MARCHÉ DU FILM 2017

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TENDANCES DU MARCHÉ MONDIAL DU FILM

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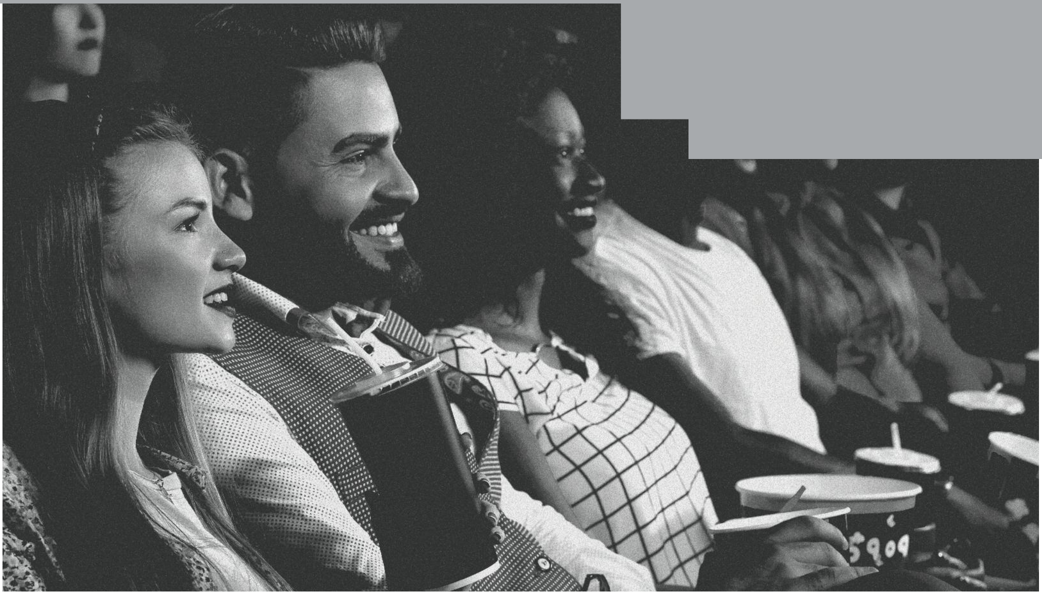

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World Film Market Trends
Tendances du marché mondial du film

Observatoire européen de l'audiovisuel
European Audiovisual Observatory
Europäische Audiovisuelle Informationsstelle

MARCHÉ DU FILM
FESTIVAL DE CANNES

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Editorial

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

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

Jérôme Paillard

Executive Director
Marché du Film

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

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

Jérôme Paillard

Directeur Délégué
Marché du Film

This year the European Audiovisual Observatory has its 25th anniversary. Part of its success is linked to our fine collaboration with the Marché du Film. We would like to express our gratitude to the Marché organisers, to all our information suppliers, national film agencies and correspondents who make it possible to supply this large amount of data via such a small booklet. More generally they make it possible to serve YOU since 25 years! In Cannes we mark this special occasion with our Conference (20th May at 9:30) on the impact of VOD on the film value chain. Come and join us in the Olympia Cinema!

Susanne Nikoltchev

Executive Director
European Audiovisual Observatory

Cette année, l'Observatoire européen de l'audiovisuel fête son 25e anniversaire. Son succès est en partie lié à notre excellente collaboration avec le Marché du Film. Nous tenons à remercier les organisateurs du Marché ainsi que tous nos fournisseurs d'information, les agences nationales du film et les correspondants, qui nous permettent de diffuser un si grand nombre de données dans un si petit format. Plus généralement, ils nous permettent de VOUS servir depuis 25 ans ! À Cannes, cet anniversaire sera marqué par notre conférence (samedi 20 mai à 9h30) sur l'impact de la VOD sur la chaîne de valeur du film. Venez nous rejoindre au Cinéma Olympia !

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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European Audiovisual Observatory

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The status quo of VOD film distribution in Europe

VOD: clarification of terms

The term pay video on demand is often used in an ambiguous manner encompassing two very different market segments, namely transactional VOD (TVOD) and subscription VOD (SVOD). For analysis purposes it is important to clearly distinguish between these two business models as they are competing with different markets. In fact, TVOD (e.g. iTunes or UniversCiné) is basically similar to the DVD market: exploitation title by title; recent films; main focus on offering films; principle of revenue sharing between the rights holders and the services. For its part, SVOD (e.g. Netflix or Viaplay) is comparable to pay-TV: availability of a catalogue; later release window; significant focus on TV series; flat-fee acquisition of rights. The growth rates are not comparable either: while TVOD growth is slowing down, that of SVOD is still being sustained.

There is nonetheless one aspect in common to the two categories: pan-European services (although their catalogues are far from being unified) available in several language versions co-exist on the European market with national services that are either general interest in nature or based on an offering of European films.

It is also necessary to distinguish between services based on an e-commerce model and those based on a more curated model. The former tend to accept all films offered provided they meet a set of basically technical criteria, while the latter choose from among the films offered, either because they correspond to their editorial policy or because they want to limit the size of the catalogues for economic reasons. Accordingly, "referencing" a film on a platform is either a relatively automatic process or resembles a negotiation similar to that in the case of a TV channel.

Finally, there is a third category that needs to be considered: catch-up TV services, which are rapidly developing in the direction of "free-on-demand" platforms by offering a much broader catalogue than the programmes recently broadcast. However, most of them do not (yet) offer any films.

Availability of films on VOD

Based on an analysis of a sample of TVOD and SVOD services carried out in October 2016(1), the Observatory estimates that – in that month – at least 45 500 different films, which had previously been released in cinemas in at least one European country, were available on TVOD services and at least 8 900 on SVOD. On average transactional VOD services based in the EU offered around 3 300 films compared to about 1 300 films in the case of SVOD services.

European films were generally available on a smaller number of services than American films, accounting on average for about 25% of the films offered by a European TVOD service and 20% of the films offered by European SVOD services. However, these figures vary significantly from one country to another and one service to another and even between different language versions of the same pan-European service.

Theatrical releases and "straight to VOD"

A minority (47%) of European films produced and released in cinemas in Europe between 2005 and 2014 were available on TVOD. The figures are more positive when the analysis focuses on recent European films (produced between 2011 and 2015) which have generated at least 20% of their admissions outside of their domestic market. 80% of these films are in fact available on TVOD in at least one market. However, circulation on TVOD is still lower than in cinemas: recent European films – as defined above - have been released in cinemas on average in 10 European countries, compared with a TVOD release in only 6 countries.

A comparison of national theatrical releases and releases on TVOD is instructive(2): out of 49% of national releases, there is one theatrical release with no corresponding one on TVOD in the same country; of 37% there is a release in both cinemas and on TVOD on the same market; and of

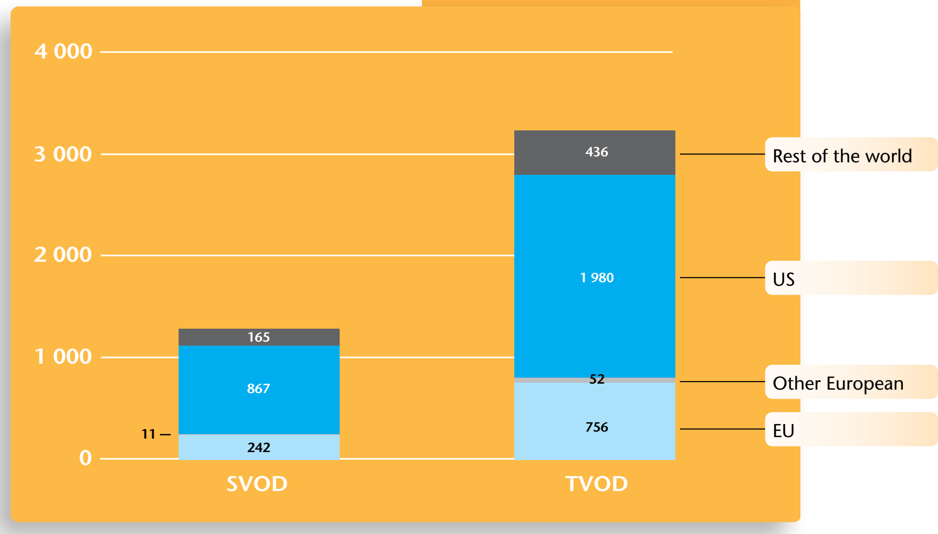
(1) *Origin of films and TV content in VOD catalogues in the EU & Visibility of films on VOD services*, Gilles Fontaine and Christian Grece, April 2017, European Audiovisual Observatory.

(2) *VOD distribution and the role of aggregators*, Gilles Fontaine and Patrizia Simone, April 2017, European Audiovisual Observatory.

Average number of films on TVOD and SVOD services based in the EU – by origin | October 2016

In units.

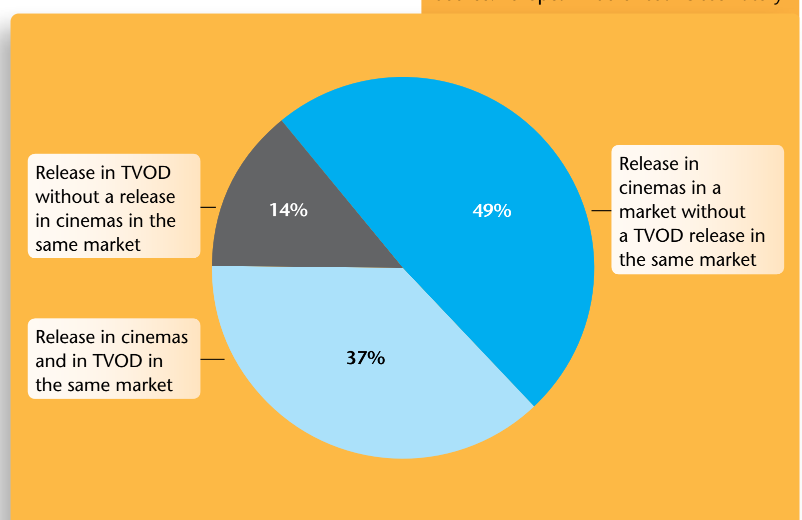
Source: European Audiovisual Observatory



Interplay between theatrical release and TVOD availability of European films in the EU | October 2016

In %.

Source: European Audiovisual Observatory



Remark: Based on a sample analysis of 8 000 releases of 677 European films produced between 2011 and 2015 and released either in cinemas or on a TVOD service in EU markets.

14% there is a release on TVOD with no previous theatrical release in the same territory.

These figures indicate that a significant number of films are not exploited on TVOD in their national market, that a broad majority of TVOD releases are preceded by theatrical releases on the same market and that, finally, a pattern is now developing of straight-to-TVOD releases.

Barriers to release on TVOD

There are several reasons that provide a possible explanation why some films are not released on TVOD even though they have been released in cinemas in the same market. The first obstacle is the perception that the level of revenues from VOD exploitation is still low, at least for a substantial majority of films. Although the sector unfortunately lacks transparency as far as film revenues are concerned, it is in fact likely that the Pareto principle applies to TVOD: 80% of revenues are generated by 20% of films. This revenue expectation must be balanced against a number of costs, not only of a technical nature but also transaction costs incurred to identify and negotiate with the very many VOD services operating on the market. In most cases, a lack of box office success will also be reflected in poor TVOD results, unless a new investment is made in marketing. Finally, it may be feared that a release on TVOD or SVOD will "expose" the film and thus reduce the likelihood of obtaining a sale to a TV channel.

A straight-to-VOD release will naturally require the investment in marketing not made for the theatrical release. It is therefore reserved for a relatively limited number of films and naturally depends on the film exploitation strategy implemented by the film producer and agent. In some cases, they may actually defer this straight-to-VOD release in the hope that a distributor will show an interest in a theatrical release.

The role of aggregators

A new feature has appeared in the chain of film exploitation on VOD: "aggregation". Its definition has evolved over the years: while it originally consisted in facilitating access to the major pan-European VOD platforms by pre-negotiating a contractual framework, ensuring the technical conformity, and providing promotional material, it now also covers the definition of the digital exploitation strategy and the marketing of films available on VOD. In addition to the so-called "pure players", companies of all origins have entered the aggregation market: providers of technical services; distributors; producers or agents; consultants; video-on-demand services etc.

The aggregator joins the film exploitation chain in various ways, but there are two main schemes: when there is a national distributor for a film, the aggregator can act as a subcontractor. However, distributors can also try to do the aggregation work themselves to avoid sharing TVOD revenues with an intermediary. When, on the other hand, there is no national distributor, the aggregator can negotiate with the film producer or agent directly for a straight-to-VOD exploitation. That is probably the aggregator's most important role: increasing the circulation of films by enabling their release in territories where they are not given a theatrical release. There too, however, the film producer or agent can choose to negotiate directly with VOD services.

Future activities of the Observatory

The Observatory has made the impact of VOD on the exploitation of films the theme of its annual conference at the Cannes Film Market. It will also continue to provide policy makers and the industry with data on the development of on-demand services: the size of markets; a recurring analysis of TVOD and SVOD catalogues, which will be gradually extended to TV content; a comparison of films exploitation schemes between cinemas, television and VOD; an analysis of the flow of films between European countries; and an analysis of catch-up TV offerings.

Gilles Fontaine
Head of the Department for Market Information

Martin Kanzler
Film Analyst

Julio Talavera
Film Analyst

Christian Grece
VOD Analyst

European Audiovisual Observatory

Top 10 markets worldwide by gross box office | 2012-2016 e

In USD billion. Converted at average annual exchange rates.

Sources: OBS, MPAA, comScore, IHS, KPMG

Rank	Market	2012	2013	2014	2015	2016	Annual growth rate 5 years	Annual growth rate 1 year
1	US & Canada	10.80	10.90	10.40	11.10	11.40	1.4%	2.7%
2	China	2.74	3.54	4.82	6.81	6.60	24.6%	-3.1%
3	Japan	2.45	1.99	1.70	1.80	2.17	-3.0%	20.3%
4	UK	1.74	1.69	1.74	1.90	1.66	-1.2%	-12.6%
5	France	1.68	1.66	1.77	1.48	1.54	-2.1%	4.1%
6	India	1.59	1.59	1.47	1.50	1.48	-1.7%	-1.1%
7	South Korea	1.31	1.42	1.49	1.37	1.45	2.6%	6.0%
8	Germany	1.35	1.36	1.30	1.29	1.13	-4.3%	-12.4%
9	Australia	1.17	1.06	0.87	0.89	0.91	-5.9%	2.7%
10	Mexico	0.8	0.9	0.8	0.84	0.79	0.4%	-6.2%
World total e		34.7	35.9	36.4	38.4	38.6	2.7%	0.5%
Growth rate - World e		6.4%	3.5%	1.4%	5.5%	0.5%	2.7%	0.5%
Growth rate - Top 10 e		7.1%	2.0%	1.1%	9.8%	0.5%	4.9%	9.8%
Growth rate - Top 10 e without China		4.4%	-1.2%	-4.4%	2.7%	1.6%	-0.4%	1.6%

Top 10 markets worldwide by admissions | 2012-2016 e

In millions. Ranked by 2016 admissions.

Source: OBS

Rank	Market	2012	2013	2014	2015	prov. 2016	Annual growth rate e 5 years	Annual growth rate e 1 year
1	India	2 641	1 978	1 900	2 016	2 015	-6.5%	0.0%
2	China	470	612	830	1 260	1 370	30.7%	8.7%
3	US & Canada	1 358	1 340	1 270	1 320	1 320	-0.7%	0.0%
4	Mexico	228	248	240	286	321	8.9%	12.2%
5	South Korea	195	213	215	217	217	2.7%	-0.1%
6	France	204	194	209	205	213	1.1%	3.8%
7	Russian Federation	160	176	176	174	195	5.0%	11.9%
8	Brazil	149	150	156	173	184	5.5%	6.6%
9	Japan	155	156	161	167	180	3.8%	8.2%
10	UK	173	166	157	172	168	-0.6%	-2.1%
World total e		6 982	6 527	6 671	7 475	7 913	3.2%	5.9%
Growth rate - World e		2.7%	-6.5%	2.2%	12.1%	5.9%	3.2%	5.9%
Growth rate - Top 10 e		4.3%	-8.7%	1.6%	12.7%	3.2%	1.9%	3.2%
Growth rate - Top 10 e without China and India		5.4%	0.8%	-2.2%	5.0%	3.1%	1.7%	3.1%

Top 10 markets worldwide by number of screens | 2012-2016 e

In units.

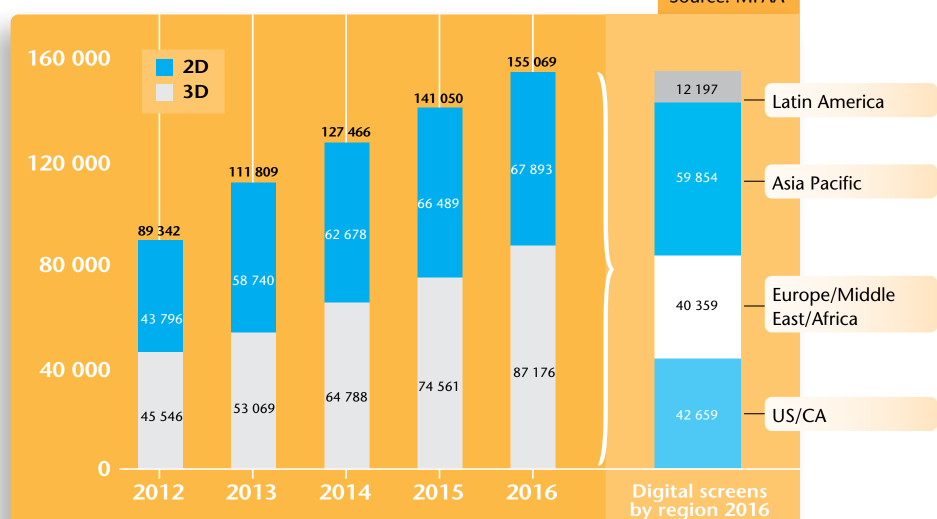
Source: OBS, MPAA, IHS

Rank	Market	2012	2013	2014	2015	2016	Annual growth rate 5 years	Annual growth rate 1 year
1	US & Canada	39 662	39 783	40 158	43 661	43 531	2.4%	-0.3%
2	China	13 118	18 195	24 607	31 627	41 179	33.1%	30.2%
3	India	11 065	11 081	11 109	11 100	c 11 500	3.9%	3.6%
4	Mexico	5 360	5 547	5 678	5 977	6 225	3.8%	4.1%
5	France	5 508	5 587	5 653	5 741	5 842	1.5%	1.8%
6	Italy	5 197	5 132	5 044	4 874	n/a	n/a	n/a
7	Germany	4 617	4 610	4 637	4 692	4 739	0.7%	1.0%
8	Russia	3 100	3 479	3 829	4 021	4 372	9.0%	8.7%
9	UK	3 817	3 867	3 909	4 046	4 150	2.1%	2.6%
10	Spain	4 003	3 908	3 694	3 588	3 557	-2.9%	-0.9%
World total		*129 866*	*134 588*	*142 215*	*152 142*	*163 928*	*6.0%*	*7.7%*
Growth rate - World e		*5.0%*	*3.6%*	*5.7%*	*7.0%*	*7.7%*	*6.0%*	*7.7%*
Growth rate - Top 10 e		*7.9%*	*6.0%*	*7.0%*	*10.2%*	*8.9%*	*8.0%*	*2.2%*
Growth rate - Top 10 e (without China and India)		*3.0%*	*0.9%*	*1.0%*	*5.5%*	*0.9%*	*2.1%*	*0.2%*

Worldwide number of digital and 3D screens | 2012-2016 e

In units.

Source: MPAA



Top 10 markets worldwide by feature film production [1] | 2012-2016 [e]

In units.

Source: OBS, IHS

Rank	Market	2012	2013	2014	2015	2016	Annual growth rate 5 years	Annual growth rate 1 year
1	India [2]	1 602	1 724	1 966	1 845	1 903	4.4%	3.1%
2	China [4]	745	638	618	686	944	6.1%	37.6%
3	US [3]	728	738	707	791	789	2.0%	-0.3%
4	Japan [5]	554	591	615	581	610	2.4%	5.0%
5	South Korea	204	207	248	269	339	13.5%	26.0%
6	France	279	269	258	300	283	0.4%	-5.7%
7	Germany [5]	241	236	234	236	256	1.5%	8.5%
8	Spain	182	235	224	254	254	8.7%	0.0%
9	Italy	166	167	201	185	224	7.8%	21.1%
10	UK [6]	375	361	339	298	200	-14,5%	-32,9%
World total [e]		6 334	6 345	6 503	6 572	7 070	2,8%	7,6%
Growth rate - World [e]		3,9%	0,2%	2,5%	1,1%	7,6%	2,8%	7,6%
Growth rate - Top 10 [e]		13,4%	1,8%	4,7%	0,6%	8,2%	3,8%	8,2%

(1) Country data may 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 seemingly strong decline of film productions in 2016 is linked to a time lag in identifying film productions with budgets below GBP 500 000. Includes inward features and inward feature co-productions.

Top 20 films by gross box office worldwide | 2016

In USD million. GBO for 2016 only. Do not include carryovers.

	Original title	Country of origin	Studio	North American box office	International box office	Global box office
1	Captain America: Civil War	US	Walt Disney	408	707	1 115
2	Finding Dory	US	Walt Disney	486	533	1 020
3	Zootopia	US	Walt Disney	341	661	1 002
4	The Jungle Book	US/GB	Walt Disney	364	583	947
5	The Secret Life of Pets	US/JP	Universal Pictures	368	496	865
6	Batman v Superman: Dawn of Justice	US	Warner Bros.	330	502	832
7	Rogue One [1]	US	Walt Disney	408	368	776
8	Deadpool	US	20th Century Fox	363	399	762
9	Fantastic Beasts and Where to Find… [1]	GB inc/US	Warner Bros.	223	525	748
10	Suicide Squad	US	Warner Bros.	325	378	703
11	Doctor Strange	US	Walt Disney	230	406	636
12	Star Wars: Episode VII - The Force… [2]	US	Walt Disney	285	305	590
13	Mei Ren Yu (The Mermaid)	CN	China Film Group/Sony	0	528	528
14	X-Men: Apocalypse	US	20th Century Fox	155	362	517
15	The Revenant [2]	US	20th Century Fox	183	333	516
16	Kung Fu Panda 3	US/CN	20th Century Fox	144	358	502
17	Warcraft	US	Universal Pictures	47	368	415
18	Jason Bourne	US/CN	Universal Pictures	162	244	406
19	Moana [1]	US	Walt Disney	206	195	401
20	Ice Age: Collision Course	US	20th Century Fox	64	329	393

(1) Still grossing in 2017.

(2) Released in 2015. 2016 GBO only.

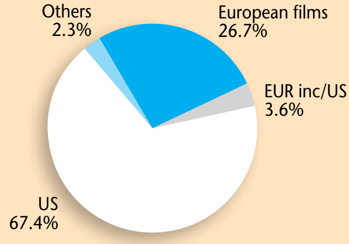
Sources: *Variety*, comScore, OBS

European Union

Population 2016 e	510.1 million
GDP per capita 2016 e	32 164 USD
Gross box office 2016	7.04 bn EUR (7.79 bn USD)
Admissions 2016	991.1 million
Average ticket price 2016	7.1 EUR (7.9 USD)
Average admissions per capita 2016	1.9
Screens 2015 | 2016 e (1)	31 621 | 31 983
Digital screens 2015 | 2016 e (2)	29 213 | 29 848
Digital 3D screens 2015 | 2016 e (2)	14 148 | 14 364

(1) OBS (2) MEDIA Salles

Market shares 2016 e



EU cinema attendance approaching the 1 billion barrier

The European Audiovisual Observatory estimates that total admissions in the 28 European Union Member States grew by 1.4% to 991 million in 2016. This is 13.3 million more than in 2015 and the highest level registered in the EU since 2004. Gross box office revenues crossed the EUR 7 billion barrier for the second consecutive year amounting to an estimated EUR 7.04 billion, down 2.3% from 2015's record high.

Admissions growth across the EU was less homogeneous than in 2015 as admissions grew in 19 and decreased in eight of the 27 EU markets for which provisional data were available. Geographically speaking the growth in EU cinema attendance was primarily driven by a strong year-on-year performance in France (+7.7 million), Poland (+7.4 million), Spain (+5.8 million) and Italy (+5.8 million). Indeed only three EU markets registered a significant decline in admissions: Germany (-18.1 million), the UK (- 3.7 million) and Belgium (-1.7 million).

Admissions growth driven by depth, not breakout successes

As in 2015, admissions growth was driven primarily by US studio titles. However, in contrast to last year, when *Star Wars VII*, *Minions* and *Spectre* stood out selling around 38 million tickets in the EU each, no single film succeeded in selling more than 30 million tickets in 2016 and admissions growth in the EU was driven by a comparatively large number of films performing solidly rather than individual breakout successes.

2016 EU box office charts were dominated by US films which accounted for 22 of the top 25 films with family animation films like *The Secret Life of Pets, Finding Dory, Zootopia* or *The Jungle Book* outperforming most of the various franchise sequels, prequels and spin-offs. On a cumulative basis, admissions to US films increased by an estimated 50 million leading to an estimated market share of 67.4%. With *Fantastic Beasts and Where to Find Them* as the only UK incoming investment film making it into the top 25, the market share of European films produced in Europe with incoming US investment (EUR inc) fell from 7.1% to 3.6%. While European films continued to perform well on several national markets, particularly in France (35.8% market share), the Czech Republic (29.5%), Italy (29.1%) and Finland (28.9%), overall admissions for European films are estimated to have remained stable, causing the market share of European films in the EU to slightly decrease from 27.0% to 26.7%, the second lowest level in the past five years.

EU production continues to grow

EU production levels continued their moderate upswing of recent years with the estimated number of European feature film productions increasing from 1 663 to 1 740 theatrical films. This figure breaks down into an estimated 1 133 fiction films (65%) and 607 feature documentaries (35%). The increase in production activity was primarily linked to an increasing number of 100% national films which accounted for 75% of total fiction production volume in 2016.

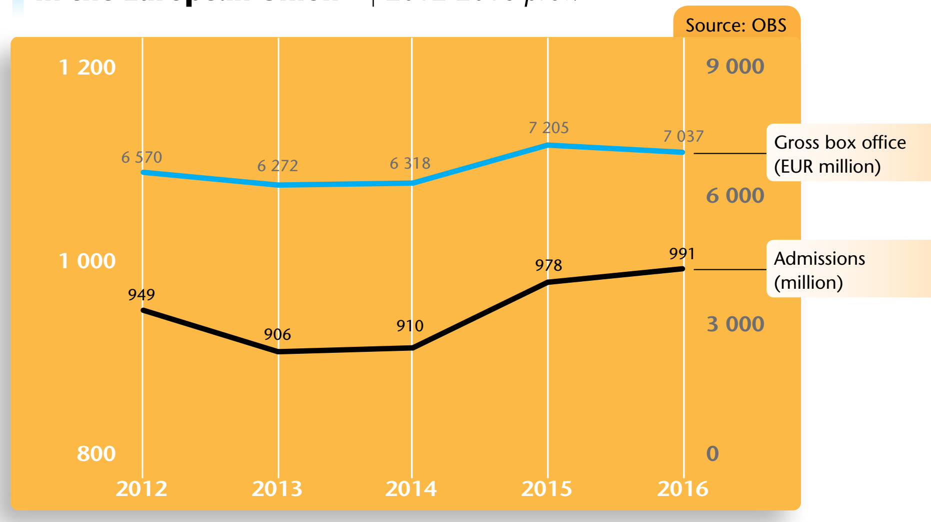
Source: European Audiovisual Observatory (OBS)

All 2016 figures for the EU are provisional estimates. "Inc" refers to films produced in a "host" country with US incoming investment.

Information on the number of European digital screens is provided MEDIA Salles and refers only to digital screens equipped with DLP Cinema or SXRD technology. MEDIA Salles operates in the framework of the EU's Creative Europe MEDIA sub-programme and supports the promotion of European films through information and training specifically for cinema exhibitors.

Complementary admissions data to top European films are provided by Europa Cinemas, the first international network of cinemas for the circulation of European films, supported by Creative Europe/MEDIA and the French CNC. The network counts 1 024 member cinemas (2 462 screens) in 611 cities of 33 MEDIA countries.

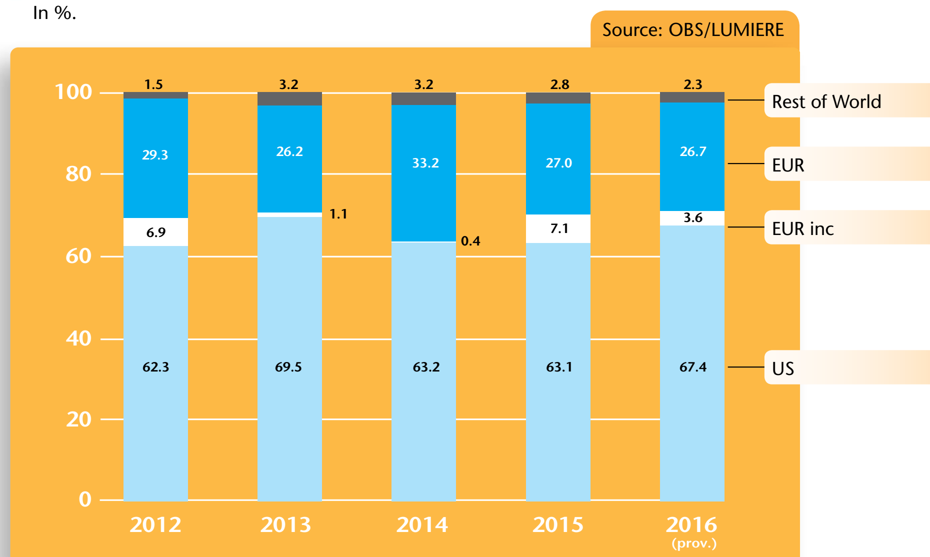
Admissions and gross box office in the European Union (1) | 2012-2016 *prov.*



(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 | 2012-2016 e

In %.



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

Number of feature films produced in the European Union | 2012-2016 *prov.*

In units.

Country		2012	2013	2014	2015	*prov.* 2016	Sources
Austria	100% national fiction	9	18	10	15	13	Austrian Film Institute
	maj. co-prod. fiction	6	5	6	1	3	Austrian Film Institute
	min. co-prod. fiction	8	2	4	7	7	Austrian Film Institute
	Feature documentaries	31	21	25	17	21	Austrian Film Institute
Belgium (1)	100% national fiction	6	12	12	13	16	CFWB / VAF
	maj. co-prod. fiction	14	17	20	17	21	CFWB / VAF
	min. co-prod. fiction	27	33	36	31	28	CFWB / VAF
	Feature documentaries	8	5	5	8	17	CFWB / VAF
Bulgaria	100% national fiction	5	0	2	10	6	National Film Center
	maj. co-prod. fiction	1	4	1	2	5	National Film Center
	min. co-prod. fiction	2	0	0	5	7	National Film Center
	Feature documentaries	11	11	10	8	11	National Film Center
Cyprus e	100 % national fiction	0	0	1	2	2	Min. Cult. / IMDB / OBS
	maj. co-prod. Fiction	1	0	1	1	0	Min. Cult. / IMDB / OBS
	min. co-prod. Fiction	0	1	1	1	1	Min. Cult. / IMDB / OBS
Croatia	100% national fiction	9	14	7	5	6	Croatian Audiovisual Centre
	maj. co-prod. fiction	4	2	4	4	4	Croatian Audiovisual Centre
	min. co-prod. fiction	3	8	5	5	6	Croatian Audiovisual Centre
Czech Rep.	100% national fiction	23	19	21	20	24	State Cinematography Fund
	maj. co-prod. fiction	5	8	8	7	17	State Cinematography Fund
	min. co-prod. fiction	4	2	6	9	7	State Cinematography Fund
	Feature documentaries	15	18	26	20	31	State Cinematography Fund
Denmark (2)	100% national fiction	12	13	14	14	15	Danish Film Institute
	maj. co-prod. fiction	6	9	7	9	8	Danish Film Institute
	min. co-prod. fiction	9	9	7	8	8	Danish Film Institute
	Feature documentaries	27	33	27	40	31	Danish Film Institute
Estonia (2)	100% national fiction	5	4	3	1	7	Estonian Film Institute
	maj. co-prod. fiction	0	3	1	3	2	Estonian Film Institute
	min. co-prod. fiction	6	0	2	2	3	Estonian Film Institute
	Feature documentaries	9	12	13	19	8	Estonian Film Institute
Finland (3)	100% national fiction	20	14	18	14	15	Finnish Film Foundation
	maj. co-prod. fiction	4	5	1	3	3	Finnish Film Foundation
	min. co-prod. fiction	4	6	5	4	5	Finnish Film Foundation
	Feature documentaries	16	18	23	24	22	Finnish Film Foundation
France	100% national fiction	116	122	124	126	125	CNC
	maj. co-prod. fiction	55	50	44	66	55	CNC
	min. co-prod. fiction	66	59	53	61	59	CNC
	Feature documentaries	42	38	37	47	44	CNC
Germany (2)	100% national fiction	86	79	84	76	82	SPIO
	maj. co-prod. fiction	32	38	22	24	41	SPIO
	min. co-prod. fiction	36	37	43	45	43	SPIO
	Feature documentaries	87	82	85	91	90	SPIO
Greece (2) e	100% national fiction	12	12	13	21	27	Greek Film Center / OBS
	maj. co-prod. fiction	7	3	0	0	2	Greek Film Center / OBS
	min. co-prod. fiction	3	2	0	0	2	Greek Film Center / OBS
Hungary	100% national fiction	26	27	11	13	15	National Film Office (NMHH)
	maj. co-prod. fiction	0	2	1	2	3	National Film Office (NMHH)
	min. co-prod. fiction	1	3	3	3	1	National Film Office (NMHH)
Ireland	100% national fiction	4	4	6	4	6	Irish Film Board
	maj. co-prod. fiction	9	9	6	7	10	Irish Film Board
	min. co-prod. fiction	10	6	13	6	4	Irish Film Board
	Feature documentaries	16	15	7	15	9	Irish Film Board
Italy	100% national fiction	109	114	150	126	142	MiBACT
	maj. co-prod. fiction	19	14	14	22	23	MiBACT
	min. co-prod. fiction	16	7	7	5	7	MiBACT
	Feature documentaries	22	32	30	32	52	MiBACT

Continued

Number of feature films produced in the European Union | 2012-2016 *prov.*

In units.

Country		2012	2013	2014	2015	*prov.* 2016	Sources
Latvia (2)	100% national fiction	2	2	1	1	2	National Film Centre of Latvia
	maj. co-prod. fiction	4	1	5	2	2	National Film Centre of Latvia
	min. co-prod. fiction	0	1	1	0	3	National Film Centre of Latvia
	Feature documentaries	6	9	17	14	13	National Film Centre of Latvia
Lithuania (2)	100% national fiction	3	7	8	6	8	Lithuanian Film Centre
	maj. co-prod. fiction	1	1	3	2	2	Lithuanian Film Centre
	min. co-prod. fiction	0	2	1	0	1	Lithuanian Film Centre
	Feature documentaries	5	6	3	1	2	Lithuanian Film Centre
The Netherlands	100% national fiction	26	19	22	24	19	NFF
	maj. co-prod. fiction	17	18	21	19	9	NFF
	min. co-prod. fiction	12	14	19	20	20	NFF
	Feature documentaries	23	16	22	19	32	NFF
Poland	100% national fiction	28	19	30	28	39	Polish Film Institute
	maj. co-prod. fiction	4	3	4	4	1	Polish Film Institute
	min. co-prod. fiction	10	3	3	3	6	Polish Film Institute
	Feature documentaries	5	6	9	14	8	Polish Film Institute
Portugal	100% national fiction	3	2	2	6	5	ICA
	maj. co-prod. fiction	4	1	1	9	8	ICA
	min. co-prod. fiction	1	5	3	2	4	ICA
	Feature documentaries	7	5	7	14	10	ICA
Romania	100% national fiction	10	16	27	27	27	CNC
	maj. co-prod. fiction	8	7	3	8	7	CNC
	min. co-prod. fiction	2	3	7	1	7	CNC
	Feature documentaries	18	11	10	7	8	CNC
Slovakia	100% national fiction	7	3	4	5	2	Slovak Film Institute
	maj. co-prod. fiction	1	4	3	5	4	Slovak Film Institute
	min. co-prod. fiction	5	7	5	5	8	Slovak Film Institute
	Feature documentaries	8	6	15	11	12	Slovak Film Institute
Slovenia (2)	100% national fiction	2	9	5	9	4	Slovenian Film Center
	maj. co-prod. fiction	2	1	1	1	4	Slovenian Film Center
	min. co-prod. fiction	4	2	4	5	4	Slovenian Film Center
	Feature documentaries	2	4	2	4	8	Slovenian Film Center
Spain	100% national fiction	60	76	26	69	98	ICAA
	maj. co-prod. fiction	33	37	68	58	23	ICAA
	min. co-prod. fiction	22	31	32	16	13	ICAA
	Feature documentaries	67	91	98	111	120	ICAA
Sweden (2)	100% national fiction	27	34	26	21	16	SFI
	maj. co-prod. fiction	3	1	4	7	6	SFI
	min. co-prod. fiction	8	8	7	4	7	SFI
	Feature documentaries	13	18	19	18	25	SFI
United Kingdom (4)	100% national fiction	210	194	177	136	107	BFI
	maj. co-prod. fiction	14	17	10	12	7	BFI
	min. co-prod. fiction	18	22	21	16	12	BFI
	Feature documentaries	88	86	77	72	27	BFI
	Inward features (5)	45	42	54	62	47	BFI
Total fiction films EU 28 (6) e		***1 077***	***1 096***	***1 069***	***1 096***	***1 133***	OBS
Total feature documentaries EU 28 (6) e		***492***	***527***	***547***	***566***	***607***	OBS
Total feature films EU 28 (6) e		***1 569***	***1 623***	***1 616***	***1 662***	***1 740***	OBS

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

(2) Films on first release.

(3) Films receiving national support.

(4) The apparent decline of film productions in 2016 is linked to a time lag in identifying film productions with budgets below GBP 500 000.

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

(6) Restated data series. Estimates accounting for time-lag in identifiying GB productions. Excluding GB inward investment features.

Admissions in the European Union | 2012-2016 *prov.*

In millions.

ISO	Country	2012	2013	2014	2015	*prov.* 2016	*2016/15*	Sources
AT	**Austria** [e]	16.4	15.2	14.3	15.9	15.1	***-5.0%***	Austrian Film Institute (ÖFI)
BE	**Belgium** [e]	21.8	20.9	20.9	21.1	19.4	***-8.2%***	SPF Economie, Cinedata, FCB, ABDF/VFDB
BG	**Bulgaria**	4.1	4.8	4.9	5.3	5.5	***3.7%***	National Film Center (NFC)
CY	**Cyprus** [e]	0.8	0.7	0.7	0.7	0.7	***-2.4%***	Ministry of Culture
CZ	**Czech Republic**	11.2	11.1	11.6	13.0	15.6	***20.6%***	Czech Cinematography Fund (SFK)
DE	**Germany**	135.1	129.7	121.7	139.2	121.1	***-13.0%***	FFA
DK	**Denmark**	13.6	12.9	11.9	13.8	13.0	***-5.8%***	Statistics Denmark
EE	**Estonia**	2.6	2.6	2.6	3.1	3.3	***6.4%***	Estonian Film Institute (EFI)
ES	**Spain** [e]	94.2	78.7	88.0	96.1	102.0	***6.1%***	ICAA
FI	**Finland** [e]	8.4	7.7	7.3	8.7	8.7	***-0.6%***	Finnish Film Foundation
FR	**France**	203.6	193.7	209.1	205.4	213.1	***3.8%***	CNC
GB	**United Kingdom**	172.5	165.5	157.5	171.9	168.3	***-2.1%***	CAA / BFI
GR	**Greece** [e]	10.1	9.2	9.0	9.8	10.0	***2.2%***	Greek Film Center (GFC)
HR	**Croatia**	4.1	4.0	3.8	3.9	4.3	***9.1%***	Croatian Audiovisual Centre (HAC)
HU	**Hungary** [e]	9.5	10.1	11.0	13.0	14.6	***12.3%***	National Film Office (NMHH)
IE	**Ireland** [e]	15.4	14.7	14.4	15.2	15.8	***4.0%***	Irish Film Board, MEDIA LIVE
IT	**Italy** [e]	102.6	105.7	98.3	106.7	112.5	***5.4%***	SIAE / Cinetel / ANICA
LT	**Lithuania**	3.0	3.3	3.2	3.3	3.7	***10.1%***	Lithuanian Film Centre (LFC)
LU	**Luxembourg** [e]	1.3	1.2	1.1	1.3	1.3	***-3.8%***	Media Salles
LV	**Latvia**	2.3	2.4	2.3	2.4	2.5	***6.2%***	National Film Centre of Latvia (NFC)
MT	**Malta**	0.7	0.7	0.7	0.7	~	~	National Statistics Office
NL	**Netherlands**	30.7	30.8	30.8	33.0	34.2	***3.7%***	NFF / MaccsBox - NVB & NVF
PL	**Poland**	38.5	36.3	40.5	44.7	52.1	***16.6%***	Polish Film Institute
PT	**Portugal**	13.8	12.6	12.1	14.6	14.9	***2.2%***	Instituto do Cinema e do Audiovisual (ICA)
RO	**Romania**	8.3	9.0	10.2	11.2	13.0	***16.7%***	Centrul National al Cinematografiei
SE	**Sweden**	17.9	16.6	16.3	17.0	17.8	***4.2%***	Swedish Film Institute
SI	**Slovenia**	2.7	2.3	1.9	2.1	2.3	***11.5%***	Slovenian Film Centre (SFC)
SK	**Slovak Republic**	3.4	3.7	4.1	4.6	5.7	***22.8%***	UFD / Slovak Film Institute (SKFI / AIC)
	EU 28 - Total [e]	***949***	***906***	***910***	***978***	***991***	***1.4%***	European Audiovisual Observatory

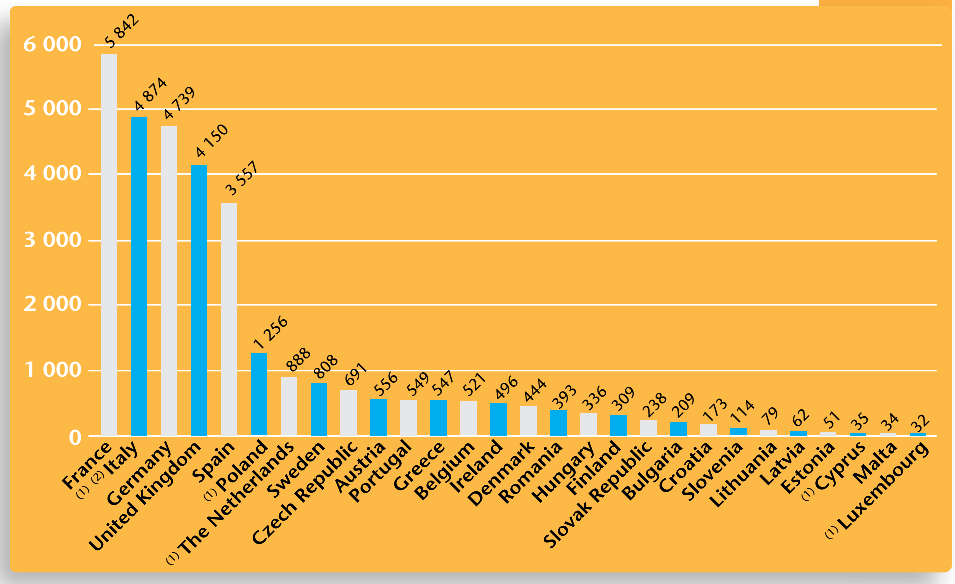
Source: OBS

Number of screens in the European Union by country

December 2016 e

In units.

Source: OBS



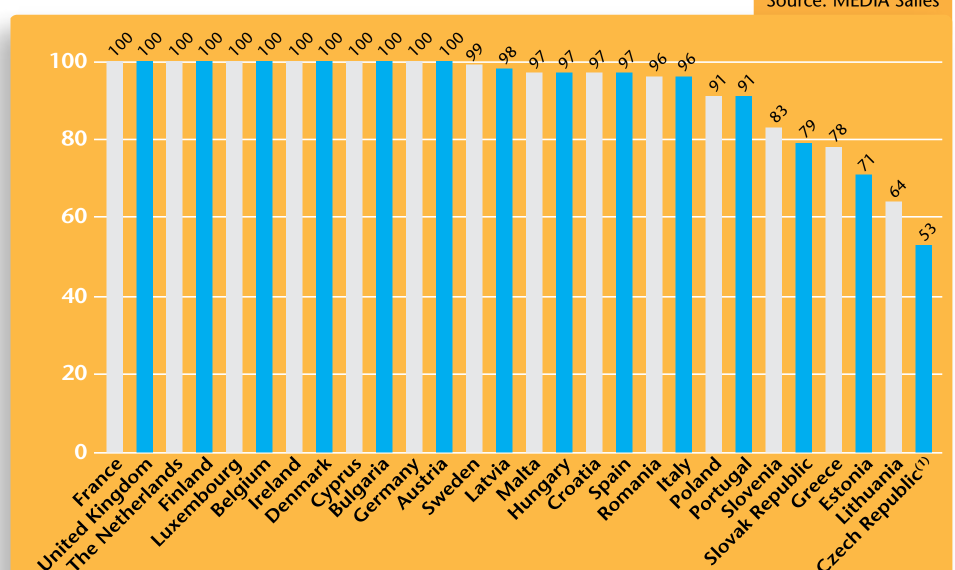
(1) Estimated as of December 2015. (2) Including screens with screenings on less than 60 days.

Digital screen penetration in the European Union by country

December 2016 e

In %.

Source: MEDIA Salles



(1) Czech screen base includes non-permanent screens (open-air, part-time, itinerant screens) which represent an important part of the local cinema landscape. Digital screen penetration among permanent cinemas is 91%.

The tables below offer provisional rankings based on the analysis of partially fragmentary data from 26 EU member states representing 91% of all admissions in the EU.

Top 25 films by admissions in the European Union | 2016 *prov.*

	Original title	Country of origin	Director	*prov.* Admissions
1	The Secret Life of Pets	US/JP	Yarrow Cheney, Chris Renaud	26 514 137
2	Finding Dory	US	Andrew Stanton, Angus MacLane	24 650 635
3	Fantastic Beasts and Where to Find Them	GB inc/US	David Yates	23 429 613
4	Zootopia	US	B. Howard, R. Moore, J. Bush	22 271 827
5	Rogue One	US	Gareth Edwards	21 673 965
6	The Jungle Book	US/GB	Jon Favreau	20 522 306
7	Deadpool	US	Tim Miller	19 822 778
8	The Revenant	US	Alejandro González Iñárritu	18 981 078
9	Suicide Squad	US	David Ayer	16 732 103
10	Bridget Jones's Baby	GB/US/FR	Sharon Maguire	16 267 602
11	Ice Age: Collision Course	US	Mike Thurmeier, Galen T. Chu	15 477 437
12	Star Wars: Episode VII - The Force Awakens (1)	US	J.J. Abrams	14 993 604
13	Batman v Superman: Dawn of Justice	US	Zack Snyder	14 827 339
14	Captain America: Civil War	US	Anthony Russo, Joe Russo	13 323 478
15	Doctor Strange	US	Scott Derrickson	11 168 706
16	Kung Fu Panda 3	US/CN	A. Carloni, J. Yuh Nelson	10 808 797
17	Moana	US	Williams, Musker, Clements, Hall	10 595 510
18	Inferno	US/HU	Ron Howard	9 687 793
19	Quo vado?	IT	Gennaro Nunziante	9 517 654
20	Alvin and the Chipmunks: The Road Chip	US	Walt Becker	9 409 117
21	Angry Birds	US/FI	Clay Kaytis, Fergal Reilly	9 214 346
22	Jason Bourne	US/CN	Paul Greengrass	9 019 156
23	Miss Peregrine's Home for Peculiar Children	US/GB/BE	Tim Burton	8 447 225
24	X-Men: Apocalypse	US	Bryan Singer	8 424 067
25	The Girl on the Train	US	Tate Taylor	7 912 904

(1) 39 791 061 admissions in the EU in 2015.

Source: OBS/LUMIERE

Top 25 European films (including EUR inc) by admissions in the European Union | 2016 *prov.*

	Original title	Country of origin	Director	*prov.* Admissions
1	Fantastic Beasts and Where to Find Them	GB inc/US	David Yates	23 429 613
2	Bridget Jones's Baby	GB/US/FR	Sharon Maguire	16 267 602
3	Quo vado?	IT	Gennaro Nunziante	9 517 654
4	Les Tuche 2 - Le rêve américain	FR	Olivier Baroux	4 619 884
5	A Monster Calls	ES/US	J.A. Bayona	4 609 272
6	The Danish Girl	GB/US/BE/DK/DE	Tom Hooper	4 179 967
7	Camping 3	FR/BE	Fabien Onteniente	3 229 538
8	Willkommen bei den Hartmanns	DE	Simon Verhoeven	3 215 065
9	Radin !	FR	Fred Cavayé	2 994 049
10	Pitbull. Niebezpieczne kobiety	PL	Patryk Vega	2 901 238
11	Perfetti sconosciuti	IT	Paolo Genovese	2 777 980
12	Heidi (1)	DE/CH	Alain Gsponer	2 502 078
13	Absolutely Fabulous: The Movie	GB inc/US	Mandie Fletcher	2 487 669
14	Retour chez ma mère	FR	Eric Lavaine	2 390 255
15	Robinson Crusoe	BE/FR	Ben Stassen, Vincent Kesteloot	2 386 826
16	Les Visiteurs: La Révolution	FR/BE/CZ	Jean-Marie Poiré	2 255 095
17	Chocolat	FR	Roschdy Zem	2 177 049
18	En man som heter Ove (2)	SE/NO	Hannes Holm	2 175 548
19	Julieta	ES	Pedro Almodóvar	2 135 964
20	Bibi & Tina: Mädchen gegen Jungs	DE	Detlev Buck	2 113 003
21	Florence Foster Jenkins	GB	Stephen Frears	2 064 454
22	Planeta Singli	PL	Mitja Okorn	2 018 372
23	Palmeras en la nieve (3)	ES	Fernando González Molina	1 974 376
24	The Little Prince (4)	FR/US	Mark Osborne	1 970 041
25	Pattaya	FR	Franck Gastambide	1 962 266

(1) 153 465 admissions in the EU in 2015.
(2) 429 028 admissions in the EU in 2015.
(3) 736 247 admissions in the EU in 2015.
(4) 3 629 406 admissions in the EU in 2015.

Source: OBS/LUMIERE

Top 25 EU films by admissions in the Europa Cinemas Network (1) | 2016 e

	Original title	Country of origin (2)	Director	prov. Admissions
1	I, Daniel Blake	GB/FR/BE	Ken Loach	964 900
2	Toni Erdmann	DE/AT/RO/CH	Maren Ade	926 648
3	Julieta	ES	Pedro Almodóvar	820 081
4	The Danish Girl	GB/US/BE/DK/DE	Tom Hooper	717 533
5	Florence Foster Jenkins	GB	Stephen Frears	525 404
6	Demain (Tomorrow)	FR	Mélanie Laurent, Cyril Dion	479 187
7	Suffragette	GB	Sarah Gavron	470 313
8	Bridget Jones's Baby	GB/US/FR	Sharon Maguire	438 636
9	Frantz	FR/DE	François Ozon	400 569
10	Brooklyn	GB/IE/CA	John Crowley	399 836
11	L'Avenir (Things to Come)	FR/DE	Mia Hansen-Løve	397 445
12	La pazza gioia (Like Crazy)	IT/FR	Paolo Virzi	393 171
13	Room	CA/US/GB/IE	Lenny Abrahamson	392 138
14	En man som heter Ove (A Man Called Ove)	SE/NO	Hannes Holm	391 992
15	Le Goût des merveilles (The Sense of Wonder)	FR	Eric Besnard	388 221
16	Mustang	FR/DE/TR	Deniz Gamze Ergüven	345 212
17	Les Innocentes (The Innocents)	FR/PL	Anne Fontaine	339 797
18	Médecin de campagne (Irreplaceable)	FR	Thomas Lilti	338 024
19	Saul fia (Son of Saul)	HU/US/FR/IL/BA	László Nemes	335 917
20	Youth (La giovinezza)	IT/FR/GB/CH	Paolo Sorrentino	326 153
21	Le Tout Nouveau Testament (The Brand…)	BE/LU/FR	Jaco van Dormael	315 811
22	Love and Friendship	GB/IE/FR/NL	Whit Stillman	294 373
23	Quo vado?	IT	Gennaro Nunziante	276 520
24	Elle	FR/DE/BE	Paul Verhoeven	274 319
25	Vor der Morgenröte (Stefan Zweig: …)	DE/AT/FR	Maria Schrader	267 773

(1) Data based on Europa Cinemas members in 33 countries, 611 cities, 1 024 cinemas, 2 462 screens.
(2) Country of origin and production year as allocated in LUMIERE database.

Sources: Europa Cinemas, OBS

Top 25 European films by admissions in the US & Canada | 2016 e

Admissions estimated based on average ticket price of USD 8.60.

	Original title	Country of origin	Director	Distributor	Admissions e
1	Fantastic Beasts and …	GB INC/US	David Yates	Warner Bros.	25 583 115
2	Florence Foster Jenkins	GB	Stephen Frears	Paramount Pictures	3 184 158
3	Bridget Jones's Baby	GB/US/FR	Sharon Maguire	Universal Pictures	2 820 048
4	Nine Lives	FR/CN/CA	Barry Sonnenfeld	EuropaCorp	2 290 701
5	Brooklyn	GB/IE/CA	John Crowley	Fox Searchlight	2 181 249
6	Eye in the Sky	GB	Gavin Hood	Bleecker Street	2 174 952
7	Eddie the Eagle	GB inc/US/DE	Dexter Fletcher	20th Century Fox	1 835 974
8	The Infiltrator	GB inc/US	Brad Furman	Broad Green Pictures	1 794 976
9	Love & Friendship	GB/IE/FR/NL	Whit Stillman	Roadside Attractions	1 629 833
10	The Lady in the Van	GB	Nicholas Hytner	Sony Classics	1 159 709
11	Hardcore Henry	RU/US	Ilya Naishuller	STX Entertainment	1 075 817
12	Carol	GB/US/AU	Todd Haynes	The Weinstein Cy	1 036 087
13	The Lobster	IE/FR/GB/NL/GR	Yorgos Lanthimos	A24 Films	1 011 671
14	Robinson Crusoe	BE/FR	B. Stassen, V. Kesteloot	Lionsgate	930 881
15	Loving	GB/US	Jeff Nichols	Focus/Focus Features	861 550
16	Grimsby	GB inc/US	Louis Leterrier	Sony Pictures	799 399
17	The Danish Girl	GB/US/BE/DK/DE	Tom Hooper	Focus/Focus Features	768 322
18	Absolutely Fabulous: …	GB inc/US	Mandie Fletcher	Fox Searchlight	554 901
19	A Hologram for the King	GB/FR/DE/US/MX	Tom Tykwer	Roadside Attractions	489 824
20	45 Years	GB	Andrew Haigh	IFC Films	477 399
21	Denial	GB inc/US	Mick Jackson	Bleecker Street	473 656
22	Miss Sloane	FR/US	John Madden	EuropaCorp	403 459
23	En man som heter Ove	SE/NO	Hannes Holm	Music Box Films	384 087
24	Sing Street	IE/GB/US	John Carney	The Weinstein Cy	376 408
25	Our Kind of Traitor	GB/FR	Susanna White	Roadside Attractions	366 645

Note: A total of 113 European films (including 11 EUR inc films) featured among the top 600 films on release in the US and Canada in 2016, generating cumulative admissions of 58.2 million (4.4% market share)

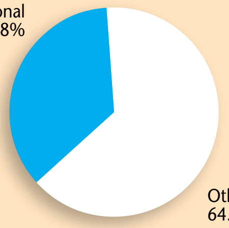
Sources: comScore, OBS/LUMIERE

France

Population 2016 e	66.7 million
GDP per capita 2016 e	38 537 USD
Gross box office 2016 e	1.39 bn EUR (1.54 bn USD)
Admissions 2016 e	213.1 million
Average ticket price 2016 e	6.5 EUR (7.2 USD)
Average admissions per capita 2016 e	3.2
Screens 2015 | 2016 (1)	5 741 | 5 842
Digital screens 2015 | 2016 (1)	5 741 | 5 842
Digital 3D screens 2015 | 2016 (2)	3 000 | 3 020

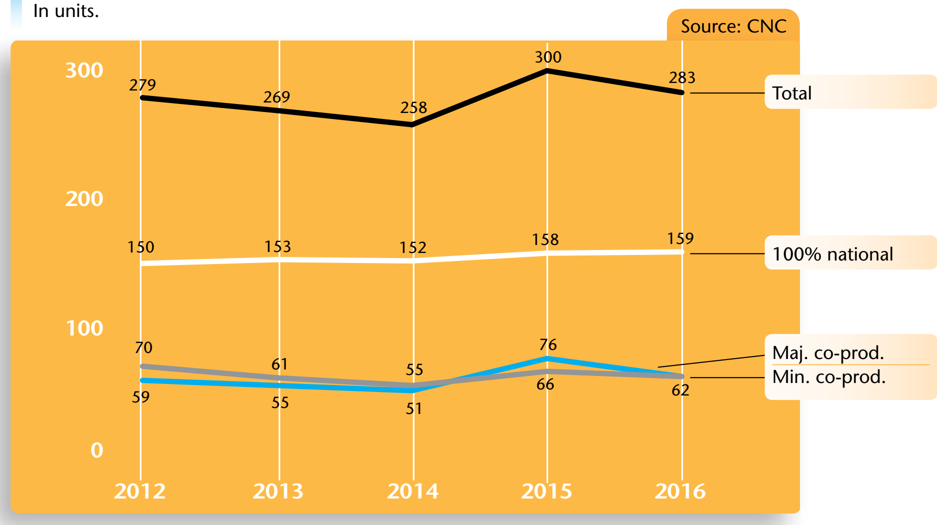
(1) Source: CNC (2) Source: MEDIA Salles

Market shares 2016 e



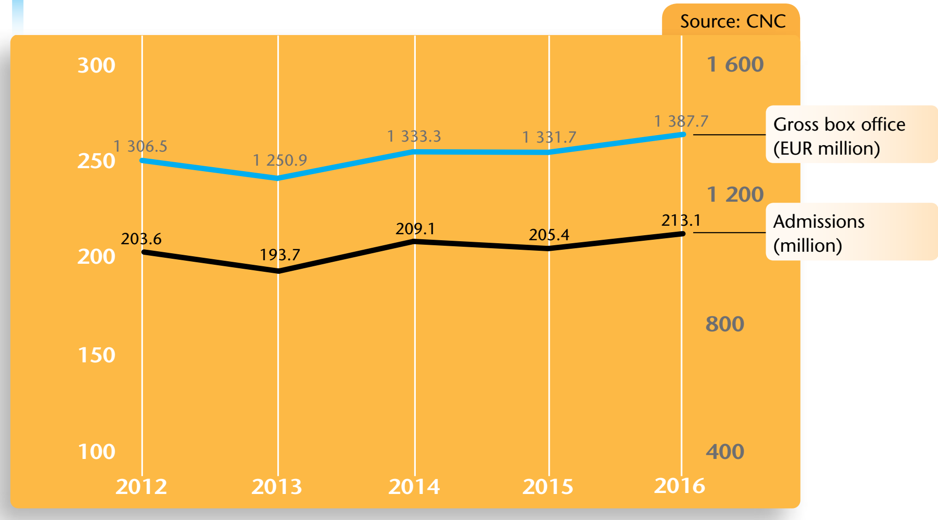
Number of French feature films produced(1) | 2012-2016

In units.



(1) Officially recognised films.

Admissions and gross box office in France | 2012-2016



Top 20 films by admissions in France | 2016 (1)

	Original title	Country of origin	Director	Distributor	Admissions e
1	Zootopia	US	Howard, Moore, Bush	Walt Disney	4 843 529
2	Les Tuche 2 - Le rêve américain	FR	Olivier Baroux	Pathé Distribution	4 619 884
3	Moana	US	Williams, Musker…	Walt Disney	3 855 391
4	The Revenant	US	A. González Iñárritu	20th Century Fox	3 845 641
5	Deadpool	US	Tim Miller	20th Century Fox	3 763 642
6	The Secret Life of Pets	US/JP	Y. Cheney, C. Renaud	UPI	3 745 575
7	The Jungle Book	US/GB	Jon Favreau	Walt Disney	3 717 982
8	Fantastic Beasts and Where to…	GB inc/US	David Yates	Warner Bros.	3 654 457
9	Ice Age: Collision Course	US	M. Thurmeier, G.T. Chu	20th Century Fox	3 498 421
10	Finding Dory	US	A. Stanton, A. MacLane	Walt Disney	3 434 392
11	Camping 3	FR/BE	Fabien Onteniente	Pathé Distribution	3 229 538
12	Rogue One	US	Gareth Edwards	Walt Disney	3 143 303
13	Radin !	FR	Fred Cavayé	Mars Distribution	2 920 360
14	Trolls	US	M. Mitchell, W. Dohrn	20th Century Fox	2 711 705
15	Miss Peregrine's Home for Peculiar…	GB/BE/US	Tim Burton	20th Century Fox	2 697 344
16	Kung Fu Panda 3	US/CN	Carloni, Yuh Nelson	20th Century Fox	2 576 948
17	Batman v Superman: Dawn of Justice	US	Zack Snyder	Warner Bros.	2 493 728
18	Suicide Squad	US	David Ayer	Warner Bros.	2 283 659
19	Les Visiteurs: La Révolution	FR/BE/CZ	Jean-Marie Poiré	Gaumont Distribution	2 200 452
20	Retour chez ma mère	FR	Eric Lavaine	Pathé Distribution	2 196 796

(1) Covering film release and admissions between 30/12/2015 and 25/12/2016. Source: *Le Film Français*

Distribution and exhibition

2016 saw French cinema attendance reach its second highest level in the past 50 years as admissions increased by 3.6% to 213.1 million, surpassed only in 2011 when admissions hit 217 million. This is the highest level registered in any European country and marks the third consecutive year of admissions exceeding 200 million. Growing by 4.2% year-on-year, GBO reached a new historic record high of EUR 1.39 billion.

As in other European markets admissions were less concentrated in 2016 as they spread over a comparatively large number of films with no individual films selling more than 5 million tickets (compared to 3 and 4 films in 2014 and 2015) but with a total of 25 films generating more than 2 million admissions. Growth was driven primarily by local mainstream live-action comedies and US animation or superhero films while art-house films struggled. The 2016 box office charts were topped by *Zootopia* which sold over 4.8 million tickets and was only one out of six animated family films among the top 10 films. Comedy sequel *Les Tuche 2 – Le rêve américain* took second place and became the most successful French title of the year (4.6 million admissions). A total of five local films made it into the top 20 and contributed largely to national market share for French films increasingly marginally to 35.8%. US market share increased slightly from 52.0% to 52.9%.

Releasing four out of the top 10 titles Walt Disney led the French distribution market with a market share of 15%, followed by 20th Century Fox (13%), Warner Bros. (9%) and local market leader Pathé Distribution (8%).

Production and funding

After hitting a record high of 300 films in 2015, French feature film production declined somewhat in 2016, with 283 films being approved by the country's national funding body CNC in 2016. This is the second highest level since statistics started in 1952. The small decrease stems from a drop in international co-productions (from 142 to 124) while the number of 100% national films actually increased by one film to 159.

In 2016, total investment in film production in France rose by 13.4% to EUR 1.39 billion, EUR 1.21 billion of which was invested in French initiative films. This is the highest level since 2008 and is largely due to two big budget productions, namely Besson's *Valerian and the City of a Thousand Planets* and Steven Quale's *The Lake*. These two also caused the average production cost of French initiative films to increase from EUR 4.38 million to EUR 5.47 (EUR 4.32 million excluding Valerian).

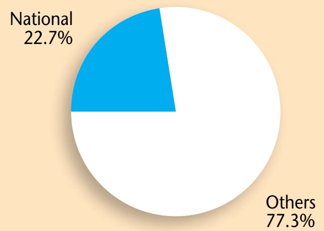
Sources: CNC, *Le Film Français*, *Screen International*, *Variety*, OBS

Germany

Population 2016 e	82.2 million
GDP per capita 2016 e	42 326 USD
Gross box office 2016 e	1.02 bn EUR (1.13 bn USD)
Admissions 2016 e	121.1 million
Average ticket price 2016 e	8.4 EUR (9.3 USD)
Average admissions per capita 2016 e	1.5
Screens 2015 | 2016 (1)	4 692 | 4 739
Digital screens 2015 | 2016 (2)	4 692 | 4 739
Digital 3D screens 2015 | 2016 (2)	2 178 | 2 190

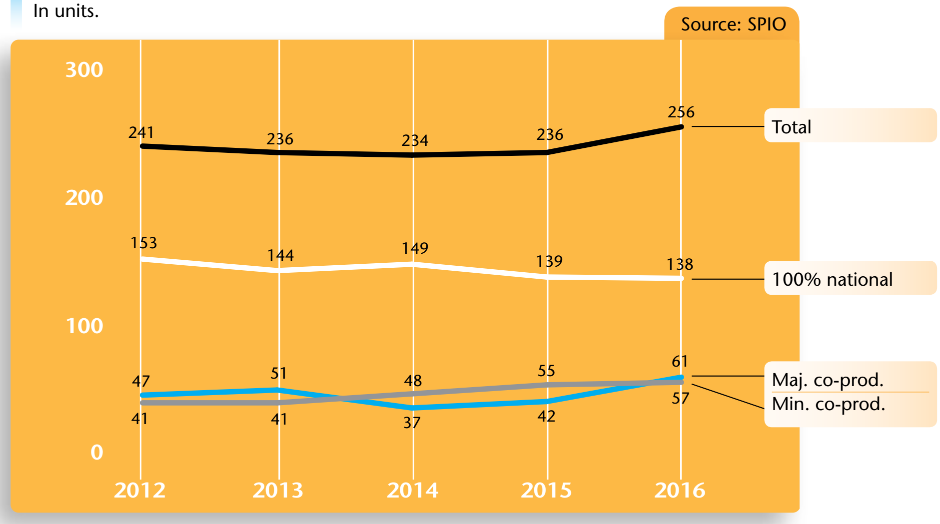
(1) Source: FFA (2) Source: MEDIA Salles

Market shares 2016 e



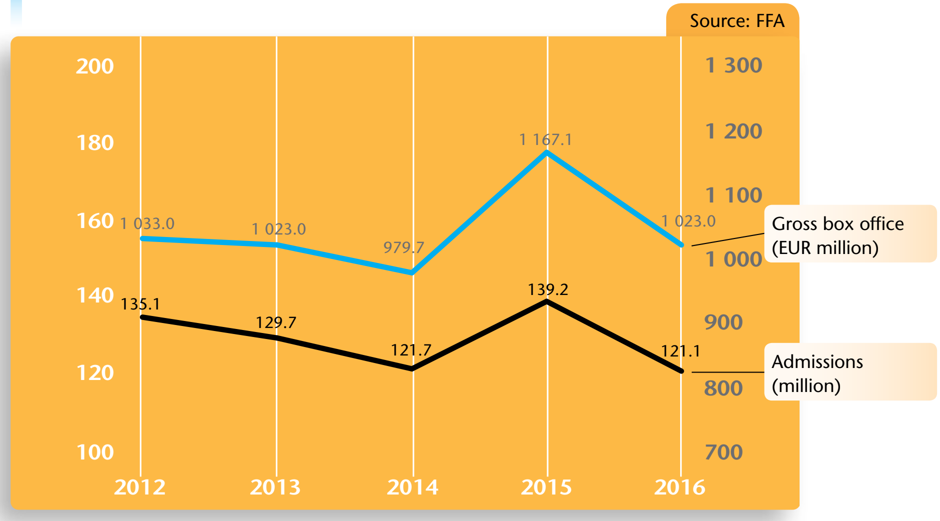
Number of German feature films produced(1) | 2012-2016

In units.



(1) Films on first release.

Admissions and gross box office in Germany | 2012-2016



Top 20 films by admissions in Germany | 2016

	Original title	Country of origin	Director	Distributor	Admissions
1	Zootopia	US	Howard, Moore, Bush	Walt Disney Studios	3 831 921
2	The Secret Life of Pets	US/JP	Y. Cheney, C. Renaud	Universal Pictures	3 816 088
3	Finding Dory	US	A. Stanton, A. MacLane	Walt Disney Studios	3 789 985
4	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Walt Disney Studios	3 397 099
5	Rogue One	US	Gareth Edwards	Walt Disney Studios	3 362 768
6	Fantastic Beasts and Where to Find…	GB inc/US	David Yates	Warner Bros.	3 146 764
7	Willkommen bei den Hartmanns	DE	Simon Verhoeven	Warner Bros.	3 079 425
8	Ice Age: Collision Course	US	M. Thurmeier, G. T. Chu	20th Century Fox	2 913 737
9	The Revenant	US	A. González Iñárritu	20th Century Fox	2 826 169
10	Deadpool	US	Tim Miller	20th Century Fox	2 711 055
11	Me Before You	US	Thea Sharrock	Warner Bros.	2 368 602
12	Bibi & Tina: Mädchen gegen Jungs	DE	Detlev Buck	DCM Film Distrib.	1 994 248
13	The Jungle Book	US/GB	Jon Favreau	Walt Disney Studios	1 874 936
14	Sing	US/JP	G. Jennings, C. Lourdelet	Universal Pictures	1 764 133
15	Captain America: Civil War	US	Anthony Russo, Joe Russo	Walt Disney Studios	1 734 683
16	Der geilste Tag	DE	Florian David Fitz	Warner Bros.	1 727 950
17	Suicide Squad	US	David Ayer	Warner Bros.	1 609 074
18	Batman v Superman: Dawn of Justice	US	Zack Snyder	Warner Bros.	1 533 202
19	Inferno	US/HU	Ron Howard	Sony Pictures	1 503 837
20	Independence Day: Resurgence	US	Roland Emmerich	20th Century Fox	1 453 268

(1) Covering film release and admissions between 30/12/2015 and 25/12/2016. Source: FFA

Distribution and exhibition

Following a record 2015, Germany registered the biggest decline in admissions out of any European market in 2016: cinema attendance was down 13%, falling to 121.1 million, 18 million admissions less than in 2015 and the lowest level in over 20 years. GBO remained above the one billion euros benchmark but decreased by 12.3% from its record high of EUR 1.17 billion to EUR 1.02 billion.

A decline in admissions to national films, falling by almost 10 million to 27.7 million admissions, largely contributed to the overall decrease in cinema attendance. National market share dropped accordingly from its all-time record high of 27.5% to 22.7%. An increase in admissions was however achieved by 3D films which took 25.6% of total admissions. As the vast majority of 3D films were produced by US studios this trend contributed to a growth in admissions to US films and caused US market share to increase from 58.7% to 67.5%. US studio titles dominated the German box office, accounting for 17 out of the top 20 films with animated family films *Zootopia, The Secret Life of Pets* and *Finding Dory* topping the charts. *Willkommen bei den Hartmanns*, a comedy about a Munich family hosting a refugee, became the most successful local release of the year, ahead of family franchise *Bibi & Tina: Mädchen gegen Jungs* and *Der geilste Tag*.

The German distribution market in 2016 was led by Warner Bros. taking an estimated 19% of total admissions, closely ahead of Walt Disney (18%), 20th Century Fox (15%), UPI (12%) and Sony (7%).

Production and funding

A total of 256 German feature films, including minority co-productions, were released in 2016. This is the highest level in recent history. Soon after the new German Film Law (FFG) came into effect in January 2017, the German Federal Commissioner for Culture announced an increase in the 2017 budget of the country's cash rebate incentive programme DFFF from EUR 50 million to EUR 75 million. More good news followed in March when plans were announced to further increase the DFFF budget to EUR 125 million in 2018. It is planned to create a second separate funding pool within the DFFF, dubbed DFFF II, endowed with EUR 75 million while the current DFFF I will dispense a budget of EUR 50 million. DFFF II is intended to target big budget productions and may offer a rebate of up to 25%, while DFFF I funding might focus on films with local production spend of less than EUR 25 million. A final decision on the actual scale of the increase in film funding will however not be taken until the autumn after the Bundestag elections in September.

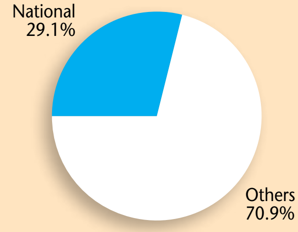
Sources: FFA, SPIO, *Blickpunkt Film, filmecho-filmwoche,* OBS

Italy

Population 2016 e	60.8 million
GDP per capita 2016 e	30 294 USD
Gross box office 2016 e	688.5 M EUR (762 M USD)
Admissions 2016 e	112.5 million
Average ticket price 2016 e	6.1 EUR (6.8 USD)
Average admissions per capita 2016 e	1.9
Screens 2015 | 2016 (1)	4 874 | ~
Digital screens 2015 | 2016 (2)	3 525 | 3 556
Digital 3D screens 2015 | 2016 (2)	1 360 | 1 380

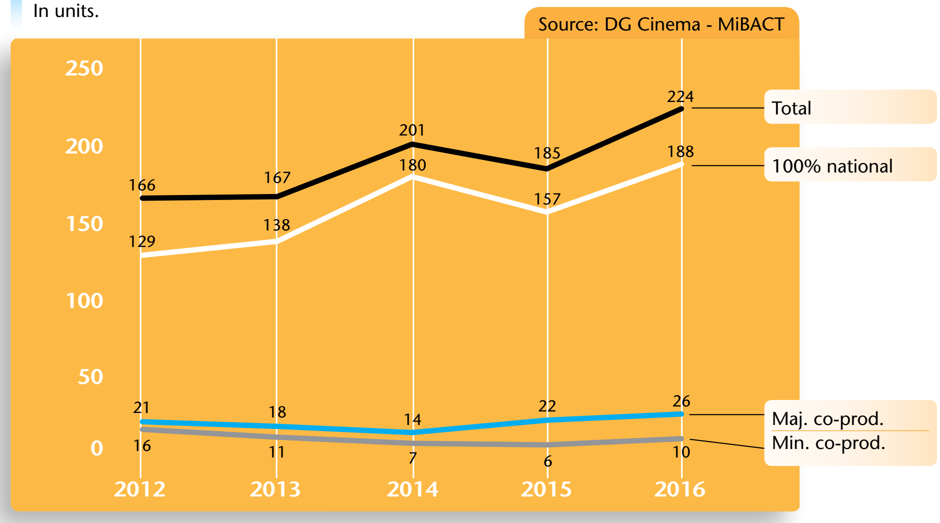
(1) Source: SIAE (2) Source: MEDIA Salles

Market shares 2016 e

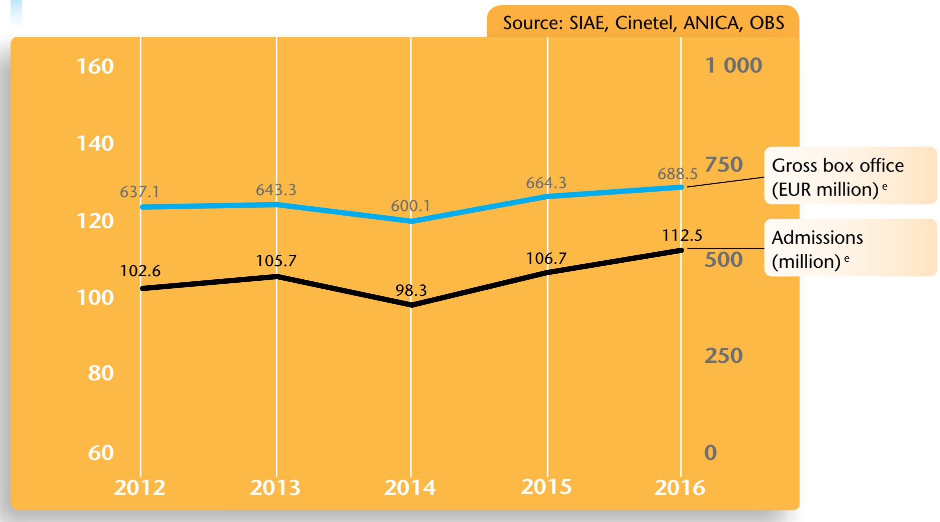


Number of Italian feature films produced | 2012-2016

In units.



Admissions and gross box office in Italy | 2012-2016 e



Top 20 films by admissions in Italy | 2016

	Original title	Country of origin	Director	Distributor	Admissions
1	Quo vado?	IT	Gennaro Nunziante	Medusa Film	4 062 788
2	Perfetti sconosciuti (Perfect Strangers)	IT	Paolo Genovese	Medusa Film	3 568 348
3	Finding Dory	US	A. Stanton, A. MacLane	Walt Disney	2 832 587
4	The Secret Life of Pets	US/JP	Y. Cheney, C. Renaud	Universal	2 814 462
5	Fantastic Beasts and Where to Find…	GB inc/US	David Yates	Warner Bros.	2 696 055
6	The Revenant	US	A. González Iñárritu	20th Century Fox	2 629 969
7	Inferno	US/HU	Ron Howard	Warner Bros.	2 416 987
8	Suicide Squad	US	David Ayer	Warner Bros.	2 353 256
9	Zootopia	US	Howard, Moore, Bush	Walt Disney	2 310 509
10	Captain America: Civil War	US	A. Russo, J. Russo	Walt Disney	2 104 996
11	The Jungle Book	US/GB	Jon Favreau	Walt Disney	1 804 809
12	Batman v Superman: Dawn of Justice	US	Zack Snyder	Warner Bros.	1 697 821
13	The Little Prince	FR/US	Mark Osborne	Lucky Red	1 315 933
14	Ice Age: Collision Course	US	Thurmeier, Chu	20th Century Fox	1 191 736
15	Kung Fu Panda 3	US/CN	Carloni, Yuh Nelson	20th Century Fox	1 160 769
16	The Hateful Eight	US	Quentin Tarantino	01 Distribution	971 493
17	L'abbiamo fatta grossa	IT	Carlo Verdone	Filmauro/Universal	964 099
18	Me Before You	US	Thea Sharrock	Warner Bros.	961 166
19	Rogue One	US	Gareth Edwards	Walt Disney	927 181
20	Doctor Strange	US	Scott Derrickson	Walt Disney	905 567

Source: Cinetel

Distribution and exhibition

Italian box office continued its moderate growth trend with estimated admissions growing to 112.5 million in 2016, up 5.4% from 106.7 million in the previous year. GBO increased by 3.6% to EUR 688.5 million reflecting a slight decrease in the average ticket price. The latter is partly due to the introduction of the Cinema2Day initiative which offered cinema tickets at just EUR 2 one day per month between September 2016 and February 2017. The initiative aimed at boosting audience numbers while related costs were reported to be split between supporting government agencies and cinemas involved.

Box office growth was largely due to the breakout success of one single film, comedy hit *Quo Vado?* starring Italian comedian Checco Zalone as a civil servant posted to the arctic after refusing voluntary redundancy. With almost 9.4 million tickets sold, *Quo Vado* became not only the most successful film of the year but also the biggest Italian film of all times. Boosted by this "Zalone Factor" and the strong performance of *Perfect Strangers* the market share for Italian films jumped from 21% to 29% while US market share dropped from 60% to 55%, despite US studio titles accounting for 17 out of the year's top 20 films.

Warner Bros led the distribution market with a market share of 18%, followed by Medusa Film (15%), Walt Disney (13%), Universal (12%) and 20th Century Fox (10%).

Production and funding

Italian feature film production volume hit a record high of 224 films produced in 2016, driven by both an increase in 100% national films as well as international co-productions. For the future, the Italian film industry stands to benefit from a new film law which took effect in January 2017 and foresees – among many other measures – the creation of a new film fund with a budget of at least EUR 400 million, effectively increasing film funding by 60%. The fund will be financed through an allocation of 11% of IRES (corporation tax) and VAT revenues from companies exploiting film content, including exhibition, distribution, TV broadcasters, ISPs and telecommunication companies. The new law also foresees to improve Italy's tax credit schemes, providing tax refunds up to 30% or even 40% of the film's budget. The investment in tax credits is expected to rise from EUR 150 million to about EUR 260 million. In order to promote international co-productions with Latin America, Italy became a member of the Ibermedia co-production programme in October 2016.

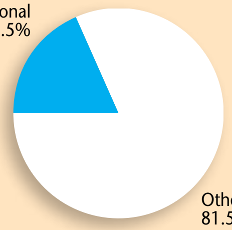
Sources: DG Cinema-MiBACT, ANICA, Cinetel, *Cineuropa, Screen International, Variety,* OBS

Spain

Population 2016 e	46.4 million
GDP per capita 2016 e	27 012 USD
Gross box office 2016 e	602.4 M EUR (666.5 M USD)
Admissions 2016 e	102.0 million
Average ticket price 2016 e	5.9 EUR (6.5 USD)
Average admissions per capita 2016 e	2.2
Screens 2015 | 2016 (1)	3 588 | 3 557
Digital screens 2015 | 2016 (2)	3 302 | 3 350
Digital 3D screens 2015 | 2016 (2)	1 108 | 1 120

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

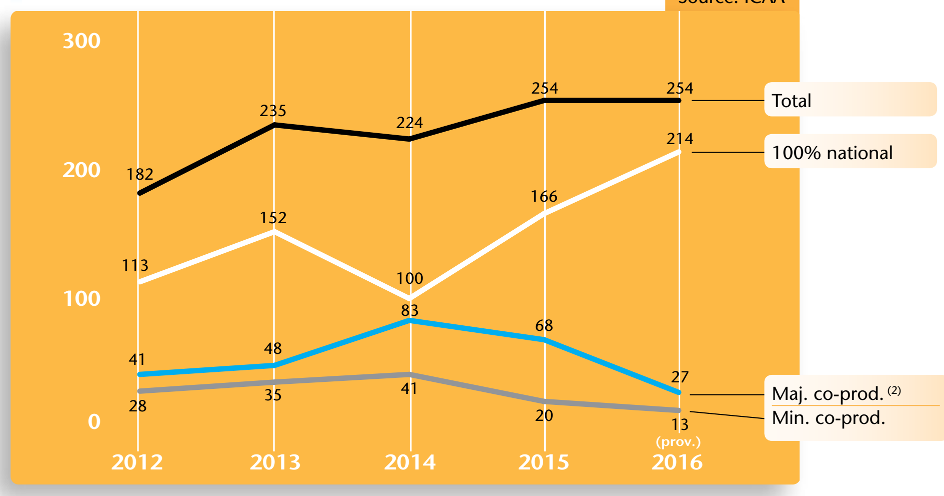
Market shares 2016 e



Number of Spanish feature films produced(1) | 2012-2016

In units.

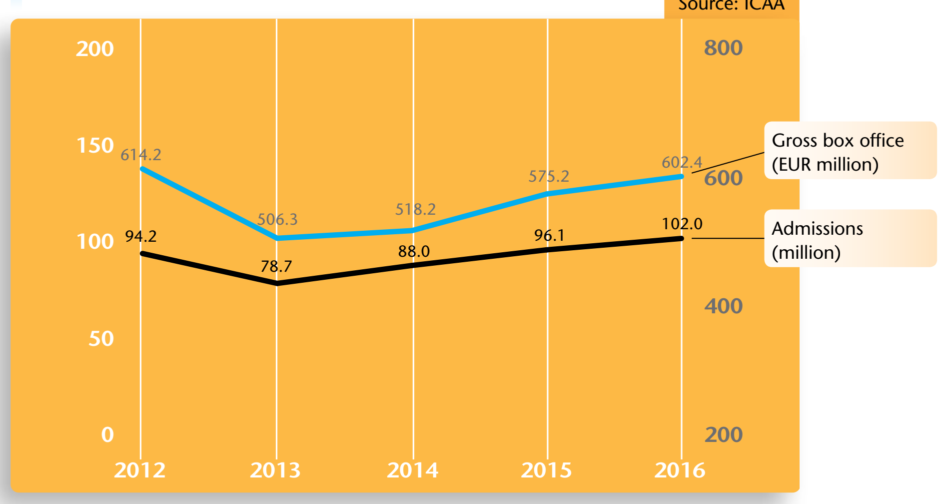
Source: ICAA



(1) Films certified. (2) Including parity co-productions.

Admissions and gross box office in Spain | 2012-2016 *prov.*

Source: ICAA



Top 20 films by admissions in Spain | 2016 *prov.*

	Original title	Country of origin	Director	Distributor	Admissions
1	A Monster Calls	ES/US	J.A. Bayona	UPI	4 582 925
2	The Secret Life Of Pets	US/JP	Y. Cheney, C. Renaud	UPI	3 854 355
3	Finding Dory	US	A. Stanton, A. MacLane	Walt Disney	3 219 630
4	The Jungle Book	US/GB	Jon Favreau	Walt Disney	2 983 237
5	Zootopia	US	Howard, Moore, Bush	Walt Disney	2 391 712
6	The Revenant	US	A. González Iñárritu	Hispano Foxfilms	2 261 476
7	Fantastic Beasts And Where To…	GB inc/US	David Yates	Warner Bros.	1 996 258
8	Palmeras en la Nieve	ES	Fernando González Molina	Nostromo Pictures	1 973 431
9	Suicide Squad	US	David Ayer	Warner Bros.	1 796 969
10	Rogue One	US	Gareth Edwards	Walt Disney	1 768 399
11	Captain America: Civil War	US	Anthony Russo, Joe Russo	Walt Disney	1 723 051
12	Deadpool	US	Tim Miller	Hispano Foxfilms	1 639 340
13	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Walt Disney	1 614 700
14	Trolls	US	M. Mitchell, W. Dohrn	Hispano Foxfilms	1 568 343
15	Batman V Superman: Dawn Of…	US	Zack Snyder	Warner Bros.	1 501 660
16	Moana	US	Williams, Musker, …	Walt Disney	1 406 342
17	Villaviciosa de al lado	ES	Nacho G. Velilla	Warner Bros.	1 270 795
18	Sing	US/JP	G. Jennings, C. Lourdelet	UPI	1 252 712
19	Miss Peregrine's Home for…	US/GB/BE	Tim Burton	Hispano Foxfilms	1 113 618
20	The Legend of Tarzan	US/GB	David Yates	Warner Bros.	1 101 125

Source: ICAA, comScore

Distribution and exhibition

Spanish box office increased for the third consecutive year, growing by 6.1% to 102 million admissions in 2016. This is the first time since 2010 that cinema attendance broke the 100 million barrier. GBO takings grew by around EUR 27 million to an annual total of EUR 602 million, 4.7% up on 2015. While showing promising signs of continuing recovery, 2016 admissions results are still well below the levels registered in Spain up until 2009. The recovery in admissions was also helped by the "Fiesta del Cine" initiative, which offers cinema tickets at only EUR 2.90 for three days in spring and autumn.

Just as in 2015, box office growth was driven by a comparatively large number of films with solid performances rather than the breakout success of a few individual titles. For the fourth time in the last five years Spanish box office charts were topped by a local title: J.A. Bayona's English language drama *A Monster Calls* which sold an estimated 4.6 million tickets in 2016. On a cumulative basis Spanish films took a market share of 18.5%, slightly down from last year's 19.2%. US studio titles, particularly family animation films, performed well and accounted for 17 out of the top 20 films.

Releasing 7 out of the top 20 films and capturing an estimated 18.8% of annual admissions, Walt Disney led the Spanish distribution market marginally ahead of UPI (18.6%). Warner Bros took third place (16.6%), followed by Hispano Foxfilms (15.6%) and Sony Pictures (9.1%).

Production and funding

Spanish film production activity remained stable with a total of 254 films certified by ICAA, the country's national public funding body, the same number as in 2015. While the production of 100% national films increased significantly, growing from 166 to 214 films, the number of international co-productions dropped from 88 to 40.

Spain introduced a new public funding system in 2016 with a total of EUR 30 million up-front production support being ring-fenced for a smaller number of "economically viable" films rather than "ex-post" support based on the commercial success of a film coming two or more year's after a film's release. The two systems will however overlap for two years as subsidies due from 2014 and 2015 will be paid out. In January 2017 the European Investment Fund signed its first partnership agreement in Spain for the Creative Europe guarantee fund, covering up to 70% of loans granted to Spanish SMEs operating in the cultural and creative sectors up to a total of EUR 150 million.

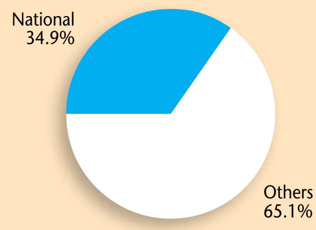
Sources: ICAA, *Screen International, Cineuropa, Variety, Hollywood Reporter*, comScore, OBS

United Kingdom

Population 2016 e	65.4 million
GDP per capita 2016 e	40 412 USD
Gross box office 2016 e	1.23 bn GBP (1.66 bn USD)
Admissions 2016 e	168.3 million
Average ticket price 2016 e	7.3 GBP (9.9 USD)
Average admissions per capita 2016 e	2.6
Screens 2015 | 2016 (1)	4 046 | 4 150
Digital screens 2015 | 2016 (2)	4 046 | 4 130
Digital 3D screens 2015 | 2016 (2)	2 030 | 2 050

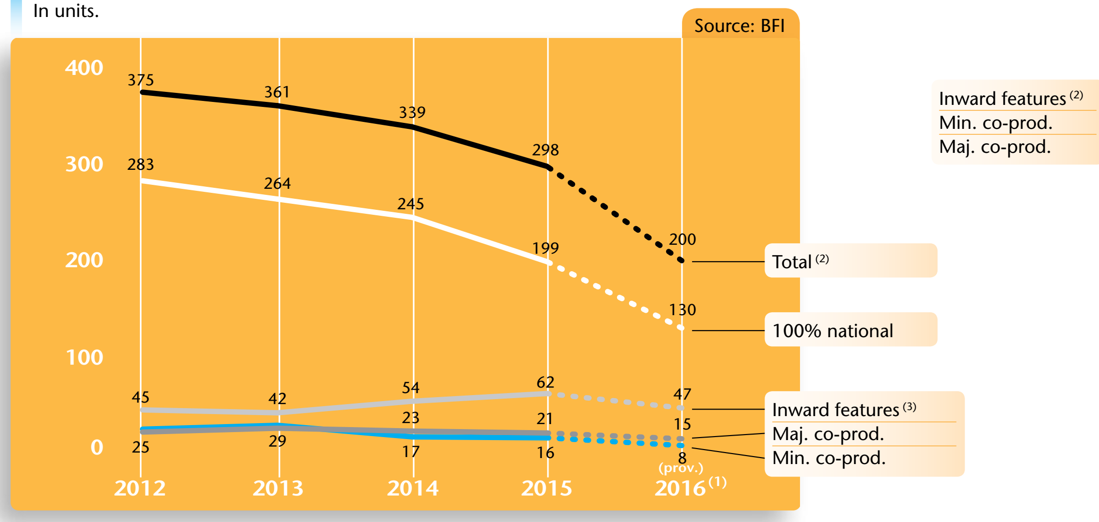
(1) Source: BFI (2) Source: MEDIA Salles

Market shares 2016 e



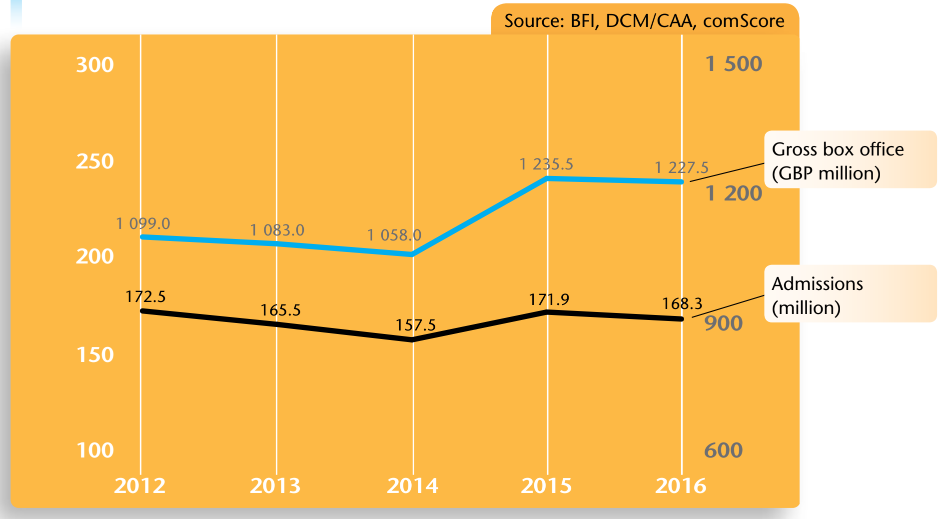
Number of films produced in the United Kingdom | 2012-2016 *prov.* (1)

In units.



(1) The seemingly strong decline of film productions in 2016 is linked to a time lag in identifying film productions with budgets below GBP 500 000.
(2) Including inward features and inward feature co-productions.
(3) Including inward feature co-productions.

Admissions and gross box office in the UK | 2012-2016



Top 20 films by admissions in the United Kingdom & Ireland | 2016 (1) e

Estimated admissions based on average ticket price of GBP 7.30.

	Original title	Country of origin	Director	Distributor	Admissions e
1	Rogue One	US	Gareth Edwards	Walt Disney	6 948 971
2	Fantastic Beasts and Where to Find…	GB inc/US	David Yates	Warner Bros.	6 943 691
3	Bridget Jones's Baby	GB/US/FR	Sharon Maguire	Universal Pictures	6 583 302
4	The Jungle Book	US/GB	Jon Favreau	Walt Disney	6 333 484
5	Finding Dory	US	Stanton, MacLane	Walt Disney	5 884 457
6	Deadpool	US	Tim Miller	20th Century Fox	5 190 697
7	Captain America: Civil War	US	A. Russo, J. Russo	Walt Disney	5 068 397
8	Batman v Superman: Dawn of Justice	US	Zack Snyder	Warner Bros.	5 019 211
9	The Secret Life of Pets	US/JP	Y. Cheney, C. Renaud	Universal Pictures	4 966 472
10	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Walt Disney	4 921 163
11	Suicide Squad	US	David Ayer	Warner Bros.	4 607 126
12	The BFG	US/IN	Steven Spielberg	Entert. One Films	4 210 789
13	Zootopia	US	Howard, Moore, Bush	Walt Disney	3 288 769
14	The Girl on the Train	US	Larry Brand	Entert. One Films	3 241 378
15	The Trolls	US	Lex Lybrand	20th Century Fox	3 198 920
16	Jason Bourne	US/CN	Paul Greengrass	Universal Pictures	3 193 243
17	The Revenant	US	A. González Iñárritu	20th Century Fox	3 176 531
18	Doctor Strange	US	Scott Derrickson	Walt Disney	3 172 742
19	X-Men: Apocalypse	US	Bryan Singer	20th Century Fox	2 513 063
20	Alvin and the Chipmunks: The Road…	US	Walt Becker	20th Century Fox	2 312 774

Source: BFI, comScore

Distribution and exhibition

The UK registered a box office decline in 2016 with admissions falling by 3.7 million to 168.3 million, while GBO – thanks to a continued increase in the average ticket price – declined only marginally to GBP 1.23 billion, 0.6% down on last year's historic record high.

In contrast to 2015, box office was led by a broader range of titles and lacked individual breakout successes. *Rogue One* and *Fantastic Beasts and Where To Find Them* topped the charts, selling 6.9 million tickets each. This is roughly half the admissions generated by last year's top films *Spectre* and *Star Wars VII*. Market share for UK films dropped from a record 44.5% to 34.9%, splitting into a market share of 27.5% for US studio backed UK qualifying films like *Rogue One*, and a 7% share for UK independent films, the lowest in three years.

Releasing seven out of the top 20 titles, Walt Disney achieved the biggest-ever year for an distributor in the UK and Ireland, generating GBP 301 million and taking a market share of 22.6%, ahead of 20th Century Fox (16%), Warner Bros. (15%) and Universal (14%).

Production and funding

The number of UK film productions has been steadily declining over the past five years: According to BFI interim figures, a total of 200 UK feature films - including inward investment films – started principal photography in 2016. This compares to 375 films five years ago. However, a significant part of the seemingly strong decline in 2016 can be explained by a time lag in identifying films with a budget of less than GB 500 000, which account for the majority of domestic productions. Production spend in the UK, on the other hand, increased by 13% to a new record level of GBP 1.60 billion, 85% of which were contributed by 48 inward investment films, while domestic films (129 films) accounted for 13% and international co-productions (23 films) for 3%.

In November 2016 the BFI announced its five-year strategic plan for supporting UK with around GBP 500 million from 2017 to 2022. Among other actions, the BFI plans to establish a small number of regional production funds, adopt a new approach to non-theatrical filmmaking, support the creation of additional shooting space as well as emphasize audience building and diversity.

The implications of the UK's decision to leave the EU have yet to become clear but the uncertainty of EU nationals'(who make up a significant share of the UK film sector's workforce) right to stay after the Brexit poses a major concern for the film industry.

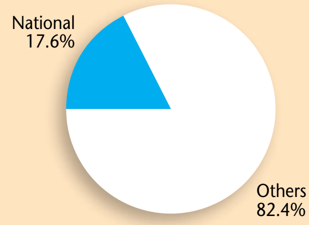
Sources: British Film Institute (BFI), DCM, *Screen International*, comScore, OBS

Russian Federation

Population 2016 e	143.4 million
GDP per capita 2016 e	8 838 USD
Gross box office 2016 e	47.5 bn RUB (712 M USD)
Admissions 2016 e	194.7 million
Average ticket price 2016 e	243.9 RUB (3.7 USD)
Average admissions per capita 2016 e	1.4
Screens 2015 | 2016 (1)	3 995 | 4 372
Digital screens 2015 | 2016 (2)	4 058 | 4 364
Digital 3D screens 2015 | 2016 (2)	3 228 | 3 417

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

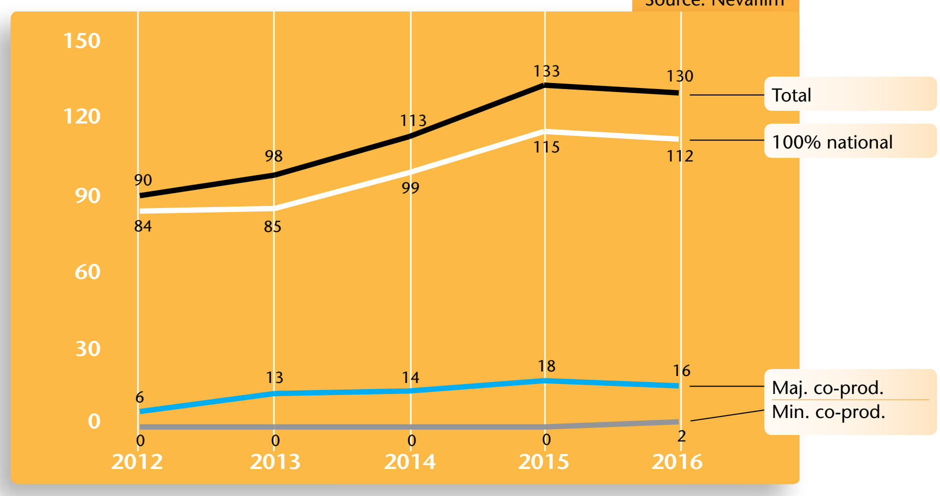
Market shares 2016 e



Number of Russian feature films produced(1) | 2012-2016

In units.

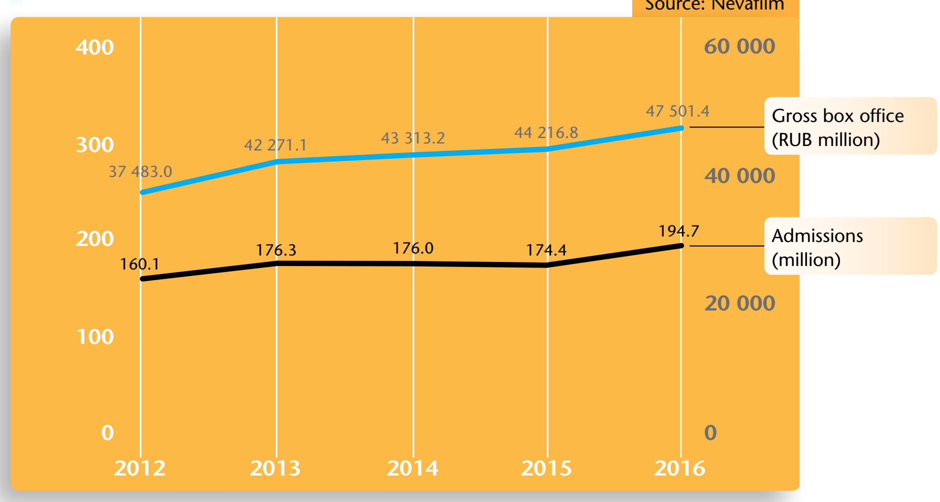
Source: Nevafilm



(1) Update time series based on year of release.

Admissions and gross box office in Russia | 2012-2016 (1)

Source: Nevafilm



(1) Excluding admissions and box office from Alternative Content screenings.

Top 20 films by admissions in the Russian Federation | 2016 (1)

	Original title	Country of origin	Director	Distributor	Admissions e
1	The Secret Life of Pets	US/JP	Y. Cheney, C. Renaud	UPI	9 514 702
2	Zootopia	US	Howard, Moore, Bush	Walt Disney/Sony	9 388 485
3	Deadpool	US	Tim Miller	20th Century Fox	6 784 778
4	Suicide Squad	US	David Ayer	Karo Premier	6 334 247
5	Warcraft	US	Duncan Jones	UPI	5 523 747
6	Ekipazh (The Crew)	RU/KH	Nikolay Lebedev	Central Partnership	5 383 436
7	The Jungle Book	US/GB	Jon Favreau	Walt Disney/Sony	5 294 908
8	Fantastic Beasts and Where to Find…	GB inc/US	David Yates	Karo Premier	5 271 671
9	Doctor Strange	US	Scott Derrickson	Walt Disney/Sony	5 155 548
10	Ice Age: Collision Course	US	M. Thurmeier, T. Chu	20th Century Fox	4 578 013
11	Now You See Me 2	US/CN	Jon Chu	Central Partnership	4 356 746
12	Kung Fu Panda 3	US/CN	Carloni, Yuh Nelson	20th Century Fox	4 095 177
13	Captain America: Civil War	US	A. Russo, J. Russo	Walt Disney/Sony	4 080 580
14	Miss Peregrine's Home for Peculiar…	US/GB/BE	Tim Burton	20th Century Fox	4 034 708
15	The Revenant	US	A. González Iñárritu	20th Century Fox	4 025 096
16	Trolls	US	Mitchell, Dohrn	20th Century Fox	3 880 673
17	Moana	US	Williams, Musker…	Walt Disney/Sony	3 606 032
18	Angry Birds	US/FI	C. Kaytis, F. Reilly	Walt Disney / Sony	3 603 225
19	Ivan Tsarevich I Sery Volk 3	RU	Darina Shmidt	Nashe kino	3 326 535
20	Batman v Superman: Dawn of Justice	US	Zack Snyder	Karo Premier	3 026 271

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

Sources: Nevafilm Research, *Russian Film Business Today, Booker's Bulletin,* comScore, CAIS

Distribution and exhibition

2016 was declared the "Year of Russian Cinema". Honouring the occasion Russian box office defied the tough economic climate as cinema attendance increased for the first time since 2013, jumping by 11.6% to a new record level of 194.7 million while GBO takings increased by 7.6%, amounting to RUB 47.5 billion, the best box office result in Russia's recent history. However, due to the ongoing weakness of the rouble GBO measured in US dollar amounted to only USD 712 million, the lowest result since 2007.

Box office growth was primarily driven by the success of US studio films, which accounted for 18 out of the top 20 films in 2016, as well as Russian films, which registered an increase in admissions from 29.6 to 34.2 million, the highest level of ticket sales for domestic films since 1991. Led by action drama *The Crew,* national films took a market share of 17.6% in 2016. In April 2017 the Russian Ministry of Culture used for the first time its power to reschedule the release of foreign films to prevent competition with local films when the *Fate of the Furious* could only be released under the condition that Timur Bekmambetov's *Time of the First* would get the highest number of screenings.

Walt Disney / Sony Pictures once more led the distribution market, taking a market share of 29% of total admissions, ahead of 20th Century Fox CIS (19%), Caro Premiere / Caroprokat (16%), Central Partnership (15%) and UPI (12%).

Partly thanks to public support, the number of modern screens increased from around 3 995 to 4 372. The biggest development in the exhibition sector however came in April 2017, when Russian tycoon Alexander Mamut acquired the country's two largest cinema chains, Cinema Park and Formula Kino, making the biggest-ever consolidation drive in the industry.

Production and funding

Russian production levels remained relatively stable at 130 films, only 3 films less than in 2015. Plans to further boost the budgets of the country's two largest public film funding institutions, the Russian Cinema Fund and the Ministry of Culture, via new taxes on foreign films, cinemas and TV channels were dropped in the course of 2016 due to heavy opposition from local TV channels and exhibitors. Promoting production levels and regional tourism, Russia introduced tax rebate programs for local and foreign film and TV productions in several regions, reportedly amounting to USD 1 million to be spent in 2017. These rebates are expected to benefit local as well as foreign independent productions rather than big US blockbusters.

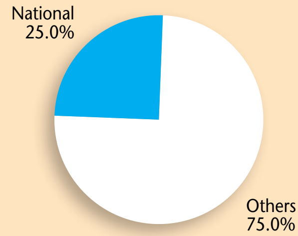
Sources: Nevafilm Research, *Hollywood Reporter, Screen International, Variety,* OBS

Poland

Population 2016[e]	38.0 million
GDP per capita 2016[e]	12 309 USD
Gross box office 2016[e]	967.5M PLN (245.4 M USD)
Admissions 2016	52.1 million
Average ticket price 2016	18.6 PLN (4.7 USD)
Average admissions per capita 2016	1.4
Screens 2015 | 2016[(1)]	1 256 | ~
Digital screens 2015 | 2016[(2)]	1 074 | 1 224
Digital 3D screens 2015 | 2016[(2)]	680 | 710
National films released 2015 | 2016	49 | ~

(1) Source: Polski Instytut Sztuki Filmowej (PISF) (2) Source: MEDIA Salles

Market shares 2016[e]



Top 10 films by admissions in Poland | 2016

	Original title	Country of origin	Director	Distributor	Admissions
1	Pitbull. Niebezpieczne kobiety (Pitbull…)	PL	Patryk Vega	Kino Swiat	2 791 928
2	Planeta Singli	PL	Mitja Okorn	Kino Swiat	1 926 090
3	Ice Age: Collision Course	US	M. Thurmeier, G. T. Chu	Imperial Cinepix	1 459 376
4	Wolyn (Hatred)	PL	Wojciech Smarzowski	Forum Film	1 435 732
5	Pitbull. Nowe porzadki (Pitbull. New…)	PL	Patryk Vega	Vue Movie	1 433 466
6	The Secret Life of Pets	US/JP	Y. Cheney, C. Renaud	UIP	1 420 141
7	Rogue One	US	Gareth Edwards	Disney	1 355 188
8	Zootopia	US	Howard, Moore, Bush	Disney	1 263 937
9	Bridget Jones's Baby	GB/US/FR	Sharon Maguire	UIP	1 179 946
10	7 rzeczy, których nie wiecie o facetach	PL	Kinga Lewinska	Interfilm	1 144 532

Sources: Polish Film Institute (PISF), boxoffice.pl

Distribution and exhibition

2016 was an excellent year for Polish cinema, with record breaking box office results and strong results for domestic titles. Admissions jumped to 52.1 million, up by an impressive 17% from 2015, and reached the highest level in recent history. GBO takings reached a record high of PLN 967.5 million (USD 245.4 million), up 18% as the average ticket price increased slightly to PLN 18.6 despite several cinema chains introducing discount subscription plans.

In contrast to 2015 box office growth was largely driven by the renewed strength of local films. A total of five Polish films ranked among the top 10 films, compared to only one in 2015. Led by *Pitbull: Tough Women* Polish films sold a record 13 million tickets (2015: 8.3 million) and captured a market share of 25% (2015: 18.6%). Box office growth was also driven by the strong performance of US titles which increased ticket sales from 28.9 million to 33.2 million and took 64% of total admissions.

With a market share of 19.7% KinoSwiat became Poland's most successful theatrical distributor in 2016, followed by UIP (18.2%), Walt Disney (14.9%), Imperial Cinepix (12.4%) and Monolith (11.0%).

The Polish market for VOD distribution heated up with Showmax and Netflix as well as mobile services Play and Orange launching new VOD services in 2016 and early 2017.

Production and funding

A total of 54 Polish films, including six minority co-productions, were produced in 2016, five films more than in 2015 resulting in the highest production level in over a decade. In order to further boost international co-productions the Polish Film Institute (PISF) created a new minority co-production fund with a budget of USD 2 million in 2016. The Polish government is furthermore planning to introduce an incentive scheme with annual funds of USD 23 million later on in 2017. This new incentive will be available for local as well as international film and high-end TV drama productions and give producers a 25% rebate on qualifying Polish production costs. This new measure should not affect existing public funding schemes such as those managed by the PISF which provided about USD 28 million in production support in 2016.

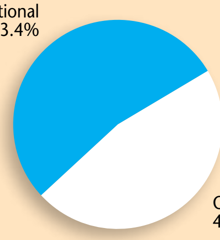
Sources: Polish Film Institute (PISF), *FilmNewEurope, Screen International,* MEDIA Salles, OBS

Turkey

Population 2016 [e]	78.7 million
GDP per capita 2016 [e]	9 317 USD
Gross box office 2016 [e]	691.8 M TRY (229.5 M USD)
Admissions 2016 [e]	58.3 million
Average ticket price 2016 [e]	11.9 TRY (3.9 USD)
Average admissions per capita 2016 [e]	0.7
Screens 2015 | 2016 (1)	2 626 | 2 826
Digital screens 2015 | 2016 (2)	2 184 | 2 443
Digital 3D screens 2015 | 2016 (2)	595 | 629
National films released 2015 | 2016	138 | 138

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

Market shares 2016 [e]



Top 10 films by admissions in Turkey | 2016

	Original title	Country of origin	Director	Distributor	Admissions
1	Dag 2 (The Mountain 2)	TR	Alper Çaglar	Mars Dagitim	2 859 173
2	Kardesim Benim	TR	Mert Baykal	Mars Dagitim	2 070 008
3	Dedemin Fisi	TR	Meltem Bozoflu	UIP	2 015 665
4	Osman Pazarlama	TR	Togan Gökbakar	Warner Bros.	1 983 777
5	Görümce	TR	Kivanc Baruonu	Mars Dagitim	1 628 513
6	Batman v Superman: Dawn of Justice	US	Zack Snyder	Warner Bros.	1 461 576
7	Kolpaçino 3. Devre	TR	Safak Sezer	UIP	1 412 639
8	Ikimizin Yerine	TR	Umur Turagay	UIP	1 372 971
9	Kocan Kadar Konus: Dirilis (Husband Factor…)	TR	Kivanc Baruonu	UIP	1 332 907
10	Çakallarla Dans 4	TR	Murat Seker	UIP	1 311 228

Source: Antrakt - Deniz Yavuz

Distribution and exhibition

The Turkish film industry was faced with a challenging political and economic climate in 2016 but box office results held up comparatively well: While admissions declined by 3.6% to 58.3 million, 2016 still marked the third best result in Turkey's recent history. Thanks to increasing ticket prices GBO takings actually increased by 1.5% and reached a record high of TRY 691.8 million (USD 230 million).

Just as in past years box office charts were dominated by Turkish films which accounted for nine of the top 10 films in 2016. Driven primarily by the success of selected local blockbusters Turkish films captured 53.4% of total admissions. This is by far the highest national market share achieved in any European country. *Dag 2 (The Mountain 2)*, a war film about a Turkish special forces squad on a mission in contemporary Iraq, became the most successful film in 2016, followed by the comedy *Kardesim Benim*. Both films were released by Mars Cinema Group which has become Turkey's leading integrated film company, which, besides producing films, dominates both the exhibition as well as the distribution market where it took a market share of 30%, followed by UIP (29%), Warner Bros. (17%) and TME (15%). Mars Cinema Group was acquired by South Korea's CJ-CGV in April 2016.

Production and funding

For the second year in a row 138 Turkish feature films were released. This is the highest production level over past decades. Public support, granted exclusively by the Turkish Ministry of Culture and Tourism, has played an important role in steadily raising Turkish production volume over the past years. However, in 2016 only 27 out of the 138 newly released films benefitted from the Ministry's production support.

Film financing is hence a major challenge for the majority of Turkish filmmakers who often rely on smaller funding opportunities and prizes provided by film festivals. Turkish film festivals will also regret the Turkish Government's decision in October 2016 to withdraw from the EU's Creative Europe programme which had allocated an estimated EUR 2.4 million to Turkish training and festival projects since Turkey joined in 2015.

Sources: Antrakt - Deniz Yavuz, SE-YAP, *Hürriyet*, *Variety*, DG Sinema

Other Western Europe

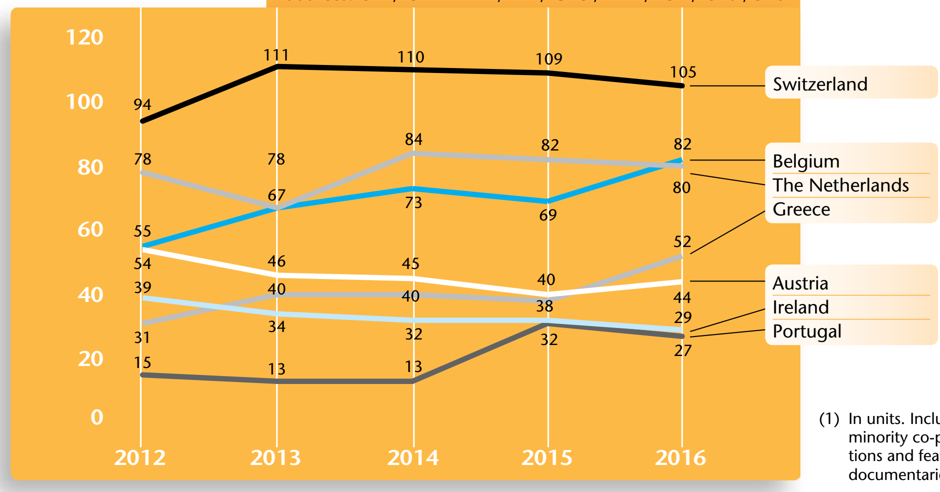
	Austria	Belgium	Greece	Ireland	Netherlands	Portugal	Switzerland
Population 2016 e (million)	8.7	11.3	10.8	4.7	17.0	10.3	8.3
GDP per capita 2016 e (USD)	44 561	41 491	18 078	65 871	45 210	19 759	79 578
Gross box office 2016 (M USD)	148.1	164.0	71.3	120.5	318.3	84.9	206.8
Admissions 2016 (million)	15.1	19.4	10.0	15.8	34.2	14.9	13.4
Average ticket price 2016 (USD)	9.8	8.4	7.1	7.6	9.3	5.7	15.4
Average admissions per capita 2016	1.7	1.7	0.9	3.4	2.0	1.4	1.6
Screens 2016 e (1)	556	521	547	496	888 (3)	549	575
Digital screens 2016 (2)	554	521	380	499	946	508	549
Digital 3D screens 2016 (2)	332	180	150	261	469	249	296
National market shares 2016 e	4.9%	9.6%	9.0%	4.3%	12.3%	2.3%	7.4%

(1) National data source (2) Source: MEDIA Salles (3) 2015

Number of feature films produced by selected Western European countries (1) | 2012-2016

In units.

Sources: OFI / CFWB-VAF / IFB / GFC / NFF / ICA / OFS /OBS

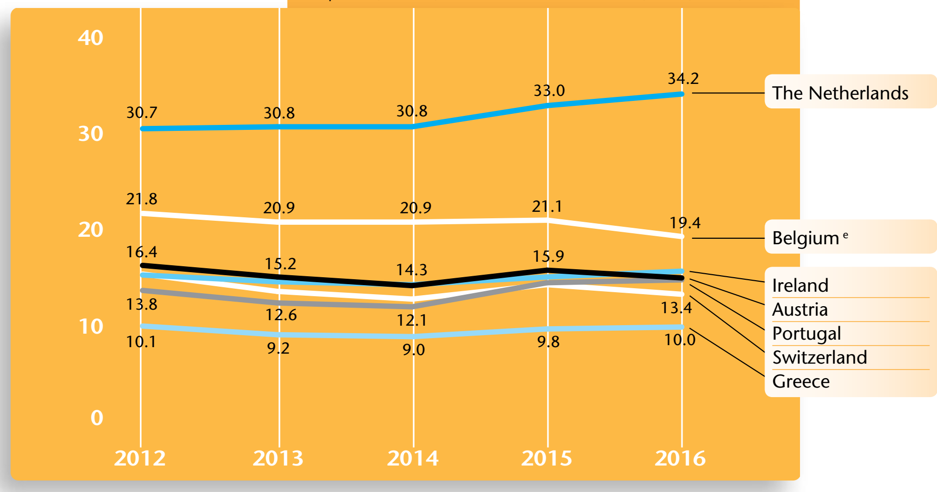


(1) In units. Including minority co-productions and feature documentaries.

Admissions in selected Western European countries | 2012-2016

In millions.

Sources: OFI /SPF Economie, Cinedata, FCB, ABDF/VFDB / IFB, CSA / GFC / MaccsBox - NVB & NVF / ICA / OFS / OBS



Top 10 films by admissions in the Netherlands | 2016

	Original title	Country of origin	Director	Distributor	Admissions
1	Bridget Jones's Baby	GB/US/FR	Sharon Maguire	UPI	1 196 748
2	Finding Dory	US	Stanton, MacLane	Walt Disney	1 082 779
3	The Secret Life of Pets	US/JP	Y. Cheney, C. Renaud	UPI	1 024 205
4	The Jungle Book	US/GB	Jon Favreau	Walt Disney	967 434
5	Fantastic Beasts and Where to…	GB inc/US	David Yates	Warner Bros.	830 810
6	The Revenant	US	A. González Iñárritu	Warner Bros.	725 565
7	Zootopia	US	Howard, Moore, Bush	Walt Disney	675 501
8	Suicide Squad	US	David Ayer	Warner Bros.	574 072
9	Jason Bourne	US/CN	Paul Greengrass	UPI	565 104
10	Inferno	US/HU	Ron Howard	UPI	562 382

Sources: MaccsBox - NVB & NVF

Top 10 films by admissions in Belgium | 2016

	Original title	Country of origin	Director	Distributor	Admissions
1	Finding Dory	US	Stanton, MacLane	Walt Disney	594 390
2	The Secret Life of Pets	US/JP	Y. Cheney, C. Renaud	Universal Pictures	565 277
3	Fantastic Beasts and Where to…	GB inc/US	David Yates	Warner Bros.	563 400
4	Zootopia	US	Howard, Moore, Bush	Walt Disney	539 830
5	The Jungle Book	US/GB	Jon Favreau	Walt Disney	523 019
6	The Revenant	US	A. González Iñárritu	20th Century Fox	503 794
7	De Premier	BE	Erik Van Looy	Kinepolis Film Distr.	390 355
8	Deadpool	US	Tim Miller	20th Century Fox	384 572
9	Rogue One	US	Gareth Edwards	Walt Disney	367 777
10	Star Wars: Episode VII - The…	US	J.J. Abrams	Walt Disney	355 085

Sources: Cinedata, FCB, ABDF/VFDB

Top 10 films by admissions in Austria | 2016

	Original title	Country of origin	Director	Distributor	Admissions
1	The Secret Life of Pets	US/JP	Y. Cheney, C. Renaud	Universal Pictures	538 988
2	Finding Dory	US	Stanton, MacLane	Walt Disney	479 255
3	Ice Age: Collision Course	US	Thurmeier, T. Chu	20th Century Fox	438 472
4	Zootopia	US	Howard, Moore, Bush	Walt Disney	397 066
5	The Revenant	US	A. González Iñárritu	20th Century Fox	352 216
6	Deadpool	US	Tim Miller	20th Century Fox	334 421
7	Rogue One	US	Gareth Edwards	Walt Disney	329 993
8	Bad Moms	US	Jon Lucas, Scott Moore	Constantin/Tobis	312 669
9	Fantastic Beasts and Where to…	GB inc/US	David Yates	Warner Bros.	294 454
10	Dirty Grandpa	US	Dan Mazer	Constantin	289 590

Sources: Austrian Film Institute (OFI), comScore

Top 10 films by admissions in Portugal | 2016

	Original title	Country of origin	Director	Distributor	Admissions
1	The Secret Life of Pets	US/JP	Y. Cheney, C. Renaud	NOS Luso. Audiovisuais	604 958
2	Suicide Squad	US	David Ayer	NOS Luso. Audiovisuais	449 441
3	Finding Dory	US	Stanton, MacLane	NOS Luso. Audiovisuais	424 583
4	Zootopia	US	Howard, Moore, Bush	NOS Luso. Audiovisuais	393 635
5	Deadpool	US	Tim Miller	Big Picture 2 Films	361 637
6	Fantastic Beasts and Where to…	GB inc/US	David Yates	NOS Luso. Audiovisuais	318 438
7	The Revenant	US	A. González Iñárritu	Big Picture 2 Films	312 316
8	Sing	US/GB	Jennings, Lourdelet	NOS Luso. Audiovisuais	294 474
9	Batman v Superman: Dawn…	US	Zack Snyder	NOS Luso. Audiovisuais	291 892
10	Moana	US	Williams, Musker…	NOS Luso. Audiovisuais	286 042

Source: ICA

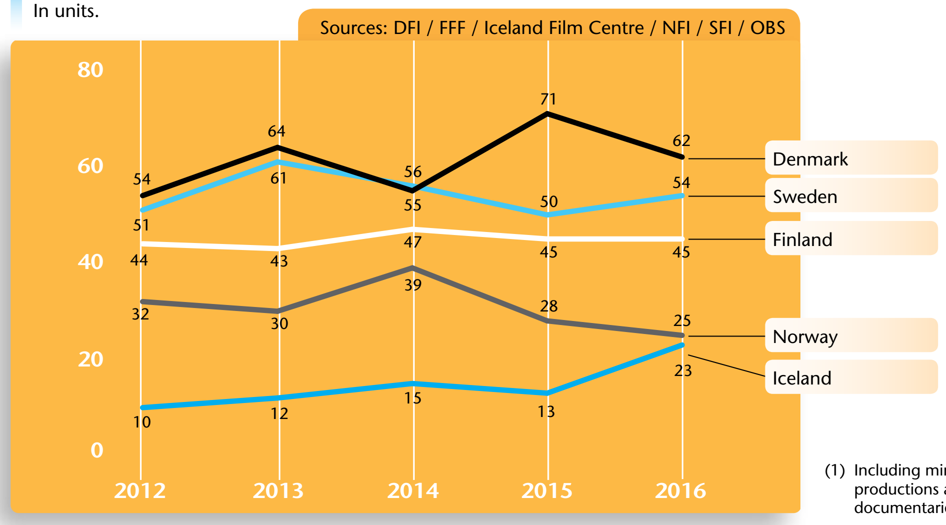
Nordic countries

	Denmark	Finland	Iceland	Norway	Sweden
Population 2016 e (million)	5.7	5.5	0.3	5.2	9.8
GDP per capita 2016 e (USD)	53 243	43 492	57 889	71 497	51 604
Gross box office 2016 (M USD)	166.4	99.2	14.0	163.7	226.0
Admissions 2016 (million)	13.0	8.7	1.5	13.1	17.8
Average ticket price 2016 (USD)	12.8	11.4	9.6	12.5	12.7
Average admissions per capita 2016	2.3	1.6	4.3	2.5	1.8
Screens 2016 e (1)	444	309	40	439	808
Digital screens 2016 (2)	441	309	39	437	798
Digital 3D screens 2016 (2)	260	224	30	288	552
National market shares 2016 e	21.0%	28.6%	6.5%	23.9%	15.8%

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

Number of feature films produced by Nordic countries (1) | 2012-2016

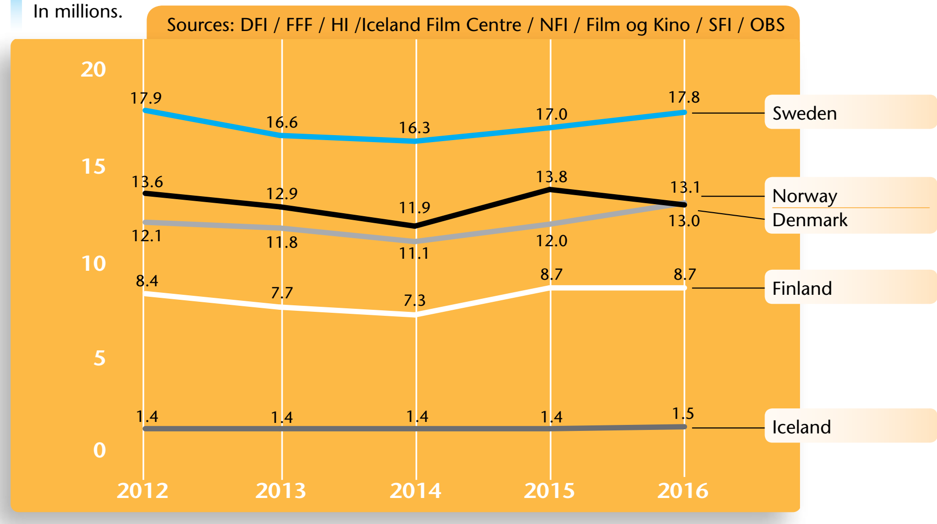
In units.



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

Admissions in Nordic countries | 2012-2016

In millions.



Top 10 films by admissions in Sweden | 2016

	Original title	Country of origin	Director	Distributor	Admissions
1	En man som heter Ove (A Man…)	SE/NO	Hannes Holm	Nordisk Film	1 285 966
2	Zootopia	US	Howard, Moore, Bush	Walt Disney	608 225
3	Finding Dory	US	Stanton, MacLane	Walt Disney	566 299
4	The Jungle Book	US/GB	Jon Favreau	Walt Disney	536 218
5	Rogue One	US	Gareth Edwards	Walt Disney	513 566
6	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Walt Disney	484 993
7	The Secret Life of Pets	US/JP	Y. Cheney, C. Renaud	Universal/UIP	437 949
8	Fantastic Beasts and Where to Find…	GB inc/US	David Yates	Warner/Fox	432 762
9	The Legend of Tarzan	US/GB	David Yates	Warner/Fox	424 497
10	Deadpool	US	Tim Miller	20th Century Fox	415 743

Source: Swedish Film Institute

Top 10 films by admissions in Denmark | 2016

	Original title	Country of origin	Director	Distributor	Admissions
1	Flaskepost fra P (A Conspiracy of…)	DK/DE/SE/NO	Hans Petter Moland	Nordisk Film Distr.	704 971
2	Klassefesten 3: Dåben (The Reunion 3)	DK	Birger Larsen	Nordisk Film Distr.	538 506
3	The Revenant	US	A. González Iñárritu	SF Studios	351 157
4	Zootopia	US	Howard, Moore, Bush	Disney	343 281
5	Rogue One	US	Gareth Edwards	Disney	336 260
6	Deadpool	US	Tim Miller	SF Studios	333 785
7	Fantastic Beasts and Where to Find…	GB inc/US	David Yates	SF Studios	333 479
8	The Secret Life of Pets	US/JP	Y. Cheney, C. Renaud	UIP	330 918
9	Kollektivet (The Commune)	DK/SE/NL	Thomas Vinterberg	Nordisk Film Distr.	301 278
10	Kung Fu Panda 3	US/CN	Carloni, Yuh Nelson	SF Studios	292 033

Sources: Danmark Statistik, DFI

Top 10 films by admissions in Norway | 2016

	Original title	Country of origin	Director	Distributor	Admissions
1	Kongens nei (The King's Choice)	NO	Erik Poppe	Nordisk Film Distr.	713 676
2	Snekker Andersen og Julenissen	NO	Terje Rangnes	Nordisk Film Distr.	498 368
3	Børning 2	NO	Hallvard Bræin	SF Norway	438 231
4	Me Before You	US	Thea Sharrock	SF Norway	407 747
5	Ice Age: Collision Course	US	Thurmeier, Chu	20th Century Fox	383 531
6	Rogue One	US	Gareth Edwards	Walt Disney	313 315
7	Deadpool	US	Tim Miller	20th Century Fox	312 970
8	Bridget Jones's Baby	GB/US/FR	Sharon Maguire	UIP	299 260
9	Suicide Squad	US	David Ayer	SF Norway	296 069
10	The Secret Life of Pets	US/JP	Y. Cheney, C. Renaud	UIP	291 385

Source: Film og Kino

Top 10 films by admissions in Finland | 2016

	Original title	Country of origin	Director	Distributor	Admissions
1	Risto Räppääjä ja yöhaukka (Ricky…)	FI	Timo Koivusalo	Walt Disney	338 914
2	Angry Birds	US/FI	C. Kaytis, F. Reilly	Walt Disney	327 687
3	Kanelia kainaloon, Tatu ja Patu!	FI	Rike Jokela	Nordisk Film Distr.	323 664
4	The Secret Life of Pets	US/JP	Y. Cheney, C. Renaud	Finnkino	295 954
5	Luokkakokous 2: Polttarit	FI	Taneli Mustonen	Nordisk Film Distr.	293 543
6	Deadpool	US	Tim Miller	FS Film	245 642
7	Rogue One	US	Gareth Edwards	Walt Disney	228 521
8	The Revenant	US	A. González Iñárritu	Finnkino	207 556
9	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Walt Disney	200 742
10	Bridget Jones's Baby	GB/US/FR	Sharon Maguire	Finnkino	197 866

Source: Finnish Film Foundation

Baltics and Central Europe

	Czech Republic	Estonia	Hungary	Latvia	Lithuania	Slovenia	Slovakia
Population 2016 e (million)	10.6	1.3	9.8	2.0	2.9	2.1	5.4
GDP per capita 2016 e (USD)	18 326	17 896	11 903	14 141	14 899	21 370	16 648
Gross box office 2016 (M USD)	82.3	19.5	70.5	19.2	19.6	13.1	32.1
Admissions 2016 (million)	15.6	3.3	14.6	2.5	3.7	2.3	5.7
Average ticket price 2016 (USD)	5.3	5.9	4.8	7.6	5.3	5.6	5.7
Average admissions per capita 2016	1.5	2.5	1.5	1.3	1.3	1.1	1.0
Screens 2016 e (1)	691	51	336	62	79	114	238
Digital screens 2016 (2)	489	62	326	60	58	95	186
Digital 3D screens 2016 (2)	280	36	188	25	32	42	103
Films produced 2016	79	20	20	20	13	20	26
National market shares 2016 e	29.5%	10.5%	3.5%	7.4%	19.0%	10.2%	6.6%

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

Top 10 films by admissions in the Czech Republic | 2016

	Original title	Country of origin	Director	Distributor	Admissions
1	Andel Páne (An Angel of the Lord)	CZ	Jirí Strach	Falcon	913 767
2	The Secret Life of Pets	US/JP	Y. Cheney, C. Renaud	CinemArt	510 953
3	Fantastic Beasts and Where to Find…	GB inc/US	David Yates	Freeman Entertainment	457 891
4	Lída Baarová (The Devil's Mistress)	GB/US/FR	Filip Renc	CinemArt	414 732
5	Bridget Jones's Baby	GB/US/FR	Sharon Maguire	CinemArt	394 810
6	Finding Dory	US	A. Stanton, A. MacLane	Falcon	387 483
7	Teorie tygra (Tiger Theory)	CZ	Radek Bajgar	CinemArt	385 974
8	Bezva zenská na krku	CZ	Tomas Hoffman	CinemArt	372 581
9	Ice Age: Collision Course	US	M. Thurmeier, T. Chu	CinemArt	366 548
10	Deadpool	US	Tim Miller	CinemArt	350 751

Sources: Czech State Cinematography Fund, Unie Filmovvych Distributoru

Top 10 films by admissions in Hungary | 2016

	Original title	Country of origin	Director	Distributor	Admissions
1	The Secret Life of Pets	US/JP	Y. Cheney, C. Renaud	UIP-Dunafilm	657 642
2	Rogue One	US	Gareth Edwards	Forum-Hungary	548 913
3	Deadpool	US	Tim Miller	Intercom	431 203
4	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Forum-Hungary	367 752
5	Dirty Grandpa	US	Dan Mazer	Freeman Entertainment	351 321
6	Zootopia	US	Howard, Moore, Bush	Forum-Hungary	344 816
7	Bridget Jones's Baby	GB/US/FR	Sharon Maguire	UIP-Dunafilm	335 982
8	Ice Age: Collision Course	US	M. Thurmeier, T. Chu	Intercom	335 662
9	Fantastic Beasts and Where to Find…	GB inc/US	David Yates	Intercom	294 145
10	Captain America: Civil War	US	A. Russo, J. Russo	Forum-Hungary	287 618

Source: National Film Office

Top 10 films by admissions in Slovakia | 2016

	Original title	Country of origin	Director	Distributor	Admissions
1	Finding Dory	US	A. Stanton, A. MacLane	Saturn Entertainment	280 744
2	The Secret Life of Pets	US/JP	Y. Cheney, C. Renaud	CinemArt	217 726
3	Ice Age: Collision Course	US	M. Thurmeier, T. Chu	CinemArt	180 612
4	Zootopia	US	Howard, Moore, Bush	Saturn Entertainment	154 602
5	Fantastic Beasts and Where to Find…	GB inc/US	David Yates	Continental film	143 131
6	Deadpool	US	Tim Miller	CinemArt	140 239
7	Suicide Squad	US	David Ayer	Continental film	134 281
8	The Revenant	US	A. González Iñárritu	CinemArt	120 025
9	Bridget Jones's Baby	GB/US/FR	Sharon Maguire	CinemArt	114 790
10	Trolls	US	M. Mitchell, W. Dohrn	CinemArt	108 146

Sources: Slovak Film Institute, UFD

South-Eastern Europe

	BA (1)	Bulgaria	Croatia	Cyprus	Georgia	Montenegro	FYROM (2)	Romania
Population 2016 e (million)	3.8	7.2	4.2	0.8	3.7	0.6	2.1	19.7
GDP per capita 2016 e (USD)	4 289	7 091	11 858	23 425	3 908	6 809	5 060	9 439
Gross box office 2016 (M USD)	2.6 (3)	27.4	18.6	5.6	4.1	1.3	1.4	59.5
Admissions 2016 (million)	0.9 (3)	5.5	4.3	0.7	1.1	0.3	0.4	13.0
Average ticket price 2016 (USD)	2.8 (3)	5.0	4.3	8.1	3.6	4.2	4.0	4.6
Average admissions per capita 2016	0.2 (3)	0.8	1.0	0.8	0.3	0.5	0.2	0.7
Screens 2016 e (4)	34 (3)	209	173	35 (3)	23	22	~	393
Digital screens 2016 (5)	22 (3)	218	160	32	23	6	~	371
Digital 3D screens 2016 (5)	~	163	90	14	17	~	~	210
Films produced 2016	11 (3)	29	17	3	4	5	12	49
National market shares 2016 e	1% (3)	3.2%	4.2%	~	2.0%	~	4.2%	3.5%

(1) Bosnia-Herzegovina (2) Former Yugoslav Republic of Macedonia (3) 2015 (4) National data source (5) MEDIA Salles

Top 10 films by admissions in Greece | 2016

	Original title	Country of origin	Director	Distributor	Admissions
1	Enas Allos Kosmos (Worlds Apart)	GR	C. Papakaliatis	Village	356 519
2	The Revenant	US	A. González Iñárritu	Odeon	332 339
3	Finding Dory	US	Stanton, MacLane	Feelgood	295 338
4	Batman v Superman: Dawn of Justice	US	Zack Snyder	Tanweer	277 232
5	Inferno	US/HU	Ron Howard	Feelgood	246 017
6	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Feelgood	219 387
7	Deadpool	US	Tim Miller	Odeon	217 220
8	Captain America: Civil War	US	A. Russo, J. Russo	Feelgood	215 155
9	Ice Age: Collision Course	US	Thurmeier, Chu	Odeon	214 994
10	Suicide Squad	US	David Ayer	Tanweer	207 982

Source: Greek Film Centre

Top 10 films by admissions in Romania | 2016

	Original title	Country of origin	Director	Distributor	Admissions
1	Suicide Squad	US	David Ayer	Freeman Entertain.	424 782
2	Deadpool	US	Tim Miller	Odeon Cineplex	354 819
3	The Jungle Book	US/GB	Jon Favreau	Forum Film Romania	353 088
4	Dirty Grandpa	US	Dan Mazer	Freeman Entertain.	305 691
5	Batman v Superman: Dawn of Justice	US	Zack Snyder	Freeman Entertain.	304 108
6	Doctor Strange	US	Scott Derrickson	Forum Film Romania	287 555
7	Zootopia	US	Howard, Moore, Bush	Forum Film Romania	264 538
8	Trolls	US	Mitchell, Dohrn	Odeon Cineplex	253 507
9	The Secret Life of Pets	US/JP	Y. Cheney, C. Renaud	Ro-Image 2000	253 196
10	Now You See Me 2	US/CN	Jon Chu	Freeman Entertain.	244 353

Source: Centrul National al Cinematografiei

Top 10 films by admissions in Bulgaria | 2016

	Original title	Country of origin	Director	Distributor	Admissions
1	Ice Age: Collision Course	US	Thurmeier, Chu	Aleksandra	290 668
2	The Secret Life of Pets	US/JP	Y. Cheney, C. Renaud	Forum Film	201 169
3	Zootopia	US	Howard, Moore, Bush	Forum Film	195 926
4	Angry Birds	US/FI	C. Kaytis, F. Reilly	Aleksandra	163 910
5	The Jungle Book	US/GB	Jon Favreau	Forum Film	138 822
6	Suicide Squad	US	David Ayer	Aleksandra	137 045
7	Rogue One	US	Gareth Edwards	Forum Film	135 842
8	Deadpool	US	Tim Miller	Aleksandra	133 397
9	Warcraft	US	Duncan Jones	Forum Film	121 578
10	Inferno	US/HU	Ron Howard	Aleksandra	111 292

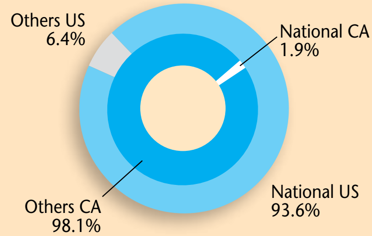
Source: Bulgarian National Film Center

North America

	North America	US	Canada
Population 2016 e (million)	360.2	324.0	36.2
GDP per capita 2016 e (USD)	55 788	57 294	42 319
Gross box office 2016 e (M USD) (1)	11 400	10 280	997.3
Admissions 2016 e (million) (1)	1 320	1 195	116
Average ticket price 2016 e (USD)	8.6	8.6	8.6
Average admissions per capita 2016 e	3.7	3.7	3.2
Screens 2016 e	43 531	40 392	3 139
Digital screens 2016 e	42 659	39 523	3 136
Digital 3D screens 2016 e	16 745	15 318	1 427

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

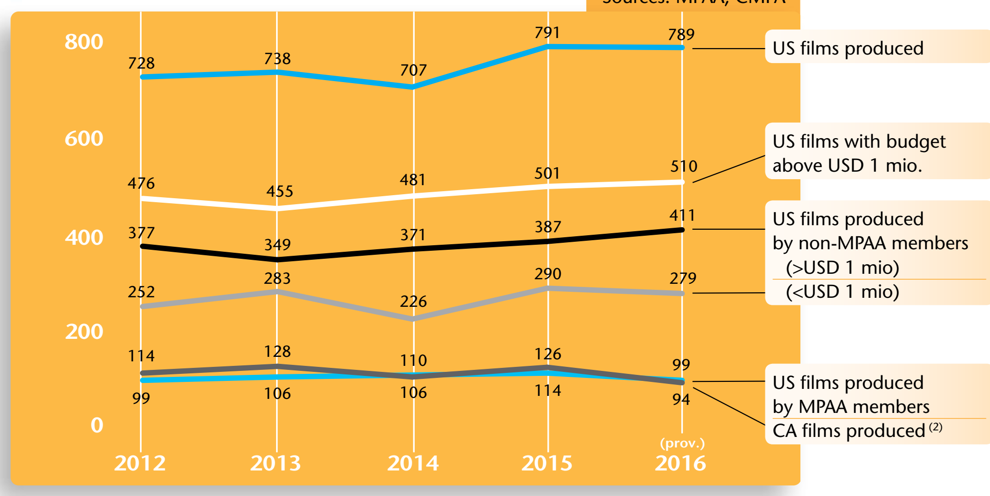
Market shares 2016 e



Number of US (1) and Canadian feature films produced | 2012-2016

In units.

Sources: MPAA, CMPA

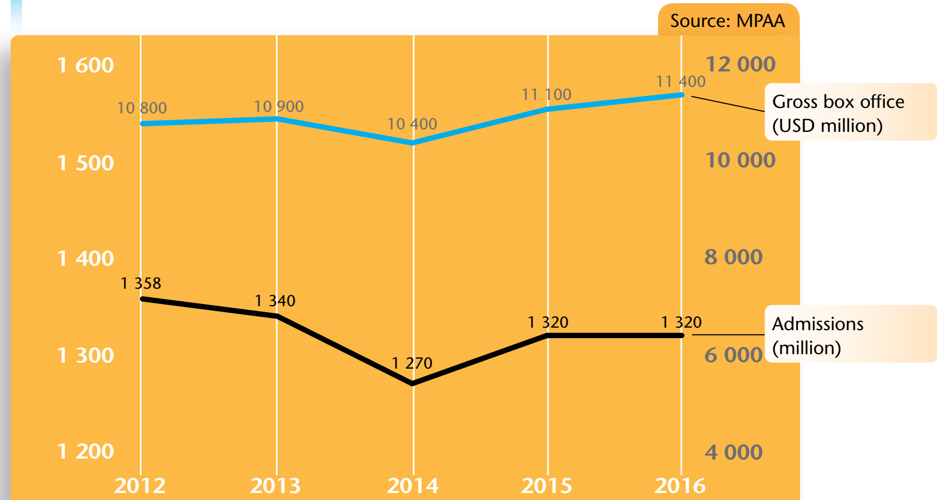


(1) English-language films (including co-productions). Does not include documentaries, films with budgets below USD 200 000, student films and works not intended for theatrical release.

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

Admissions and gross box office in the US & Canada | 2012-2016

Source: MPAA



Top 20 films by admissions in North America | 2016 e

Estimated admissions based on GBO and average ticket price.

	Original title	Country of origin	Director	Distributor	Admissions
1	Finding Dory	US	Stanton, MacLane	Walt Disney	52 249 446
2	Captain America: Civil War	US	A. Russo, A. Russo	Walt Disney	43 472 089
3	Rogue One	US	Gareth Edwards	Walt Disney	39 550 679
4	The Secret Life of Pets	US/JP	Cheney, Renaud	Universal Pictures	39 162 242
5	The Jungle Book	US/GB	Jon Favreau	Walt Disney	38 401 970
6	Deadpool	US	Tim Miller	20th Century Fox	37 823 296
7	Zootopia	US	Howard, Moore, Bush	Walt Disney	36 040 368
8	Batman v Superman: Dawn of Justice	US	Zack Snyder	Warner Bros.	35 229 611
9	Suicide Squad	US	David Ayer	Warner Bros.	34 145 066
10	Star Wars: Episode VII - The Force…	US	J.J. Abrams	Walt Disney	29 120 401
11	Doctor Strange	US	Scott Derrickson	Walt Disney	23 785 818
12	Fantastic Beasts and Where to Find Them	GB inc/US	David Yates	Warner Bros.	23 019 819
13	Moana	US	Williams, Musker, …	Walt Disney	21 612 001
14	The Revenant	US	A. González Iñárritu	20th Century Fox	19 042 267
15	Jason Bourne	US/CN	Paul Greengrass	Universal Pictures	16 829 844
16	Star Trek Beyond	US/HK/CN	Justin Lin	Paramount Pict.	16 398 871
17	X-Men: Apocalypse	US	Bryan Singer	20th Century Fox	16 366 720
18	Trolls	US	Mitchell, Dohrn	20th Century Fox	15 952 122
19	Kung Fu Panda 3	US/CN	Carloni, Yuh Nelson	20th Century Fox	14 942 859
20	Ghostbusters	US/AU	Paul Feig	Sony Pictures	13 765 593

Source: comScore

Distribution and exhibition

North American attendance figures remained flat in 2016 - circa 1 320 million admissions, accounting for a GBO of USD 11.4 billion (a 2.7% increase on 2015). 718 films were released in this territory in 2016, the highest figure of this century. Although the number of titles on release has significantly increased since the beginning of the century (by 58.1%), the concentration at the top of the BO remains constant (42.9% of 2016 admissions went to the top 20 films, in line with previous years this century). The two highest-grossing films of the year, Pixar's animation *Finding Dory* (52.2 m. tickets) and Marvel's franchise instalment *Captain America: Civil War* (43.5 m. tickets) are far from the +70 million admissions achieved by previous years' toppers. In turn, French-language domestic productions, led by *Snowtime!*, crowned the BO list of domestic productions in Canada – unsurprisingly, the market share of local films in the country's French-language market (10.7%) is way higher than the national average (1.9%).

2016 saw a decrease in the number of cinemas in the US, with 155 screens shutting down after failing to convert to digital, resulting in a higher digital penetration rate (97.8% of the 40 392 screens in the country). In turn, fully-digitised Canada experienced marginal growth, adding 25 new screens during the year, up to 3 139.

Production and funding

US production volume held steady with 789 films in 2016. Hollywood majors shot fewer movies than the average of the previous three years (99 films in 2016), while productions by non-MPAA members over USD 1 million continued their growth trend of the last three years (up to 411 films in 2016, 6.2% up on previous year).

With the new US administration in place, it seems unlikely that the government will extend IRC Section 181, the federal tax incentive designed to keep runaway productions within national borders. Amidst increasing claims (certainly not shared by the producers' associations) that State-level public incentives do not generate sufficient return on investment, the number of such incentives has decreased from 43 earlier this decade to 36 in 2016, with several States, such as Florida, Wisconsin or Michigan shutting down their schemes in recent years.

94 feature film productions were shot in Canada in 2016, accounting for a total investment of CAD 255 million; that is, a 10-year low for both indicators and a year on year decrease by 25.4% and 27.6% respectively. It's worth noting that Canada joined *Eurimages*, the Council of Europe's Cinema Support Fund in 2016.

Sources: MPAA, CMPA, Telefilm Canada, CSG, *Variety, The Hollywood Reporter,* OBS

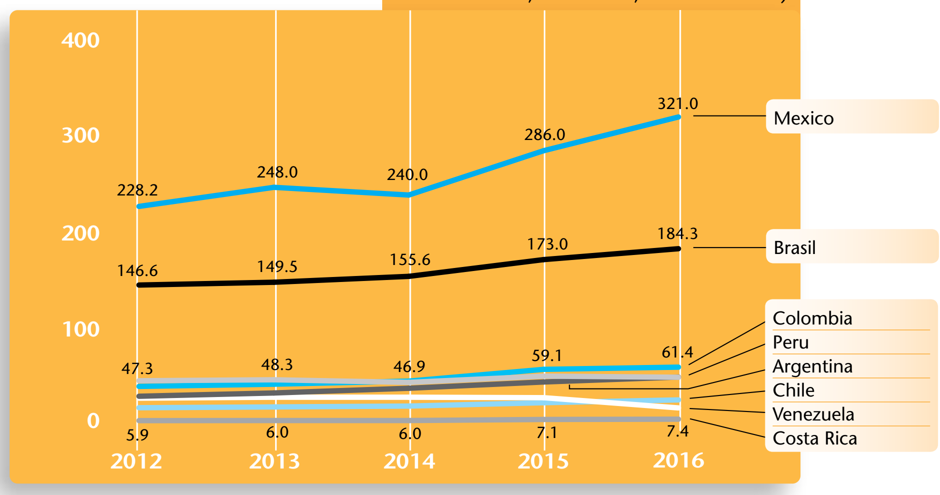
Latin America

	Argentina	Brazil	Chile	Colombia	Costa Rica	Mexico	Peru	Venezuela
Population 2016 (million)	43.6	206.1	18.2	48.8	4.9	122.3	31.5	31.1
GDP per capita 2016 (M USD)	12 425	8 587	12 910	5 623	11 749	8 699	5 727	10 755
Gross box office 2016 (M USD) [e]	267.4	744.7	131.7	172.6	41.4	792.0	161.4	~ [(1)]
Admissions 2016 (million)	50.9	184.3	27.4	61.4	7.4	321.0	51.1	19.1
Average ticket price 2016 (USD)	5.3	4.0	4.8	2.8	5.6	2.5	3.2	~ [(1)]
Average admissions per capita 2016 [e]	1.2	0.9	1.5	1.3	1.5	2.6	1.6	0.6
Screens 2016	933	3 160	366	1 006	151	6 225	613	449
Digital screens 2016 [e]	868	3 148	366	1 006	149	5976	613	408
National market shares 2016	14.4%	16.5%	6.4%	7.8%	0.8%	10.0%	11.2%	2.3%

Admissions in Latin America | 2012-2016

In millions.

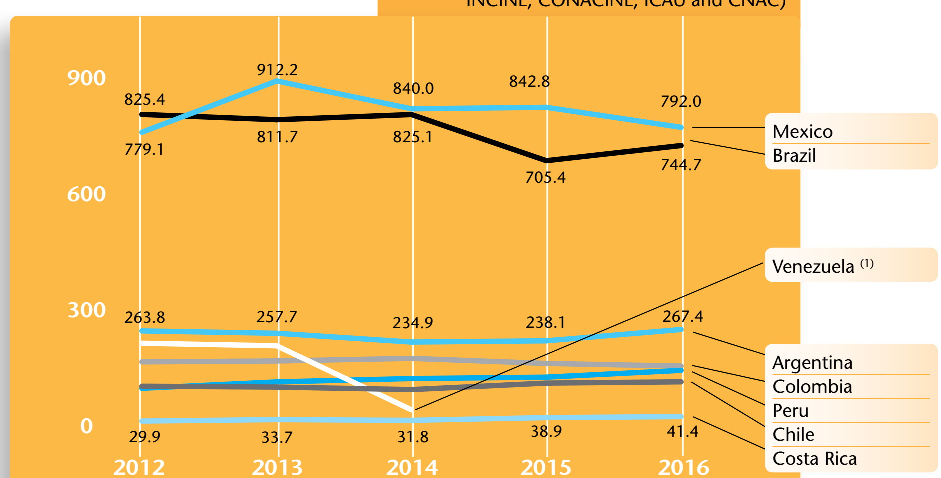
Sources: OIA (INCAA, ANCINE, CNCA, DCMC, INCINE, CONACINE, ICAU and CNAC)



Gross box office in Latin America | 2012-2016 [e]

In USD million.

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



(1) Amidst a context of hyperinflation, USD figures for 2015-2016 do not accurately reflect reality due to a highly overvalued currency.

Overview

Following a 16% surge in attendance in 2015, overall admissions in the eight main markets of Latin America kept growing in 2016 (by 6.6% year on year). Besides Venezuela, where admissions plummeted by 35.7% on 2015, and a marginal decrease in Argentina (-2.3%), the other six markets were on the up, with Chile, Mexico and Peru reaching double-digit growth on 2015. In fact, Venezuela aside, attendance levels in all major Latin American markets experienced growth over the last 5 years, with medium-size markets Peru (63.3%), Colombia (48.3%) and Chile (42.2%) showing the highest increase over that period.

Conversely, 703 films were produced in these eight markets in 2016, only three more than the year before; however, this was mainly due to a drop in local film shoots in Venezuela. In fact, production volume went up by 32.9% over the last five years (by 51.7% when excluding outlying Venezuela) with remarkable growth in all major markets.

When it comes to theatrical infrastructure, things evolved at a slower pace. The number of screens increased by 5.4% year on year, up to 12 932 in 2016, amounting to a 20.4% growth over the last five years. Almost all territories are now fully (or almost) digitised, with Argentina and Venezuela (93% and 91% penetration rate respectively) lagging behind.

Latin America continues to be a disintegrated market; few local productions are released in other territories in the region and those which make it account for a negligible share of the overseas admissions. Argentine films are the only limited exception to this, with several releases in some major Latin American markets amounting to an attendance equivalent to circa 14% of the domestic rate in 2016.

Mexico

With theatrical infrastructure constantly growing since early this century, along with a remarkable surge in admissions over the last two years - 321 million tickets sold in 2016 (81 million more than in 2014), it seems the Mexican market still has scope for growth; in 2016, the number of screens grew by 4.1% year on year, up to 6 225 (96% of which were digital).

Although domestic productions do not always make it to the big screen (90 titles in 2016), 162 Mexican films were produced that year, a figure above the historic record of 1958. After a poor performance in 2015, local productions were back on track at the domestic box office (10% market share); with the 5.9 million admissions, romantic-comedy *¿Qué culpa tiene el niño?* as the highest-grossing Mexican film of the year.

Brazil

Attendance rates have shown a constant upward trend (and more than doubled) since 2007; in 2016, admissions grew by 6.6% year on year, up to 184.3 million, while GBO grew by 10.5% on 2015, up to BRR 2.6 billion (USD 744.7 million). Brazilian production *Os Dez Mandamentos: O Filme*, a literal adaptation of the Book of Exodus, topped the BO list and boosted the market share for Brazilian productions (16.5% in 2016), becoming the second most successful ever Brazilian film by admissions at home.

Fully digitised Brazil has a theatrical infrastructure of 3 160 screens (155 more than the previous year); the sector has scope for growth, as the country has one of the lowest ratios of screen per population (15.3 screens per million inhabitants) and admissions per capita (0.9 tickets per capita a year) of the subcontinent, only ahead of Venezuela.

Argentina

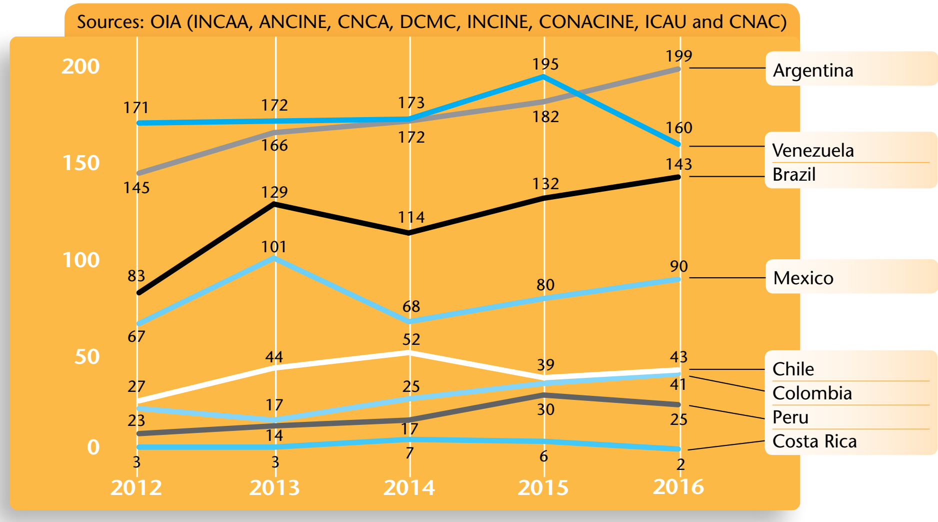
Following the boost of the domestic BO in 2015, admissions slightly decreased (by 2.3% year on year), down to 50.9 million, yet the second highest level this century. In turn, GBO went up to ARS 395.2 million (by 66% on 2015); that is, USD 267.4 million; however, most of the surge has to be credited to the rampant inflationary trend since the end of 2015 and therefore, the rise of average ticket prices.

In addition, with 199 films released in 2016, production volume reached a record high over the last decades. However, only 10 productions surpassed the USD 1 million threshold at the domestic box office, with 154 films grossing less than USD 10 000. In order to improve these figures, the government started the reconversion of the public support system, raising the allocated budget to ARS 930 million (USD 63 million). *Me casé con un boludo* was the highest grossing domestic film of the year.

Sources: Ibero-American Audiovisual Obervatory, INCAA, IMCINE, ANCINE, *Screen International*, *Variety*, OBS

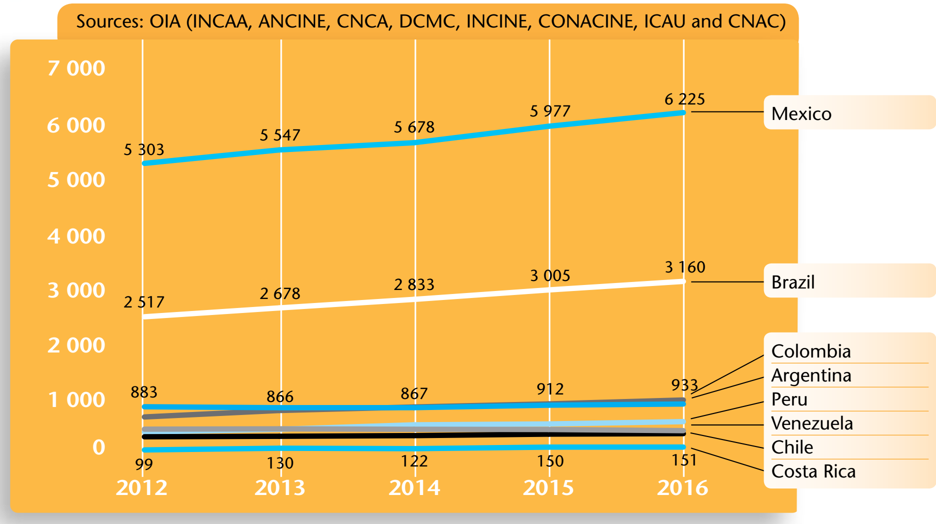
Number of national feature films released in Latin America | 2012-2016

In units.



Number of screens in Latin America | 2012-2016

In units.



Top 10 films by admissions in Argentina | 2016

	Original title	Country of origin	Director	Admissions
1	Finding Dory	US	Andrew Stanton, Angus MacLane	3 006 043
2	Ice Age: Collision Course	US	Mike Thurmeier, Galen T. Chu	2 608 457
3	The Secret Life of Pets	US/JP	Yarrow Cheney, Chris Renaud	2 446 783
4	Me casé con un boludo	AR	Juan Taratuto	2 026 469
5	Zootopia	US	Byron Howard, Rich Moore, Jared Bush	1 833 440
6	The Conjuring 2	US	James Wan	1 796 001
7	The Jungle Book	US/GB	Jon Favreau	1 704 301
8	Captain America: Civil War	US	Anthony Russo, Joe Russo	1 548 948
9	Batman v Superman: Dawn of Justice	US	Zack Snyder	1 373 943
10	Suicide Squad	US	David Ayer	1 237 490

Sources: OIA, INCAA

Top 10 films by admissions in Brazil | 2016

	Original title	Country of origin	Director	Admissions
1	Os Dez Mandamentos: O Filme	BR	Alexandre Avancini	11 305 479
2	Captain America: Civil War	US	Anthony Russo, Joe Russo	9 617 572
3	Batman v Superman: Dawn of Justice	US	Zack Snyder	8 565 380
4	Finding Dory	US	Andrew Stanton, Angus MacLane	8 189 410
5	Suicide Squad	US	David Ayer	7 827 788
6	Deadpool	US	Tim Miller	6 044 324
7	Ice Age: Collision Course	US	Mike Thurmeier, Galen T. Chu	5 260 450
8	Doctor Strange	US	Scott Derrickson	4 797 512
9	The Secret Life of Pets	US/JP	Yarrow Cheney, Chris Renaud	4 416 403
10	X-Men: Apocalypse	US	Bryan Singer	4 373 939

Sources: OIA, ANCINE

Top 10 films by admissions in Chile | 2016

	Original title	Country of origin	Director	Admissions
1	Ice Age: Collision Course	US	Mike Thurmeier, Galen T. Chu	1 522 936
2	Finding Dory	US	Andrew Stanton, Angus MacLane	1 505 113
3	Captain America: Civil War	US	Anthony Russo, Joe Russo	1 204 238
4	The Conjuring 2	US	James Wan	1 181 363
5	The Secret Life of Pets	US/JP	Yarrow Cheney, Chris Renaud	1 303 730
6	Sin Filtro	CL	Nicolás López	1 284 553
7	Batman v Superman: Dawn of Justice	US	Zack Snyder	902 276
8	Suicide Squad	US	David Ayer	950 409
9	The Jungle Book	US/GB	Jon Favreau	971 778
10	Deadpool	US	Tim Miller	898 366

Sources: OIA, CNCA

Top 10 films by admissions in Mexico | 2016

	Original title	Country of origin	Director	Admissions
1	Captain America: Civil War	US	Anthony Russo, Joe Russo	14 523 084
2	Batman v Superman: Dawn of Justice	US	Zack Snyder	13 259 960
3	The Secret Life of Pets	US/JP	Yarrow Cheney, Chris Renaud	10 882 564
4	Finding Dory	US	Andrew Stanton, Angus MacLane	10 167 369
5	Suicide Squad	US	David Ayer	9 938 442
6	The Jungle Book	US/GB	Jon Favreau	9 514 036
7	Ice Age: Collision Course	US	Mike Thurmeier, Galen T. Chu	9 326 032
8	The Conjuring 2	US	James Wan	8 194 711
9	Deadpool	US	Tim Miller	8 098 619
10	Zootopia	US	Byron Howard, Rich Moore, Jared Bush	7 719 766

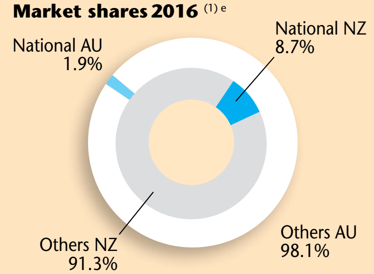
Sources: OIA, INCINE

Australia and New Zealand

	Australia	New Zealand
Population 2016 e (million)	24.4	4.7
GDP per capita 2016 e (USD)	51 593	38 066
Gross box office 2016 (M USD)	911.9	140.7
Admissions 2016 (million)	91.3	16.0
Average ticket price 2016 (USD)	10.0	8.8
Average admissions per capita 2016	3.7	3.4
Screens 2016	2 121	407
Digital screens 2016	1 195	407
Digital 3D screens 2016	963	407

(1) By GBO

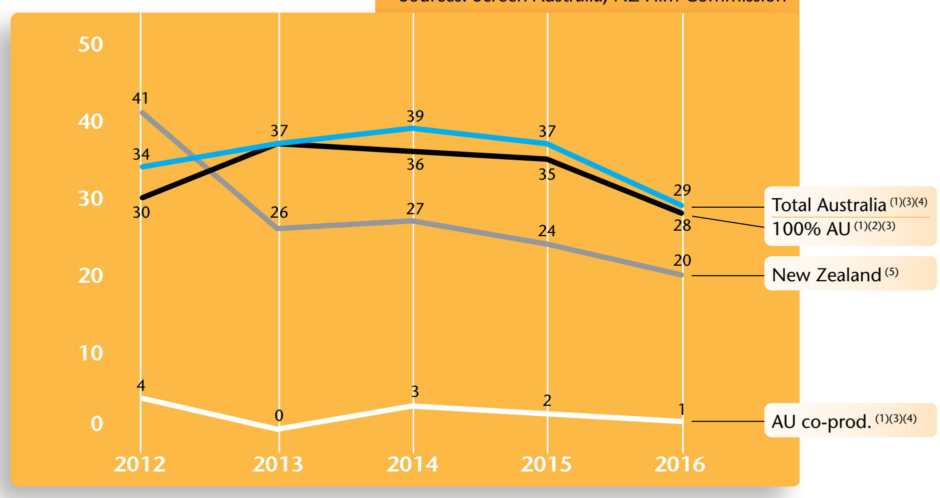
Market shares 2016 (1) e



Number of Australian and New Zealand feature films produced | 2012-2016

In units.

Sources: Screen Australia, NZ Film Commission



(1) Films with budgets below AUD 0.5 million 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.

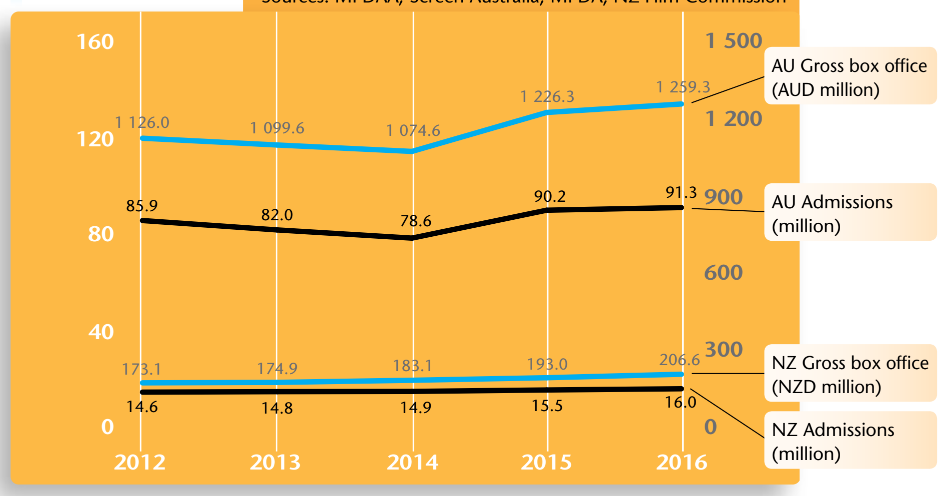
(3) Refers to the fiscal year ending that year.

(4) Does not include unofficial co-productions.

(5) Restated series. Feature films made in NZ; PDV only films are not included, minority co-prod. shot in the county included.

Admissions and gross box office in Australia and New Zealand | 2012-2016

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



Top 10 films by admissions in Australia | 2016 e

Estimated admissions based on average ticket price of AUD 13.8.

	Original title	Country of origin	Director	Distributor	Admissions e
1	Finding Dory	US	Andrew Stanton	Walt Disney	3 518 740
2	Deadpool	US	Timothy Miller	Fox	3 135 235
3	Rogue One	US	Gareth Edwards	Walt Disney	2 636 885
4	Suicide Squad	US	David Ayer	Warner Bros.	2 483 637
5	Captain America: Civil War	US	Joe Russo, A. Russo	Walt Disney	2 444 459
6	Fantastic Beasts and Where to Find ...	GB inc/US	David Yates	Warner Bros.	2 261 108
7	Star Wars VII: The Force Awakens	US	J.J. Abrams	Walt Disney	2 257 098
8	The Jungle Book	US/GB	Jon Favreau	Walt Disney	2 158 292
9	Batman v Superman: Dawn of Justice	US	Zack Snyder	Warner Bros.	2 150 598
10	The Secret Life of Pets	US/JP	C. Renaud, Y. Cheney	Universal	2 141 829

Source: MPDAA

Top 10 films by admissions in New Zealand | 2016 e

Estimated admissions based on average ticket price of NZD 12.9.

	Original title	Country of origin	Director	Distributor	Admissions (1) e
1	Hunt for the Wilderpeople	NZ	Taika Waititi	Madman/Piki	944 309
2	Finding Dory	US	Andrew Stanton	Walt Disney	548 810
3	Star Wars VII: The Force Awakens	US	J.J. Abrams	Walt Disney	424 542
4	Suicide Squad	US	David Ayer	Warner Bros.	413 280
5	Deadpool	US	Timothy Miller	20th Century Fox	402 119
6	The Jungle Book	US/GB	Jon Favreau	Walt Disney	390 599
7	Captain America: Civil War	US	Joe Russo, A. Russo	Walt Disney	377 789
8	Batman v Superman: Dawn of Justice	US	Zack Snyder	Warner Bros.	374 301
9	Rogue One (2)	US	Gareth Edwards	Walt Disney	360 687
10	Fantastic Beasts and Where to Find... (2)	GB inc/US	David Yates	Warner Bros.	352 540

(1) Lifetime admissions as at 31st December 2016. (2) Still grossing in 2017. Source: MPDA

Distribution and exhibition

With 91.3 million tickets sold in Australia (1.3% up year on year) and a GBO of AUD 1 259 million, 2016 consolidated the hike initiated the year before, following a period of stagnation and decline since the beginning of the decade. Mel Gibson's #49 *Hacksaw Ridge* was the biggest domestic success, grossing AUD 6.8 million at home, just a small portion of the AUD 200 million takings worldwide. In turn, New Zealand's admissions (16 million in 2016) grew for the fifth consecutive year, 3.3% up from 2015, marking a high since 2003.

Hunt for the Wilderpeople broke all records for New Zealand films at the domestic box office, becoming the 6th highest-grossing film of all times in the country, accounting for the lion's share of an unprecedented 8.7% market share for domestic productions. Conversely, Australian productions represented a meagre 1.9% of the total domestic GBO. With a 56.3% digitisation rate, Australia is still far from the standards of developed big markets. In turn, fully digitised New Zealand suffered a net loss of 10 screens (407 in 2016) due to the Wellington earthquake that year.

Production and funding

Although Australia produced eight films less in 2016 than in 2015, overall expenditure increased by 59% year on year (AUD 194 million in 2016), yet still remained far from pre-2015 figures; fewer low-budget films and more high-budget films (above AUD 6 million) were shot. Additionally, 22 foreign films were produced or post-produced in the country, accounting for AUD 242 million spend in Australia. 2016 saw grants and incentives to local films increasing, yet still below 5-year average; in turn, fiscal incentives for foreign productions decreased after skyrocketing in 2015.

In New Zealand, film production and postproduction spend remained stable at NZD 343 million in 2016; conversely, the industry recorded a decade high of NZD 1 billion revenues in 2016, in part thanks to a significant hike in overseas revenues.

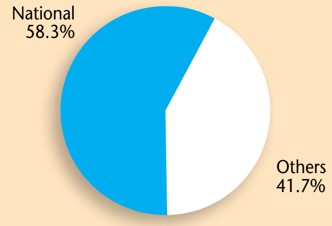
Sources: Screen Australia, MPDAA, NZ Film Commission, MPDA, Statistics NZ, *Variety*, OBS

People's Republic of China

Population 2016 e	1 379 million
GDP per capita 2016 e	8 261 USD
Gross box office 2016 e	46.00 bn CNY (6.60 bn USD)
Admissions 2016 e	1.37 billion
Average ticket price 2016 e	33.6 CNY (5.1 USD)
Average admissions per capita 2016 e	1.0
Screens 2015 | 2016 e	31 627 | 41 179
Digital screens 2015 | 2016 e	28 968 | 37 500 (1)
Digital 3D screens 2015 | 2016 e	25 983 | 32 943 (1)

(1) By September 2015. (2) By GBO

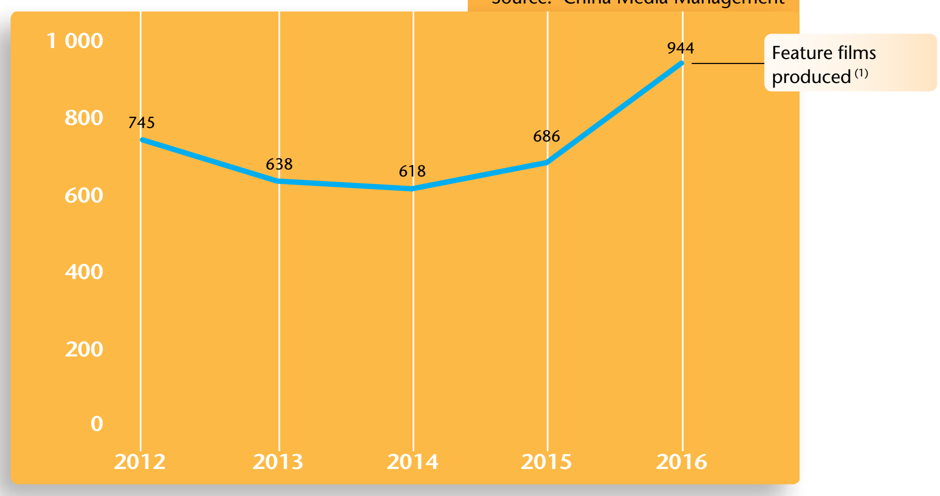
Market shares 2016 (2)



Number of feature films produced in China | 2012-2016 e

In units.

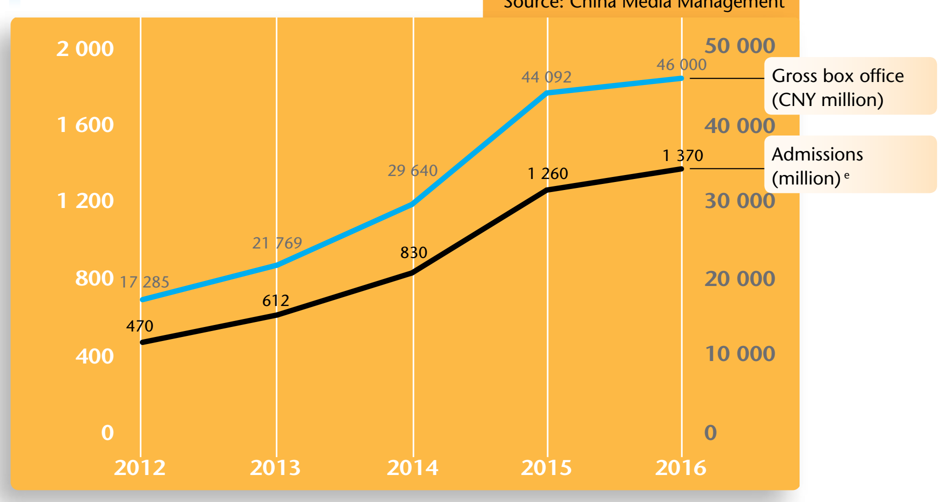
Source: China Media Management



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

Admissions and gross box office in China | 2012-2016

Source: China Media Management



Top 20 films by admissions in China | 2016

Admissions calculated based on the average ticket price in 2016.

	Original title	Country of origin	Director	Admissions [e]
1	Mei ren yu	CN	Stephen Chow	91 256 633
2	Zootopia	US	B. Howard, R. Moore, J. Bush	44 717 628
3	Warcraft	US	Duncan Jones	38 727 671
4	Mei Gong he xing dong	CN/HK	Dante Lam	38 085 381
5	Captain America: Civil War	US	Anthony Russo, Joe Russo	33 851 834
6	Xi you ji zhi: Sun Wukong san da Baigu Jing	HK/CN	Pou-Soi Cheang	32 318 716
7	Du cheng feng yun III	HK/CN	Jing Wong	30 700 308
8	The Jungle Book	US/GB	Jon Favreau	28 502 152
9	Time Raiders	CN	Daniel Lee	27 860 776
10	Kung Fu Panda 3	US/CN	A. Carloni, J. Yuh Nelson	27 534 871
11	I Belonged to You	CN	Yibai Zhang	25 514 898
12	The Great Wall	CN/US	Yimou Zhang	25 169 488
13	Jue di tao wang	CN/HK/US	Renny Harlin	25 070 981
14	X-Men: Apocalypse	US	Bryan Singer	22 870 857
15	Beijing Meets Seattle II: Book of Love	CN	Xiaolu Xue	22 689 139
16	Star Wars: Episode VII - The Force Awakens	US	J.J. Abrams	21 306 691
17	Doctor Strange	US	Scott Derrickson	20 840 909
18	Tang ren jie tan an	CN	Sicheng Chen	20 638 320
19	Yip Man 3	CN/HK	Wilson Yip	20 201 980
20	Shi tu xing zhe	CN/HK	Jazz Boon	19 776 327

Source: comScore

Distribution and exhibition

2016 saw China narrowly overtaking the US as the #1 world market by number of screens and North America as #2 by admissions. With 9 552 screens unveiled during the year (a 30.2% increase on 2015), the country reached 41 179 screens and a digital penetration rate of 91.1% in 2016 - as well as 80% 3D penetration rate, showing the appetite for 3D content in this country, on the one hand, and the room for more screens, on the other.

Conversely, the sky-rocketing growth of Chinese BO slowed down in 2016. After a 34% year-on-year hike in attendance in 2015, admissions increased by 8% in 2016, up to 1 370 million tickets. In turn, GBO grew by a meagre 4%, amounting to CNY 46 billion (compared to CNY 44.1 billion in 2015). The times of 3D and high inflation-ridden hike in ticket prices are long gone; in fact, average prices have been moderately down for the last five years (by 4%, down to CNY 33.6, in 2016).

The poor performance of the box office compared to the previous year led authorities to an unofficial relaxation of the 34-foreign-film distribution quota – reportedly increasing to 40 films in 2016. As usual in recent times, domestic productions took the lion's share of box office revenues: 58.3% of the market in 2016, slightly down on the outstanding 61.6% reached the previous year.

Production and funding

Production volume in China has more than doubled in less than a decade, also increasing significantly in 2016 – by 37.6% on previous year, up to 944 feature films, after some years of consolidation.

Long-awaited new film legislation was enacted in March 2017, ushering in transparency in the censorship process, reducing the red tape for production and taking a stand on box office cheating. However, it continues to be very protective of the domestic industry, reserving two thirds of screen time in the country for local productions, introducing economic measures to boost the industry and underlining that companies, actors and films should comply with core socialist values. Moreover, restrictions on foreign companies wishing to distribute or produce independently in the country remain.

Negotiations for a new 5-year Sino-American film agreement kicked off in early 2017, with Hollywood majors advocating more revenue-sharing films in China and a higher share of the revenues (currently 25%); however, an inward-looking American president along with a foreseen renewal of leadership of the Chinese Communist Party during the year do not make major changes a reasonable expectation.

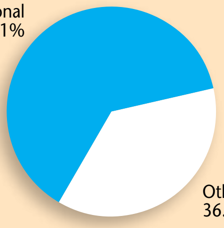
Sources: Central Media Management, *Variety*, *The Hollywood Reporter*, IHS

Japan

Population 2016 [e]	126.8 million
GDP per capita 2016 [e]	37 304 USD
Gross box office 2016	235.5 bn JPY (2.17 bn USD)
Admissions 2016	180.2 million
Average ticket price 2016	1 307 JPY (12.0 USD)
Average admissions per capita 2016	1.4
Screens 2015 | 2016	3 437 | 3 472
Digital screens 2015 | 2016	3 408 | 3 392
Digital 3D screens 2015 | 2016	1 152 | 1 184

(1) By GBO

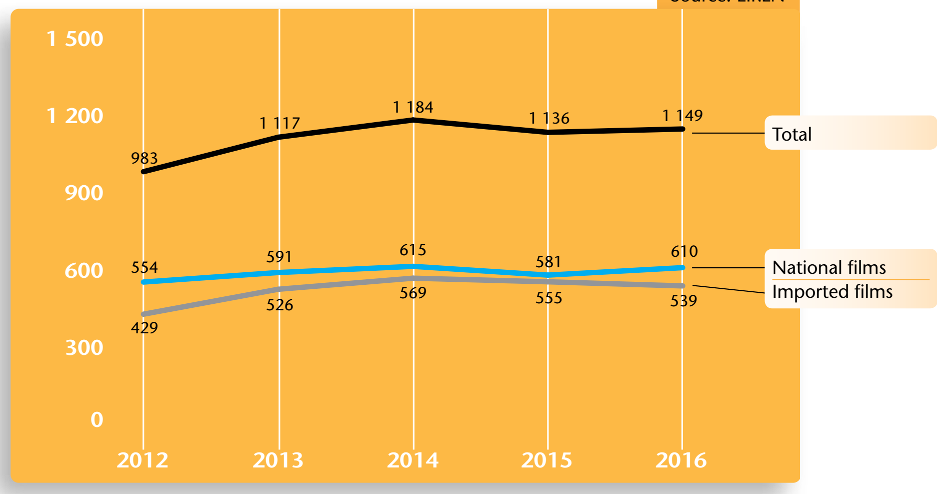
Market shares 2016 (1)



Number of films released in Japan | 2012-2016

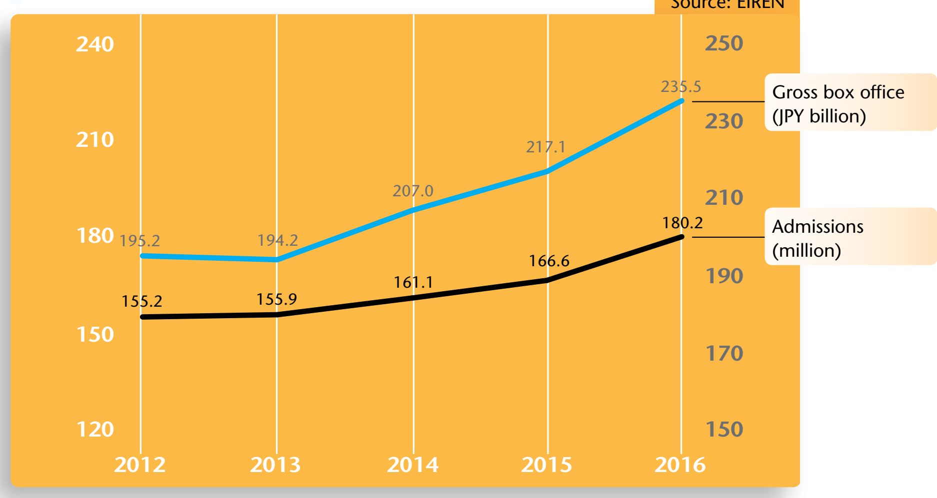
In units.

Source: EIREN



Admissions and gross box office in Japan | 2012-2016

Source: EIREN



Top 20 films by admissions in Japan | 2016 [e]

Estimated admissions based on average ticket price of JPY 1 307.

	Original title	Country of origin	Director	Distributor	Admissions [e]
1	Your Name	JP	Makoto Shinkai	TOHO	18 026 014
2	Star Wars VII: The Force Awakens	US	J.J. Abrams	WDS	8 898 240
3	Shin Godzillas	JP	H. Anno, S. Higuchi	TOHO	6 312 165
4	Zootopia	US	Howard, Moore, Bush	WDS	5 837 796
5	Finding Dory	US	Andrew Stanton	WDS	5 225 708
6	Detective Conan: The Darkest Nightmare	JP	Kôbun Shizuno	TOHO	4 843 152
7	Yo-Kai Watch 2: Five Tales from Beyond...	JP	T. Shigeharu, U. Shinji	TOHO	4 231 064
8	One Piece Film: Gold	JP	Hiroaki Miyamoto	TOEI	3 963 275
9	Npbunaga Concerto	JP	Hiroaki Matsuyama	TOHO	3 527 161
10	The Secret Life of Pets	US/JP	C. Renaud, Y. Cheney	TOHO-TOWA	3 244 070
11	Doraemon the Movie: Nobita and the …	JP	Shinnosuke Yakuwa	TOHO	3 152 257
12	The Martian	US	Ridley Scott	FOX	2 708 493
13	Assassination Classroom: The Graduation	JP	Eiichirô Hasumi	TOHO	2 693 191
14	Orange	JP	Kojiro Hashimoto	TOHO	2 486 611
15	Spectre	GB inc/US	Sam Mendes	SPE	2 264 728
16	Alice Through the Looking Glass	US	James Bobin	WDS	2 127 008
17	Independence Day: Resurgence	US	Roland Emmerich	FOX	2 035 195
18	Captain America: Civil War	US	J. Russo, A. Russo	WDS	2 012 242
19	A Silent Voice	JP	Naoko Yamada	SHOCHIKU	1 759 755
20	The Jungle Book	US/GB	Jon Favreau	WDS	1 690 895

Sources: EIREN, OBS

Distribution and exhibition

2016 saw significant hike in attendance, by 8.1% on 2015, up to 180.2 million admissions, marking accelerating growth over the last four years and a high since the 70s. With average ticket prices almost flat, this implied similar growth of revenues (by 8.5% on 2015, up to JPY 235.5 billion). In turn, the number of screens grew marginally (1% on 2015), in line with the trend of sustained growth since the late 90s, with the number of screens (3 472 in 2016) back at 1960s level.

With outstanding 18 million admissions, the breakaway animation film *Your Name* crowned the box office charts, becoming the fourth highest-grossing film ever in the country (and the second Japanese one). In addition, the film became the most successful Japanese film ever in China (20.3 million admissions by April 2017). Equally, it sold 3.6 million admissions in South Korea and is scheduled for release in the US in April 2017. At home, it certainly contributed, along with #3 Shin Godzillas, to the rise in the market share for domestic films (63.1% in 2016), 13.9% higher than in 2015 and the highest level since 2012. As usual, the top 20 films accounted for circa half of the total GBO, with a balanced split between animation (mostly local) and live action (mostly Hollywood blockbusters).

Production and funding

610 Japanese films got a first release in 2016, 5% up on the previous year, confirming the quiet boom of films shot in the country, with production volume more than doubling over this century. Although the Association of Japanese Animation (AJA) reported that the Japanese animation industry abroad was worth JPY 583.3 billion in 2015, up 78.7% on 2014, and in spite of the above-mentioned one-off overseas success of *Your Name* in 2016, it is thought that Japanese animation – the most exportable of domestic production – has not yet unleashed its full commercial potential abroad.

Furthermore, it is no secret that Japan has become a demographic time bomb; with low fertility rates, population is shrinking and aging rather quickly. Aware of the impact this may have on the local market for domestic productions and the scope for growth for Japanese animation abroad, the promotion of IP abroad (mainly orchestrated by *Cool Japan* since 2011) has increasingly become a priority for the government. At the same time, Japanese (and South Korean) companies and talent are helping to develop the animation film industry in China, which could, in the long term, cannibalise the domestic one.

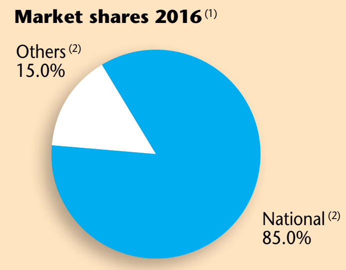
Sources: EIREN, UNIJAPAN, *Variety, Screen Digest, The Japan Times, The Hollywood Reporter.*

India

Population 2016 e	1 310 million
GDP per capita 2016 e	1 719 USD
Gross box office 2016 e	99.8 bn INR (1.5 bn USD)
Admissions 2016 e	2.02 billion
Average ticket price 2016 e	49.5 INR (0.8 USD)
Average admissions per capita 2016 e	1.5
Screens 2015 | 2016 e	11 179 | ~
D-Cinema screens 2015 | 2016 e	2 690 | ~
3D screens 2015 | 2016 e	1 153 | ~

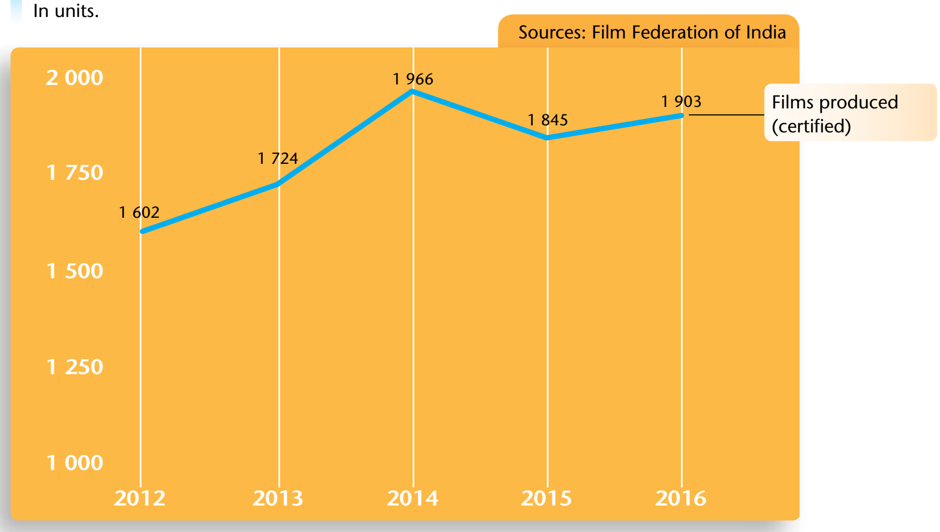
(1) Only Hollywood films included under Others (2) 2015

Market shares 2016 (1)

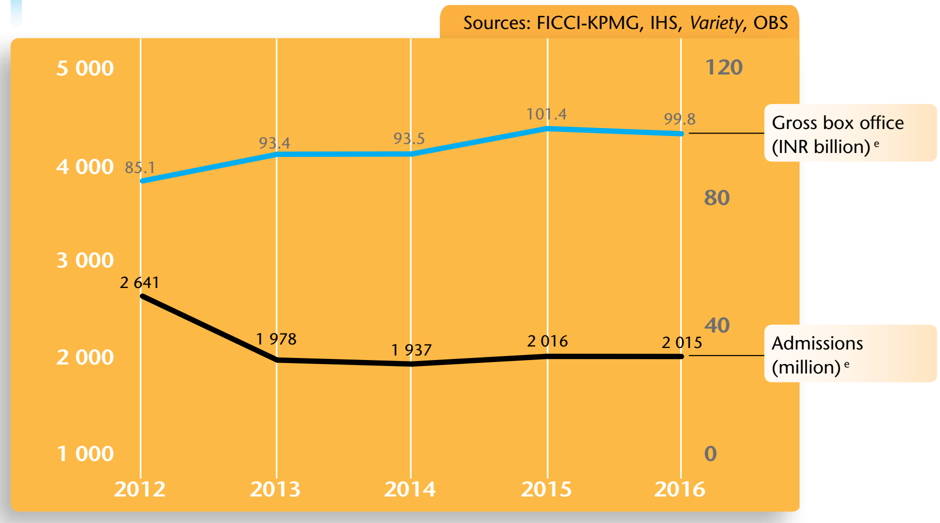


Number of Indian feature films certified | 2012-2016

In units.



Admissions and gross box office in India | 2012-2016 e



Top 10 Bollywood films by gross box office in India | 2016

GBO calculated using an average exchange rate of 1 USD = 67.27 INR.

	Original title	Country of origin	Director	Gross box office (in USD million) e
1	Dangal	IN	Nitesh Tiwari	57.59
2	Sultan	IN	Ali Abbas Zafar	44.66
3	Dhoni: The Untold Story	IN	Neeraj Pandey	19.78
4	Airlift	IN	Raja Krishna Menon	19.18
5	Rustom	IN	Tinu Suresh Desai	18.94
6	Ae Dil Hai Mushkil	IN	Karan Johar	16.72
7	Housefull 3	IN	Sajid-Farhad	16.01
8	Shivaay	IN	Ajay Devgn	14.92
9	Fan	IN	Maneesh Sharma	12.64
10	Baaghi	IN	Sabbir Khan	11.30

Source: Koimoi.com

Top 10 US films by gross box office in India | 2016

GBO calculated using an average exchange rate of 1 USD = 67.27 INR.

	Original title	Country of origin	Director	Gross box office (in USD million) e
1	The Jungle Book	US/GB	Jon Favreau	36.33
2	Captain America: Civil War	US	Anthony Russo, Joe Russo	11.46
3	The Conjuring 2	US	James Wan	11.88
4	Batman v Superman: Dawn of Justice	US	Zack Snyder	9.86
5	X-Men: Apocalypse	US	Bryan Singer	6.28
6	Deadpool	US	Tim Miller	5.89
7	Independence Day: Resurgence	US	Roland Emmerich	5.02
8	Doctor Strange	US	Scott Derrickson	4.87
9	Kung Fu Panda 3	US/CN	A. Carloni, J. Yuh Nelson	4.15
10	Angry Birds	US/FI	Clay Kaytis, Fergal Reilly	3.94

Sources: OBS, comScore

Distribution and exhibition

The revenues for the Indian film industry slowed down in 2016 (INR 142.3 billion); in fact, the 3% year on year growth took place in spite of a slight decrease in domestic box office (from INR 101.4 billion in 2015 to INR 99.8 billion in 2016), thanks to a surge in ancillary revenues (mainly OTT rights) and, to a lesser extent, overseas theatrical revenues.

The decrease in admissions to Bollywood films (INR 37 billion in 2016) has been a constant since 2014, with high concentration at the top - 50 of the 225 Hindi films released in the country in 2016 accounted for 96% of the domestic Bollywood revenues. With a GBO of USD 57.8 million, *Dangal* became the highest-grossing Bollywood film of all times. The increase of versions dubbed into local languages contributed to an increase of Hollywood's share of the pie, with GBO to their top 10 movies going up by almost 10% on 2015 - INR 7.1 billion in 2016; this year's box office list topper, *The Jungle Book*, became the highest-grossing ever foreign film in India (GBO of USD 36.8 million), with 58% of domestic box office coming from dubbed screenings. American films accounted for circa 10% of domestic box office. The remaining 50% of the market was shared by the so called regional industries; notably, Tamil, Telugu, Bengali and Malayalam productions.

Production and funding

The number of domestic features released in the country has not undergone major changes over the last three years, with 1903 films certified in 2016. While Hindi movies are becoming less and less profitable due to the explosion of film budgets, other regional film industries have increased their production volume and success in recent years - Tamil film *Kabali* ranked fourth in the BO list for 2016.

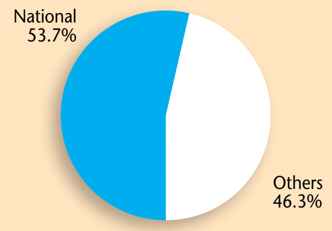
In addition, the Film Facilitation Office became a reality: a national one-stop shop for production clearance and permits in order to reduce red tape and foster production in the country.

Sources: KPMG, FICCI, Ernst & Young, *Variety, Screen International*, IHS, OBS

South Korea

Population 2016 [e]	50.8 million
GDP per capita 2016 [e]	27 633 USD
Gross box office 2016	1 691 bn KRW (1.45 bn USD)
Admissions 2016 [e]	217.0 million
Average ticket price 2016 [e]	7 792 KRW (6.7 USD)
Average admissions per capita 2016 [e]	4.3
Screens 2015 | 2016	2 492 | ~
Digital screens 2015 | 2016	2 492 | ~
Digital 3D screens 2015 | 2016	~ | ~

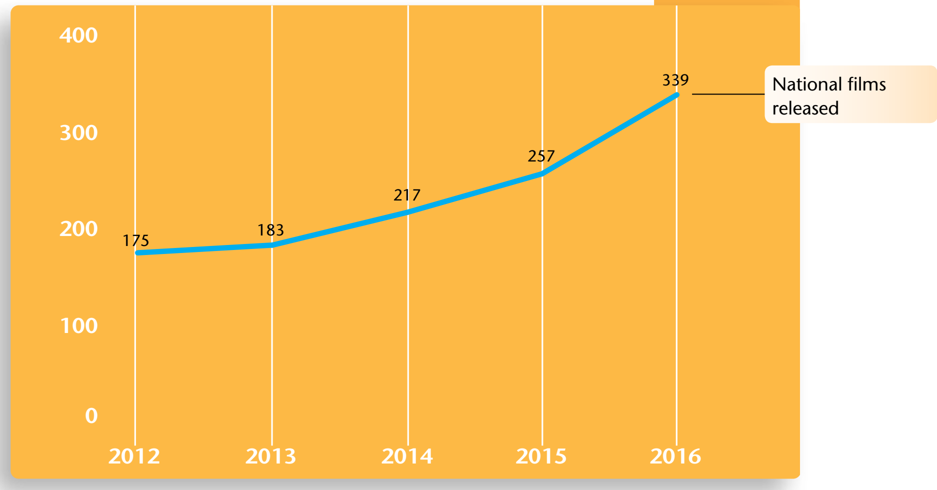
Market shares 2016 [e]



Number of Korean feature films released | 2012-2016

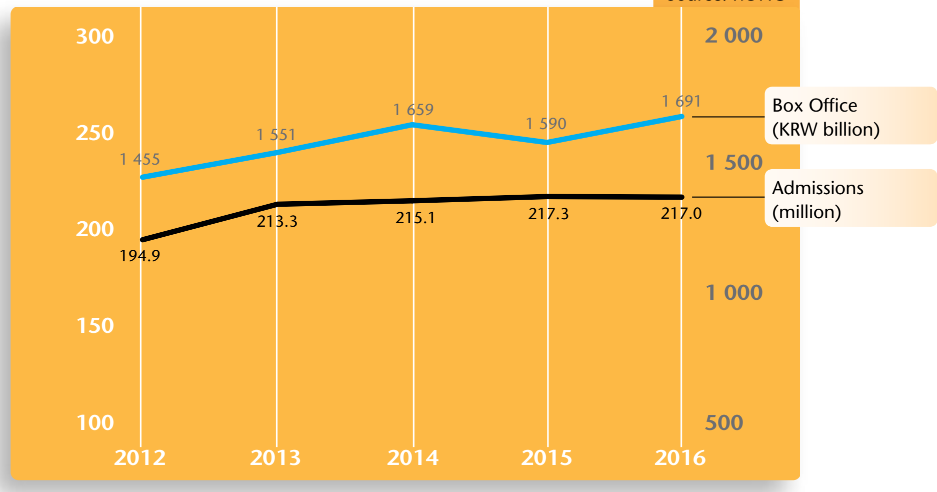
In units.

Source: KOFIC



Admissions and gross box office in South Korea | 2012-2016

Source: KOFIC



Top 20 films by admissions in South Korea | 2016

	Original title	Country of origin	Director	Distributor	Admissions
1	Train to Busan	KR	Yeon Sang-ho	Contents Panda	11 565 479
2	A Violent Prosecutor	KR	Lee Il-hyung	Showbox	9 707 581
3	Captain America: Civil War	US	J. Russo, A. Russo	Walt Disney	8 677 249
4	The Age of Shadows	KR	Kim Jee-woon	Finecut	7 500 420
5	Tunnel	KR	Kim Seong-hun	Showbox	7 120 508
6	Operation Chromite	KR	John H. Lee	CJ, Finecut	7 049 643
7	Luck-Key	KR	Lee Gae-byok	Showbox	6 975 291
8	The Wailing	KR	Na Hong-jin	Finecut	6 879 908
9	The Last Princess	KR	Hur Jin-ho	Lotte Entertainment	5 599 229
10	Doctor Strange	US	Scott Derrickson	Walt Disney	5 446 241
11	Master	KR	Cho Ui-seok	CJ	4 935 297
12	Zootopia	US	Howard, Moore, Bush	Walt Disney	4 706 158
13	Fantastic Beasts and Where to…	GB inc/US	David Yates	Warner Bros.	4 662 751
14	Pandora	KR	Park Jung-woo	Contents Panda	4 313 566
15	The Handmaiden	KR	Park Chan-wook	CJ	4 287 839
16	Kung Fu Panda 3	US/CN	Carloni, Yuh Nelson	DreamWorks Animation	3 984 812
17	Spirits' Homecoming	KR	Cho Jung-rae	M-Line Distribution	3 587 173
18	Deadpool	US	Timothy Miller	20th Century Fox	3 317 196
19	Now You See Me 2	US/CN	Jon Chu	Summit Entertainment	3 100 113
20	My Annoying Brother	KR	Kwon Soo-kyung	CJ	2 979 561

Source: KOFIC

Distribution and exhibition

Cinema attendance was rather flat for the third consecutive year (217 million admissions in 2016), showing the market has reached its full potential. In turn, highest-ever GBO grew 6.3% on 2015, up to KRW 1 691 billion after dropping in 2015. South Korea is a fine example of how to boost a decaying film industry and a minor market in record time; over the century, the number of admissions has fourfolded, with the country consolidating as the fifth world market by admissions in 2016. Equally, local productions got the lion's share of the domestic GBO almost uninterruptedly since 2001 (53.7% in 2016), up from a 20-25% bracket at the end of the 90s. In addition, South Korea has reached a ratio of 4.3 admissions per capita a year, the highest in the world.

Eight Korean productions made it to the top 10 BO list in 2016, including #1 zombie action-thriller *Train to Busan*, which also ranked #2 in Hong Kong. In addition, #15 *The Handmaiden*'s rights were sold to a record 175 territories. Concentration at the top of the BO list is not unusual in South Korea, where the top 20 films accounted for a remarkable 71% of the overall attendance in 2016.

Production and funding

The number of theatrical releases (1 573 in 2016) has skyrocketed in recent years, more than doubling since 2012. 339 Korean productions got their first theatrical release during the year; that is, 82 more than previous record 2015. However, only 250 films (of which, 83 homegrown productions) got more than 20k admissions in 2016.

The Korean Film Council (KOFIC) improved the conditions of its 25% cash rebate for foreign productions in order to promote the country as a shooting location, increasing the overall budget by 250% from 2015 (KRW 2.42 billion in 2016) and raising the cap per film up to KRW 2 billion. KOFIC also unveiled plans to introduce theatrical quotas for local art-house productions and started implementation of film literacy measures.

In addition, the government introduced a tax incentive of up to 10% of eligible expenses for domestic productions so as to offset the foreseeable consequences of unofficial China's ban on South Korean cultural content, following the deployment of the US missile defence system THAAD on South Korean soil. Furthermore, historical disputes with Japan, along with a wave of films set in Korea under Japanese occupation, makes the Nippon market instable for Korean entertainment, so the country is now turning its eyes to the ASEAN region, quite notably to emerging markets such as Indonesia and Vietnam.

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

Other Asia

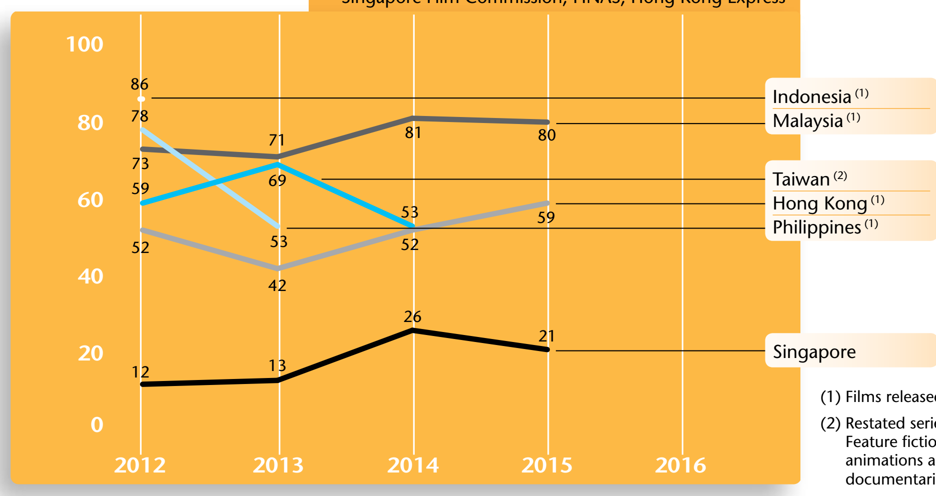
	Hong Kong	Indonesia	Malaysia	Philippines	Singapore	Taiwan	Thailand
Population 2016 e (million)	7.4	258.8	31.7	104.2	5.6	23.6	69.0
GDP per capita 2016 e (USD)	42 963	3 636	9 546	2 991	53 053	22 044	5 662
Gross box office 2016 e (M USD)	251.2	264.4 (2)	220.2	191.2 (2)	145.6	263.4 (2)	164.2 (2)
Admissions 2016 e (million)	28.3 (2)	100.5 (2)	71.5	83.5 (2)	21.9	29.0 (1)	35.8 (1)
Average ticket price 2016 e (USD)	9.1 (2)	2.6 (2)	3.1	2.3 (2)	6.6	9.1 (2)	4.6 (2)
Average admissions per capita 2016 e	3.9 (2)	0.4 (2)	2.3	0.8 (2)	3.9	1.2 (2)	0.5 (2)
Screens 2016 e	221 (2)	1 146 (2)	991	738 (2)	242 (2)	723 (2)	1 055 (2)
Digital screens 2016 e	221 (2)	1 146 (2)	944 (2)	734 (2)	242 (2)	723 (2)	1 055 (2)
3D screens 2016 e	203 (2)	636 (2)	310 (2)	152 (2)	94 (2)	414 (2)	413 (2)
National market shares 2016 e	18.1 (1)	~	9.8%	25.7% (4)	4% (3)	17.5% (3)	~

(1) By GBO (2) 2015 (3) 2014 (4) 2011

Number of feature films produced in selected Asian countries | 2012-2016

In units.

Sources: OBS, UNESCO, IHS, Taiwan Cinema, Singapore Film Commission, FINAS, Hong Kong Express



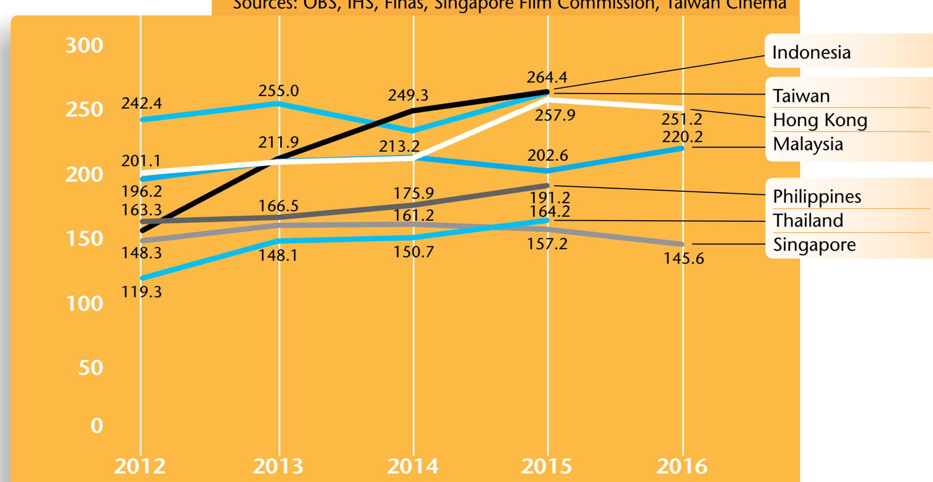
(1) Films released.

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

Gross box office in selected Asian countries | 2012-2016 e

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

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



Top 10 films by gross box office in Hong Kong | 2016

	Original title	Country of origin	Director	Distributor	Admissions
1	Captain America: Civil War	US	J. Russo, A. Russo	Walt Disney	1 111 355
2	Train to Busan	KR	Yeon Sang-ho	EDKO	1 028 643
3	Cold War 2	HK/CN	L. Leung, K. Luk	EDKO	968 044
4	Batman v Superman: Dawn of Justice	US	Zack Snyder	Warner Bros.	601 218
5	Doctor Strange	US	Scott Derrickson	Walt Disney	719 829
6	Deadpool	US	Timothy Miller	20th Century Fox	736 386
7	Mei Ren Yu	CN	Stephen Chow	EDKO	794 688
8	Zootopia	US	Howard, Moore, Bush	Walt Disney	745 197
9	X-Men: Apocalypse	US	Bryan Singer	20th Century Fox	529 228
10	Fantastic Beasts and Where to Find Them	GB inc/US	David Yates	Warner Bros.	586 997

Source: comScore

Top 10 films by gross box office in Singapore | 2016 [e]

	Original title	Country of origin	Director	Distributor	Admissions
1	Captain America: Civil War	US	J. Russo, A. Russo	Walt Disney	1 007 752
2	X-Men: Apocalypse	US	Bryan Singer	20th Century Fox	739 589
3	Batman v Superman: Dawn of Justice	US	Zack Snyder	Warner Bros.	663 145
4	Doctor Strange	US	Scott Derrickson	Walt Disney	694 422
5	Fantastic Beasts and Where to Find Them	GB inc/US	David Yates	Warner Bros.	601 713
6	Deadpool	US	Timothy Miller	20th Century Fox	568 281
7	Zootopia	US	Howard, Moore, Bush	Walt Disney	603 439
8	Suicide Squad	US	David Ayer	Warner Bros.	532 776
9	Finding Dory	US	Andrew Stanton	Walt Disney	552 533
10	Rogue One	US	Gareth Edwards	Walt Disney	461 048

Source: comScore

Distribution and exhibition

As usual, the delay in the publication of data prevents us from providing a full analysis of year 2016, it must be noted that aggregate admissions for the seven countries analysed grew by almost 30% between 2012 and 2015 as well as in each individual territory, with Indonesia (up 81.4%) and Thailand (up 43.5%) showing a remarkable surge over said period. Two developed and consolidated markets such as Hong Kong and Singapore experienced a decrease in admissions and revenues year on year; the former's GBO went 2.5% down on 2015 (HKD 1950 million in 2016; that is, USD 251.2 million); while the latter's dropped by 6.9% on the previous year (SGD 201.2 million; that is, USD 145.6 million).

Although the number of screens in the Asia-Pacific region grew more year on year than anywhere else in the world, this was almost exclusively due to the more than 9 500 screens unveiled in China in 2016, showing that the main developing markets in the region are still to unleash their full potential. Singapore will invest USD 260 million in developing the Indonesian theatrical infrastructure, while local investors are also building new venues around a heavily under-screened country (4.4 screens per million inhabitants). In turn, Hong Kong unveiled legislation to make mandatory the construction of cinema theatres in any new land development in an aim to reverse the plummeting trend of cinema venues in the country since the 1990s due to sky-rocketing real estate prices.

Production

Hong Kong-Chinese sequel thriller *Cold War 2* was the only domestic production in the top 10 box office list in the country. In 2015, production volume increased in Hong Kong, Malaysia and Singapore. Moreover, Filipino cinema seems to be enjoying a golden age in independent and international circles, with Diaz's *The Woman Who Left* winning the Golden Lion in Venice in 2016 as an example of its international recognition. 2016 also saw the break-up of GTH, one of Thailand's leading production studios.

Sources: FINAS, Taiwan Cinema, MPAA, UNESCO, *Screen International, Variety, Film Business Asia*, OBS

Africa

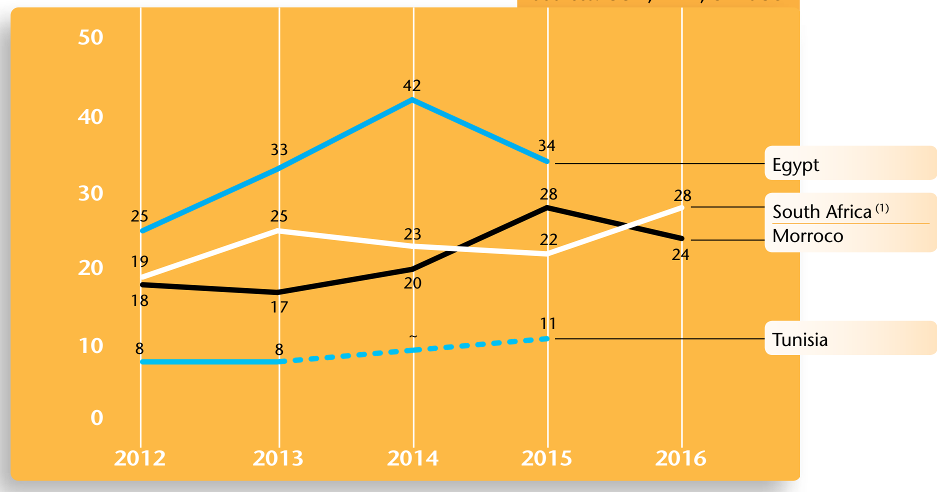
	Algeria	Egypt	Morocco	South Africa	Tunisia
Population 2016 e (million)	40.8	91.0	33.8	55.9	11.2
GDP per capita 2016 e (USD)	4 129	3 710 (1)	3 101	5 018	3 777
Gross box office 2016 e (in M USD)	0.0 (4)	25.9	6.2	77.1	~
Admissions 2016 e (million)	0.0 (4)	5.5	1.5	49.7 (1)	0.3 (5)
Admissions per capita 2016 e	0.0 (4)	0.1	0.1	0.9 (1)	~
Average ticket price 2016 e (in USD)	0.7 (4)	~	4.1	1.6 (1)	2.3 (4)
Screens 2016 e	~	416 (1)	64	729 (1)	11 (1)
Digital screens 2016 e	~	166 (1)	56	710 (1)	~
National market shares 2016 e	~	80% (3)	23.2%	6.1% (6)	~

(1) 2015 (2) 2014 (3) 2012 (4) 2009 (5) 2008 (6) By GBO

Number of feature films produced in selected African countries | 2012-2016

In units.

Sources: CCM, NFVF, UNESCO

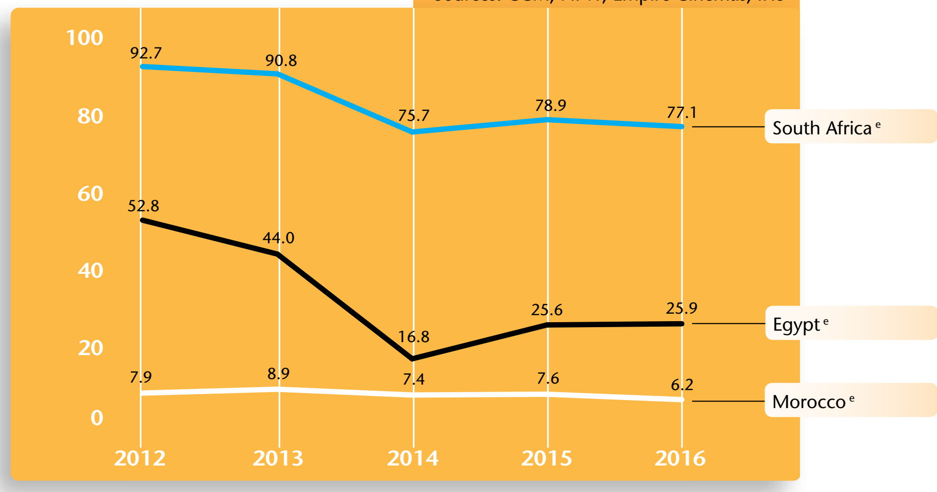


(1) Films released.

Gross box office in selected African countries | 2012-2016

In USD million.

Sources: CCM, NFVF, Empire Cinemas, IHS



Top 10 films by gross box office in South Africa | 2016

	Original title	Country of origin	Director	Gross Box Office (in USD)
1	Finding Dory	US	Andrew Stanton, Angus MacLane	2 969 050
2	Batman v Superman: Dawn of Justice	US	Zack Snyder	2 864 709
3	Suicide Squad	US	David Ayer	2 448 992
4	Captain America: Civil War	US	Anthony Russo, Joe Russo	2 201 291
5	The Jungle Book	US/GB	Jon Favreau	2 119 281
6	Deadpool	US	Tim Miller	2 065 144
7	Central Intelligence	US	Rawson Marshall Thurber	1 927 066
8	Moana	US	Williams, Musker, Clements, Hall	1 766 791
9	Rogue One	US	Gareth Edwards	1 703 482
10	Fantastic Beasts and Where to Find Them	GB inc/US	David Yates	1 644 484

Source: NFVF

Top 10 films by admissions in Morocco | 2016

	Original title	Country of origin	Director	Gross Box Office (in USD)
1	Dallas	MA	Ali El Mejboud	111 543
2	Suicide Squad	US	David Ayer	47 908
3	Batman v Superman: Dawn of Justice	US	Zack Snyder	41 441
4	Dilwale	IN	Rohit Shetty	39 270
5	The Jungle Book	US/GB	Jon Favreau	38 275
6	The Revenant	US	Alejandro González Iñárritu	36 707
7	Deadpool	US	Timothy Miller	35 517
8	Mechanic Resurrection	US/FR	Dennis Gansel	28 867
9	Chambra 13	MA	Aziz el Jahidi	27 755
10	Star Wars VII: The Force Awakens	US	J.J. Abrams	25 013

Source: Centre Cinématographique Marocain (CCM)

Morocco and Egypt

2016 saw the Moroccan attendance level drop on the previous year (by 17.1%, down to 1.5 million tickets). The share of admissions for domestic films went down (by 23.2% year on year), with local comedy *Dallas* crowning the BO list. Theatrical infrastructure remains the main challenge for Morocco's full market potential; with a population of 33.8 million inhabitants, the country only has 64 screens. Although the 20% tax rebate for foreign productions did not become effective until early 2017, the country was able to attract a growing number of inward productions.

Egypt's admissions grew 10% year on year, up to 5.5 million in 2016, yet this is still a small percentage of the attendance levels prior to the Arab spring. Moreover, the position of Egypt as the film and audiovisual powerhouse of the Arabic-speaking world seems doomed, as other countries in the region are building up their indigenous production.

Nigeria

Despite the double-digit inflation figures and the depreciation of the national currency, 2016 was a record-breaking year for the local market. Nigerian production *The Wedding Party* topped a BO list where local films got almost 30% of the overall GBO (NGN 3.5 billion; that is, USD 11.5 million).

Although the domestic industry has a long road ahead towards professionalisation and monetisation of content, the Nigerian diaspora in developed countries (notably through VOD) seems a short term way to increase revenues. Moreover, 2016's Toronto International Film Festival (TIFF) offered the country an excellent opportunity to showcase its potential to the world, programming a focus on Nollywood.

South Africa

After GBO booming in 2015, revenues decreased by 5.2%, down to ZAR 1.14 billion (USD 77.1 million) in 2016. #20 Afrikaans-language *Vir Altyd* was the highest grossing South African film of the year. Local productions gained 6.1% of the overall market, well in line with recent years' shares. 2016 also saw 28 domestic productions released in South Africa, 6 more than the previous year and a record high this century, suggesting growth in production volume.

Sources: CCM, NFVF, *Variety,* OBS

Middle East

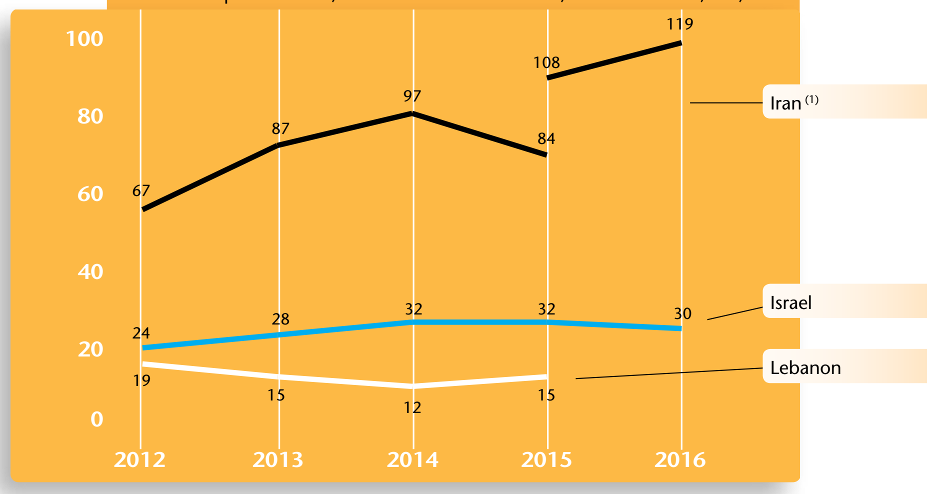
	Iran	Israel	Kuwait	Lebanon	Qatar	United Arab Emirates
Population 2016 e (million)	80.5	8.5	4.2	4.6	2.6	9.9
GDP per capita 2016 e (USD)	5 124	36 557	26 146	11 271	60 733	38 050
Gross box office 2016 e (in M USD)	45.7	127.8	53.4	31.0	32.7	200.0
Admissions 2016 e (million)	25.5	14.0	4.7	3.5	2.9	16.5
Admissions per capita 2016 e	0.3	1.6	1.1	0.8	1.1	1.7
Average ticket price 2016 e (USD)	1.8	9.1	11.5	9.0	11.4	12.1
Screens 2016 e	425	410	73 (2)	148 (2)	~	432 (1)
Digital screens 2016 e	425	410	~	~	~	432 (1)
National market shares 2016 e	97.2%	12.1%	~	12.4%	~	~

(1) 2015 (2) 2014

Number of films produced in selected Middle East countries | 2012-2016 e

In units.

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

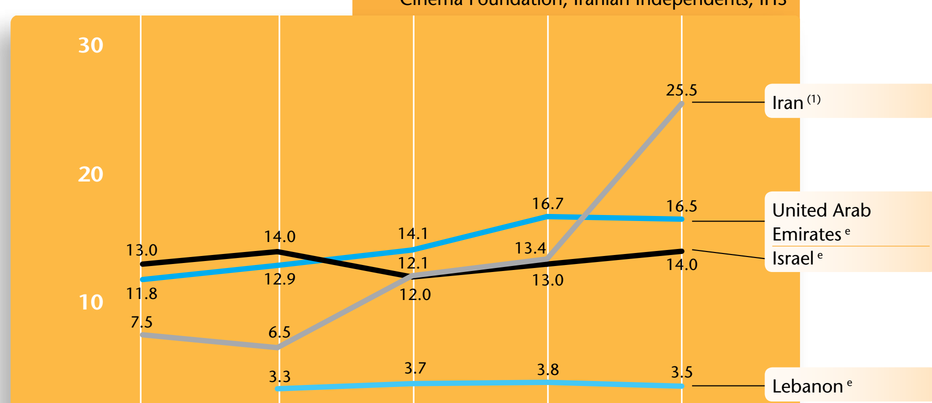


(1) Data from the Farabi Cinema Foundation for the period 2012-2015; data from Iranian Independents for 2016 (according to this source 108 films were produced in Iran in 2015).

Admissions in selected Middle Eastern countries | 2012-2016 e

In millions.

Sources: Israeli Film Fund, Empire Cinemas, Farabi Cinema Foundation, Iranian Independents, IHS



(1) Data from the *Farabi Cinema Foundation* for the period 2012-2015; data from *Iranian Independents* for 2016

Top 10 films by admissions in the United Arab Emirates | 2016

	Original title	Country of origin	Director	Distributor	Admissions
1	The Jungle Book	US/GB	Jon Favreau	Walt Disney	748 019
2	Batman v Superman: Dawn of Justice	US	Zack Snyder	Warner Bros.	541 025
3	Captain America: Civil War	US	A. Russo, J. Russo	Walt Disney	457 820
4	Suicide Squad	US	David Ayer	Warner Bros.	338 891
5	Finding Dory	US	A. Stanton, A. MacLane	Walt Disney	384 279
6	Deadpool	US	Tim Miller	20th Century Fox	328 354
7	X-Men: Apocalypse	US	Bryan Singer	20th Century Fox	278 278
8	London has fallen	US/GB/BG	Babak Najafi	EAG	298 593
9	The Legend of Tarzan	US/GB	David Yates	Warner Bros.	273 231
10	Sully	US	Clint Eastwood	Warner Bros.	270 339

Source: Empire Cinemas

Overview

2016 saw a boom in the Iranian theatrical market; that aside, attendance did not experience drastic changes in most other countries in the region. Admissions in Kuwait and Qatar remained rather constant, slightly up in the former (4.7 million in 2016) and slightly down in the latter (2.9 million in 2016), while Israeli BO surged for the second year in a row. Lebanon was the only country with a relevant drop in attendance – by 7.9% on 2015, down to 3.5 million in 2016.

Iran aside, the Middle-East market is almost monopolised by American films. In Lebanon, domestic productions got 12.4% of the GBO in 2016, with theatre play adaptation *Bel Nesbe La Bokra Shou* as the highest-grossing domestic film in the country that year.

Iran

The lifting of economic sanctions by the international community has started to bear fruit for this country in general and the film industry and market in particular. 2016 saw an attendance surge of 90% year on year, with 25.5 million tickets sold in 2016. This growth was matched by an increase in revenues of 86.5% over that period, up to USD 45.7 million. In addition, 45 screens were unveiled in the country in 2016, making for a total of 425 screens.

Local social drama *The Salesman*, not only topped the BO list in the country, but went on to win the first Oscar for Best Foreign Film for Iran. Moreover, the domestic BO was mainly made up of local productions, accounting for 97.2% of the overall grossing – well in line with the figure in previous years.

Israel

Following a sharp drop in 2014, attendance has been growing at a rate of one million admissions per year since 2014. The 14 million tickets sold in Israel in 2016 accounted for a 7.7% year on year increase; however GBO decreased, down to ILS 491.4 million – USD 127.8 million. After a poor performance of Israeli productions at the domestic box office in 2015, the market share for domestic films went up to 13% in 2016. The number of screens remained unchanged (400 in 2016) and production volume went slightly down - 32 films shot in 2016 compared to 30 the year before.

The Minister of Culture generated some controversy by calling for a closer examination of the decision making processes of film funds, in what can be interpreted as an attempt to cut public funds for films portraying Israel in a negative light. A so called loyalty in culture bill was submitted to the Knesset in early 2017.

United Arab Emirates

After an all-time attendance high in 2015, admissions went slightly down (by 1.2% year on year), with 16.5 million tickets sold in 2016. Over the same period, GBO grew by 5.2%, surpassing the USD 200 million threshold; that is, fourfolding the revenues over the last ten years.

While indigenous production evolves at a very slow pace, the Emirates has consolidated a position as a leading location hub in the region.

In 2016, Abu Dhabi's Image Nation and China's official Intercontinental Communication Center inked a cooperation agreement to set up a fund worth USD 300 million to invest in film and audiovisual content in the two countries as well as in Hollywood.

Sources: Empire Cinemas, Iranian Independents, Israel Film Fund, *Variety*, IHS, OBS

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FOCUS 2017 was prepared by the European Audiovisual Observatory. We would like to thank the following sources:

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