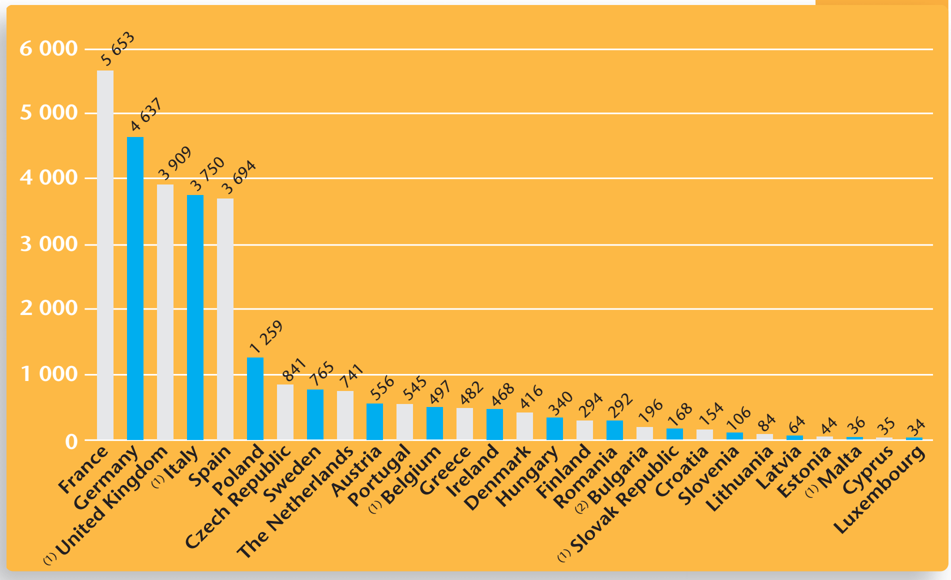
ISO	Country	2010	2011	2012	2013	prov. 2014	2014/13	Sources
AT	**Austria** e	16.5	15.8	16.4	15.2	14.1	*-7.1%*	ÖFI
BE	**Belgium** e	21.3	22.3	21.8	20.9	21.6	*3.3%*	VAF / CFWB
BG	**Bulgaria**	4.0	4.7	4.1	4.8	4.9	*2.3%*	National Film Center
CY	**Cyprus** e	0.9	0.9	0.8	0.7	0.7	*2.1%*	Min. Cult. / MEDIA Salles
CZ	**Czech Republic**	13.5	10.8	11.2	11.1	11.6	*4.5%*	Czech State Cinematography Fund
DE	**Germany**	126.6	129.6	135.1	129.7	121.7	*-6.1%*	FFA
DK	**Denmark**	13.0	12.4	13.6	12.9	12.2	*-5.2%*	Danish Film Institute / Statistics Denmark
EE	**Estonia**	2.1	2.5	2.6	2.6	2.6	*1.6%*	Estonian Film Institute
ES	**Spain** e	101.6	98.3	94.2	77.0	87.4	*13.6%*	ICAA
FI	**Finland** e	7.6	7.1	8.4	7.8	7.3	*-6.4%*	Finnish Film Foundation
FR	**France**	207.1	217.2	203.6	193.7	209.0	*7.9%*	CNC
GB	**United Kingdom**	169.2	171.6	172.5	165.5	157.5	*-4.9%*	BFI / CAA / Rentrak
GR	**Greece** e	11.7	10.9	10.1	9.2	9.0	*-2.6%*	Greek Film Center / Media Salles
HR	**Croatia**	3.4	3.6	4.1	4.2	3.8	*-9.7%*	Croatian Audiovisual Center
HU	**Hungary** e	11.0	9.8	9.5	10.1	11.0	*8.4%*	Nat. Media & Infocom. Authority (NMHH)
IE	**Ireland** e	16.2	16.3	15.4	14.7	14.4	*-2.0%*	Irish Film Board
IT	**Italy** e	120.6	112.1	102.6	105.7	99.3	*-6.1%*	Cinetel / SIAE / OBS
LT	**Lithuania**	2.5	3.0	3.0	3.3	3.2	*-0.7%*	Lithuanian Film Centre
LU	**Luxembourg** e	1.2	1.3	1.3	1.2	1.1	*-6.5%*	MEDIA Salles
LV	**Latvia**	2.1	2.1	2.3	2.4	2.3	*-2.8%*	National Film Centre
MT	**Malta**	0.9	0.8	0.7	0.7	~	~	National Statistics Office
NL	**Netherlands**	28.2	30.4	30.7	30.8	30.8	*-0.2%*	NFF / MaccsBox - NVB & NVF
PL	**Poland**	37.5	38.7	38.5	36.3	40.5	*11.4%*	Polish Film Institute / boxoffice.pl
PT	**Portugal**	16.6	15.7	13.8	12.5	12.1	*-3.7%*	ICA
RO	**Romania**	6.5	7.2	8.3	9.0	10.2	*12.4%*	Centrul National al Cinematografiei
SE	**Sweden**	15.8	16.5	17.9	16.6	16.3	*-1.8%*	Swedish Film Institute
SI	**Slovenia**	2.9	2.9	2.7	2.3	1.9	*-17.4%*	Slovenian Film Center
SK	**Slovak Republic**	3.9	3.6	3.4	3.7	4.1	*10.8%*	UFD / Slovak Film Institute AIC
	EU 28 - Total e	***964***	***968***	***949***	***905***	***911***	***0.7%***	European Audiovisual Observatory

Source: OBS

Number of screens in the EU by country | December 2014 e

In units.

Source: OBS

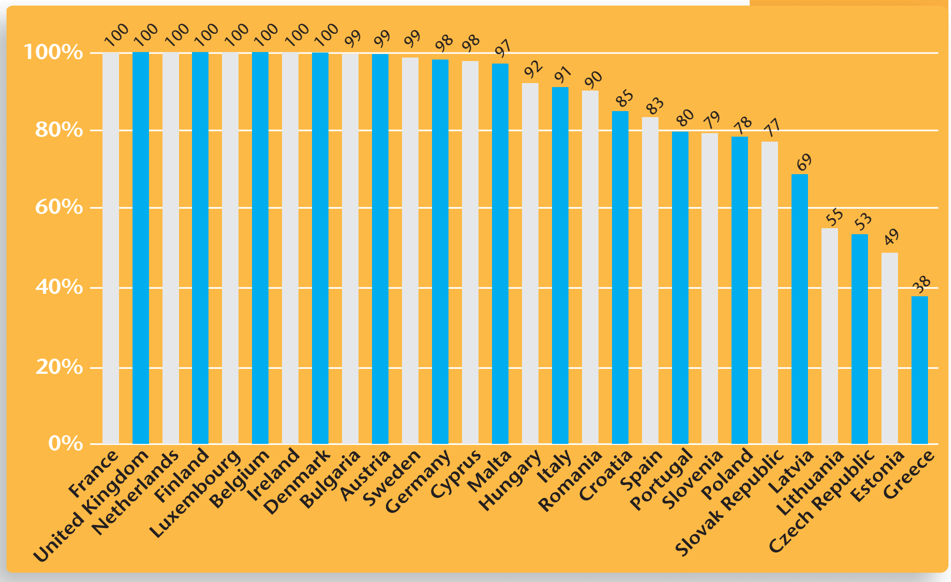


(1) Estimated as of December 2013. (2) Source: MEDIA Salles.

Digital screen penetration in the European Union by country | December 2014 e

In %.

Source: MEDIA Salles



The tables below offer provisional rankings based on the analysis of data from 24 EU member states representing 95% of all admissions in the EU.

Top 25 films by admissions in the European Union | 2014 *prov.*

	Original title	Country of origin	Year	Director	*prov.* Admissions
1	The Hobbit: The Battle of the Five...	US/NZ inc	2014	Peter Jackson	22 659 287
2	The Hunger Games: Mockingjay - P. 1	US	2014	Francis Lawrence	20 097 495
3	How to Train Your Dragon 2	US	2014	Dean DeBlois	17 500 829
4	The Wolf of Wall Street (1)	US	2013	Martin Scorsese	17 139 295
5	Qu'est-ce qu'on a fait au Bon Dieu ?	FR	2014	Philippe de Chauveron	17 098 008
6	Lucy	FR	2014	Luc Besson	15 202 930
7	Dawn of the Planet of the Apes	US	2014	Matt Reeves	14 617 327
8	Rio 2	US	2014	Carlos Saldanha	13 800 211
9	Maleficent	US/GB inc	2014	Robert Stromberg	13 753 766
10	Interstellar	US/GB	2014	Christopher Nolan	13 565 694
11	Guardians of the Galaxy	US	2014	James Gunn	13 453 075
12	Transformers: Age of Extinction	US/CN	2014	Michael Bay	12 981 510
13	X-Men: Days of Future Past	US	2014	Bryan Singer	12 587 855
14	The Lego Movie	US/AU/DK	2014	Phil Lord, Christopher Miller	11 969 537
15	The Amazing Spider-Man 2	US	2014	Marc Webb	11 238 153
16	Gone Girl	US	2014	David Fincher	10 133 944
17	Captain America: The Winter Soldier	US	2014	Anthony Russo, Joe Russo	9 548 599
18	Ocho apellidos vascos (Spanish Affair)	ES	2014	Emilio Martínez Lázaro	9 322 010
19	Frozen (2)	US	2013	Chris Buck, Jennifer Lee	9 078 360
20	12 Years a Slave	US/GB	2013	Steve McQueen	8 865 074
21	The Maze Runner	US/GB/CA	2014	Wes Ball	8 642 125
22	Noah	US	2014	Darren Aronofsky	8 299 604
23	Mr. Peabody & Sherman	US	2014	Rob Minkoff	7 731 983
24	300: Rise of an Empire	US	2014	Noam Murro	7 716 175
25	Paddington	GB/FR	2014	Paul King	7 703 409

(1) 217 374 admissions in the EU in 2013. (2) 18 626 680 admissions in the EU in 2013. Source: OBS/LUMIERE

Top 25 European Union films by admissions in the European Union | 2014 *prov.*

	Original title	Country of origin	Year	Director	*prov.* Admissions
1	Qu'est-ce qu'on a fait au Bon Dieu ?	FR	2014	Philippe de Chauveron	17 098 008
2	Lucy	FR	2014	Luc Besson	15 202 930
3	Ocho apellidos vascos (Spanish Affair)	ES	2014	Emilio Martínez Lázaro	9 322 010
4	Paddington	GB/FR	2014	Paul King	7 703 409
5	Supercondriaque (Superchondriac)	FR/BE	2014	Dany Boon	5 892 379
6	The Inbetweeners Movie 2	GB	2014	Damon Beesley, Iain Morris	5 011 123
7	Les vacances du petit Nicolas	FR	2014	Laurent Tirard	3 685 470
8	Hundraåringen som klev ut genom (1)	SE	2013	Felix Herngren	3 654 734
9	The Physician (2)	DE	2013	Philipp Stölzl	3 636 062
10	Samba	FR	2014	O. Nakache, E. Toledano	3 497 531
11	The House of Magic (3)	BE	2013	J. Degruson, B. Stassen	3 160 193
12	Beauty and the Beast	FR/DE	2014	Christophe Gans	3 094 170
13	Philomena (4)	GB/US/FR	2013	Stephen Frears	2 944 317
14	El Niño	ES	2014	Daniel Monzón	2 678 463
15	Babysitting	FR	2014	N. Benamou, P. Lacheau	2 534 575
16	Les trois frères, le retour	FR	2014	Bourdon, Légitimus, Campan	2 375 936
17	Vaterfreuden (Joy of Fatherhood)	DE	2014	M. Schweighöfer, T. Künstler	2 373 401
18	Astérix : Le domaine des dieux	FR	2014	Louis Clichy, Alexandre Astier	2 332 094
19	La famille Bélier (The Bélier Family)	FR/BE	2014	Eric Lartigau	2 298 391
20	Bogowie (Gods)	PL	2014	Lukasz Palkowski	2 187 768
21	Yves Saint Laurent	FR/BE	2014	Jalil Lespert	2 174 516
22	Mrs. Brown's Boys D'Movie	GB/IE	2014	Ben Kellett	2 166 150
23	Minuscule - La vallée des fourmis... (5)	FR/BE	2013	T. Szabo, H. Giraud	2 033 029
24	Fack ju Göhte (6)	DE	2013	Bora Dagtekin	2 007 653
25	Fiston	FR	2014	Pascal Bourdiaux	1 934 069

(1) 484 415 EU admissions in 2013. (2) 1 399 196 EU admissions in 2013. (3) 448 650 EU admissions in 2013.
(4) 2 200 849 EU admissions in 2013. (5) 19 207 EU admissions in 2013. (6) 5 976 948 EU admissions in 2013.
Source: OBS/LUMIERE

Top 25 EU films by admissions in the Europa Cinemas Network [(1)] | 2014 e

	Original title	Country of origin [(2)]	Prod. year [(2)]	Director	prov. Admissions
1	Qu'est-ce qu'on a fait au Bon Dieu?	FR	2014	Ph. de Chauveron	1 298 658
2	Philomena	GB/US/FR	2013	Stephen Frears	900 502
3	The Hundred-Year-Old Man…	SE	2013	Felix Herngren	617 725
4	Ida	PL/DK	2013	Pawel Pawlikowski	583 692
5	Mr. Turner	GB/DE/FR	2014	Mike Leigh	517 758
6	The Salt of the Earth	FR/IT	2014	W. Wenders, J.R. Salgado	487 910
7	Deux jours, une nuit	BE/FR/IT	2014	J-P et Luc Dardenne	481 588
8	Nymphomaniac - I	DK/DE/FR/BE/SE/GB	2013	Lars von Trier	446 928
9	La Grande Bellezza	IT/FR	2013	Paolo Sorrentino	435 085
10	Jimmy's Hall	GB/IE/FR	2014	Ken Loach	351 028
11	A Most Wanted Man	GB/US/DE	2014	Anton Corbijn	342 137
12	Il giovane favoloso (Leopardi)	IT	2014	Mario Martone	341 272
13	Yves Saint Laurent	FR/BE	2013	Jalil Lespert	339 783
14	Only Lovers Left Alive	DE/CH/CY/GB	2013	Jim Jarmusch	338 480
15	Ocho apellidos vascos	ES	2014	E.M. Lazaro	333 616
16	Pride	GB/FR	2014	Matthew Warchus	331 637
17	Wir sind die Neuen	DE	2014	Ralf Westhoff	318 803
18	Les Garçons et Guillaume, à table!	FR/BE	2013	Guillaume Gallienne	265 260
19	Il Capitale Umano (Human Capital)	IT/FR	2013	Paolo Virzi	265 212
20	The Physician	DE	2013	Philipp Stölzl	261 195
21	Nymphomaniac - II	DK/DE/FR/BE/SE/GB	2013	Lars von Trier	240 286
22	Timbuktu	FR	2014	Abderrahmane Sissako	231 454
23	Le Week-End (Weekend)	GB/FR	2013	Roger Michell	219 699
24	Lucy	FR	2013	Luc Besson	199 208
25	The Two Faces of January	GB/FR/US	2014	Hossein Amini	195 187

(1) Data based on Europa Cinemas members in 30 MEDIA countries, 530 cities, 868 cinemas, 2 061 screens.
(2) Country of origin and production year as allocated in LUMIERE database.

Source: Europa Cinemas, OBS

Top 25 EU films by admissions in North America | 2014 e

Admissions estimated based on average ticket price of USD 8.13.

	Original title	Country of origin	Director	Distributor	Admissions e
1	Lucy	FR	Luc Besson	Universal Pictures	15 568 754
2	The Theory of Everything	GB	James Marsh	Focus Features	2 910 951
3	Brick Mansions	FR/CA	Camille Delamarre	Relativity Media	2 508 836
4	Philomena	GB/US/FR	Stephen Frears	The Weinstein Comp.	2 406 721
5	A Most Wanted Man	GB/US/DE	Anton Corbijn	Roadside Attractions	2 120 225
6	Belle	GB	Amma Asante	Fox Searchlight	1 319 390
7	The Quiet Ones	GB inc/US	John Pogue	Lionsgate	1 046 726
8	My Old Lady	GB/FR/US	Israel Horovitz	Cohen Media Group	482 897
9	Ida	PL/DK	Pawel Pawlikowski	Music Box Films	455 673
10	Calvary	IE/GB	J.M McDonagh	Fox Searchlight	442 806
11	What If	IE/CA	Michael Dowse	CBS Films	429 645
12	Before I Go to Sleep	GB inc/US/FR/SE	Rowan Joffe	Freestyle Releasing	398 827
13	The Trip to Italy	GB	M. Winterbottom	IFC Films	349 342
14	Under the Skin	GB inc/US/CH	Jonathan Glazer	A24 Films	308 331
15	Mandela: Long Walk to Freedom	GB/ZA	Justin Chadwick	The Weinstein Comp.	285 028
16	Le Week-End	GB/FR	Roger Michell	Music Box Films	273 691
17	Citizenfour	DE/US	Laura Poitras	Radius-TWC	270 612
18	Only Lovers Left Alive	DE/CH/CY/GB	Jim Jarmusch	Sony Pictures Classics	231 186
19	La grande bellezza	IT/FR	Paolo Sorrentino	Janus Films	222 318
20	Pride	GB/FR	Matthew Warchus	CBS Films	177 939
21	Selma	GB/US	Ava DuVernay	Paramount	176 542
22	Locke	GB inc/US	Steven Knight	A24 Films	164 552
23	Le passé	FR/IT	Asghar Farhadi	Sony Pictures Classics	149 040
24	The Invisible Woman	GB	Ralph Fiennes	Sony Pictures Classics	138 340
25	Hector and the Search for…	DE/CA/GB/ZA	Peter Chelsom	Relativity Media	138 309

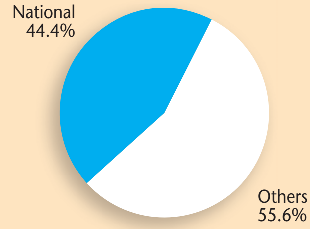
Note: 'inc' refers to films produced in Europe with US incoming investment. A total of 206 EU films were on release in the US and Canada in 2014, generating cumulative admissions of 35.6 million (2.8% market share).

Source: Rentrak, OBS/LUMIERE

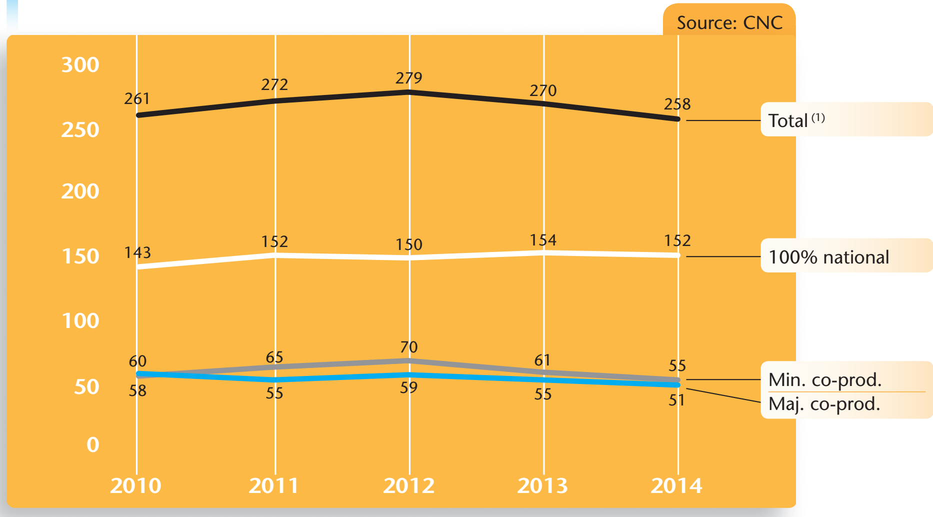
France

Population 2014 [e]	65.8 million
GDP per capita 2014 [e]	45 384 USD
Gross box office 2014	1.33 bn EUR (1.77 bn USD)
Admissions 2014	209.0 million
Average ticket price 2014	6.4 EUR (8.5 USD)
Average admissions per capita 2014	3.2
Screens 2013 I 2014	5 587 I 5 653
Digital screens 2013 I 2014	5 433 I 5 653
Digital 3D screens 2013 I 2014	2 970 I 2 688

Market shares 2014

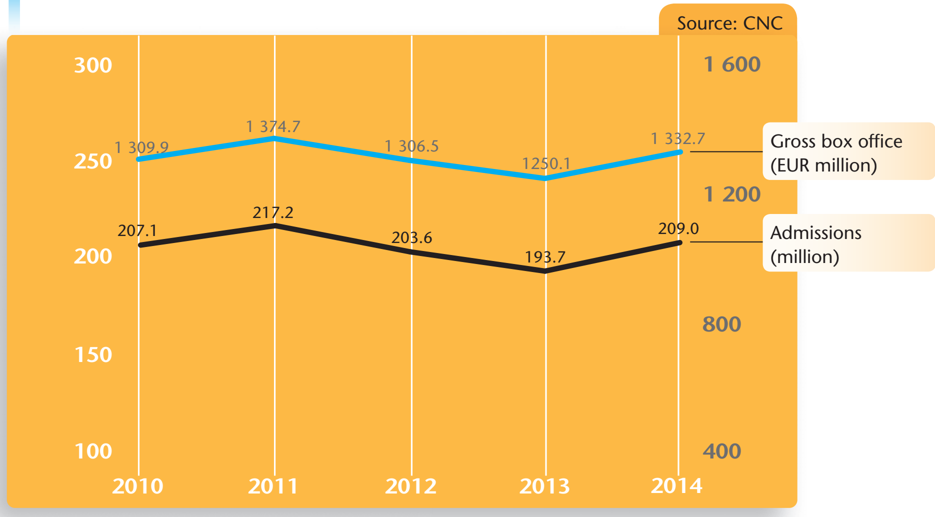


Number of French feature films produced I 2010-2014



(1) Officially recognised films.

Admissions and gross box office I 2010-2014



Top 20 films by admissions in France | 2014 (1)

	Original title	Country of origin	Director	Distributor	Admissions e
1	Qu'est-ce qu'on a fait au Bon Dieu ?	FR	P. de Chauveron	UGC Distribution	12 338 574
2	Supercondriaque (Superchondriac)	FR/BE	Dany Boon	Pathé Distribution	5 268 881
3	Lucy	FR	Luc Besson	EuropaCorp	5 202 954
4	Dawn of the Planet of the Apes	US	Matt Reeves	20th Century Fox	3 783 782
5	How to Train Your Dragon 2	US	Dean DeBlois	20th Century Fox	3 375 600
6	X-Men: Days of Future Past	US	Bryan Singer	20th Century Fox	3 289 100
7	Rio 2	US	Carlos Saldanha	20th Century Fox	3 261 052
8	The Maze Runner	US/GB/CA	Wes Ball	20th Century Fox	3 126 743
9	Samba	FR	Nakache, Toledano	Gaumont Distrib.	3 108 923
10	The Wolf of Wall Street	US	Martin Scorsese	Metropolitan Film	3 022 694
11	The Hobbit: The Battle of the Five…	US/NZ inc	Peter Jackson	Warner Bros.	3 018 424
12	The Hunger Games: Mockingjay - P.1	US	Francis Lawrence	Metropolitan Film	3 015 935
13	Interstellar	US/GB	Christopher Nolan	Warner Bros.	2 512 103
14	Les vacances du petit Nicolas	FR	Laurent Tirard	Wild Bunch Distr.	2 454 906
15	Guardians of the Galaxy	US	James Gunn	Walt Disney Studios	2 393 386
16	Babysitting	FR	Benamou, Lacheau	Universal Pict. Intl	2 358 890
17	Transformers: Age of Extinction	US/CN	Michael Bay	Paramount Pict.	2 336 176
18	The Amazing Spider-Man 2	US	Marc Webb	Sony Pict. Releasing	2 324 171
19	Les trois frères, le retour	FR	Bourdon, Légitimus…	Wild Bunch Distr.	2 289 422
20	Astérix: Le domaine des dieux	FR	L. Clichy, A. Astier	SND Films	2 224 426

(1) Covering film releases and admissions between 25/12/2013 and 24/12/2014.

Source: *Le film français*

Distribution and exhibition

After a 2013 below average, 2014 saw the resurgence of the French theatrical market, which registered its best results over the past three years. With 209 million tickets sold and a GBO of EUR 1.33 billion, the local box office experienced a year-on-year increase of 7.9% in admissions and 6.5% in revenues. All of this is mostly thanks to the performance of local productions, which reached a market share of 44.4% (the highest rate since 2008, way above last year's 33.8%) with over 92 million admissions to French productions - the best figure since 1984. Market share for US films decreased from 54.2% to 45.1% as US films sold 10 million tickets less than in 2013.

Local high-budget comedy *Qu'est-ce qu'on a fait au Bon Dieu ?* crowned the box office list with more than 12 million admissions. At a huge distance, it was followed by another domestic comedy, *Supercondriaque*, which made 5.3 million admissions. English-language thriller *Lucy* is to be given most credit for the second best year ever for French films abroad, which sold 111 million tickets outside France. Five more local films made it into the top 20 list otherwise filled by Hollywood blockbusters.

The French screen base continued its timid, yet steady upward trend of recent times, with an increase of 1.2%, up to 5 653 screens in 2014, the year in which the country reached full digitisation.

Production and funding

French production decreased for the second consecutive year. 258 films were produced in 2014, 12 less than the previous year. More importantly, the total investment in film production suffered a sharp decrease, by 20%, down to EUR 994 million in 2014. Investment from outside France registered an especially acute decline, with foreign investment in French majority productions representing half the amount attracted the previous year (EUR 46 million in 2014), confirming a four-year downward trend.

Unsurprisingly, the average budget of films of French nationality saw its lowest levels for the last 15 years (EUR 3.9 million in 2014). In turn, the median budget grew by 12.4% up to EUR 2.8 million, confirming a trend towards a larger number of medium budget productions. France produced ten international co-productions less than the year before – 106 feature co-productions with 34 countries.

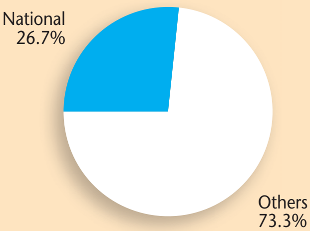
The launch of Netflix in France generated mistrust within the industry as it is perceived as a threat to France's release window schedule.

Source: CNC, *Le Film Francais, Screen International*

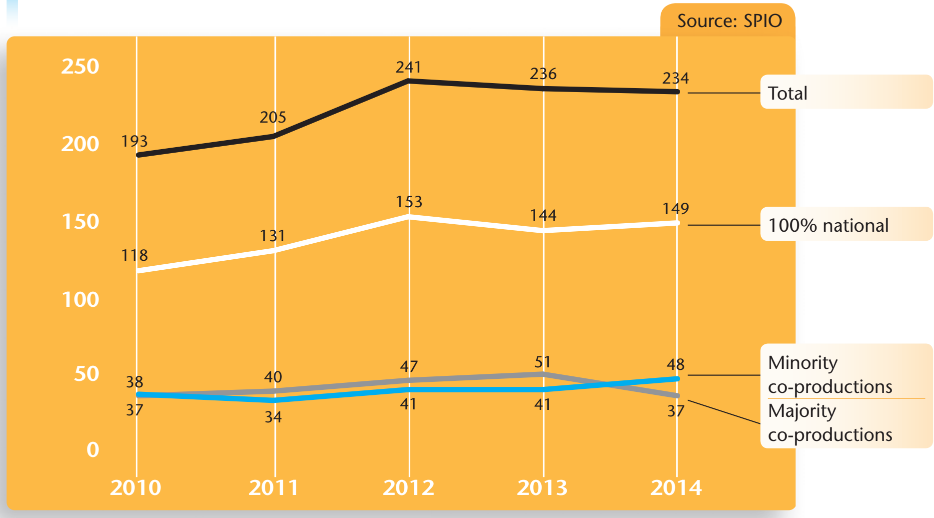
Germany

Population 2014 e	80.8 million
GDP per capita 2014 e	47 201 USD
Gross box office 2014	979.7 M EUR (1.30 bn USD)
Admissions 2014	121.7 million
Average ticket price 2014	8.1 EUR (10.7 USD)
Average admissions per capita 2014	1.5
Screens 2013 I 2014	4 610 I 4 637
Digital screens 2013 I 2014	4 170 I 4 544
Digital 3D screens 2013 I 2014	1 985 I 2 093

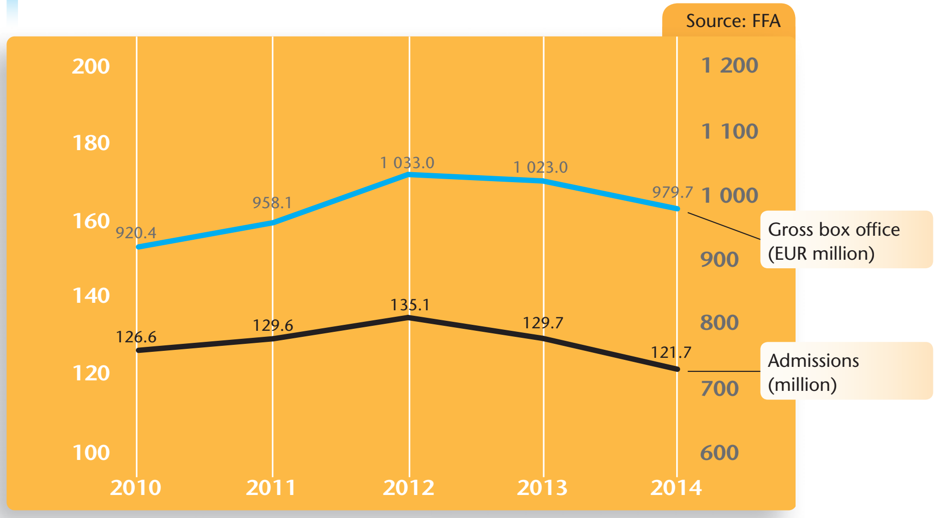
Market shares 2014



Number of German films on first release | 2010-2014



Admissions and gross box office | 2010-2014



Top 20 films by admissions in Germany | 2014

	Original title	Country of origin	Director	Distributor	Admissions
1	The Hobbit: The Battle of the Five Armies	US/NZ inc	Peter Jackson	Warner Bros.	4 684 916
2	The Hunger Games: Mockingjay - Part 1	US	Francis Lawrence	StudioCanal	4 369 905
3	Qu'est-ce qu'on a fait au Bon Dieu?	FR	P. de Chauveron	Neue Visionen	3 121 434
4	How to Train Your Dragon 2	US	Dean DeBlois	20th Century Fox	2 723 730
5	The Physician	DE	Philipp Stölzl	Universal Pictures	2 611 292
6	Transformers: Age of Extinction	US/CN	Michael Bay	Paramount	2 507 657
7	The Wolf of Wall Street	US	Martin Scorsese	Universal Pictures	2 400 242
8	Vaterfreuden (Joy of Fatherhood)	DE	Schweighöfer, Künstler	Warner Bros.	2 367 567
9	Guardians of the Galaxy	US	James Gunn	Walt Disney Studios	1 790 887
10	Rio 2	US	Carlos Saldanha	20th Century Fox	1 759 233
11	Fack ju Göhte (Suck Me Shakespeer)	DE	Bora Dagtekin	Constantin Film	1 712 275
12	Neighbors	US	Nicholas Stoller	Universal Pictures	1 706 037
13	Lucy	FR	Luc Besson	Universal Pictures	1 640 892
14	Interstellar	US/GB	Christopher Nolan	Warner Bros.	1 605 285
15	Maleficent	US/GB inc	Robert Stromberg	Walt Disney Studios	1 509 551
16	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	Warner Bros.	1 499 297
17	22 Jump Street	US	P. Lord, C. Miller	Sony Pict. Releasing	1 486 770
18	Frozen	US	C. Buck, J. Lee	Walt Disney Studios	1 425 801
19	Stromberg - Der Film	DE	Arne Feldhusen	NFP Market. & Distr.	1 328 607
20	Dawn of the Planet of the Apes	US	Matt Reeves	20th Century Fox	1 320 435

Source: FFA

Distribution and exhibition

In 2014 German box office declined for the second year in a row with admissions decreasing by 6% from 129.7 million in 2013 to 121.7 million tickets sold. This is the lowest level in over 20 years. Gross box office dropped to EUR 979.7 million after passing the EUR 1 billion benchmark in the two preceding years.

German films however performed comparatively well selling 32 million tickets, compared to 33.6 million in 2013, and captured a market share of 26.7%. This is the second highest level on record. Led by the English language adventure drama *The Physician* and the romantic comedy *Vaterfreuden* a total of eight German films attracted over 1 million admissions while the latest instalments of The Hobbit and The Hunger Games franchises topped the charts with over 4.7 and 4.4 million admissions respectively. Market share for US films decreased from 65.4% to 60.0%, while the market share for European films increased from 6.1% to 11.7%, largely due to the strong good results of the French comedy *Qu'est-ce qu'on a fait au Bon Dieu,* which sold over 3.1 million tickets in Germany

Like in 2013 Warner Bros. led the distribution market capturing 18.2% of total admissions, followed by 20th Century Fox (15.6%) and Universal Pictures (11.7%). The number of first releases increased marginally by 3 films to 570 premieres, the highest level on record.

Production and funding

Germany remained to be the third largest feature film producing country in Europe, with 234 feature films released in 2014. This is seven less than in the record year 2012 and the third highest level in recent history.

2014 was an important year for the German film sector with the legal basis of the German Film Law being confirmed after ten years of legal proceedings. In 2014 the new amendment of the film law entered into force and introduced an obligation of VOD service providers without a seat in Germany to pay a levy – relating to revenues generated from customers in Germany from films in German language - to the national film fund FFA, just like German exhibitors, broadcasters and video providers. This new levy however remains on hold until the European Commission decides whether it is in line with European Union Law.

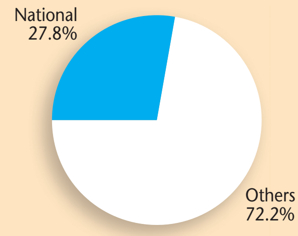
The overall level of national and regional public support for film related support amounted to over EUR 325 million, EUR 26 million less than in 2013. Despite criticism from the industry, the budget of the German Federal Film Fund (DFFF), which provides grants up to 20% of qualifying spend, was reduced by EUR 10 million to EUR 50 million in 2015.

Source: FFA, SPIO, *Blickpunkt Film*, Mediabiz, OBS

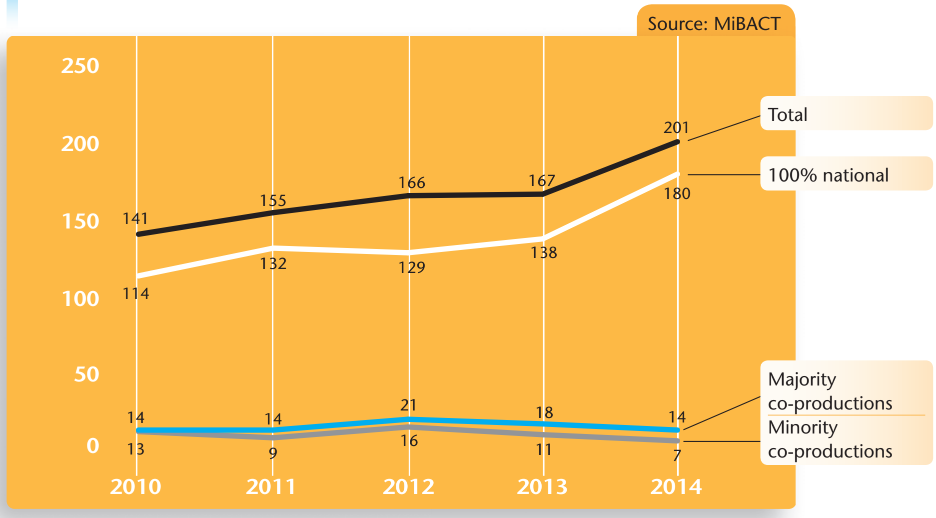
Italy

Population 2014 e	60.8 million
GDP per capita 2014 e	35 512 USD
Gross box office 2014	600.5 M EUR (798 M USD)
Admissions 2014	99.3 million
Average ticket price 2014	6.1 EUR (8.0 USD)
Average admissions per capita 2014	1.6
Screens 2013 I 2014 e	3 750 I ~
Digital screens 2013 I 2014	2 850 I 3 421
Digital 3D screens 2013 I 2014	1 195 I 1 334

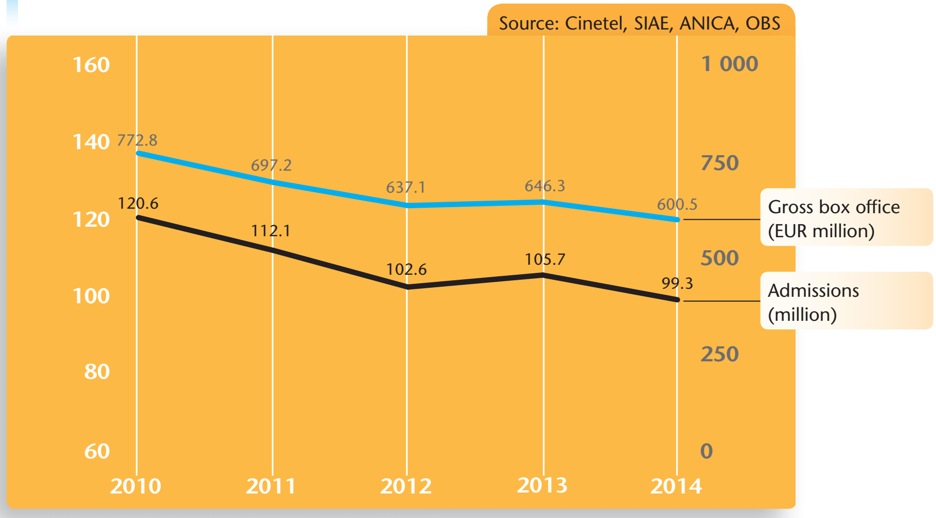
Market shares 2014 e



Number of feature films produced in Italy I 2010-2014



Admissions and gross box office I 2010-2014 e



Top 20 films by admissions in Italy | 2014

	Original title	Country of origin	Director	Distributor	Admissions
1	Maleficent	US/GB Inc	Robert Stromberg	Walt Disney	2 173 206
2	Un boss in salotto	IT	Luca Miniero	Warner Bros.	1 888 662
3	The Wolf of Wall Street	US	Martin Scorsese	01 Distribution	1 843 901
4	Sotto una buona stella	IT	Carlo Verdone	Filmauro/Universal	1 653 445
5	Interstellar	US/GB	Christopher Nolan	Warner Bros.	1 588 186
6	Il ricco, il povero e il maggiordomo	IT	Giovanni, Giacomo…	Medusa Film	1 586 491
7	The Hobbit: The Battle of the Five…	US/NZ Inc	Peter Jackson	Warner Bros.	1 486 936
8	The Amazing Spider-Man 2	US	Marc Webb	Warner Bros.	1 447 202
9	The Hunger Games: Mockingjay - Part 1	US	Francis Lawrence	Universal	1 335 804
10	Andiamo a quel paese	IT	Ficarra, Picone	Medusa Film	1 286 776
11	Tutta colpa di Freud (Blame Freud)	IT	Paolo Genovese	Medusa Film	1 279 902
12	How to Train Your Dragon 2	US	Dean DeBlois	20th Century Fox	1 255 869
13	Transformers: Age of Extinction	US/CN	Michael Bay	Universal	1 224 256
14	Penguins of Madagascar	US	Eric Darnell, S.J. Smith	20th Century Fox	1 199 784
15	Frozen	US	Chris Buck, J. Lee	Walt Disney	1 180 994
16	Belle et Sébastien	FR	Nicolas Vanier	Notorious Pictures	1 174 235
17	Noah	US	Darren Aronofsky	Universal	1 155 959
18	Lucy	FR	Luc Besson	Universal	1 131 847
19	Il giovane favoloso (Leopardi)	IT	Mario Martone	01 Distribution	1 067 563
20	Captain America: The Winter Soldier	US	Anthony & Joe Russo	Walt Disney	1 065 722

Source: Cinetel

Distribution and exhibition

2014 turned out to be a disappointing year for the Italian cinema industry, which saw admissions dropping by over 6% to an estimated 99.3 million, the lowest level since 1996. Due to a slight decline in the average ticket price, GBO even decreased by 7.1% to EUR 600.5 million, EUR 173 million less than five years ago. Market experts linked this decline to the lack of a local breakout success like *Sole a catinelle*, which sold over 8 million tickets in 2013, several US blockbusters not meeting expectations, the lack of attractive film supply particularly over the summer months and piracy.

Maleficent was the only film to sell more than 2 million tickets in 2014, followed by local comedy Un boss in salotto (1.9 mio) and The Wolf of Wall Street (1.8 mio.). Market shares for Italian and US films dropped accordingly, falling from 31.1% to 27.8% and 53.4% to 50% respectively. Admissions to other European films however increased by at least 30 million raising their market share from 10.8% to 17.2% of total admissions.

Like in 2013 Warner Bros lead the distribution market with a market share of 16.9%, followed by Universal (14%), 01 Distribution (13.5%) and 20th Century Fox (12.6%). Italian exhibitors made significant progress in digitising their screens throughout 2014 with digital screen penetration jumping from around 75% to 91%.

Production and funding

Italian production activity on the other hand registered a strong growth with the number of feature films rated increasing from 167 to 201 films in 2014. This is the highest level in recent history and compares to 131 films six years ago, before the Italian government introduced a package of film production incentives in 2009.

A new bill passed in mid-2014 increased the overall tax credit for the cinema and audiovisual industry from EUR 110 to 115 million and further improved the terms for individual tax measures, including e.g. the raising of the ceiling of the 25% tax credit on local expenses for foreign productions from EUR 5 to 10 million per production company – no longer per project. Rome's Cinecittà Studios – which are now allowed to act as a production service company – are hence hoping to attract some major US productions.

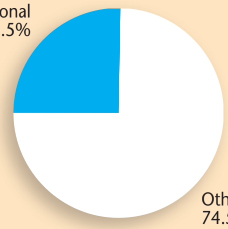
2014 saw the launch of an Italian-German co-production development fund as well as the signing of the rules of procedure for the co-production agreement between Italy and China which allow qualifying productions to have double nationality and access all fiscal benefits and public incentives provided by both countries.

Source: DG Cinema-MiBACT, ANICA, Cinetel, *Screen International*

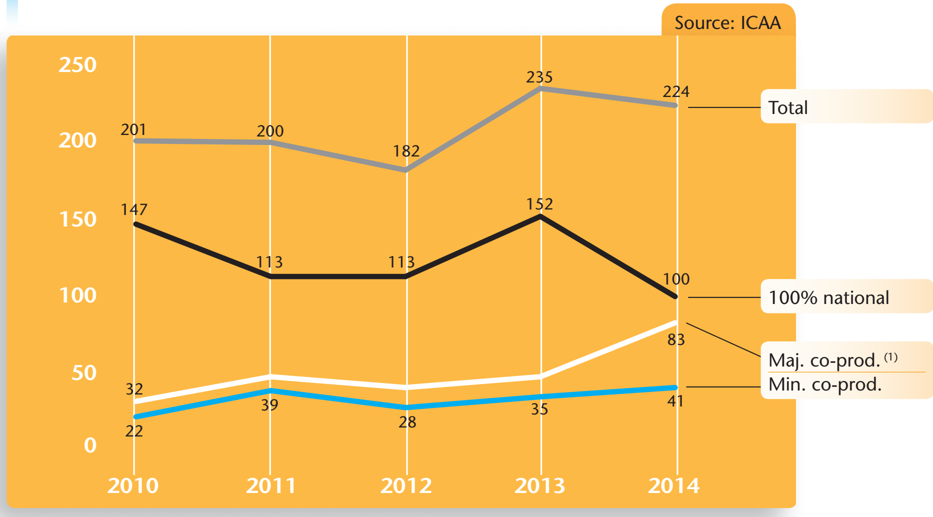
Spain

Population 2014 e	46.5 million
GDP per capita 2014 e	30 113 USD
Gross box office 2014	522.5 M EUR (695 M USD)
Admissions 2014	87.4 million
Average ticket price 2014	6.0 EUR (7.9 USD)
Average admissions per capita 2014	1.9
Screens 2013 I 2014	3 908 I 3 694
Digital screens 2013 I 2014	2 720 I 3 000
Digital 3D screens 2013 I 2014	1 030 I 1 111

Market shares 2014 e

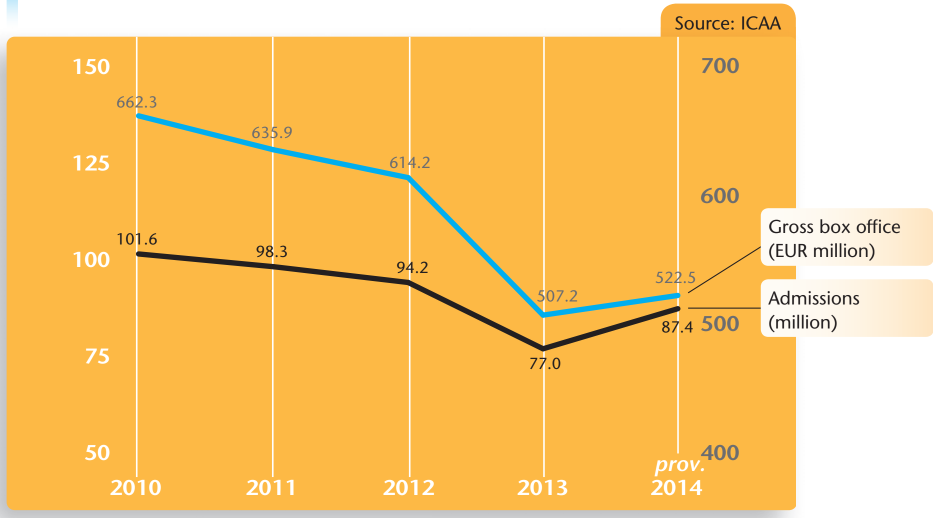


Number of Spanish feature films produced I 2010-2014



(1) Including parity co-productions.

Admissions and gross box office I 2010-2014 *prov.*



Top 20 films by admissions in Spain | 2014 *prov.*

	Original title	Country of origin	Director	Distributor	*prov.* Admissions
1	Ocho apellidos vascos (Spanish Affair)	ES	E. Martínez Lázaro	Snow Films	9 295 944
2	El Niño	ES	Daniel Monzón	Hispano Foxfilms	2 677 696
3	Maleficent	US/GB inc	Robert Stromberg	Walt Disney	2 180 345
4	Dawn of the Planet of the Apes	US	Matt Reeves	Hispano Foxfilms	2 083 580
5	The Wolf of Wall Street	US	Martin Scorsese	Universal	1 949 552
6	The Hunger Games: Mockingjay - Part 1	US	Francis Lawrence	Aurum Prod.	1 838 927
7	Torrente V: Misión Eurovegas	ES	Santiago Segura	Sony Pictures	1 802 281
8	How to Train Your Dragon 2	US	Dean DeBlois	Hispano Foxfilms	1 758 386
9	Lucy	FR	Luc Besson	Universal	1 615 437
10	The Hobbit: The Battle of the Five Armies	US/NZ inc	Peter Jackson	Warner Bros.	1 533 131
11	Rio 2	US	Carlos Saldanha	Hispano Foxfilms	1 369 009
12	Interstellar	US/GB	Christopher Nolan	Warner Bros.	1 340 374
13	Guardians of the Galaxy	US	James Gunn	Walt Disney	1 314 543
14	Exodus: Gods and Kings	US/GB inc/ES	Ridley Scott	Hispano Foxfilms	1 190 172
15	Mr. Peabody & Sherman	US	Rob Minkoff	Hispano Foxfilms	1 183 576
16	Dracula Untold	US/JP	Gary Shore	Universal	1 114 981
17	X-Men: Days of Future Past	US	Bryan Singer	Hispano Foxfilms	1 113 960
18	Noah	US	Darren Aronofsky	Paramount Spain	1 090 336
19	300: Rise of an Empire	US	Noam Murro	Warner Bros.	1 077 435
20	Captain America: The Winter Soldier	US	A. Russo, Joe Russo	Walt Disney	1 038 466

Source: ICAA

Distribution and exhibition

For the first time since 2009 Spanish box office registered a year-on-year increase ending a downward trend which had seen admissions falling from 144 million in 2004 to a record low of 77 million in 2013. Spanish cinemas sold 87.4 million tickets (+14%) and grossed EUR 522.5 million (+3%) as average ticket prices decreased by almost 10% to EUR 6.0, the lowest level since 2008.

Against the background of the lingering economic crisis, admissions were driven primarily by the success of a couple of local blockbusters in combination with discount ticket schemes such as a 50% discount on Wednesdays or the *Fiesta de Cine* offering tickets at EUR 2.9 attracting 3.8 million admissions in six days. Such discounts however put pressure on industry margins, which are already under strain from 21% VAT on cinema tickets, one of the highest in Europe. Piracy remains an issue despite the introduction of strict anti-piracy legislation in early 2014.

While many big budget US productions targeting young adults did not meet box office expectations, several Spanish films performed extremely well and boosted national market share to an all-time record high of 25.5%. Two local productions stood out: culture clash romantic comedy *Ocho apellidos vascos (Spanish Affair)* sold 9.3 million tickets alone and became the highest grossing Spanish film of all times and the thriller *El Niño*, which took second with 2.7 million admissions.

Production and funding

Despite difficult conditions, Spanish production figures remained comparatively high, with a total of 224 films certified by ICAA, only 11 less than in peak year 2013. Spanish producers are however reported to struggle with a 50% cut in public funding compared to four years ago and the difficult box office market. Financing problems have led to a 50% drop in average film budgets (since 2009) to less than USD 2 million which forced many producers to look for international co-producers. The number of 100% national films consequently fell from 152 films in 2013 to 100 films, while the number of international co-productions increased from 82 to 124.

As of January 2015 Spain offers a new tax rebate for investments in Spanish productions (20% for the first EUR 1 mio and 18% for exceeding amounts) as well as a 15% deduction of direct costs incurred in Spanish territory by Spanish producers directly related to foreign productions (capped at EUR 2.5 million per production). This rebate was met with moderate enthusiasm among many in the industry who had been hoping for a more competitive incentive structure.

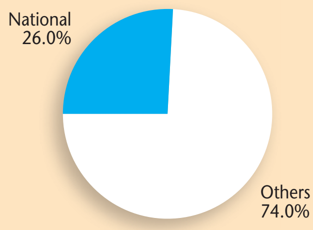
Source: ICAA, *Screen International, Cineinforme, Variety*, FAPAE, OBS

United Kingdom

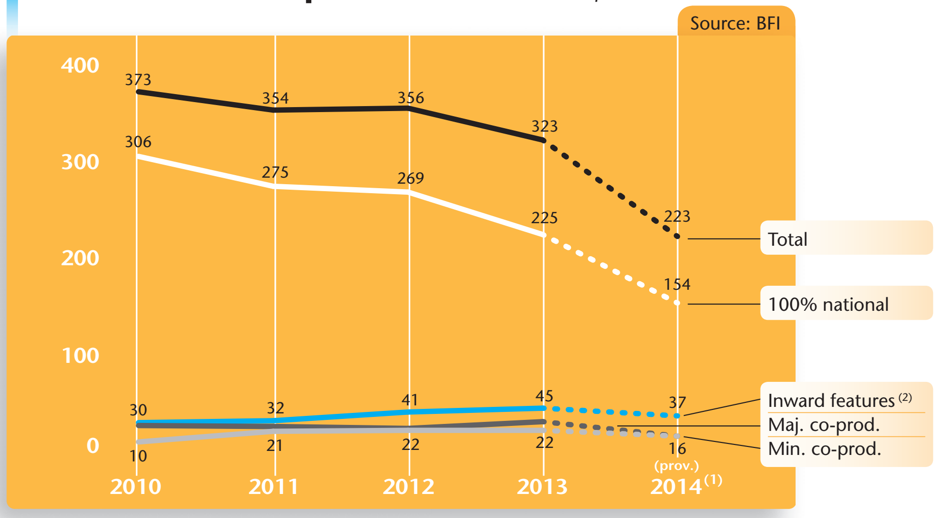
Population 2014 [e]	64.3 million
GDP per capita 2014 [e]	44 141 USD
Gross box office 2014	1.06 bn GBP (1.74 bn USD)
Admissions 2014	157.5 million
Average ticket price 2014	6.8 GBP (11.2 USD)
Average admissions per capita 2014	2.4
Screens 2013 | 2014	3 867 | 3 909 (1)
Digital screens 2013 | 2014	3 860 | 3 944 (2)
Digital 3D screens 2013 | 2014	2 021 | 2 025

(1) According to BFI. (2) According to MEDIA Salles.

Market shares 2014

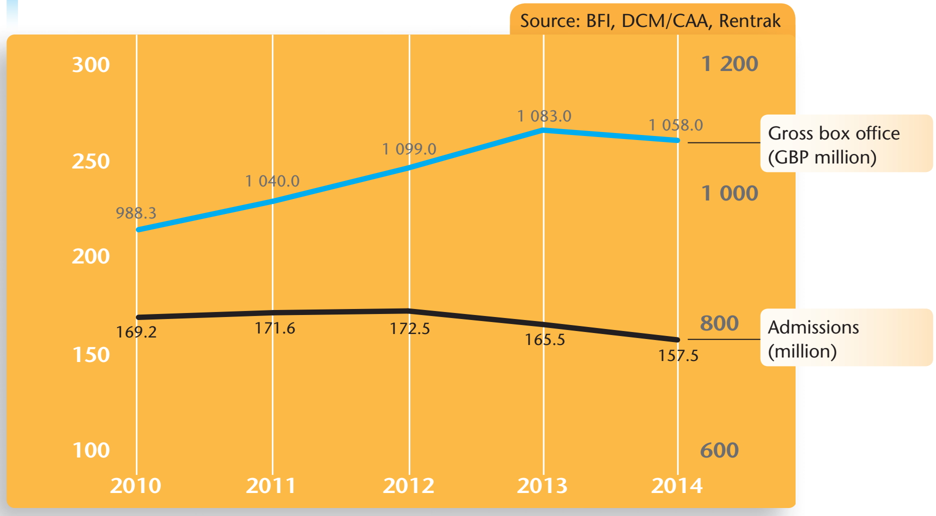


Number of UK films produced | 2010-2014 *prov.* (1)



(1) The apparent decline of film productions in 2014 is linked to a time lag in identifying film productions with budgets below GBP 500 000.
(2) Including inward feature co-productions but excluding inward features involving only VFX work in the UK.

Admissions and gross box office | 2010-2014



Top 20 films by admissions in the United Kingdom & Ireland | 2014 [(1) e]

Estimated admissions based on average ticket price of GBP 6.80.

	Original title	Country of origin	Director	Distributor	Admissions [e]
1	The Hobbit: The Battle of the Five…	US/NZ inc	Peter Jackson	Warner Bros.	5 930 882
2	The Lego Movie	US/AU/DK	Phil Lord, C. Miller	Warner Bros.	5 049 754
3	Paddington	GB/FR	Paul King	StudioCanal	5 010 294
4	The Inbetweeners 2	GB/FR	D. Beesley, I. Morris	Enter. Film Distrib.	4 910 685
5	Dawn of the Planet of the Apes	US	Matt Reeves	20th Century Fox	4 811 507
6	The Hunger Games: Mockingjay…	US	Francis Lawrence	Lionsgate	4 552 941
7	Guardians of the Galaxy	US	James Gunn	Walt Disney	4 196 698
8	X-Men: Days of Future Past	US	Bryan Singer	20th Century Fox	3 989 756
9	How to Train Your Dragon 2	US	Dean DeBlois	20th Century Fox	3 688 797
10	The Amazing Spider-Man 2	US	Marc Webb	Sony Pictures	3 541 428
11	The Wolf of Wall Street	US	Martin Scorsese	Universal	3 338 569
12	Gone Girl	US	David Fincher	20th Century Fox	3 289 706
13	Interstellar	US/GB	Christopher Nolan	Warner Bros.	3 017 647
14	12 Years A Slave	US/GB	Steve McQueen	eOne Films	2 947 956
15	Transformers: Age of Extinction	US/CN	Michael Bay	Paramount	2 873 529
16	Maleficent	US/GB inc	Robert Stromberg	Walt Disney	2 861 031
17	Captain America: The Winter Soldier	US	Anthony & Joe Russo	Walt Disney	2 845 666
18	22 Jump Street	US	Phil Lord, C. Miller	Sony Pictures	2 737 483
19	Godzilla	US/JP	Gareth Edwards	Warner Bros.	2 534 646
20	Bad Neighbours	US	Nicholas Stoller	Universal	2 356 752

(1) Cumulative admissions up to 18 January 2015.

Source: BFI, Rentrak

Distribution and exhibition

UK admissions fell by 5% to 157.5 million, that is, 15 million less than in 2012 and the lowest level since 2006. Gross box office was down by 2% to GBP 1 058 millions. This decline may partly be explained by the football World Cup, increasing competition from online services as well as the lack of big blockbusters. Indeed *The Hobbit: The Battle of the Five Armies* was the only film with takings above GBP 40 million [(1)] in the UK and Ireland, compared to three films in 2013.

The market share for UK films increased from 22% to 26%, breaking down into 16% for UK independent films (up from 7%) and 10% for inward investment films with US studio-backing (down from 15%). This is the first time that UK independent films, boosted by the strong performance of *Paddington* and *The Inbetweeners 2*, outperformed US studio-backed UK productions.

20th Century Fox became the most successful distributor in 2014, taking 21.4% of total box office, thereby outperforming last year's market leader Warner Bros. (15%), Universal (11.4%) and Walt Disney (9.3%).

Production and funding

The total number of UK film productions – including inward investment films – fell from 323 to 223 films starting principal photography in 2014. A significant part of this seemingly dramatic decline can however be explained by a time lag in identifying UK productions with a budget of less than GB 500 000 which account for the majority of domestic productions.

Production spend on the other hand increased to a new record high with over GBP 1.47 billion spent on film productions in the UK, 35% more than in 2013. This impressive increase was more or less exclusively driven by the 20 US studio films accounting for 75% of the total production spend in the country. The UK's tax relief system certainly played an important role in attracting such inward investment productions. In order to stimulate further growth the UK government announced that it would increase film tax relief to 25% for all qualifying expenditure (and not just the first GBP 20 million) as well as modernize the cultural test to allow more projects to qualify. The minimum UK expenditure requirement for high-end TV productions will be lowered from 25% to 10% and a new children's TV tax relief will be brought in from April 2015, pending state aid approval by the European Commission.

Hoping to circumvent China's import quotas and enable more British films to benefit from the country's booming cinema market, the UK signed a co-production treaty with China in March 2015.

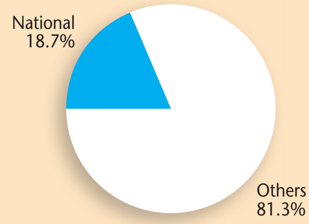
(1) Taking into account box office gross up to 18 January 2015.

Source: BFI, DCM, *Screen International*

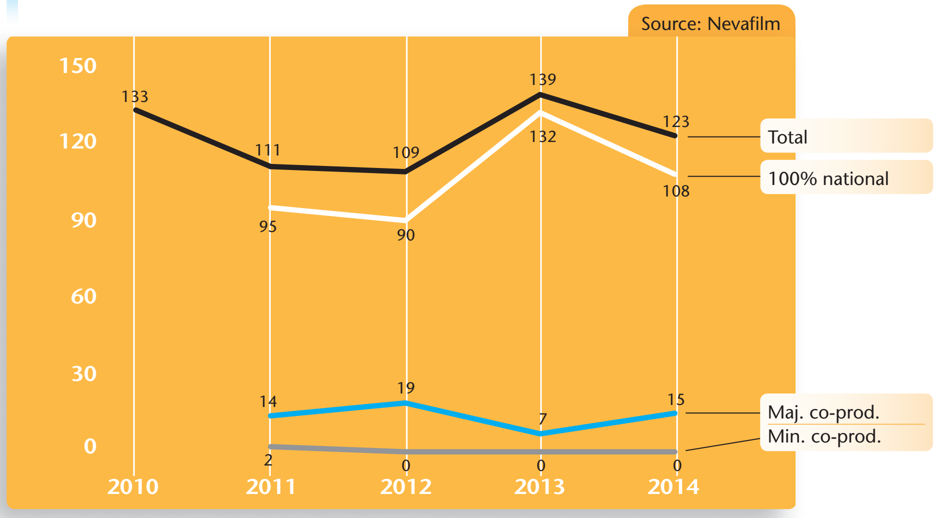
Russian Federation

Population 2014 e	143.7 million
GDP per capita 2014 e	14 317 USD
Gross box office 2014	43.332 bn RUB (1.15 bn USD)
Admissions 2014	176.1 million
Average ticket price 2014	246.0 RUB (6.5 USD)
Average admissions per capita 2014	1.2
Screens 2013 | 2014	3 479 | 3 829
Digital screens 2013 | 2014	2 967 | 3 693
Digital 3D screens 2013 | 2014	2 476 | 3 001

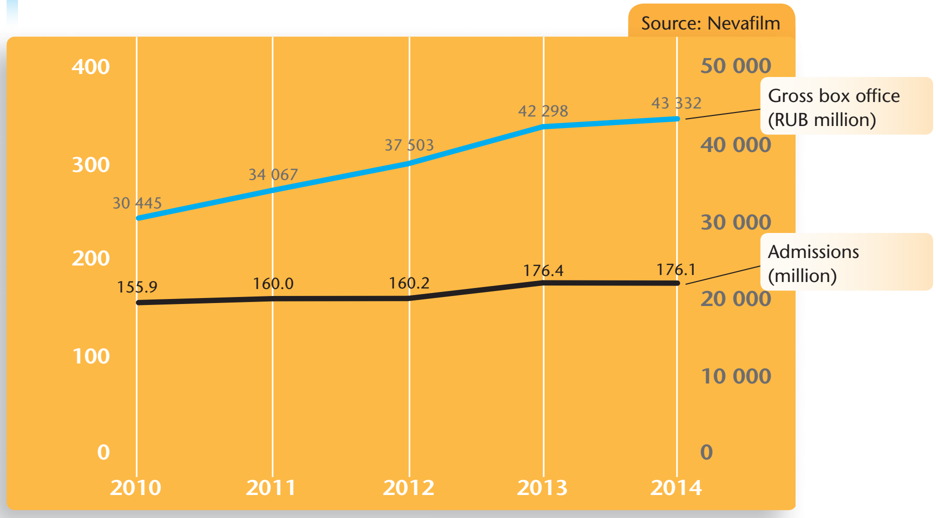
Market shares 2014



Number of Russian feature films produced | 2010-2014



Admissions and gross box office in Russia | 2010-2014 (1)



(1) Without alternative content.

Top 20 films by admissions in the Russian Federation | 2014 (1)

	Original title	Country of origin	Director	Distributor	Admissions
1	Transformers: Age of Extinction	US/CN	Michael Bay	Central Partnership	5 642 690
2	Maleficent	US/GB Inc	Robert Stromberg	Walt Disney/Sony	5 313 995
3	Guardians of the Galaxy	US	James Gunn	Walt Disney/Sony	5 308 047
4	The Hobbit: The Battle of the Five…	US/NZ Inc	Peter Jackson	Karo Premier	4 865 516
5	How to Train Your Dragon 2	US	Dean DeBlois	20th Century Fox	4 794 052
6	Teenage Mutant Ninja Turtles	US	Jonathan Liebesman	Central Partnership	4 579 737
7	Rio 2	US	Carlos Saldanha	20th Century Fox	4 457 971
8	Viy	RU/UA/CZ	Oleg Stepchenko	UPI	4 444 690
9	Interstellar	US/GB	Christopher Nolan	Karo Premier	4 432 367
10	Noah	US	Darren Aronofsky	Central Partnership	4 349 363
11	Big Hero 6	US	C. Williams, Don Hall	Walt Disney/Sony	4 005 583
12	Penguins of Madagascar	US	E. Darnell, S.J. Smith	20th Century Fox	3 757 306
13	Yolki 3	RU	Levan Gabriadze, …	Bazelevs	3 754 204
14	Dracula Untold	US/JP	Gary Shore	UPI	3 698 127
15	The Hunger Games: Mockingjay - P.1	US	Francis Lawrence	Volga	3 468 051
16	Lucy	FR	Luc Besson	UPI	3 435 030
17	X-Men: Days of Future Past	US	Bryan Singer	20th Century Fox	3 117 595
18	Hercules	US	Brett Ratner	Central Partnership	3 051 358
19	47 Ronin	US	Carl Rinsch	UPI	2 967 420
20	Dawn of the Planet of the Apes	US	Matt Reeves	20th Century Fox	2 926 643

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

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

Distribution and exhibition

2014 proved to be a challenging year for many in the Russian cinema industry. While admissions remained stable at 176 million ticket sold and GBO measured in rubles actually increased by 2.4% to RUB 43.3 billion, the collapse of the ruble – which lost over 42% of its value against the US dollar towards the end of the year – not only affected the dollar value of US blockbusters takings but also put economic pressure on distributors, producers and exhibitors as many of their costs are denominated in foreign currency. High bank loans might slow down new cinema projects in shopping malls which have been the backbone of Russia's impressive growth in the past years.

Russian 2014 box office was once more dominated by US blockbusters which accounted for 17 out of the top 20 new releases in 2014. Horror fantasy *Viy* was the only Russian film to make it into the top 10 selling over 4.4 million tickets. On a cumulative basis, local films accounted for 18.7% of total admissions while US films took around 71%.

A motion to limit the circulation of foreign films to 50% of screenings was rejected by the Duma in November 2014. In early 2015 Russia's Ministry of Culture was however reportedly planning to introduce new requirements for issuing exhibition licenses which would ban films that "threaten the national unity of the country or denigrate its culture". In May 2015 amendments to the Federal Statute "On State Support for Cinematography of the Russian Federation" were introduced, including a ban on swearing in films.

Production and funding

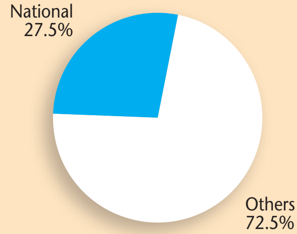
Russian production levels decreased to 123 films, 16 less than in 2013, while the number of Russian theatrical film releases increased to 84 films, 19 more than in 2013. The Russian Cinema Fund, which focuses on the support of commercial films, has been allocated a budget of RUB 3.9 billion (~USD 74 million) for 2015 while the Ministry of Culture, which is responsible for funding "cultural" and "socially significant" films, operates with a budget of RUB 3 billion (~USD 57 million), about the same amount as allocated last year. The ruble's sharp devaluation is however expected to cause financial problems to Russian producers who are faced with many production expenses being denominated in US dollars or Euros. While public support had been granted as non-repayable subsidies before, the Cinema Fund introduced repayable interest-free subsidies in 2014, which accounted for 40% of the grants and are meant to significantly increase the Fund's budget in the long term.

Source: Nevafilm Research, Interfax, *Russian Film Business Today, Screen International, Variety*, OBS

Poland

Population 2014 e	38.0 million
GDP per capita 2014 e	14 330 USD
Gross box office 2014	727.8 M PLN (231.0 M USD)
Admissions 2014	40.5 million
Average ticket price 2014	18.0 PLN (5.7 USD)
Average admissions per capita 2014	1.1
Screens 2013 I 2014	1 259 I 1 259
Digital screens 2013 I 2014	972 I 986
Digital 3D screens 2013 I 2014	660 I 670
Films produced 2013 I 2014	31 I 46

Market shares 2014



Top 10 films by admissions in Poland I 2014

	Original title	Country of origin	Director	Distributor	Admissions
1	Bogowie (Gods)	PL	Lukasz Palkowski	Next Film	2 154 737
2	Miasto 44 (Warsaw 44)	PL	Jan Komasa	Kino Swiat	1 742 935
3	The Hobbit: The Battle of the Five Armies	US/NZ inc	Peter Jackson	Forum Film	1 292 972
4	Jack Strong	PL	Wladyslaw Pasikowski	Vue Movie	1 175 625
5	How to Train Your Dragon 2	US	Dean DeBlois	Imperial Cinepix	1 012 837
6	The Wolf of Wall Street	US	Martin Scorsese	Monolith	895 593
7	Pod mocnym aniolem (The Mighty Angel)	PL/HU	Wojciech Smarzowski	Kino Swiat	882 785
8	Wkreceni	PL	Piotr Weresniak	Interfilm	840 568
9	Kamienie na szaniec (Stones for the…)	PL	Robert Glinski	Monolith	831 094
10	The Hobbit: The Desolation of Smaug	US/NZ inc	Peter Jackson	Forum Film	770 023

Source: PISF/boxoffice.pl

Distribution and exhibition

2014 was a good year for Polish cinema as box office reached its highest levels in recent history. Admissions increased by over 11% from 36.3 million to 40.5 million tickets sold and gross box office takings rose by 9.4% to PLN 728 million (USD 231 million).

Box office growth was furthermore primarily driven by the success of national rather than US productions. A total of six Polish films ranked among the top 10 most successful films in 2014, more than in any other year in the past twenty years. *Bogowie (Gods)*, a biopic about a doctor who carried out Poland's first successful heart transplantion, topped the charts with over 2.1 million tickets sold, ahead of war drama *Miasto 44 (Warsaw 44)* and spy action film *Jack Strong*, which took rank 4. Cumulative national market share consequently increased from 20.4% to 27.5%. Rounding off the success of Polish films, Pawel Pawlikowski's drama *Ida* won the Oscar Academy Awards for Best Foreign Language Film in 2015. Like in many other European markets, US blockbusters generally showed a mediocre performance leading to US market share falling from 63% to 55%.

A total of 339 feature films were released in Polish cinemas, 32 more than in 2013, while the number of 3D releases continued to fall to 32 films, 11 films less than two years ago. Market share for 3D films fell accordingly to 16.5% of admissions, compared to 31.7% in 201. Kino Swiat led the Polish distribution market with a market share of 17%, followed by Monolith (14.8%), and UIP (11.3%).

Production and funding

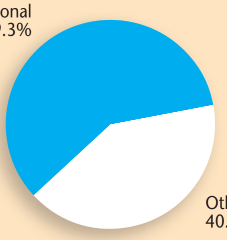
After an exceptional drop to 31 feature film productions in 2013, Polish film production activity increased again to 46 films in 2014, the same level as in preceding years. The current strength of Polish cinema is closely linked to national and regional support programmes. In 2014 the Polish Film Institute, the country's national film agency established in 2005, allocated a total of about EUR 31 million in support, about 70% of which goes to film production. It is interesting to note that Poland is one of the few European countries which finances its national public film support through payments not only from exhibitors, film distributors or broadcasters but also from cable and digital satellite service operators. In addition there are 11 regional funds providing film production support.

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

Turkey

Population 2014 e	76.7 million
GDP per capita 2014 e	10 518 USD
Gross box office 2014	655.4 M TRY (300 M USD)
Admissions 2014	61.4 million
Average ticket price 2014	10.7 TRY (4.9 USD)
Average admissions per capita 2014	0.8
Screens 2013 I 2014	2 243 I 2 483
Digital screens 2013 I 2014	1 073 I 1 496
Digital 3D screens 2013 I 2014	433 I 498
Films produced 2013 I 2014	87 I 108

Market shares 2014



Top 10 films by admissions in Turkey I 2014

	Original title	Country of origin	Director	Distributor	Admissions
1	Recep Ivedik 4	TR	Togan Gökbakar	Warner Bros./Tiglon	7 374 931
2	Eyyvah Eyvah 3	TR	Hakan Algül	UIP	3 423 650
3	Dü ün Dernek	TR	Selçuk Aydemir	UIP	2 893 915
4	Pek Yakında	TR	Cem Yilmaz	Warner Bros.	2 184 636
5	Unutursam Fısılda	TR	Çagan Irmak	Mars Dagitim	1 705 963
6	Deliha	TR	Hakan Algül	UIP	1 591 920
7	Birlesen Gönüller	TR	Hasan Kiraç	Chantier Films	1 582 399
8	Çakallarla Dans 3: Sıfır Sıkıntı	TR	Murat Seker	Mars Dagitim	1 461 615
9	Patron Mutlu Son Istiyor	TR	Kivanc Baruonu	UIP	1 423 240
10	Incir Reçeli 2	TR	Aytaç Agirlar	UIP	1 378 517

Source: Antrakt

Distribution and Exhibition

In 2014 the Turkish cinema industry celebrated its 100th anniversary not only with international festival prizes, notably Nuri Bilge Ceylan's *Winter Sleep* winning the Palme d'Or in Cannes, but also by registering the highest box office growth in all of Europe. Admissions jumped by 21.8% from 50.4 to 61.4 million, the highest level in recent history. GBO even increased by 30% to TRY 655 millions. Box office growth was once more driven by the immense popularity of local comedy blockbusters. Led by the latest instalments of the *Recep Ivedik 4* and *Eyyvah Eyvah 3*, two franchises which sold 7.4 and 3.4 million tickets respectively, Turkish films accounted for all of the top 10 grossing films with a total of 11 local films selling more than 1 million tickets. On a cumulative level Turkish films took a record market share of 59% of total admissions. This is by far the highest national market share for any European country and left US films a market share of only 32%.

Like in Russia box office growth has also been boosted by the growing number of cinemas opening in newly constructed shopping malls. 240 new screens were opened in 2014, bringing the total screen base to 2 483. About 77% of the regular commercial cinema screens were equipped for digital projection. Turkey's exhibition and distribution markets are highly concentrated. Mars Cinema Group, the leading cinema chain achieved a market share of 52% in 2013. This was the highest concentration level among the ten largest European markets. The two leading distributors UIP and Warner Bros each took over 31% of total box office in 2014. Tiglon, formerly the leading local distributor with 26% market share in 2013, faced financial difficulties and ceased significant parts of its commercial activities.

Production and Funding

Stimulated by the box office success of local blockbusters and benefiting from public production support, Turkish feature film production volume exploded from only 16 feature films released in 2004 to a new record high of 108 films released in 2014.

The introduction of a new Cinema Law has been postponed several times but the Ministry hopes to pass it in 2015. According to information provided by the Ministry and SEYAP the new cinema law will allow a broadening and expansion of support activities including e.g. support for co-productions and a rebate on local production spend - up to 25% - for foreign films shot in Turkey.

Source: Antrakt, SE-YAP, OBS: The *Turkish film industry 2004-2013 (2014)*, DG Sinema

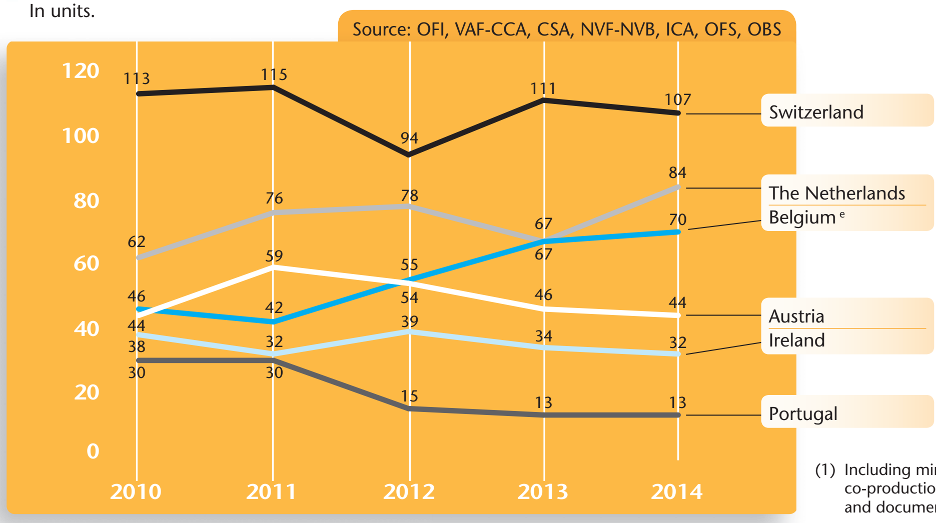
Other Western Europe

	Austria	Belgium	Ireland	Netherlands	Portugal	Switzerland
Population 2014 e (million)	8.5	11.2	4.6	16.8	10.4	8.1
GDP per capita 2014 e (USD)	51 183	47 164	51 159	52 249	21 748	84 344
Gross box office 2014 (M USD)	156.8	210.6	133.5	332.2	83.4	219.9
Admissions 2014 (million)	14.1	21.6	14.4	30.8	12.1	12.9
Average ticket price 2014 (USD)	11.1	9.8	9.3	10.8	6.9	17.0
Average admissions per capita 2014	1.7	1.9	3.1	1.8	1.2	1.6
Screens 2014 e	556	497 (1)	468	741 (2)	545	557
Digital screens 2014	553	515	468	861 (3)	434	546
Digital 3D screens 2014	320	171	236	442	236	287
National market shares 2014 e	4.6%	14.0%	7.1%	20.8%	4.8%	6.2%

(1) 2013 (2) Source: NFF (3) Source: MEDIA Salles

Number of feature films produced by selected Western European countries (1) | 2010-2014

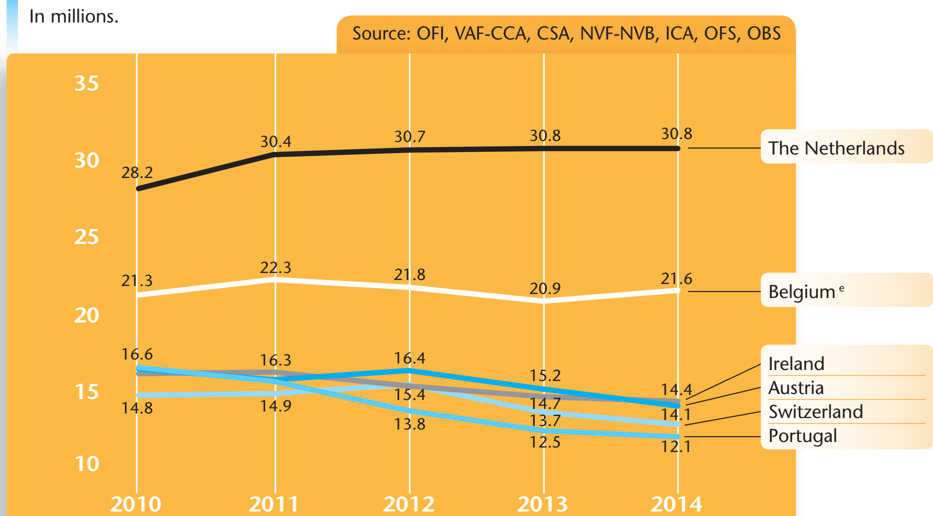
In units.



(1) Including minority co-productions and documentaries.

Admissions in selected Western European countries | 2010-2014

In millions.



Top 10 films by admissions in the Netherlands | 2014

	Original title	Country of origin	Director	Distributor	Admissions
1	Gooische Vrouwen II	NL	Will Koopman	Independent Films	1 183 660
2	The Hobbit: The Battle of the Five Armies	US/NZ inc	Peter Jackson	Warner Bros.	834 923
3	The Hunger Games: Mockingjay - P. 1	US	Francis Lawrence	Independent Films	673 805
4	The Wolf of Wall Street	US	Martin Scorsese	Dutch FilmWorks	670 755
5	Rio 2	US	Carlos Saldanha	Warner Bros./20th	580 222
6	Toscaanse bruiloft (A Tuscan Wedding)	NL	Johan Nijenhuis	A-Film	557 200
7	How to Train Your Dragon 2	US	Dean DeBlois	Warner Bros./20th	529 575
8	The Maze Runner	US/GB/CA	Wes Ball	Warner Bros./20th	508 679
9	Soof	NL	Antoinette Beumer	Independent Films	470 719
10	22 Jump Street	US	P. Lord, C. Miller	Universal	448 811

Source: MaccsBox - NVB & NVF

Top 10 films by admissions in Belgium | 2014 (1)

	Original title	Country of origin	Director	Distributor	Admissions
1	The Hunger Games: Mockingjay - P. 1	US	Francis Lawrence	Belga Film	615 626
2	Lucy	FR	Luc Besson	Belga Film	525 242
3	Qu'est-ce qu'on a fait au Bon Dieu ?	FR	Ph. de Chauveron	Cineart	420 342
4	Maleficent	US/GB inc	Robert Stromberg	Walt Disney	380 143
5	Divergent	US	Neil Burger	Belga Film	364 470
6	F.C. De Kampioenen: Kampioen zijn…	BE	Eric Wirix	Independent Films	337 397
7	Paddington	GB/FR	Paul King	Belga Film	323 259
8	Frozen	US	C. Buck, Jennifer Lee	Walt Disney	288 219
9	12 Years a Slave	US/GB	Steve McQueen	Belga Film	277 078
10	Guardians of the Galaxy	US	James Gunn	Walt Disney	275 353

(1) May not be comprehensive as based on voluntary distributor declarations.

Source: CCA, VAF / Distributors

Top 10 films by admissions in Austria | 2014

	Original title	Country of origin	Director	Distributor	Admissions
1	The Hobbit: The Battle of the Five Armies	US/NZ inc	Peter Jackson	Warner Bros.	519 721
2	How to Train Your Dragon 2	US	Dean DeBlois	Fox Int'l	409 971
3	The Hunger Games: Mockingjay - P. 1	US	Francis Lawrence	Constantin/Studio.	398 235
4	Wacken 3D	DE	Norbert Heitker	Thimfilm	367 174
5	The Wolf of Wall Street	US	Martin Scorsese	Universal	319 245
6	Rio 2	US	Carlos Saldanha	Fox Int'l	294 879
7	Transformers: Age of Extinction	US/CN	Michael Bay	Universal	283 327
8	Der letzte Mentsch (The Last Mentsch)	DE/CH/FR	Pierre-Henry Salfati	Thimfilm	257 560
9	Kvinden i buret (Keeper of Lost Causes)	DK/DE/SE	Mikkel Nørgaard	Luna Film	244 335
10	We Come as Friends	FR/AT	Hubert Sauper	Filmladen	232 495

Source: Austrian Film Institute (OFI), Rentrak

Top 10 films by admissions in Switzerland | 2014

	Original title	Country of origin	Director	Distributor	Admissions
1	Qu'est-ce qu'on a fait au Bon Dieu?	FR	Ph. de Chauveron	Frenetic Films	468 128
2	The Hobbit: The Battle of the Five Armies	US/NZ inc	Peter Jackson	Warner Bros.	426 010
3	The Wolf of Wall Street	US	Martin Scorsese	Universal Pictures	349 149
4	The Hunger Games: Mockingjay - P. 1	US	Francis Lawrence	Impuls Pictures	342 122
5	How to Train Your Dragon 2	US	Dean DeBlois	20th Century Fox	279 165
6	Rio 2	US	Carlos Saldanha	20th Century Fox	273 720
7	Lucy	FR	Luc Besson	Universal Pictures	255 419
8	Interstellar	US/GB	Christopher Nolan	Warner Bros.	220 743
9	The Grand Budapest Hotel	US/DE/GB	Wes Anderson	20th Century Fox	184 977
10	The Other Woman	US	Nick Cassavetes	20th Century Fox	181 431

Source: Office fédéral de la statistique (OFS)

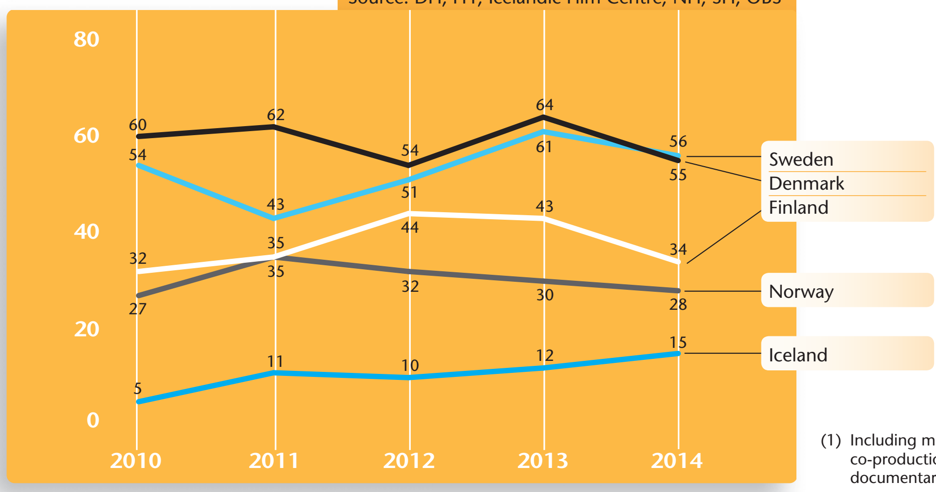
Nordic countries

	Denmark	Finland	Iceland	Norway	Sweden
Population 2014 e (million)	5.6	5.5	0.3	5.1	9.6
GDP per capita 2014 e (USD)	61 885	50 451	50 006	99 295	57 557
Gross box office 2014 (M USD)	176.8	95.2	12.8	172.4	241.8
Admissions 2014 (million)	12.2	7.3	1.3	11.1	16.3
Average ticket price 2014 (USD)	14.5	13.0	9.5	15.6	14.9
Average admissions per capita 2014	2.2	1.3	4.1	2.2	1.7
Screens 2014 e	416	294	40	425	765
Digital screens 2014	415	294	39	425	751
Digital 3D screens 2014	250	213	27	281	439
National market shares 2014 e	27.3%	28.1%	11.0%	24.4%	26.4%

Number of feature films produced by Nordic countries (1) | 2010-2014

In units.

Source: DFI, FFF, Icelandic Film Centre, NFI, SFI, OBS

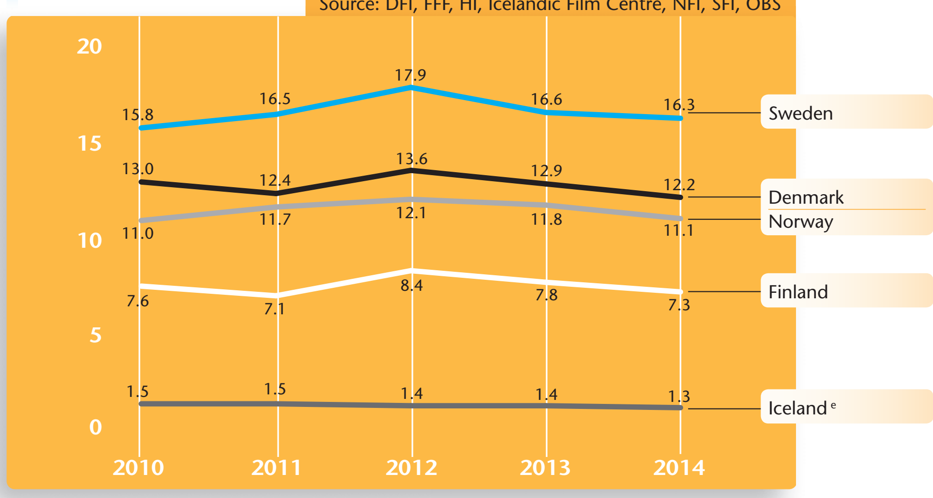


(1) Including minority co-productions and documentaries.

Admissions in Nordic countries | 2010-2014

In millions.

Source: DFI, FFF, HI, Icelandic Film Centre, NFI, SFI, OBS



Top 10 films by admissions in Sweden | 2014

	Original title	Country of origin	Director	Distributor	Admissions
1	Hundraåringen som klev ut genom…	SE	Felix Herngren	Walt Disney	1 143 881
2	The Hobbit: The Battle of the Five Armies	US/NZ inc	Peter Jackson	SF Film	732 819
3	Frozen	US	C. Buck, Jennifer Lee	Walt Disney	670 454
4	The Hunger Games: Mockingjay - P. 1	US	Francis Lawrence	Nordisk Film	534 480
5	How to Train Your Dragon 2	US	Dean DeBlois	20th Century Fox	386 725
6	Interstellar	US/GB	Christopher Nolan	Warner	355 556
7	Bamse och tjuvstaden (Bamse and the…)	SE	Christian Ryltenius	Nordisk Film	321 664
8	Guardians of the Galaxy	US	James Gunn	Walt Disney	312 952
9	Sune i fjällen (The Anderssons Rock…)	SE	Gustaf Åkerblom	Nordisk Film	311 945
10	The Wolf of Wall Street	US	Martin Scorsese	UIP/Universal	295 078

Source: Swedish Film Institute

Top 10 films by admissions in Denmark | 2014

	Original title	Country of origin	Director	Distributor	Admissions
1	Fasandræberne (The Absent One)	DK	Mikkel Nørgaard	Nordisk Film Distr.	764 002
2	Klassefesten 2: Begravelsen (The Reunion…)	DK	Mikkel Serup	Nordisk Film Distr.	604 364
3	The Hobbit: The Battle of the Five Armies	US/NZ inc	Peter Jackson	Filmcompagniet	485 425
4	The Hunger Games: Mockingjay - P. 1	US	Francis Lawrence	Nordisk Film Distr.	310 076
5	How to Train Your Dragon 2	US	Dean DeBlois	Filmcompagniet	306 049
6	Frozen	US	C. Buck, Jennifer Lee	Walt Disney	290 852
7	Far til fire - Onkel Sofus vender tilbage	DK	Giacomo Campeotto	Nordisk Film Distr.	286 444
8	Kapgang (Speed Walking)	DK	Niels Arden Oplev	Nordisk Film Distr.	249 489
9	The Wolf of Wall Street	US	Martin Scorsese	UIP	246 373
10	Stille hjerte (Silent Heart)	DK	Bille August	Filmcompagniet	236 818

Source: Danmarks Statistik, Danish Film Institute

Top 10 films by admissions in Norway | 2014

	Original title	Country of origin	Director	Distributor	Admissions
1	The Hobbit: The Battle of the Five Armies	US/NZ inc	Peter Jackson	SF Norway	483 045
2	Børning (Burning)	NO	Hallvard Bræin	SF Norway	382 104
3	Doktor Proktors prompepulver (Doctor…)	NO	Arild Fröhlich	Nordisk Film Distr.	377 840
4	Kaptein Sabeltann og skatten i Lama…	NO	Andersen, Gamlem	Walt Disney	365 900
5	Karsten og Petras vidunderlige jul	NO	Arne Lindtner Næss	SF Norway	321 997
6	The Hunger Games: Mockingjay - Part 1	US	Francis Lawrence	Nordisk Film Distr.	318 364
7	Frozen	US	C. Buck, Jennifer Lee	Walt Disney	291 286
8	How to Train Your Dragon 2	US	Dean DeBlois	20th Century Fox	262 936
9	Operasjon Arktis (Operation Arctic)	NO	Grethe Bøe-Waal	Nordisk Film Distr.	258 623
10	The Wolf of Wall Street	US	Martin Scorsese	UIP	225 681

Source: Film og Kino

Top 10 films by admissions in Finland | 2014

	Original title	Country of origin	Director	Distributor	Admissions
1	Mielensäpahoittaja (The Grump)	FI	Dome Karukoski	Nordisk	457 334
2	The Hobbit: The Battle of the Five Armies	US/NZ inc	Peter Jackson	FS Film	359 119
3	Risto Räppääjä ja liukas Lennart	FI	Timo Koivusalo	Walt Disney	265 615
4	Kummeli V	FI	Aleksi Mäkelä	Nordisk	178 345
5	Onneli ja Anneli (Jill and Joy)	FI	Saara Cantell	Nordisk	177 017
6	Muumit Rivieralla (Moomins on the Riviera)	FI/FR	X. Picard, H. Hemilä	Nordisk	174 193
7	The Hunger Games: Mockingjay - Part 1	US	Francis Lawrence	Nordisk	172 018
8	Rio 2	US	Carlos Saldanha	FS Film	161 590
9	Interstellar	US/GB	Christopher Nolan	FS Film	141 774
10	The Lego Movie	US/AU/DK	P. Lord, C. Miller	FS Film	138 628

Source: Finnish Film Foundation

Baltics and Central Europe

	Czech Republic	Estonia	Hungary	Latvia	Lithuania	Slovakia	Slovenia
Population 2014 e (million)	10.5	1.3	9.9	2.0	2.9	5.4	2.1
GDP per capita 2014 e (USD)	18 985	19 777	13 154	16 145	16 476	18 480	24 211
Gross box office 2014 (M USD)	70.6	17.0	62.8	19.3	19.1	27.7	12.7
Admissions 2014 (million)	11.6	2.6	11.0	2.3	3.2	4.1	1.9
Average ticket price 2014 (USD)	6.1	6.5	5.7	8.3	5.9	6.7	6.6
Average admissions per capita 2014	1.1	2.0	1.1	1.2	1.1	0.8	0.9
Screens 2014 e	841	44	340	64	84	168 (1)	106
Digital screens 2014	449	38	299	44	52	138	84
Digital 3D screens 2014	280	26	181	31	25	126	35
Films produced 2014	61	19	15	24	14	27	13
National market shares 2014 e	23.8%	4.7%	3.7%	7.6%	23.1%	5.7%	5.7%

(1) 2013

Top 10 films by admissions in the Czech Republic | 2014

	Original title	Country of origin	Director	Distributor	Admissions
1	Tri bratri (Three Brothers)	CZ/DK	Jan Sverák	Bioscop	661 378
2	The Hobbit: The Battle of the Five Armies	US/NZ inc	Peter Jackson	Warner Bros.	566 694
3	How to Train Your Dragon 2	US	Dean DeBlois	CinemArt	423 903
4	The Wolf of Wall Street	US	Martin Scorsese	Bontonfilm	297 510
5	Rio 2	US	Carlos Saldanha	CinemArt	257 765
6	Babovresky 2	CZ	Zdenek Troska	Falcon	245 494
7	Nezné vlny (Tender Waves)	CZ	Jirí Vejdelek	Falcon	232 717
8	Interstellar	US/GB	Christopher Nolan	Warner Bros.	231 241
9	Penguins of Madagascar	US	E. Darnell, S. J. Smith	CinemArt	225 767
10	Transformers: Age of Extinction	US/CN	Michael Bay	CinemArt	214 466

Source: Czech State Cinematography Fund, Unie Filmovvych Distributoru

Top 10 films by admissions in Hungary | 2014

	Original title	Country of origin	Director	Distributor	Admissions
1	How to Train Your Dragon 2	US	Dean DeBlois	Intercom	380 716
2	The Wolf of Wall Street	US	Martin Scorsese	ProVideo	378 157
3	The Hobbit: The Battle of the Five Armies	US/NZ inc	Peter Jackson	Forum-Hungary	313 592
4	Guardians of the Galaxy	US	James Gunn	Forum-Hungary	281 965
5	Transformers: Age of Extinction	US/CN	Michael Bay	UIP-Dunafilm	267 159
6	Interstellar	US/GB	Christopher Nolan	Intercom	260 107
7	Rio 2	US	Carlos Saldanha	Intercom	257 491
8	The Hunger Games: Mockingjay - Part 1	US	Francis Lawrence	Forum-Hungary	242 191
9	Lucy	FR	Luc Besson	UIP-Dunafilm	217 390
10	Penguins of Madagascar	US	E. Darnell, S. J. Smith	Intercom	216 830

Source: National Film Office

Top 10 films by admissions in Slovakia | 2014

	Original title	Country of origin	Director	Distributor	Admissions
1	How to Train Your Dragon 2	US	Dean DeBlois	Barracuda Movie	171 335
2	The Hobbit: The Battle of the Five Armies	US/NZ inc	Peter Jackson	Continental Film	154 380
3	38	SK	L. Zednikovic, D. Dangl	Itafilm	113 930
4	Rio 2	US	Carlos Saldanha	Barracuda Movie	112 207
5	Dedictví aneb Kurvaseneríká	CZ	Robert Sedlácek	Garfield Film	109 153
6	Interstellar	US/GB	Christopher Nolan	Continental Film	103 548
7	The Wolf of Wall Street	US	Martin Scorsese	TatraFilm/Bontonfilm	97 787
8	The Hunger Games: Mockingjay - Part 1	US	Francis Lawrence	Forum Film Slovakia	94 606
9	The Lego Movie	US/AU/DK	P. Lord, C. Miller	Continental Film	83 618
10	Frozen	US	Chris Buck, Jennifer Lee	Saturn Entertainment	76 886

Source: Slovak Film Institute, UFD

South-Eastern Europe

	BA (2)	Bulgaria	Croatia	Cyprus	Greece	ME (3)	FYROM (4)	Romania
Population 2014 e (million)	3.8	7.2	4.2	0.9	11.0	0.6	2.1	19.9
GDP per capita 2014 e (USD)	4 905	7 648	13 624	23 955	22 318	5 262	7 466	10 161
Gross box office 2014 (M USD)	3.1	27.9	19.3	6.8	77.1	1.3	1.4	55.4
Admissions 2014 (million)	0.9	4.9	3.8	0.7	9.0	0.3	0.4	10.2
Average ticket price 2014 (USD)	3.3	5.7	5.1	9.8	8.6	5.1	3.8	5.4
Average admissions per capita 2013	0.2	0.7	0.9	0.8	0.8	0.4	0.2	0.5
Screens 2014 e	31	196	154	35	482	~	36 (1)	292
Digital screens 2014	22	195	140	35	181	~	~	263
Digital 3D screens 2014	~	149	84	20	96	~	~	142
Films produced 2014	11 (1)	13	19	3	40 (1)	5	11	47
National market shares 2014 e	1.0%	3.5%	2.5%	~	3.5%	~	9.8%	2.17%

(1) 2013 (2) Bosnia-Herzegovina (3) Montenegro (4) Former Yugoslav Republic of Macedonia

Top 10 films by admissions in Greece | 2014

	Original title	Country of origin	Director	Distributor	Admissions
1	300: Rise of an Empire	US	Noam Murro	Village	408 000
2	The Hobbit: The Battle of the Five Armies	US/NZ inc	Peter Jackson	Tanweer	318 102
3	Gone Girl	US	David Fincher	Odeon	276 932
4	Interstellar	US/GB	Christopher Nolan	Village	229 170
5	Noah	US	Darren Aronofsky	UIP	187 337
6	Maleficent	US/GB inc	Robert Stromberg	Feelgood	164 394
7	The Wolf of Wall Street	US	Martin Scorsese	Spentzos Film	160 005
8	Lucy	FR	Luc Besson	UIP	141 512
9	Annabelle	US	John R. Leonetti	Village	138 663
10	The Amazing Spider-Man 2	US	Marc Webb	Feelgood	137 439

Source: Greek Film Centre

Top 10 films by admissions in Romania | 2014

	Original title	Country of origin	Director	Distributor	Admissions
1	The Hobbit: The Battle of the Five Armies	US/NZ inc	Peter Jackson	Forum Film Romania	361 867
2	Interstellar	US/GB	Christopher Nolan	Freeman Entertain.	295 132
3	The Wolf of Wall Street	US	Martin Scorsese	Media Pro Distrib.	294 470
4	300: Rise of an Empire	US	Noam Murro	Media Pro Distrib.	265 526
5	Lucy	FR	Luc Besson	Ro-Image 2000	222 634
6	Noah	US	Darren Aronofsky	Ro-Image 2000	216 046
7	Frozen	US	C. Buck, J. Lee	Forum Film Romania	204 650
8	Dracula Untold	US/JP	Gary Shore	Ro-Image 2000	203 594
9	Guardians of the Galaxy	US	James Gunn	Forum Film Romania	182 749
10	Maleficent	US/GB inc	Robert Stromberg	Forum Film Romania	176 900

Source: Centrul National al Cinematografiei

Top 10 films by admissions in Bulgaria | 2014

	Original title	Country of origin	Director	Distributor	Admissions
1	Lucy	FR	Luc Besson	Forum Film	205 558
2	The Hobbit: The Battle of the Five Armies	US/NZ inc	Peter Jackson	Forum Film	176 142
3	Noah	US	Darren Aronofsky	Forum Film	172 706
4	Dracula Untold	US/JP	Gary Shore	–	160 284
5	Maleficent	US/GB inc	Robert Stromberg	Forum Film	146 994
6	Penguins of Madagascar	US	E. Darnell, S. J. Smith	Aleksandra	136 527
7	How to Train Your Dragon 2	US	Dean DeBlois	Aleksandra	134 062
8	Hercules	US	Brett Ratner	Forum Film	130 951
9	Rio 2	US	Carlos Saldanha	Aleksandra	128 092
10	The Hunger Games: Mockingjay - Part 1	US	Francis Lawrence	Forum Film	120 381

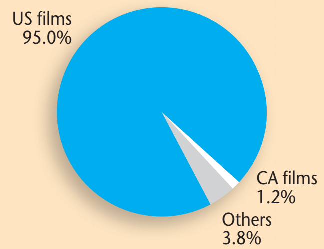
Source: Bulgarian National Film Center

North America

	North America	US	Canada
Population 2014 e (million)	354.0	318.5	35.5
GDP per capita 2014 e (USD)	54 267	54 678.2	50 576.5
Gross box office 2014 e (M USD)	10 400	9 877 (1)	1 009.6 (1)
Admissions 2014 e (million)	1 270	1 215 (1)	125 (1)
Average ticket price 2014 e (USD)	8.2	8.1 (1)	8.1 (1)
Average admissions per capita 2014 e	3.6	3.8 (1)	3.5 (1)
Screens 2014 e	43 265	40 158	3 107
Digital screens 2014 e	41 518	38 411	3 107
Digital 3D screens 2014 e	16 146	14 783	1 363

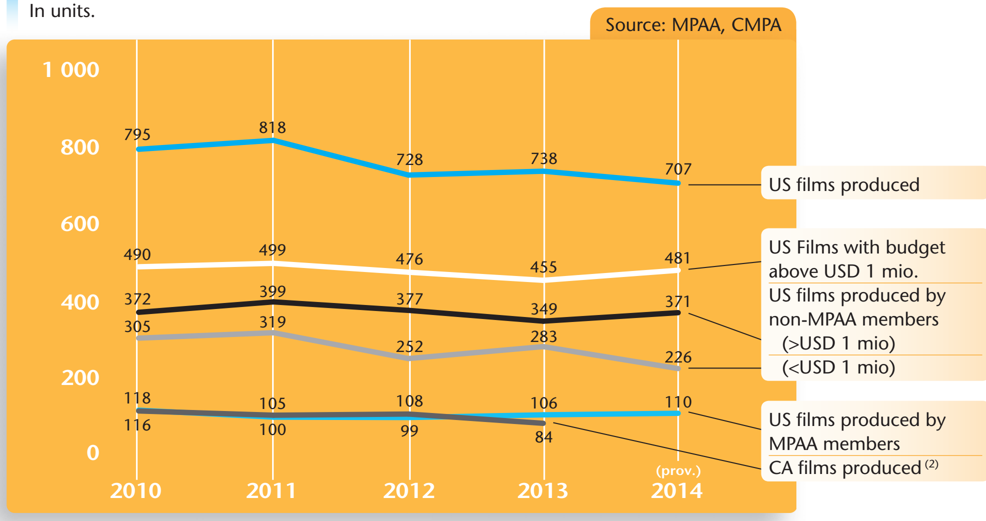
(1) 2014

Market shares 2014 e



Number of US (1) and Canadian feature films produced | 2010-2014

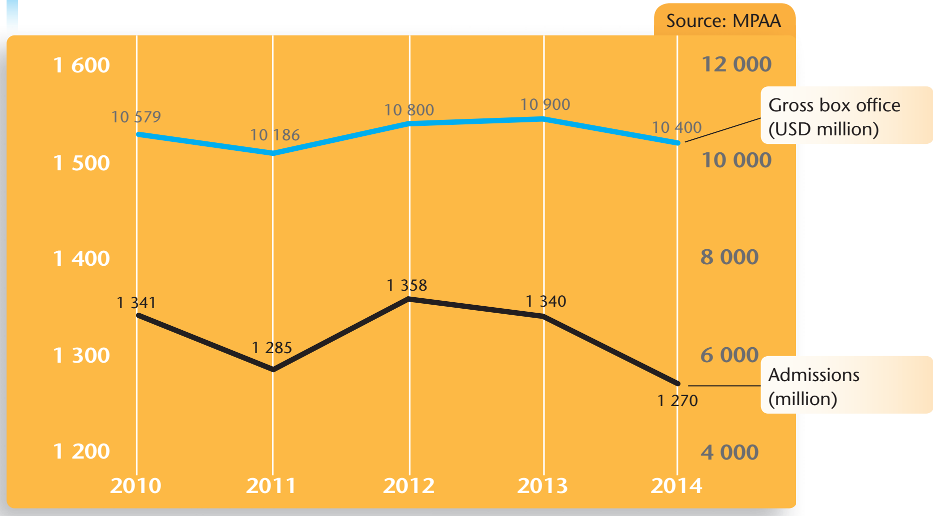
In units.



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

(2) Based on fiscal year from April of the year indicated to March of the following year.

Admissions and gross box office in the US & Canada | 2010-2014



Top 20 films by admissions in North America | 2014 [e]

Estimated admissions based on average ticket price of USD 8.19.

	Original title	Country of origin	Director	Distributor	Admissions
1	Guardians of the Galaxy	US	James Gunn	Walt Disney Studios	40 647 575
2	The Hunger Games: Mockingjay part 1 (1)	US	Francis Lawrence	Lionsgate	38 256 664
3	Captain America: The Winter Soldier	US	A. Russo, Joe Russo	Walt Disney Studios	31 721 495
4	The Lego Movie	US/AU/DK	Phil Lord, C. Miller	Warner Bros.	31 476 546
5	Transformers: Age of Extinction	US/CN	Michael Bay	Paramount Pictures	29 971 887
6	Maleficent	US/GB inc	Robert Stromberg	Walt Disney Studios	29 479 921
7	X-Men: Days of Future Past	US	Bryan Singer	20th Century Fox	28 565 418
8	Dawn of the Planet of the Apes	US	Matt Reeves	20th Century Fox	25 466 625
9	Big Hero 6 (1)	US	C. Williams, Don Hall	Walt Disney Studios	24 981 957
10	The Amazing Spider-Man 2	US	Marc Webb	Sony Pictures	24 771 586
11	Godzilla	US/JP	Gareth Edwards	Warner Bros.	24 505 635
12	22 Jump Street	US	Phil Lord, C. Miller	Sony Pictures	23 411 782
13	Teenage Mutant Ninja Turtles	US	Jonathan Liebesman	Paramount Pictures	23 349 042
14	The Hobbit: The Battle of the Five Armies	US/NZ inc	Peter Jackson	Warner Bros.	23 144 163
15	Interstellar (1)	US/GB	Christopher Nolan	Paramount Pictures	21 906 157
16	How to Train Your Dragon 2	US	Dean DeBlois	20th Century Fox	21 614 780
17	Gone Girl (1)	US	David Fincher	20th Century Fox	20 284 915
18	Divergent	US	Neil Burger	Lionsgate	18 433 060
19	Neighbors	US	Nicholas Stoller	Universal Pictures	18 327 907
20	Frozen (2)	US	C. Buck, Jennifer Lee	Walt Disney Studios	16 808 616

(1) Films still grossing in 2015. (2) Film released in 2013.

Source: *Variety*, OBS

Distribution and exhibition

North American cinema attendance went down 5.2% from the previous year, with 1.27 billion admissions in 2014. The marginal growth of the average ticket to USD 8.19 could not make up for the attendance drop and GBO decreased by 4.6% on the previous year. Most of this decrease was due to the comparatively poor performance of the blockbusters at the top of the box office list; 2014 saw no film exceeding the 40 million admissions threshold, compared with 3 productions in 2013. Nonetheless, the top 20 films at the box office continued to represent more than 40% of total GBO despite grossing USD 400 million less than in the previous year.

450 new screens were unveiled in the territory (a 1% increase), while digital screens grew by 4.5% - reaching 96% digital penetration at the end of 2014. Equally, a meagre increase in 3D screens by 1% confirms that the 3D market has reached its maturity; an argument supported by the fact that the market share of 3D films shrank for the first time since the system was launched, decreasing two percentage points to 14%.

Production and funding

707 films were produced in the United States in 2014, 31 films less than in the previous year and one of the lowest figures in recent times. However, this was due to a drastic drop of low-budget productions (under USD 1 million), which nevertheless continue to represent a third of the total production volume of the country. In turn, American studios reached a peak with respect to the last 5 years with 110 films produced – 4 more than in 2013. In addition, 2014 saw several tax credits extended, improved or about to enter into force around the country. Canada produced 84 films - the lowest volume since 2006, but registered a decade high level of production investment (CAD 376 million), mainly due to the sharp increase of the average production budget of the 50 English-language films produced in the country. The production level of French speaking films remained constant while their average budget decreased by 16%.

Cyber-security became a hot topic for American studios after the hacking of Sony Pictures' computers, allegedly over the imminent release of political satire *The Interview*. After calling off the planned major release, Sony decided to distribute the film, but most theatre chains refused to screen it over security concerns and it only got a low-profile release.

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

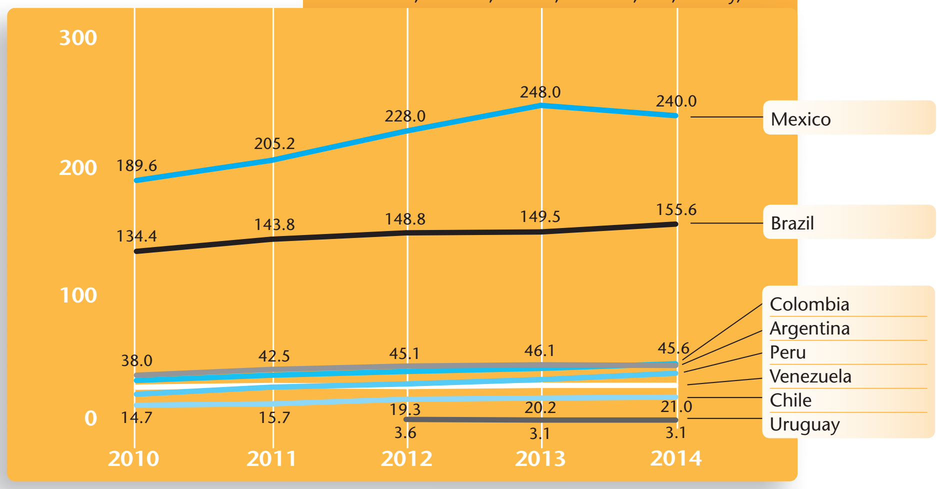
Latin America

	Argentina	Brazil	Chile	Colombia	Mexico	Peru	Uruguay	Venezuela
Population 2014 (million)	42.0	202.8	17.7	47.7	119.6	31.4	3.4	30.5
GDP per capita 2014 (M USD)	12 777.5	11 067.5	14 911.4	8 394.2	10 836.7	6 625.1	16 332.8	6 869.6
Gross box office 2014 (M USD) e	234.9	825.1	111.6	192.5	840.0 e	140.2	17.1	59.0
Admissions 2014 (million)	45.6	155.6	21.0	46.9	240.0 e	39.5	3.1	30.1
Average ticket price 2014 (USD)	5.2	5.3	5.3	4.1	3.5	3.5	5.5	2.0
Average admissions per capita 2014 e	1.1	0.8	1.2	1.0	2.0	1.3	0.9	1.0
Screens 2014	867	2830	389	879	5678	555	127	469
Digital screens 2014 e	432	1770	146	846	5113	~	66	235
Digital 3D screens 2014 e	274	1012	81	414	3565	~	32	112
National market shares 2014	17.8%	12.3%	2.8%	4.6%	10.0%	9.7%	2.3%	14.9%

Admissions in Latin America | 2010-2014

In millions.

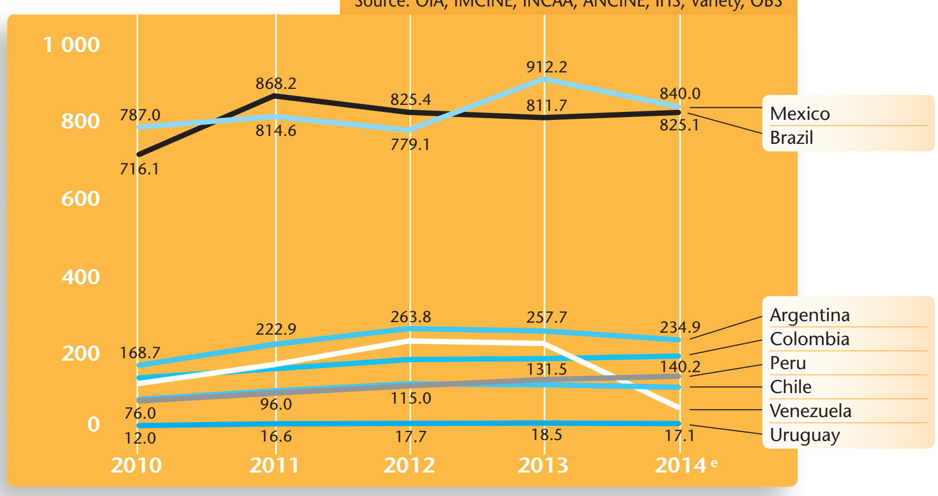
Source: OIA, IMCINE, INCAA, ANCINE, IHS, Variety, OBS



Gross box office in Latin America | 2010-2014 e

In USD millions.

Source: OIA, IMCINE, INCAA, ANCINE, IHS, Variety, OBS



Overview

Attendance to theatres in the 8 countries analysed remained quite stable as a whole, with a 1.2% increase on 2013, well in line with the general economic deceleration of the region. However, admissions to local productions decreased drastically by 16.9%, rather due to the outstanding results of the precedent year. In fact, the 62.4 million admissions to domestic productions in the territories tracked are well above the levels seen in the years up until 2012.

In terms of production, the region also seems to have matured after several years of remarkable growth. Cumulative production volume dropped by 2.5% to 477 features in 2014; a volume, nonetheless, double as high as in 2006.

2014 also saw the region catching up with digitisation. According to MPAA figures, Latin America was the most delayed world territory with respect to digital roll-out in 2013, with a 68.7% digital penetration. With 2 304 new digital screens in 2014, the region reached 86.4% digital screen penetration rate, rather close to the 89.8% world average. In turn, the total number of screens remained stable, with less than 500 new screens unveiled in 2014.

However, Latin America cannot be described as a homogenous territory. In fact, two opposing trends can be observed; the main markets and industries – Argentina, Brazil and Mexico, which were the locomotive of the region up until now, are decelerating, whereas other minor territories such as Colombia, Chile or Peru are experiencing a sharp growth by most indicators.

Mexico

Mexican theatres experienced a 3.2% decrease in attendance. Local productions took a market share of 10%. This is only two percentage points lower than the record share of 12% in 2013 and well above the national market shares achieved in the preceding three decades. Although no local production was among the top ten grossing films, eight Mexican films went beyond the one-million admissions threshold in 2014. Political satire *The Perfect Dictatorship,* romantic comedy *Cásese quien pueda* and *Cantinflas*, a biopic about the iconic Mexcian actor of the same name, were the best-performing local titles.

Never since the golden years of Mexican cinema had the country produced so many films – 130 features in 2014. Furthermore, 117 local productions had a theatrical release outside Mexico. In an effort to increase the access to local cinema, three digital platforms were implemented: *Plataforma Cine Mexico*, *Ibermedia Digital* and *Filminlatino*.

Brazil

Although 2014 was the seventh year of growth by admissions in a row (155.6 million in 2014), the times of double-digit growth at the Brazilian box office in recent times seem to have come to an end. In turn, the national market share dropped drastically, down to 12.3%. With 2.1 million admissions, political comedy *The Honest Candidate* was the highest-grossing Brazilian production of the year.

ANCINE signed an agreement with distributors and exhibitors to prevent mega releases in order to foster more diversity at local theatres. The agreement seems to be in exchange of public support for the digitisation of theatres – Brazil has a 62.5% digital penetration – and certainly won't harm local productions. Another measure introduced to foster a higher market share for Brazilian films was a subsidy for the exhibition of local productions during some periods in November.

Argentina

Attendance figures have been quite stable over the last 4 years, with a marginal decrease of 1%, down to 45.6 million admissions in 2014. However, there was a remarkable hike of the national market share (17.8% in 2014), especially thanks to Oscar nominee Argentinean film *Wild Tales,* which obtained more than 40% of the box offce for local films and topped the box office list. Another local production, *Bañeros 4: Los Rompeolas* made it to a top 10 box office list mainly made of American blockbusters.

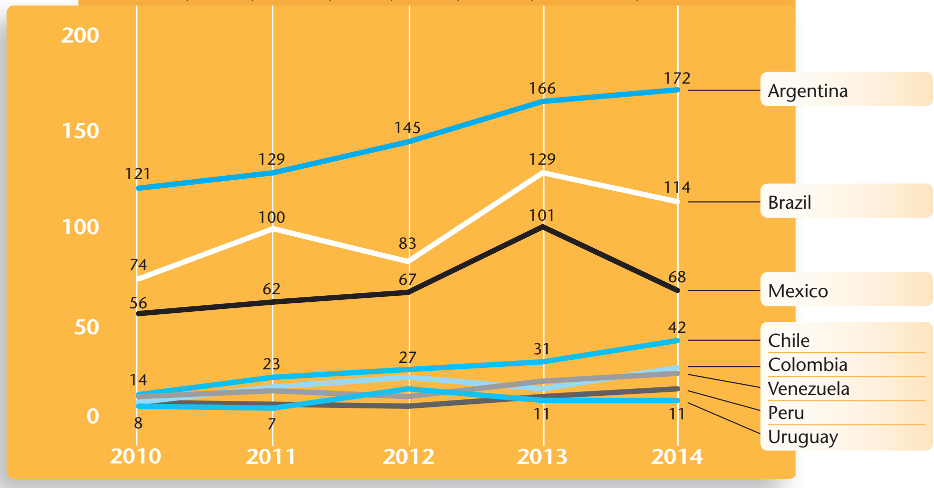
With 172 films produced, Argentina broke again all production volume records of the century. However, when it comes to digitization, the country is well behind the regional average penetration rate, with a meagre 49.8%. 2014 also saw the agreement between Argentina and Chile to create a scheme to finance bi-national co-productions.

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

Number of national feature films released in Latin America | 2010-2014 e

In units.

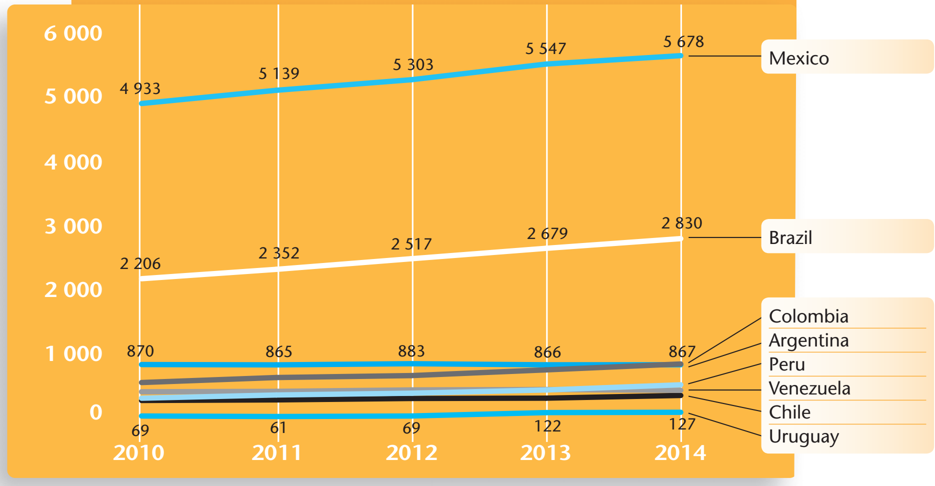
Source: OIA, INCAA, ANCINE, CNCA, DCMC, IMCINE, CONACINE, ICAU and CNAC



Number of screens in Latin America | 2010-2014

In units.

Source: OIA, INCAA, ANCINE, CNCA, DCMC, IMCINE, CONACINE, ICAU and CNAC



Top 10 films by admissions in Argentina | 2014

	Original title	Country of origin	Director	Admissions
1	Relatos Salvajes (Wild Tales)	AR/ES	Damian Szifron	3 454 410
2	Frozen	US	Chris Buck, Jennifer Lee	1 937 760
3	Maleficent	US/GB inc	Robert Stromberg	1 888 140
4	Rio 2	US	Carlos Saldanha	1 709 816
5	Transformers: Age of Extinction	US/CN	Michael Bay	1 524 363
6	How to Train Your Dragon 2	US	Dean DeBlois	1 100 197
7	The Hunger Games: Mockingjay - Part 1	US	Francis Lawrence	978 613
8	Dawn of the Planet of the Apes	US	Matt Reeves	961 813
9	Bañeros 4: Los rompeolas	AR	Rodolfo Ledo	933 062
10	X-Men: Days of Future Past	US	Bryan Singer	833 510

Source: OIA & INCAA

Top 10 films by admissions in Brazil | 2014

	Original title	Country of origin	Director	Admissions
1	The Fault in Our Stars	US	Josh Boone	6 165 705
2	Maleficent	US/GB inc	Robert Stromberg	5 755 409
3	Rio 2	US	Carlos Saldanha	5 212 811
4	X-Men: Days of Future Past	US	Bryan Singer	4 923 664
5	Noah	US	Darren Aronofsky	4 887 284
6	The Hunger Games: Mockingjay - Part 1	US	Francis Lawrence	4 755 582
7	Captain America: The Winter Soldier	US	Anthony Russo, Joe Russo	4 621 101
8	How to Train Your Dragon 2	US	Dean DeBlois	4 610 275
9	Transformers: Age of Extinction	US/CN	Michael Bay	4 587 292
10	Dawn of the Planet of the Apes	US	Matt Reeves	4 103 629

Source: OIA & Ancine

Top 10 films by admissions in Chile | 2014

	Original title	Country of origin	Director	Admissions
1	How to Train Your Dragon 2	US	Dean DeBlois	1 046 274
2	Transformers: Age of Extinction	US/CN	Michael Bay	1 002 840
3	Rio 2	US	Carlos Saldanha	949 643
4	Frozen	US	Chris Buck, Jennifer Lee	933 330
5	Annabelle	US	John R. Leonetti	891 449
6	Dawn of the Planet of the Apes	US	Matt Reeves	718 104
7	The Hunger Games: Mockingjay - Part 1	US	Francis Lawrence	672 682
8	Maleficent	US/GB inc	Robert Stromberg	667 798
9	The Fault in Our Stars	US	Josh Boone	665 757
10	X-Men: Days of Future Past	US	Bryan Singer	510 582

Source: OIA & CNCA

Top 10 films by admissions in Mexico | 2014

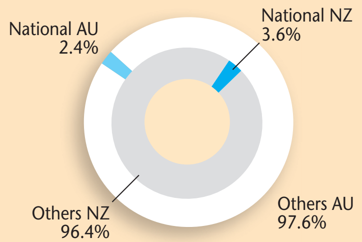
	Original title	Country of origin	Director	Admissions
1	Maleficent	US/GB inc	Robert Stromberg	12 189 931
2	Rio 2	US	Carlos Saldanha	9 125 799
3	Transformers: Age of Extinction	US/CN	Michael Bay	8 578 896
4	The Amazing Spider-Man 2	US	Marc Webb	7 476 818
5	Captain America: The Winter Soldier	US	Anthony Russo, Joe Russo	7 076 958
6	The Hunger Games: Mockingjay - Part 1	US	Francis Lawrence	6 676 077
7	Dawn of the Planet of the Apes	US	Matt Reeves	6 300 638
8	X-Men: Days of Future Past	US	Bryan Singer	6 261 641
9	Annabelle	US	John R. Leonetti	6 026 014
10	Guardians of the Galaxy	US	James Gunn	5 471 623

Source: OIA & IMCINE

Australia and New Zealand

	Australia	New Zealand
Population 2014 e (million)	23.6	4.5
GDP per capita 2014 e (USD)	62 822.1	44 298.8
Gross box office 2014 (M USD)	872.79	141.61
Admissions 2014 (million)	78.6	14.9
Average ticket price 2014 (USD)	11.1	9.5
Average admissions per capita 2014	3.3	3.3
Screens 2014	2 041	408
Digital screens 2014	1 160	408
Digital 3D screens 2014	918	178

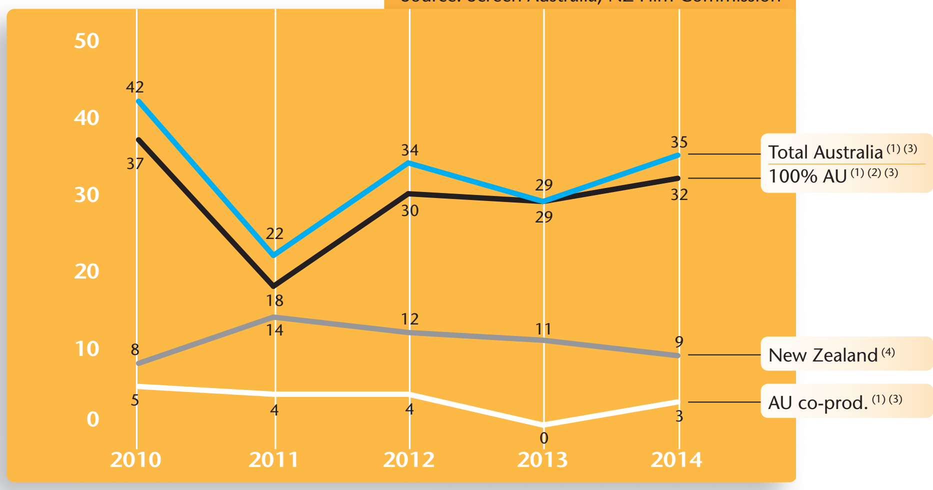
Market shares 2014 e



Number of Australian and New Zealand feature films produced | 2010-2014

In units.

Source: Screen Australia, NZ Film Commission



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

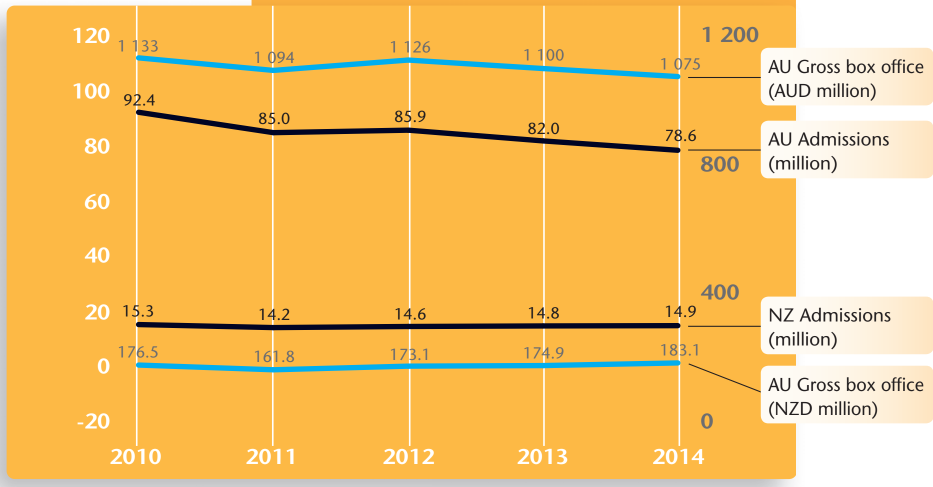
(2) Includes films under Australian creative control that were 100% foreign financed.

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

(4) Films released.

Admissions and gross box office | 2010-2014

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



Top 10 films by admissions in Australia | 2014 e

Estimated admissions based on average ticket price of AUD 13.7.

	Original title	Country of origin	Director	Distributor	Admissions e
1	The Hunger Games: Mockingjay - P. 1	US	Francis Lawrence	Roadshow	2 392 690
2	The Lego Movie	US/AU/DK	Phil Lord, C. Miller	Roadshow	2 177 698
3	Transformers: Age of Extinction	US/CN	Michael Bay	Paramount	1 967 759
4	Gone Girl	US	David Fincher	Fox	1 960 824
5	How to Train Your Dragon 2	US	Dean DeBlois	Fox	1 954 542
6	Guardians of the Galaxy	US	James Gunn	Walt Disney	1 951 816
7	Frozen	US	Chris Buck, Jennifer Lee	Walt Disney	1 874 027
8	The Wolf of Wall Street	US	Martin Scorsese	Roadshow	1 703 026
9	22 Jump Street	US	Phil Lord, C. Miller	Sony Pictures	1 664 096
10	X-Men: Days of Future Past	US	Bryan Singer	Fox	1 652 539

Source: MPDAA

Top 10 films by admissions in New Zealand | 2014 e

Estimated admissions based on average ticket price of NZD 12.2.

	Original title	Country of origin	Director	Distributor	Admissions e (2)
1	The Hobbit: The Battle of the Five… (2)	US/NZ inc	Peter Jackson	Warner Bros	504 707
2	The Hunger Games: Mockingjay - P. 1	US	Francis Lawrence	Roadshow	481 575
3	Transformers: Age of Extinction	US/CN	Michael Bay	Paramount	440 743
4	Frozen	US	Chris Buck, Jennifer Lee	Walt Disney	418 081
5	Guardians of the Galaxy	US	James Gunn	Walt Disney	372 394
6	How to Train Your Dragon 2	US	Dean DeBlois	20th Cent. Fox	344 624
7	The Lego Movie	US/AU/DK	Phil Lord, C. Miller	Roadshow	332 374
8	Dawn of the Planet of the Apes	US	Matt Reeves	20th Cent. Fox	304 791
9	X-Men: Days of Future Past	US/GB	Bryan Singer	20th Cent. Fox	303 139
10	Philomena	GB/US/FR	Stephen Frears	eOne/Rialto	289 765

(1) Lifetime admissions as at 31st December 2014. (2) Released in December 2014.

Source: MPDA

Distribution and exhibition

In 2014, Australia and New Zealand confirmed their respective theatrical attendance trends over the last four years; downwards in the former, with 78.6 million admissions (4.1% down) and upwards in the latter, with 14.9 million admissions (1.3% up), while average ticket prices went up in both countries. New Zealand completed the digital roll-out with a total of 408 screens and 44% 3D penetration in 2014, whereas the Australian stock hardly changed compared to 2013, with 2041 screens and 57% digital penetration. Furthermore, Hoyts, the second largest exhibition chain in the region, was acquired by Chinese group ID Leisure Ventures.

No local production ranked in the top 10 box office list by admissions in either country. However, New Zealand-shot US production *The Hobbit: The Battle of the Five Armies* made its way right to the top after its release in December. Russell Crowe's directorial debut *Water Diviner* became the highest-grossing Australian film of the year. Hollywood blockbusters took the lion's share of the box office in both countries, with a meagre national market share for local films of 2.4% in Australia and 3.6% in New Zealand.

Production and funding

The production volume in both countries has been quite stable in recent years, with 35 films in Australia and 9 in New Zealand in 2014. Average Australian production budgets remained steady. Although most domestic films had a budget below AUD 6 million, five productions (two of them international co-productions) went over AUD 10 millions.

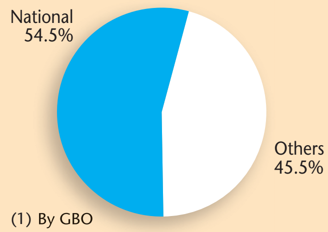
Amidst Government plans to change the current Copyright Act, Australia developed a new industry code to fight copyright infringement, which should be operational by mid-2015. In turn, the New Zealand government introduced a change in production incentives – the New Zealand Screen Production Grant (NZSPG) which replaced the former Screen Production Incentive Fund, with the goal of developing larger productions and supporting medium and larger scale New Zealand cultural films.

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

People's Republic of China

Population 2014 [e]	1 367.5 million
GDP per capita 2014 [e]	7 572.4 USD
Gross box office 2014 [e]	29.64 bn CNY (4.821 bn USD)
Admissions 2014 [e]	830 million
Average ticket price 2014 [e]	35.7 CNY (5.8 USD)
Average admissions per capita 2014 [e]	0.6
Screens 2013 I 2014 [e]	18 195 I 24 607
Digital screens 2013 I 2014 [e]	17 526 I 24 607
Digital 3D screens 2013 I 2014 [e]	11 810 I 21 176

Market shares 2014 [1]

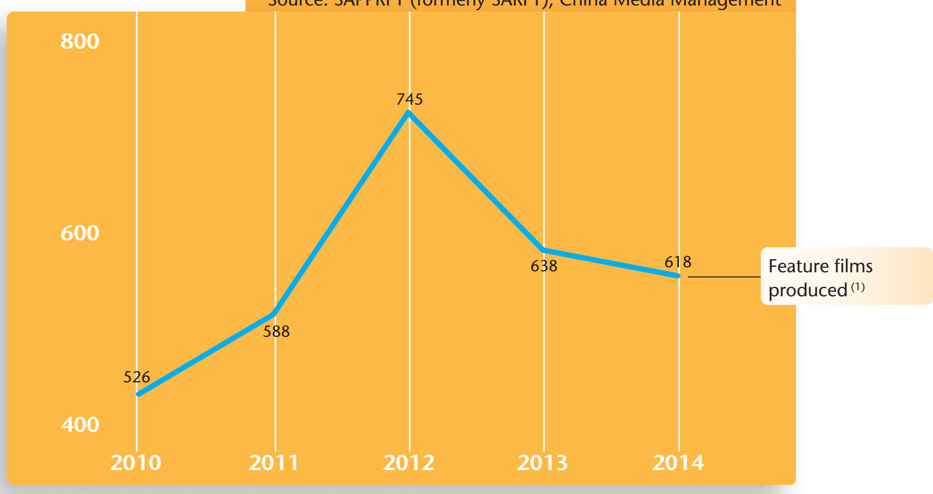


(1) By GBO

Number of feature films produced in China | 2010-2014 [e]

In units.

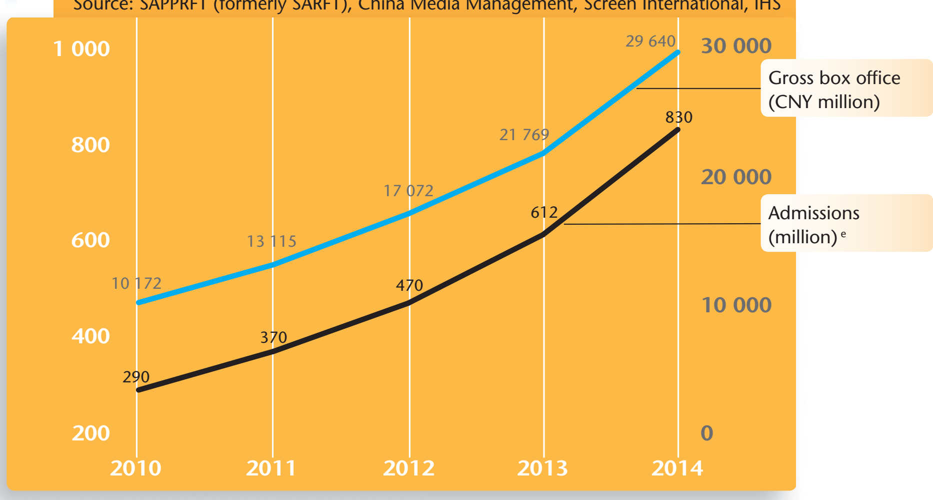
Source: SAPPRFT (formerly SARFT), China Media Management



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

Admissions and gross box office | 2010-2014

Source: SAPPRFT (formerly SARFT), China Media Management, Screen International, IHS



Top 20 films by gross box office in China | 2014

	Original title	Country of origin	Director	Gross box office (in USD million)
1	Transformers: Age of Extinction	US/CN	Michael Bay	317
2	Breakup Buddies	CN	Hao Ning	187
3	The Monkey King	CN/HK	Pou-Soi Cheang	167
4	Interstellar	US/GB	Christopher Nolan	121
5	X-Men: Days of Future Past	US	Bryan Singer	116
6	Captain America: The Winter Soldier	US	Anthony Russo, Joe Russo	115
7	Dawn of the Planet of the Apes	US	Matt Reeves	114
8	Dad, Where Are We Going	CN	Dikui Xie	111
9	Breakup Guru	CN	Yu Baimei, Chao Deng	107
10	Continent	CN	Han Han	101
11	Guardians of the Galaxy	US	James Gunn	95
12	The Amazing Spider-Man 2	US	Marc Webb	94
13	Fleet of Time	CN	Yibai Zhang	92
14	The Man from Macau	HK/CN	Jing Wong	84
15	Tiny Times 3	CN	Jinming Guo	84
16	Gone With the Bullets	CN/US/HK	Wen Jiang	78
17	Godzilla	US/JP	Gareth Edwards	77
18	The Hobbit: The Battle of the Five Armies	US/NZ inc	Peter Jackson	74
19	My Old Classmate	CN	Frant Gwo	73
20	The Expendables 3	US/FR	Patrick Hughes	72

Source: China Media Management

Distribution and exhibition

China's growth by any indicator cannot be compared with anything that ever happened in the world theatrical market. 830 million admissions accounted for a GBO of CNY 29.64 billion in 2014. Until 2010, Chinese attendance and screen growth was moderate (that is, by Chinese standards) compared with the sky-rocketing gross box office growth as the average ticket price more than doubled from 2006 to 2010. Since the beginning of this decade, ticket prices have stabilized (CNY 35.7 in 2014), with GBO and attendance showing a similar path of growth (36.2% and 35.6% respectively in 2014), accompanied by an explosion of the screen base, which quadrupled over the last five years. Nonetheless, there is still plenty of room for growth, as the country still remains under-screened; with 24 607 screens in 2014 (35.2% more than the precedent year), China has a rate of 18 screens per million inhabitants, almost nine times lower than in North America. Furthermore, the country completed its digital roll-out this year and has the by far highest 3D penetration rate (86% in 2014) among the larger cinema markets worldwide.

Thanks to co-production treaties, the number of Chinese-foreign co-productions released in the country has been increasing progressively. The Government keeps restricting access to the local market for purely foreign productions with a quota of 34 films per year, which accounted for 45.5% of the GBO in 2014. American productions represented half of the top 20 box office list both by number of films and GBO. American blockbuster *Transformers: Age of Extinction* was the most successful production of the year with a GBO of USD 317 million, more than in the North American market. The second position goes to #1 local production *Breakup Buddies.*

Production and funding

The number of local productions decreased to 618 in 2014, 20 less than the year before and 127 less than in 2012; a logical trend in view of the huge gap between the number of films produced and released in the country.

In early 2015, the Chinese Directors' Guild urged the Government to create a rating system to foster a wider variety of formats and genres produced in the country. Furthermore, Chinese regulator SAPPRFT (General Administration of Press, Publication, Radio, Film and Television) decided to tackle ticket fraud by improving the ticketing system. The Government estimates that 10% of the box office is lost every year due to bad management and practices.

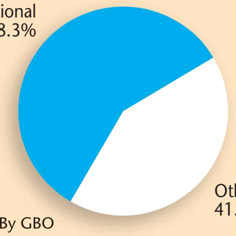
China signed film co-production agreements with India, the UK and South Korea and a TV co-production agreement with New Zealand in 2014.

Source: China Media Management, SAPPRFT, *Variety, IHS*

Japan

Population 2014 e	127.1 million
GDP per capita 2014 e	37 539.5 USD
Gross box office 2014	207.0 bn JPY (1.7 bn USD)
Admissions 2014	161.1 million
Average ticket price 2014	1 285 JPY (10.7 USD)
Average admissions per capita 2014	1.3
Screens 2013 I 2014	3 318 I 3 364
Digital screens 2013 I 2014	3 172 I 3 305
Digital 3D screens 2013 I 2014	1 077 I 1 501

Market shares 2014 (1)

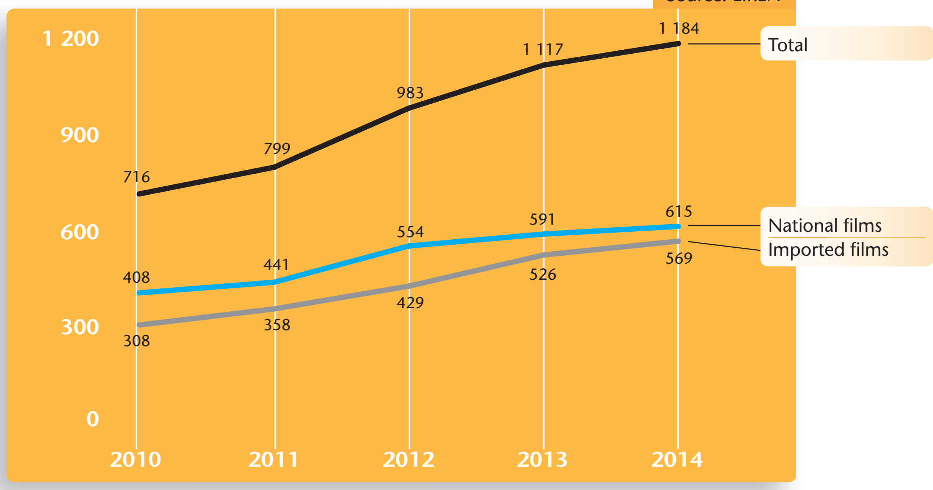


(1) By GBO

Number of films released in Japan I 2010-2014

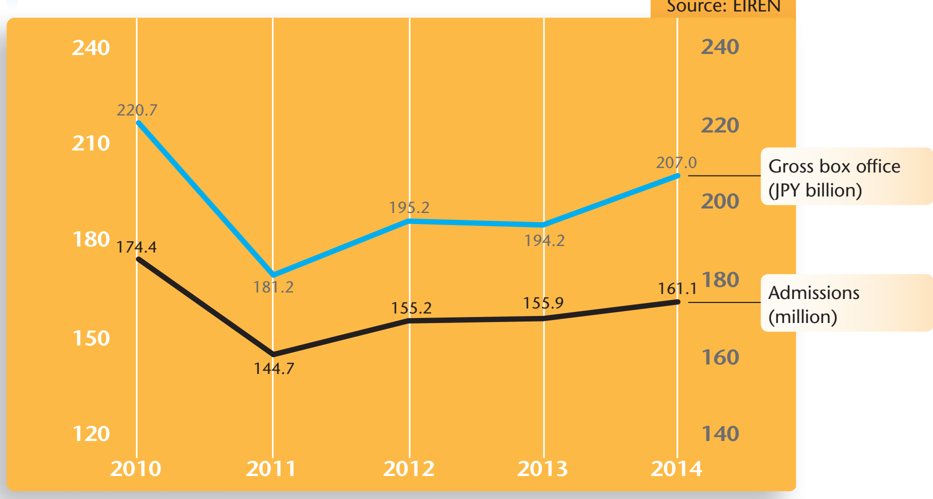
In units.

Source: EIREN



Admissions and gross box office I 2010-2014

Source: EIREN



Top 20 films by admissions in Japan | 2014 e

Estimated admissions based on average ticket price of JPY 1 285.

	Original title	Country of origin	Director	Distributor	Admissions e
1	Frozen	US	Chris Buck, J. Lee	Walt Disney	19 828 794
2	The eternal zero	JP	Takashi Yamazaki	Toho	6 817 121
3	Stand by Me Doraemon	JP/US	Oliver, Yagi, Yamazaki	Toho	6 521 401
4	Maleficent	US/GB inc	Robert Stromberg	Walt Disney	5 089 494
5	Rurouni Kenshin: Kyoto Inferno	JP	Keishi Ohtomo	Warner Bros.	4 062 257
6	Thermae Romae II	JP	Hideki Takeuchi	Toho	3 439 689
7	Rurouni Kenshin: The Legend Ends	JP	Keishi Ohtomo	Warner Bros.	3 385 214
8	Lupin III vs. Conan	JP	Hajime Kamegaki	Toho	3 315 175
9	Detective Conan: The Sniper from Another…	JP	Kobun Shizuno	Toho	3 198 444
10	Doraemon: New Nobita's Great Demon…	JP	Shinnosuke Yakuwa	Toho	2 785 992
11	When Marnie Was There	JP	H. Yonebayashi	Toho	2 747 082
12	Gravity	US/GB inc	Alfonso Cuarón	Warner Bros.	2 513 619
13	Godzilla	US/JP	Gareth Edwards	Toho	2 490 272
14	The Amazing Spider-Man 2	US	Marc Webb	Sony Pictures	2 443 580
15	Transformers: Age of Extinction	US/CN	Michael Bay	Paramount	2 264 591
16	Pokemon the Movie: Diancie and the…	JP	Kunihiko Yuyama	Toho	2 264 591
17	The Tale of The Princess Kaguya	JP	Isao Takahata	Toho	1 922 179
18	Hot Road	JP	Takahiro Miki	SHOCHIKU	1 922 179
19	Lupin III	JP	Ryûhei Kitamura	Toho	1 906 615
20	The Mole Song: Undercover Agent Reiji	JP	Takashi Miike	Toho	1 704 280

Source: EIREN, OBS

Distribution and exhibition

Attendance grew for the second consecutive year (by 3.3% on 2013), with a 4-year high of 161.1 million admissions sold in 2014. The economic recession (with the GDP dropping 2.6%) and the 3% hike of VAT, which accounted for most of the increase of the average ticket price (up by 3.1% to JPY 1 258 in 2014), did not prevent GBO from climbing to JPY 207 billion, 6.6% more than the previous year.

Although 14 local productions ranked in the top 20 box office list, American blockbuster *Frozen* crowned the list at a huge distance from the rest of films, accounting on its own for 12.3% of the total GBO in 2014. Local hits were mainly animation films, such as the Doraemon and Lupin franchises. However, the highest-grossing Japanese production of the year, *The Eternal Zero,* was a war drama about Kamikaze flyers in WWII. The market share for national films dropped by 3.8% on 2013, down to 58.3%, the lowest in the last 3 years but in line with recent average results.

The number of Japanese screens increased by 1.4% up to 3 364 screens in 2014. With the digital roll-out almost completed (98.3% digital penetration) and a consolidated 3D market, Japanese screens are more and more concentrated in multiplexes (86.5% of the screens in 2014 compared to 81.3% in 2010). After the conversion of more than 400 screens, Japan has the highest 3D penetration rate among the big world markets with 1 501 3D capable screens (44.6% of the total stock).

Production and funding

Japanese production volume has doubled over the last 10 years, reaching an all-time record of 615 local releases in 2014 – 24 more than in 2013. The same applies for imported films, with 569 foreign productions released during the year.

At the beginning of 2015, leading local studio Toho announced plans to foster the remake of its films. The owner of franchises such as Godzilla, Doraemon, Lupin or Totoro will push for remakes targeted at world audiences by looking for adaptation opportunities and financing the projects. This is well in line with Government efforts to promote Japanese culture abroad to increase the export of cultural industries, mainly through the public-private program Cool Japan Fund.

2014 ended full of controversies. Actor-director Takeshi Kitano generated a lot of debate after overtly criticising the lack of independence of the Japanese Film Academy and accusing the 3 main local studios of being a vertical monopoly which is *"spoiling Japanese film"*. Besides, part of the industry showed its opposition to the new Government's secrecy law which entered into force by the end of the year, as they fear it will threaten freedom of expression.

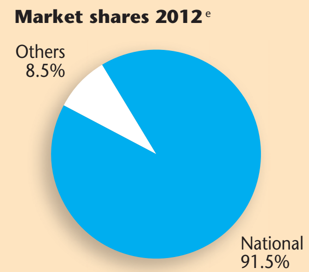
Source: EIREN, UNIJAPAN, *Variety,* IHS, *The Japan Times*

India

Population 2014 [e]	1 259.7 million
GDP per capita 2014 [e]	1 625.6 USD
Gross box office 2014 [e]	93.5 bn INR (1.5 bn USD)
Admissions 2014 [e]	approx. 1 900 million
Average ticket price 2014 [e]	36.7 INR (0.6 USD)
Average admissions per capita 2014 [e]	2.0
Screens 2013 I 2014 [e]	11 081 I 11 139
E- & D-Cinema screens 2013 I 2014 [e]	(1) 10 138 I 2 239
3D screens 2013 I 2014 [e]	~ I 1 068

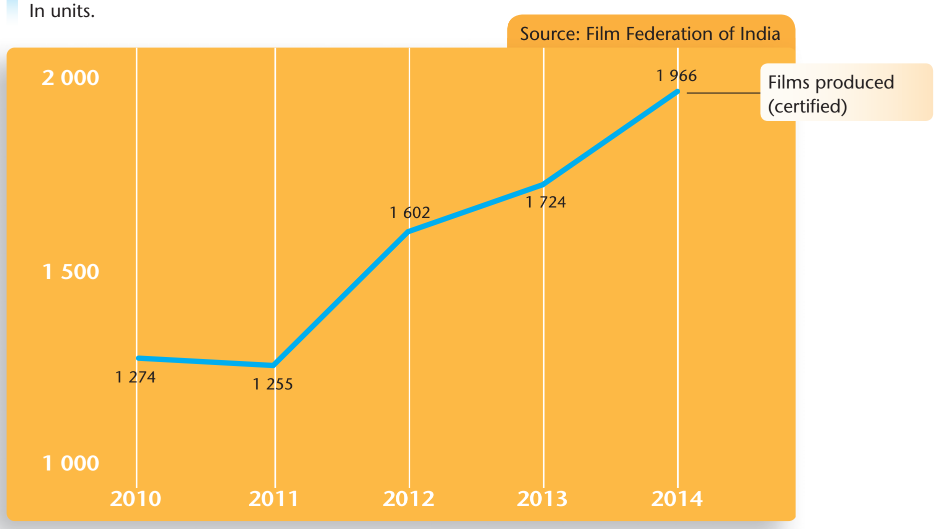
(1) Includes digital screens not complying with the 2K d-cinema standards.

Market shares 2012 [e]

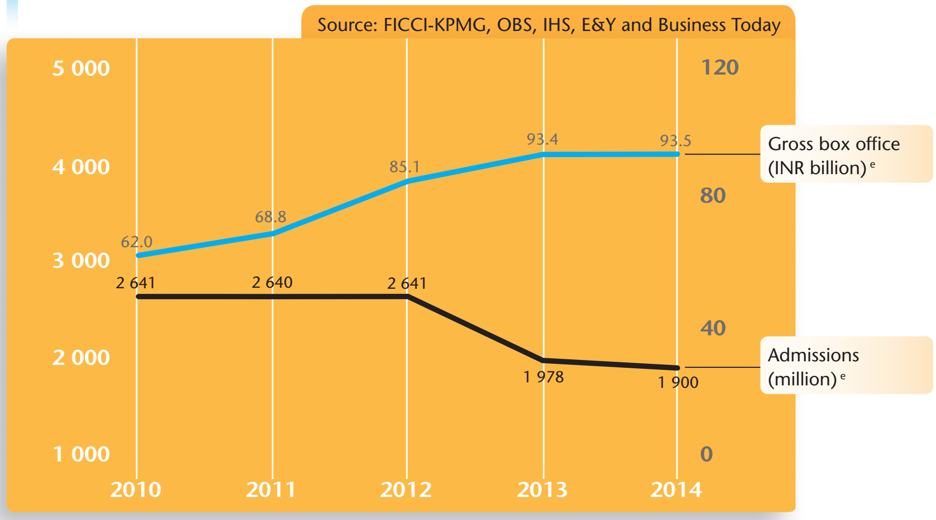


Number of Indian feature films certified I 2010-2014

In units.



Admissions and gross box office I 2010-2014 [e]



Top 10 films by gross box office in India | 2014

GBO calculated using an average exchange rate of USD 1= INR 63.7.

	Original title	Country of origin	Director	Gross box office (in USD million)[e]
1	PK	IN	Rajkumar Hirani	53.30
2	Kick	IN	Sajid Nadiadwala	36.58
3	Happy New Year	IN	Farah Khan	31.92
4	Bang Bang	IN	Siddharth Anand	28.42
5	Singham Returns	IN	Rohit Shetty	22.14
6	Holiday	IN	A.R. Murugadoss	17.69
7	Jai Ho	IN	Sohail Khan	17.43
8	Ek Villain	IN	Mohit Suri	16.56
9	2 States	IN	Abhishek Varman	16.33
10	Humpty Sharma Ki Dulhania	IN	Shashank Khaitan	12.06

Source: Koimoi.com

Top 10 US films by gross box office in India | 2014

GBO calculated using an average exchange rate of USD 1= INR 63.7.

	Original title	Country of origin	Director	Gross box office (in USD million)[e]
1	The Amazing Spider-Man 2	US	Marc Webb	13.45
2	Transformers: Age of Extinction	US/CN	Michael Bay	9.89
3	X-Men: Days of Future Past	US	Bryan Singer	8.89
4	Interstellar	US/GB	Christopher Nolan	6.78
5	300: Rise of an Empire	US	Noam Murro	6.30
6	Godzilla	US/JP	Gareth Edwards	5.34
7	Captain America: The Winter…	US	Anthony Russo. Joe Russo	4.87
8	Hercules	US	Brett Ratner	4.55
9	Dawn of the Planet of the Apes	US	Matt Reeves	3.52
10	Exodus: Gods And Kings	US/GB INC/ES	Ridley Scott	2.97

Source: KPMG-FICCI

Distribution and exhibition

The double-digit GBO growth forecast for 2014 proved to be incorrect. After years of sharp increase in revenues, the Indian box office stopped dead – INR 93.5 billion, 0.1% up on 2013. This can be mostly explained by the delays in the very much needed construction of cinema theatres. 2014 only saw a marginal 0.5% growth, up to 11 139 screens; however, this figure does not reflect the reality of a changing sector, with an escalating concentration both in geographical and ownership terms. New fully-digital multiplexes are being unveiled, especially in the big cities, while old one-screen analogue theatres are shutting down. Furthermore, big exhibition chains are acquiring independent multiplexes in tier 1 cities and are expected to go on to absorb smaller regional chains and start building new theatres in tier 2 and 3 cities.

Only one Hollywood blockbuster made it into a top 10 box office list crowned by *PK*, the highest-grossing Indian film ever. This science-fiction comedy made more than USD 100 million worldwide (slightly more than half of it in India) and a major release in China is still to come. The overseas theatrical market for Indian films represents circa 7% of the total and, although it has grown in recent times, it did so at a much slower pace than the domestic market.

Production and funding

The 1 966 local films released in 2014 marked one more milestone for the Indian production industry, which has been sky-rocketing for the last 4 years. Although production volume grew by more than 50% during this period, the market remains very fragmented; in fact, the gap by admissions between local blockbusters and indie productions reportedly kept widening in 2014.

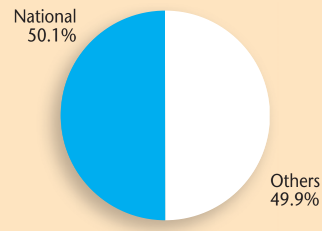
Hindi-language Bollywood continues to be the powerhouse of the domestic industry. Nonetheless, the South Indian industry outnumbered it by production volume for the second year in a row (263 films in Hindi were released in 2014 compared to 349 in Telugu and 326 in Tamil in 2014). Two co-production treaties were signed (with China and Canada) this year.

Source: KPMG, FICCI, *Ernst & Young*, *Variety*, IHS, OBS

South Korea

Population 2014 [e]	50.4 million
GDP per capita 2014 [e]	28 738.7 USD
Gross box office 2014	1 659 bn KRW (1.49 bn USD)
Admissions 2014 [e]	215.1 million
Average ticket price 2014 [e]	7 713 KRW (6.9 USD)
Average admissions per capita 2014 [e]	4.3
Screens 2013 | 2014	2 184 | 2 281
Digital screens 2013 | 2014	2 184 | 2 281
Digital 3D screens 2013 | 2014	859 | 876

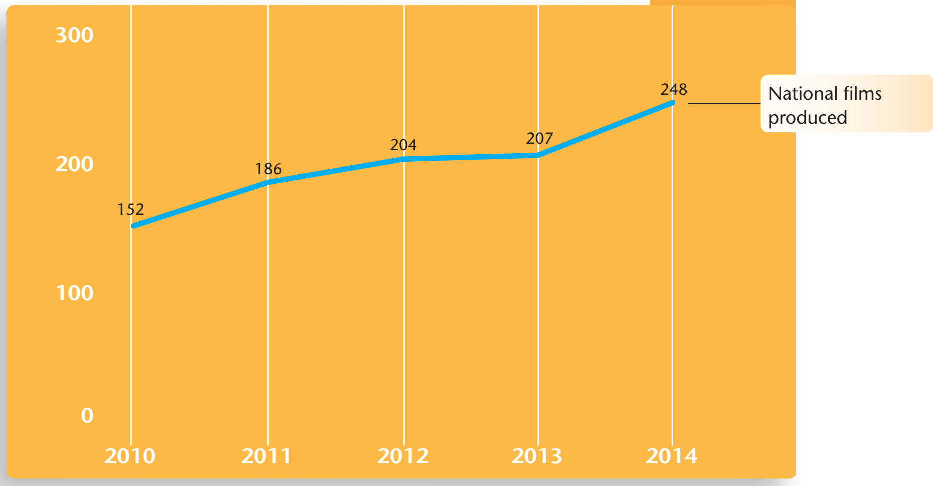
Market shares 2014 [e]



Number of Korean feature films produced | 2010-2014

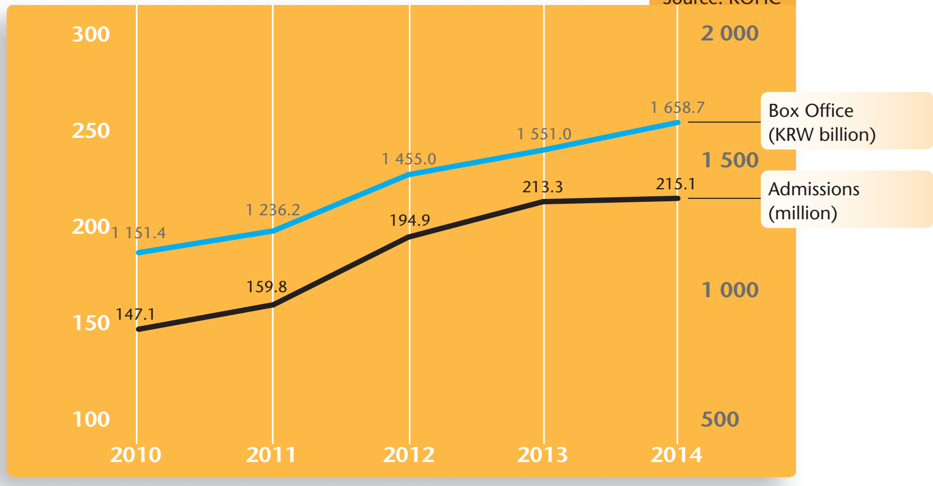
In units.

Source: KOFIC



Admissions and gross box office | 2010-2014

Source: KOFIC



Top 20 films by admissions in South Korea | 2014

	Original title	Country of origin	Director	Distributor	Admissions
1	Roaring Currents	KR	Han-min Kim	CJ Entertainment	17 611 849
2	Frozen	US	Chris Buck, J. Lee	Sony Pictures	10 296 101
3	Interstellar	US/GB	Christopher Nolan	Warner Bros.	10 105 274
4	The Pirates	KR	Seok-hoon Lee	Lotte Entertainment	8 665 652
5	Miss Granny	KR	Dong-hyuk Hwang	CJ Entertainment	8 656 417
6	Ode to My Father	KR	Youn Jk	CJ Entertainment	5 345 726
7	Transformers: Age of Extinction	US/CN	Michael Bay	CJ Entertainment	5 295 929
8	Kundo: Age of the Rampant	KR	Jong-bin Yun	Showbox/Mediaplex	4 774 715
9	Edge of Tomorrow	US	Doug Liman	Warner Bros.	4 697 110
10	X-Men: Days of Future Past	US	Bryan Singer	Twentieth Century Fox	4 313 446
11	The Amazing Spider-Man 2	US	Marc Webb	Sony Pictures	4 164 946
12	Tazza: The Hidden Card	KR	Hyeong-Cheol Kang	Lotte Entertainment	4 015 364
13	Dawn of the Planet of the Apes	US	Matt Reeves	Twentieth Century Fox	4 002 539
14	Captain America: The Winter Soldier	US	A. Russo, Joe Russo	Sony Pictures	3 962 812
15	The Fatal Encounter	KR	Jae-Gyu Lee	Lotte Entertainment	3 849 435
16	My Love. Don't Cross That River	KR	Mo-Young Jin	CGV Arthouse	3 846 428
17	The Divine Move	KR	Beom-gu Cho	Showbox/Mediaplex	3 566 316
18	A Hard Day	KR	Seong-hoon Kim	Showbox/Mediaplex	3 448 583
19	Begin Again	US	John Carney	Pancinema	3 427 526
20	How To Train Your Dragon 2	US	Dean DeBlois	CJ Entertainment	3 000 100

Source: KOFIC

Distribution and exhibition

Korean box office broke records for three years in a row, with attendance up to 215.1 million admissions in 2014. However, this only represented an annual growth of 0.8% after three years of sky-rocketing results. Although part of the deceleration may be due to the consolidation of the theatrical market (Korean attendance has almost doubled since 2010 and more than tripled compared to beginning-of-the-century performance), it is also true that the *Sewol* ferry disaster prompted a sharp attendance drop while the country was in mourning. 3D cannot take credit for the 4.4% growth in the number of screens in 2014 (confirming a steady 3-year trend), as few of it was due to these screens and attendance to 3D films has been dropping over the last 2 years. It just seems Korean cinema-goers simply cannot get enough films; and this is a country with one of the highest attendance per capita rates in the world (4.14 admissions per capita in 2014) and growing.

Attendance to local productions did not match the overall success, decreasing for the first time in 3 years. Nonetheless, Korean films made 107.7 million admissions in 2014, accounting for 50.1% of the theatrical market share. Furthermore, 10 Korean blockbusters made it into the top 20 box office list by admissions. Period-epic local production *Roaring Currents* topped the list, breaking all-time gross box office records in the country with a David-against-Goliath story about a 16th century military victory against Japan.

Production and funding

2014 saw another all-time record broken: 248 local films were shot in the country, 41 more than the previous year and twice as many as in 2008; an impressive growth, even if part of these films' target was the IPTV market and their release was just a token theatrical exposure.

In turn, the divide between high-end (mostly costume dramas and action films) and low budget films is growing bigger and bigger. 10 000 admissions has become a benchmark for success of local independent low-budget productions whereas the top 10 Korean productions accounted for 60% of the admissions to local films in 2014. By the end of the year, CGV and Lotte Entertainment, two of the main exhibition chains of the country, were fined USD 5 million for anti-competition practices.

Building upon the opening of the Korean Film Business Centre in Beijing in 2012, Korea and China signed a co-production treaty in 2014 which will allow Korean-Chinese co-productions to circumvent Chinese restrictive limits on the import of foreign productions. Over the last 2 years, there has been an increase of co-production and co-development between the two countries.

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

Other Asia

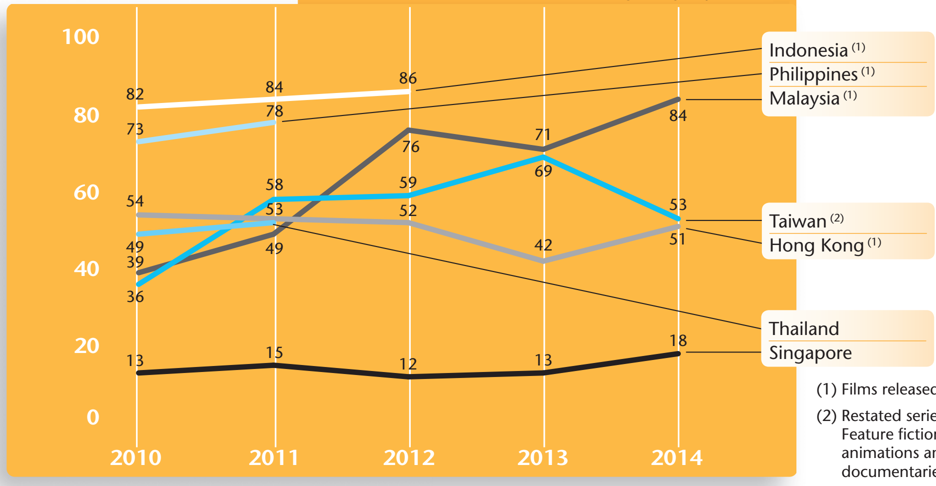
	Hong Kong	Indonesia	Malaysia	Philippines	Singapore	Taiwan	Thailand
Population 2014 e (million)	7.3	251.5	30.5	99.4	5.5	23.4	68.6
GDP per capita 2014 e (USD)	40 302.5	3 404.0	11 061.9	2 913.3	56 109.1	21 571.9	5 550.2
Gross box office 2014 e (M USD)	212.3	105.8 (1)	213.2	166.5 (1)	160.3 (1)	255 (1)	148.1 (1)
Admissions 2014 e (million)	24.9 (1)	36.9 (1)	60.7	77.6 (1)	21.6	24.2 (1)	32.4 (1)
Average ticket price 2014 e (USD)	8.4 (1)	2.9 (1)	3.5	2.1 (1)	7.3 (1)	10.5 (1)	4.6 (1)
Average admissions per capita 2014 e	3.4 (1)	0.15 (1)	2.0	0.8 (1)	3.9	1.0 (1)	0.5 (1)
Screens 2014 e	232	963	874	715	225	666	969
Digital screens 2014 e	232	962	867	673	225	666	961
Digital 3D screens 2014 e	213	505	289	146	91	388	412
National market shares 2014 e	21.7% (1)	~	10.2%	25.7% (2)	4% (1)	17.46% (1)	~

(1) 2013 (2) 2011

Number of feature films produced in selected Asian countries | 2010-2014

In units.

Source: OBS, Taiwan Cinema, Singapore Film Commission, *Screen International*, Finas, Hong Kong Express, IHS



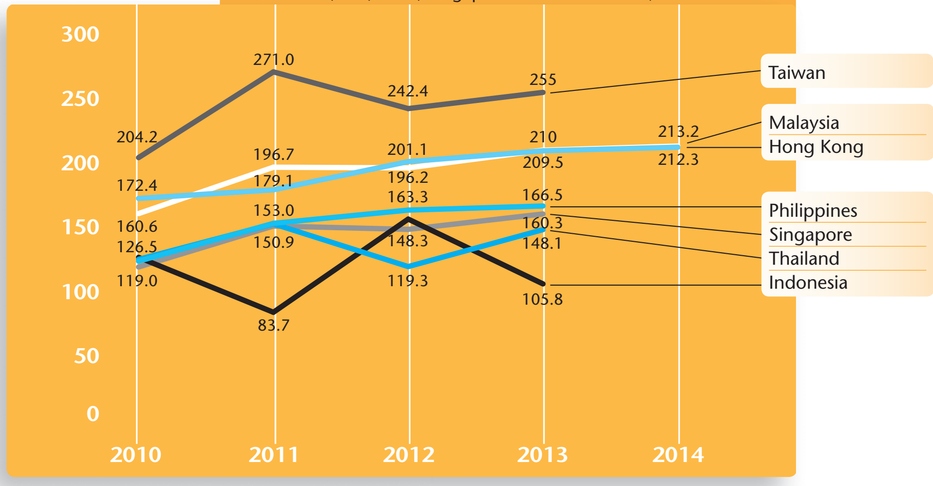
(1) Films released.

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

Gross box office in selected Asian countries | 2010-2014 e

In USD millions. Local currencies converted at average annual exchange rates.

Source: OBS, IHS, Finas, Singapore Film Commission, Taiwan Cinema



Top 10 films by gross box office in Hong Kong | 2014

	Original title	Country of origin	Director	Gross box office (in USD million) [e]
1	Transformers: Age of Extinction	US/CN	Michael Bay	12.66
2	Captain America: The Winter Soldier	US	Anthony Russo, Joe Russo	7.30
3	The Amazing Spider-Man 2	US	Marc Webb	7.05
4	Interstellar	US/GB	Christopher Nolan	6.59
5	X-Men: Days of Future Past	US	Bryan Singer	6.55
6	Golden Chickensss	HK	Matt Chow	5.32
7	Maleficent	US/GB	Robert Stromberg	5.27
8	Dawn of the Planet of the Apes	US	Matt Reeves	4.77
9	Night at the Museum: Secret of the Tomb	US/GB	Shawn Levy	4.70
10	From Vegas to Macau	HK/CN	Jing Wong	4.33

Source: Screen International

Top 10 films by admissions in Singapore | 2014 [e]

	Original title	Country of origin	Director	Gross box office (in USD million) [e]
1	Transformers: Age of Extinction	US/CN	Michael Bay	6.50
2	X-Men: Days of Future Past	US	Bryan Singer	5.63
3	The Amazing Spider-Man 2	US	Marc Webb	5.39
4	Captain America: The Winter Soldier	US	Anthony Russo, Joe Russo	4.55
5	Guardians of the Galaxy	US	James Gunn	3.58
6	The Maze Runner	US/GB/CA	Wes Ball	2.92
7	Maleficent	US/GB inc	Robert Stromberg	2.81
8	How to Train Your Dragon 2	US	Dean DeBlois	2.78
9	Dawn of the Planet of the Apes	US	Matt Reeves	2.62
10	Godzilla	US/JP	Gareth Edwards	2.55

Source: Box Office Mojo

Distribution and exhibition

Asia-Pacific was, for the second consecutive year, the highest-grossing, highest-growing territory in the world. GBO increased by 12% up to USD 12.4 billion. However, China on its own accounted for most of the growth, with the rest of the region remaining more or less stable, either because they are consolidated markets or countries still to develop their potential market – Thailand, Indonesia, Malaysia or the Philippines. GBO increased by 1.3% in Honk Kong, up to USD 212.3 million, whereas attendance dropped by 2.2% in Singapore, down to 21.6 million admissions in 2014.

The digital roll-out has been completed or is about to be in all 7 countries analysed. However, the major potential markets remain heavily underscreened. Despite unveiling 241 new screens in 2014 (a 31% growth), Indonesia remains one of the countries with the lowest rate of screens per capita (3.8 screens per million inhabitants) in the region, followed by Philippines (7.2) and Thailand (14.1). Although analysts have insisted for years now that the big developing countries in the region (mostly Indonesia, Vietnam and Thailand) are destined to follow China's path, none of the main indicators show they have not yet started to unleash their full potential. However, recent developments in 2015, such as the entry of Korean investment in the Indonesian exhibition sector or the entry of IMAX in Vietnam, give reason to believe that this may happen in the near future.

Production

Production volume increased in Hong Kong, Malaysia and Singapore, whereas it decreased in Taiwan. Two local films made it into the top 10 box office list in Hong Kong – comedy *Golden Chickensss* and Hong Kong-Chinese co-production *From Vegas to Macau*. Another Chinese co-production – in this case with the US, *Transformers: Age of Extinction* topped the list in Singapore and Hong Kong. Vietnamese-South-Korean co-production *Let Hoi Decide* became the highest-grossing ever film in Vietnam; a romantic comedy on transgender issues, the film made USD 3.85 million in 2014.

In 2014, the Philippines discussed a new fiscal incentive to attract portable productions with a generous 20% to 40% rebate on budget spend in the country. South Korea and Hong Kong signed a memorandum of understanding at the beginning of 2015 to foster their creative cooperation.

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

Africa

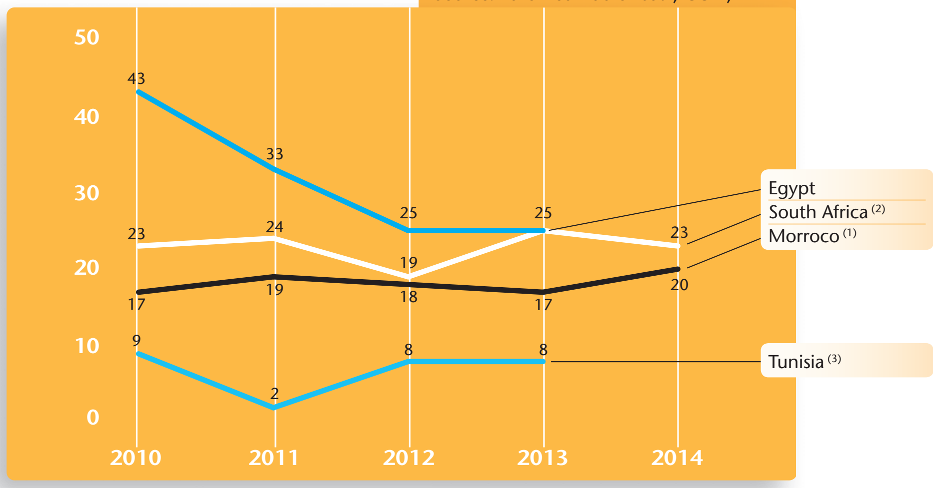
	Algeria	Egypt	Morocco	South Africa	Tunisia
Population 2014 e (million)	38.7	85.4	33.2	53.7	11.0
GDP per capita 2014 e (USD)	5 886.4	3 336.6	3 392.3	6 354.2	4 466.4
Gross box office 2014 e (in M USD)	0.0 (4)	44 (1)	7.4	75.7	~
Admissions 2014 e (million)	0.0 (4)	18.8 (1)	1.6	37.4 (1)	0.3 (5)
Admissions per capita 2014 e	0.0 (4)	0.22 (1)	0.05	0.71 (1)	0.0 (3)
Average ticket price 2014 e (in USD)	0.7 (4)	2.34 (1)	4.5	2.44 (1)	2.3 (4)
Screens 2014 e	17 (2)	406 (1)	59	757	17 (1)
Digital screens 2014 e	~	130 (1)	49	690	3 (4)
National market shares 2014 e	~	80% (2)	29.2 %	6.3% (6)	~

(1) 2013 (2) 2012 (3) 2010 (4) 2009 (5) 2008 (6) By GBO

Number of feature films produced in selected African countries | 2010-2014

In units.

Source: Euromed Audiovisual, CCM, NFVF

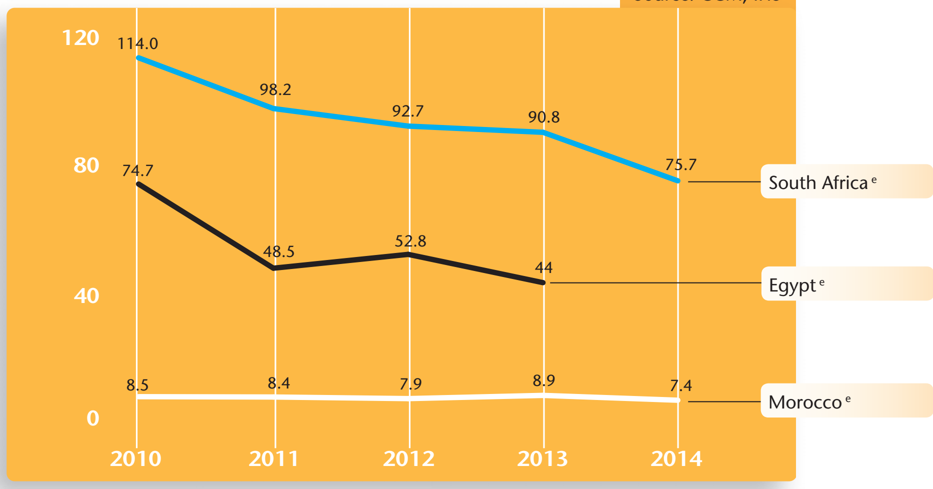


(1) Shooting permits issued by CCM. (2) Films released. (3) Feature films.

Gross box office in selected African countries | 2010-2014 e

In USD millions.

Source: CCM, IHS



Top 10 films by gross box office in South Africa | 2014

	Original title	Country of origin	Director	Distributor	Gross box office (in USD)
1	Transformers: Age of Extinction	US/CN	Michael Bay	UIP	2 326 244
2	The Hobbit: The Battle of the Five Armies	US/NZ inc	Peter Jackson	Times Media	2 168 029
3	How to Train Your Dragon 2	US	Dean DeBlois	Times Media	2 006 390
4	The Amazing Spider-Man 2	US	Marc Webb	Ster Kinekor	1 877 361
5	Rio 2	US	Carlos Saldanha	Times Media	1 821 510
6	The Hunger Games: Mockingjay - Part 1	US	Francis Lawrence	Times Media	1 616 419
7	Big Hero 6	US	Chris Williams, Don Hall	Ster Kinekor	1 530 063
8	X-Men: Days of Future Past	US/GB	Bryan Singer	Times Media	1 508 975
9	22 Jump Street	US	Phil Lord, Christopher Miller	Ster Kinekor	1 500 126
10	Step Up All In	US	Trish Sie	Times Media	1 436 418

Source: NFVF

Top 10 films by gross box office in Morocco | 2014

	Original title	Country of origin	Director	Gross Box Office (in USD)
1	Derrière les portes fermées	MA	Mohamed Bensouda	98 145
2	Road to Kaboul	MA	Brahim Chkiri	92 911
3	Sara	MA	Saïd Naciri	53 529
4	Lucy	FR	Luc Besson	39 832
5	Dhoom 3	IN	Vijay Krishna Acharya	34 212
6	The Wolf of Wall Street	US	Martin Scorsese	30 750
7	Annabelle	US	John R. Leonetti	28 635
8	Non-stop	US/GB inc/FR	Jaume Collet-Serra	28 229
9	Qu'est ce qu'on a fait au bon Dieu ?	FR	Philippe de Chauveron	27 632
10	300: Rise of an Empire	US	Noam Murro	27 194

Source: Centre Cinématographique Marocain (CCM)

Morocco and Egypt

Moroccan theatres registered a drop in attendance by 8.5%, down to 1.64 million admissions, the lowest figure of the century despite the decrease by 2.8% of the average ticket price. Screening space seems to be the main obstacle for growth in the Moroccan market. With only 59 screens and an 83% digital penetration rate, the country has lost 23% of its screens over the last 5 years. However, two new multiplexes will be unveiled in 2015.

After an all-time record market share of 40% for local productions in 2013, Moroccan films got 29.2% of the total admissions in 2014, a result nonetheless well above average in recent times. Three local films topped the box office list by admissions, with only four American productions in the top 10.

The 36th edition of the Cairo Film Festival took place in 2014 after a hiatus of one year due to the turmoil in Egypt.

South Africa

GBO decreased from USD 90.8 million in 2013 to USD 75.7 million in 2014, mostly due to the depreciation of the rand against the dollar. In turn, the performance of local productions went down to a 6.3% market share after two consecutive years of double-digit figures. No South African film made it into the top 10 box office list this year, with romantic road-movie *Pad na Jou Hart* as the highest-grossing local production with almost USD 1 million.

South African production has been rather stable over the last 5 years, with 23 local films released in 2014. Afrikaans films accounted for half of these releases and 66% of the market share for local films. In turn, 45% of the GBO went to 3D films in 2014, up from 41% the previous year.

Nigeria

The film industry of the largest African economy allegedly employs more than 1 million people and contributes 1.2% to the GDP. In view of these figures, the Government seems determined to unleash the potential of Nigeria's film industry and has announced a USD 18.7 million program to provide film training and offer a fiscal incentive for the local industry.

The most ambitious Nigerian production to date, *Half of a Yellow Sun*, was released in 2013 in several major territories; but not in Nigeria, where the film was eventually shown this year after the censorship board held up the release for months arguing concerns over the depiction of the Biafra War.

Sources: CCM, NFVF, *Variety, The Economist,* OBS

Middle East

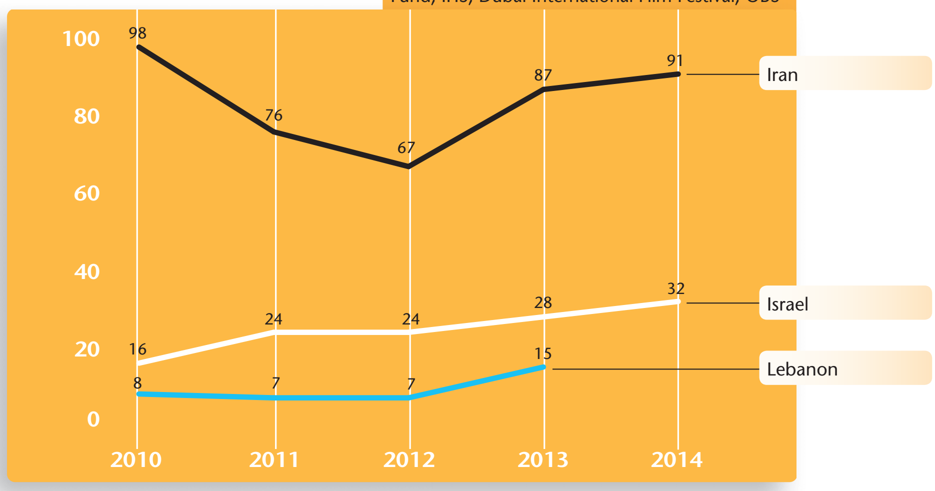
	Iran	Israel	Kuwait	Lebanon	Qatar	United Arab Emirates
Population 2014 e (million)	78.0	8.0	4.0	4.5	2.2	9.3
GDP per capita 2014 e (USD)	5 164.9	37 914.3	44 844.2	10 531.5	94 733.2	44 769.3
Gross box office 2014 e (in M USD)	17.7	122.3	51.7	33.8	29.7	145.4 (1)
Admissions 2014 e (million) e	6.0	12.0	4.5	3.7	2.7	12.9 (1)
Admissions per capita 2014 e	0.1	1.5	1.1	0.8	1.2	1.4 (1)
Average ticket price 2014 e (USD)	3.0	10.2	11.47	9.06	11.12	11.2 (1)
Screens 2014 e	383	398	62 (2)	127 (2)	~	356
Digital screens 2014 e	383	398	~	~	~	356
National market shares 2014 e	99.0%	13%	~	~	~	~

(1) 2013 (2) 2012

Number of films produced in selected Middle East countries | 2010-2014 e

In units.

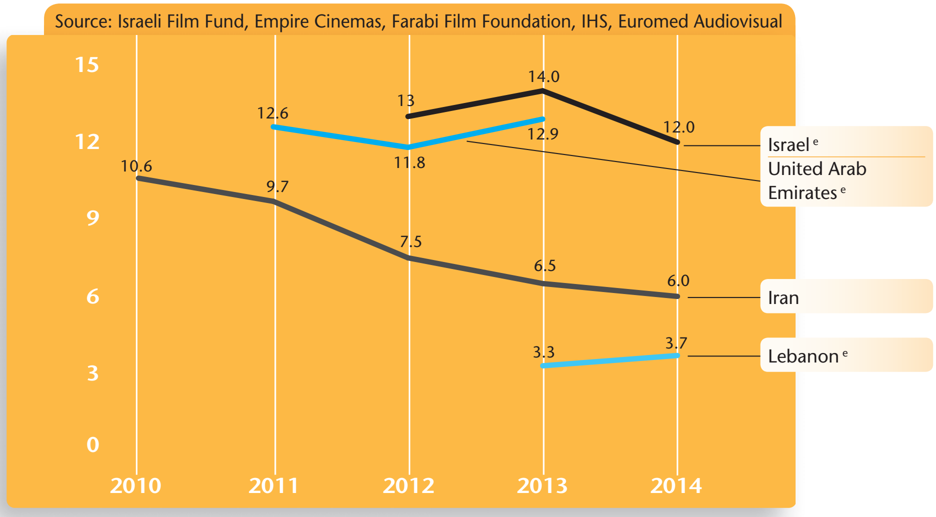
Source: Farabi Cinema Foundation, Israel Film Fund, IHS, Dubai International Film Festival, OBS



Admissions in selected Middle Eastern countries | 2010-2014 e

In millions.

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



Top 10 films by admissions in Lebanon | 2014

	Original title	Country of origin	Director	Distributor	Admissions
1	Vitamin	LB	Elie F. Habib	EAG	179 513
2	Maleficent	US/GB inc	Robert Stromberg	Walt Disney	94 799
3	Dumb and Dumber To	US	B. Farrelly, P. Farrelly	EAG	81 728
4	Lucy	FR	Luc Besson	Universal	77 880
5	The Hobbit: The Battle of the Five Armies	US/NZ inc	Peter Jackson	Warner Bros.	75 545
6	300: Rise of an Empire	US	Noam Murro	Warner Bros.	73 689
7	Non Stop	US/GB inc/FR	Jaume Collet-Serra	GF	62 971
8	Need for Speed	US/PH/IE/GB	Scott Waugh	Italia Films	61 889
9	Step Up 5	US	Trish Sie	Jaguar	61 511
10	The Amazing Spider-Man 2	US	Marc Webb	Columbia	60 231

Source: Empire Cinemas

Overview

Certainly, there is no territory in the world more heterogeneous than the Middle East. The indigenous production industry in the UAE, the main exhibition market of the region since it surpassed Israel in 2013, is still embryonic. Iran holds the highest production volume of the region, but the theatrical exploitation of its films is limited to the national territory and admissions have been free-falling for the last five years. Israel and Lebanon would qualify as the most stable countries both in terms of production and market. Attendance grew in Lebanon (by 13%), Qatar (by 11%) and Kuwait (by 6%) in 2014. For the second year in a row a local production, comedy *Vitamin*, topped the Lebanese box office list.

Israel

Although attendance dropped by 14%, down to 12 million admissions in 2014, this was rather due to an excellent 2013. Conversely, the national market share was one of the best on record (13%) with comedy-drama *Zero Motivation* as the most successful local film of the year, accounting for almost 40% of the admissions to Israeli films. Furthermore, six more local films went beyond the 100,000 admissions benchmark, compared to the usual two to three titles a year. Higher production budgets and a more commercial approach seem to be, in part, responsible for this surge.

Israel produced 32 films in 2014; four more than the year before and has doubled production volumes over the last five years. Allegedly, some productions to shoot in Israel relocated elsewhere due to Palestine-Israel tensions. The national Government along with the Jerusalem City Council launched a fund (USD 6.3 million) to attract portable productions, granting a deduction of up to 25% of the costs incurred in the country to qualifying productions spending more than USD 7 million in Israel.

United Arab Emirates

In part thanks to the generous 30% tax rebate put in place two years ago, the country is becoming a regular shooting location for international blockbusters. In 2014, *Star Wars Episode VII*, *Deliver Us from Evil*, *Fast and Furious 7* and Bollywood production *Bang Bang* shot in the country and benefited from the incentive, mainly conceived to attract tourism into the region. However, an indigenous production industry is still far from being a reality. With a fully-digitized screen base, the UAE increased its number of screens by 14.5% up to 356 in 2014.

Iran

After some years of profound economic crisis, with runaway inflation and a sharp devaluation of the Rial, the country began a new period of growth. Average ticket prices grew from IRR 60 000 in 2013 to IRR 80 000 in 2014. According to official figures by the Farabi Cinema Foundation, attendance dropped by 7.6%, down to 6 million admissions, confirming a five-year trend. The country reached full digital penetration and unveiled 30 additional screens (383 by the end of 2014).

2014 saw 91 films produced in Iran, 4 more than the previous year. As usual, local films monopolized the theatres, with a 99% share of the market by admissions. In fact, only one of the 75 films released in the country, according to Iranian Independents, was a foreign production. In contrast, the main film event in the county, the *Fajr International Film Festival*, has resolved to bring more foreign films and foreign film executives to Iran and has split into a national and an international section to be held separately. Local production *Taxi* won the Golden Bear at the Berlinale this year.

Source: Empire Cinemas, Farabi Cinema Foundation, Iranian Independents, Israel Film Fund, Cinema Industry Association of Israel, *Variety,* IHS, Haaretz, OBS

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FOCUS 2015 was prepared by the European Audiovisual Observatory. We would like to thank the following sources:

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