MARCHÉ DU FILM

2018

FOCUS

TENDANCES DU MARCHÉ MONDIAL DU FILM

WORLD FILM MARKET TRENDS

MARCHÉ DU FILM
FESTIVAL DE CANNES

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

focus 2018

World Film Market Trends
Tendances du marché mondial du film

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FESTIVAL DE CANNES

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Editorial

Already the 20th edition of *FOCUS!* I am very happy with our long-term relationship with the European Audiovisual Observatory. *FOCUS* remains an essential reference guide 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. Special thanks to Susanne Nikoltchev and her team, with whom we have worked to provide you with valuable insight into the world of film market trends.

Jérôme Paillard

Executive Director
Marché du Film

Déjà la 20ème édition de *FOCUS !* Je suis très heureux de notre relation de longue date avec l'Observatoire Européen de l'Audiovisuel. *FOCUS*, est une référence incontournable pour tous les participants professionnels. Elle vous aidera non seulement à appréhender les pratiques en constante mutation 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 vous offrant une vue d'ensemble exhaustive de l'industrie cinématographique. Nos remerciements tous particuliers à Susanne Nikoltchev et son équipe avec lesquels nous avons œuvré dans l'espoir de vous fournir des renseignements précieux sur les tendances du marché du film.

Jérôme Paillard

Directeur Délégué
Marché du Film

Producing this *FOCUS* report is like measuring the pulse of the film industry for its yearly health analysis! As very passionate analysts, we do not stop with general examinations but also target specifics. For example we have just researched how European films and TV series are promoted on VOD and explored the various deposit systems for audiovisual works. Get our free analyses of the film industry from our website and discuss these finding with us at our conferences! Coming up soon are our conferences on co-productions (Cannes, 12 May) and video sharing platforms (Paris, 5 June). See www.obs.coe.int !

Susanne Nikoltchev

Executive Director
European Audiovisual Observatory

Produire ce rapport *FOCUS* revient à prendre le pouls de l'industrie cinématographique pour faire son bilan de santé annuel ! En tant qu'analystes passionnés, nous ne nous limitons pas à un examen général mais établissons un bilan approfondi. Par exemple, nous venons de réaliser une étude sur la promotion des films et des séries télévisées européens sur les services de VOD et avons analysé les différents systèmes de dépôt des œuvres audiovisuelles. Vous pouvez télécharger gratuitement nos analyses consacrées à l'industrie cinématographique sur notre site web et venir en discuter avec nous à l'occasion de nos prochaines conférences, lesquelles porteront sur les coproductions (à Cannes, le 12 mai) et les plateformes de partage de vidéos (à Paris, le 5 juin). Voir aussi www.obs.coe.int !

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 41 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 41 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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Five key insights into European film production and circulation

As usual, the European Audiovisual Observatory is providing all the relevant statistics about film production and admissions in this year's Focus. Over the last few months, the Observatory also released a series of reports [(1)] highlighting key trends in the cinema sector. Here are five key takeaways.

1. European film production grew by almost 50% over the past decade

The number of films produced in Europe [(2)] increased by 49% between 2007 and 2016, with overall production in Europe rising from 1 422 feature films in 2007 to 2 123 in 2016. In absolute terms growth was driven in equal parts by an increase in feature fiction as well as feature documentaries. In percentage terms documentaries registered disproportionately large growth (+97%) compared to fiction films (+33%). Preliminary figures for 2017 however suggest that film production levels, at least in the EU, declined for the first time in the past decade.

Unsurprisingly, production volume remains concentrated in a limited number of countries: the top five producing countries – the UK, France, Germany, Spain and Italy – accounted for 53.6% of overall production and the top 10 producing countries accounted for 73% of the films shot between 2007 and 2016.

2. A relatively constant share of co-productions with slightly more partners

The volume of co-productions grew at the same rate as the volume of films produced: co-productions accounted on average for 20.4% of all films produced between 2007 and 2016, with a low of 19.2% in 2008 and a 22.1% high in 2015.

Feature fiction films are more often co-produced than documentaries: the share of co-productions out of total documentary production in Europe between 2007 and 2016 was 16%, below the 20.4% recorded for overall production. By and large, the share of co-productions in the field of feature documentaries was slightly lower than for overall production within each country (with a few exceptions, such as Sweden or Poland).

Most countries produce more national films than co-productions: only two European countries produced more films as a majority co-producer than as a fully national producer: Belgium (56%) and Luxembourg (53%).

The average number of co-production partners slightly increased between 2010 and 2015; in the case of the European Union, up from an average 2.48 co-production partners in 2010, to 2.64 partners in 2015. In contrast, non-EU European countries revealed a less constant pattern, with ups and downs but the overall average number of co-production partners in non-EU European countries was usually higher than in EU countries (an average high of 2.81 in 2014).

3. European Union non-national films do indeed circulate (to a certain extent)

Considering the European Union countries, non-national European films represent between 19% (in cinemas) and 31% (in Transactional

(1) *Film production in Europe - Production volume, co-production and worldwide circulation*, Julio Talavera, European Audiovisual Observatory, December 2017.

The circulation of European films outside Europe - Key figures 2016, Martin Kanzler, European Audiovisual Observatory, January 2018.

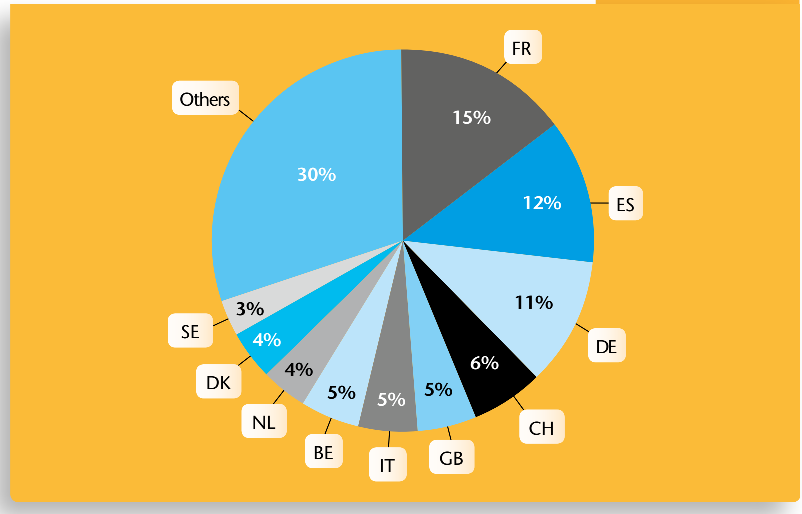
The circulation of EU non-national films - A sample study: Cinema, television and transactional video on-demand, Christian Grece, European Audiovisual Observatory, February 2018.

(2) Taking into account only 100% national and majority co-productions in order to avoid counting films twice.

Breakdown of European co-productions by majority co-producing country | 2007-2016

In %.

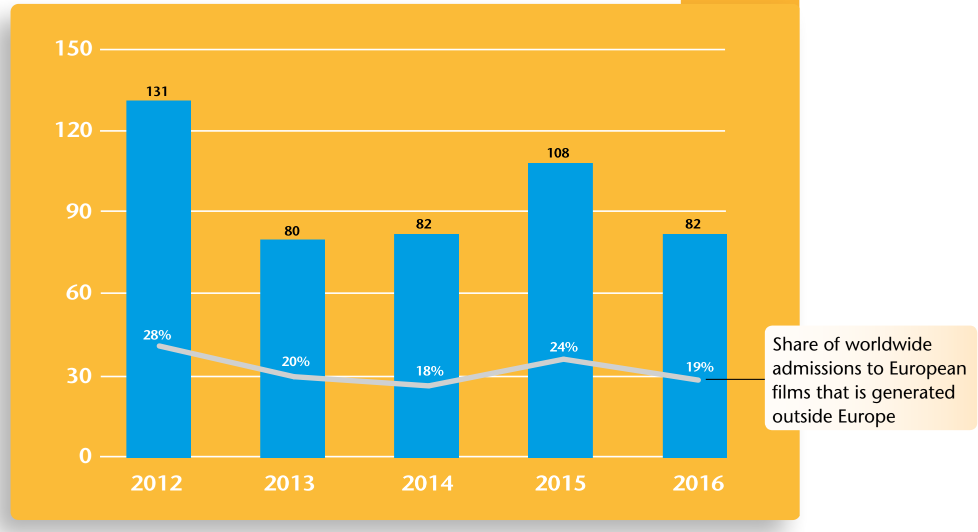
Source: OBS/LUMIERE



Admissions to European films outside Europe | 2012-2016 [e]

In millions.

Source: OBS



Video-On-Demand) of all films on offer. But, on average, there are more EU non-national films than national films on offer in cinemas, TV or TVOD. In cinemas, only Italy, France, the UK and Germany show more national films than EU non-national films; on TV, Finland, the UK, France, the Czech Republic and Sweden broadcast more national films than EU non-national films; on TVOD, only the UK and France propose more national films than EU non-national films.

4. European co-productions circulate more than purely national productions

A total of 39.5% of the films produced in Europe between 2010 and 2015 received a theatrical release in at least one country other than the main production country. For majority co-productions, this figure rises to 62.9%. On average, European co-productions circulate almost twice as much as purely national productions (32.1%).

Co-productions generate comparatively more admissions than purely national films: More than half of estimated worldwide admissions [(3)] to European films released between 2010 and 2015 were generated by co-productions. However, when excluding GB INC, co-productions account for 34.9% of worldwide admissions. A European co-production hence generates three times more admissions than purely national films. However, the gap closes significantly when GB INC productions are excluded: on average admissions to co-productions then only take 1.7 times as many admissions as purely national films.

European co-productions also circulate better on TV and on TVOD: co-productions represent between 41% of EU non-national films broadcast on TV and 55% of EU non-national films available on TVOD, showing a proportional over-representation of co-productions in the circulation of EU films.

5. Non-European markets account for a significant share of admissions, but to the benefit of a limited number of films

On average, between 2012 and 2016, about 10% of European films on release were on release outside Europe. [(4)] However, the releases outside Europe generated 20% of worldwide admissions, i.e. a similar share as for European non-national admissions. European films accounted for 19% of the tracked number of films on release (in line with the 5 year average) and 2% of the admissions generated in the 12 non-European sample markets.

The US market represents the single largest export market for European films, accounting for 32% of total admissions to European films outside Europe in 2016. Despite the very limited number of European releases, China clearly comes in as the second largest export market for European films in terms of admissions, accounting for 23% of total admission, followed by Mexico (12%), Australia (7%) and South Korea (6%).

Admissions to European films are rather concentrated: 60 films, i.e. only 9% of the 650 films on release, accounted for 90% of total admissions generated by European films outside Europe in 2016. Also, British and French films cumulatively accounted for 72% of total admissions to European films outside Europe in 2016.

All the reports from the Observatory are available for free on our website: www.obs.coe.int

Gilles Fontaine
Head of the Department for Market Information

Martin Kanzler
Patrizia Simone
Julio Talavera
Film Analysts

European Audiovisual Observatory

(3) Worldwide: EU 28 minus Malta plus Bosnia and Herzegovina, Iceland, "The former Yugoslav Republic of Macedonia", Montenegro, Norway, Russia, Turkey and Switzerland as well as Argentina, Australia, Brazil, Canada, Chile, China, Colombia, Mexico, New Zealand, South Korea, the United States of America and Venezuela.

(4) The 12 markets tracked are Canada, USA, Argentina, Brazil, Chile, Colombia, Mexico, Venezuela, Australia, New Zealand, China and South Korea.

Top 10 markets worldwide by gross box office | 2013-2017 [e]

In USD billion. Converted at average annual exchange rates. Ranked by 2017 values.

Sources: OBS, MPAA, comScore, IHS Markit , National data sources

Rank	Market	2013	2014	2015	2016	2017	Annual growth rate 5 years	Annual growth rate 1 year
1	US & Canada	10.90	10.40	11.10	11.40	11.10	0.5%	-2.6%
2	China	3.54	4.82	6.81	6.60	8.27	23.6%	25.3%
3	Japan	1.99	1.70	1.80	2.17	2.04	0.6%	-5.8%
4	UK	1.69	1.74	1.90	1.66	1.65	-0.6%	-0.6%
5	India	1.59	1.47	1.50	1.48	1.60	0.1%	7.8%
6	South Korea	1.42	1.49	1.37	1.45	1.60	3.1%	10.2%
7	France	1.66	1.77	1.48	1.54	1.56	-1.5%	1.3%
8	Germany	1.36	1.30	1.29	1.13	1.19	-3.3%	5.3%
9	Australia	1.06	0.87	0.89	0.91	0.92	-3.5%	0.9%
10	Russia	1.34	1.15	0.73	0.71	0.91	-9.1%	28.2%
World total [e]		35.9	36.4	38.4	38.8	40.6	3.1%	4.6%
Growth rate - World		3.5%	1.4%	5.5%	1.0%	4.6%	3.1%	4.6%
Growth rate - Top 10		2.0%	0.6%	8.1%	0.6%	6.2%	3.8%	6.2%
Growth rate - Top 10 without China		-1.2%	-4.8%	0.7%	1.8%	0.5%	-0.5%	0.5%

Top 10 markets worldwide by admissions | 2013-2017 [e]

In millions. Ranked by 2017 values.

Sources: OBS, IHS Markit, National data sources

Rank	Market	2013	2014	2015	2016	2017	Annual growth rate [e] 5 years	Annual growth rate [e] 1 year
1	India [e]	1 978	1 937	2 072	1 967	1 981	0.0%	0.7%
2	China	612	830	1 260	1 370	1 620	27.6%	18.2%
3	US & Canada	1 340	1 270	1 320	1 320	1 240	-1.9%	-6.1%
4	Mexico	248	240	286	321	338	8.0%	5.3%
5	South Korea	213	215	217	217	220	0.8%	1.3%
6	Russian Federation	176	176	174	193	212	4.7%	10.0%
7	France	194	209	205	213	209	2.0%	-1.7%
8	Brazil	150	156	173	184	181	4.9%	-1.6%
9	Japan	156	161	167	180	175	2.9%	-3.2%
10	UK	166	157	172	168	171	0.8%	1.4%
World total [e]		6 527	6 671	7 498	7 576	7 756	4.4%	2.4%
Growth rate - World [e]		-6.5%	2.2%	12.4%	1.0%	2.4%	4.4%	2.4%
Growth rate - Top 10 [e]		-8.7%	2.3%	13.0%	1.4%	3.5%	4.9%	3.5%
Growth rate - Top 10 [e] without China		-12.2%	-2.1%	5.9%	-0.5%	-0.8%	0.6%	-0.8%

Top 10 markets worldwide by number of screens | 2013-2017 [e]

In units. Ranked by 2017 values.

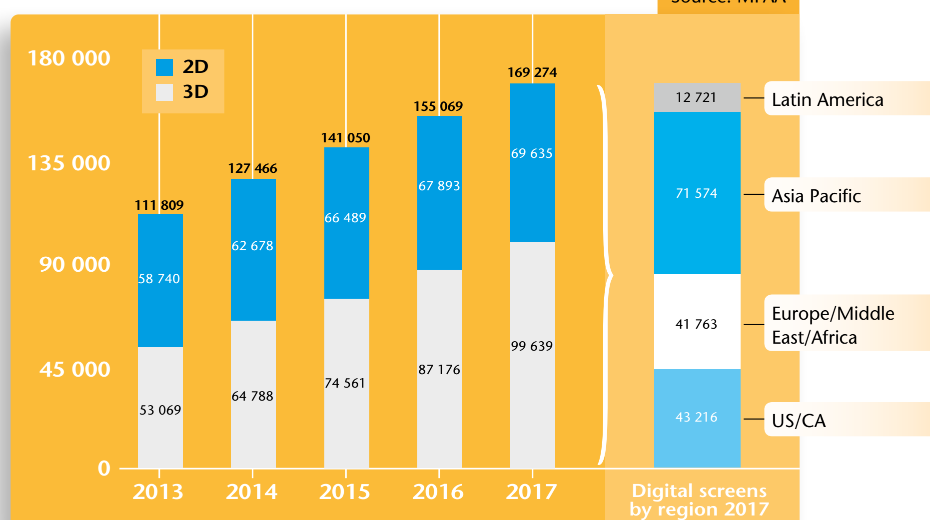
Sources: OBS, MPAA, IHS Markit, National data sources

Rank	Market	2013	2014	2015	2016	2017	Annual growth rate 5 years	1 year
1	China	18 195	24 607	31 627	41 179	50 776	29.2%	23.3%
2	US & Canada	39 783	40 158	43 661	43 531	43 500	2.3%	-0.1%
3	India	11 081	11 109	11 179	11 194	11 209	0.3%	0.1%
4	Mexico	5 547	5 678	5 977	6 225	6 633	4.6%	6.6%
5	France	5 587	5 653	5 741	5 842	5 913	1.4%	1.2%
6	Italy	5 132	5 044	4 874	5 104	5 298	0.8%	3.8%
7	Germany	4 610	4 637	4 692	4 739	4 803	1.0%	1.4%
8	Russia	3 479	3 829	4 021	4 370	4 793	8.3%	9.7%
9	UK	3 867	3 909	4 046	4 150	4 309	2.7%	3.8%
10	Spain	3 908	3 694	3 588	3 568	3 625	-1.9%	1.6%
	World total	134 588	142 215	152 142	163 928	172 039	6.3%	4.9%
	Growth rate - World [e]	3.6%	5.7%	7.0%	7.7%	4.9%	6.3%	4.9%
	Growth rate - Top 10 [e]	6.0%	7.0%	10.2%	8.8%	8.4%	8.6%	8.4%
	Growth rate - Top 10 [e] without China	0.8%	0.9%	4.9%	1.1%	1.5%	2.1%	1.5%

Worldwide number of digital and 3D screens | 2013-2017 [e]

In units.

Source: MPAA



Top 10 markets worldwide by feature film production (1) | 2013-2017 e

In units. Ranked by 2017 values.

Sources: OBS, IHS Markit, National data sources

Rank	Market	2013	2014	2015	2016	2017	Annual growth rate 5 years	Annual growth rate 1 year
1	India (2)	1 724	1 966	1 845	1903	1 986	3.6%	4.4%
2	China (3)	638	618	686	944	970	11.0%	2.8%
3	US (4)	738	707	791	789	821	2.7%	4.1%
4	Japan (5)	591	615	581	610	594	0.1%	-2.6%
5	South Korea	183	232	232	339	494	28.2%	45.7%
6	France	269	258	300	283	300	2.8%	6.0%
7	Germany (5)	236	234	236	256	247	1.1%	-3.5%
8	Spain	235	224	254	254	247	1.3%	-2.8%
9	Italy	167	201	185	224	235	8.9%	4.9%
10	UK (6)	376	366	346	296	212	-13.3%	-28.4%
World total e		6 844	7 468	7 653	7 973	8 316	5.0%	4.3%
Growth rate - World e		1.0%	9.1%	2.5%	4.2%	4.3%	2.8%	7.6%
Growth rate - Top 10 e		1.7%	5.1%	0.6%	8.1%	5.1%	3.8%	8.2%

(1) Country data include minority co-productions.

(2) Films certified.

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

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

(5) Feature films released.

(6) The apparent decline of film productions in 2017 is linked to a time lag in identifying film productions with budgets below GBP 500 000. Includes inward feature co-productions but not inward features involving only VFX work in the UK.

Top 20 films by gross box office worldwide | 2017

In USD million. GBO for 2017 only. Does not include carryovers.

	Original title	Country of origin	Studio	North American box office	International box office	Global box office
1	Beauty and the Beast	US	Walt Disney	504.01	759.70	1 263.71
2	The Fate of the Furious	US/CN/JP	Universal Pictures	226.01	1 011.67	1 237.68
3	Star Wars: The Last Jedi (1)	US	Walt Disney	517.22	533.64	1 050.86
4	Despicable Me 3	US	Universal Pictures	264.62	768.30	1 032.93
5	Wolf Warrior 2 (3)	CN	20th Century Fox	2.92	951.08	954.00
6	Spider-Man: Homecoming	US	Sony Pictures	334.20	545.99	880.19
7	Guardians of the Galaxy Vol. 2	US	Walt Disney	389.81	473.80	863.61
8	Thor: Ragnarok	US	Walt Disney	311.23	537.30	848.53
9	Wonder Woman	US/CN/HK	Warner Bros	412.56	409.16	821.72
10	Pirates of the Caribbean: Dead Men…	US	Walt Disney	172.56	622.20	794.76
11	Justice League (1)	US	Warner Bros	225.55	408.94	634.48
12	Logan	US	20th Century Fox	226.28	390.52	616.80
13	Transformers: The Last Knight	US/CN	Paramount Pictures	130.17	476.02	606.19
14	Kong: Skull Island	US/CN	Warner Bros	168.05	398.10	566.15
15	Jumanji: Welcome to the Jungle (1)	US	Sony Pictures	167.14	385.03	552.17
16	Coco (1)	US	Walt Disney	179.83	372.15	551.98
17	Dunkirk	GB INC/US/…	Warner Bros	188.37	336.97	525.34
18	The Boss Baby	US	20th Century Fox	175.00	323.93	498.93
19	War for the Planet of the Apes	US	20th Century Fox	146.88	343.78	490.66
20	Sing (2)	US/JP	Universal Pictures	117.54	360.35	477.89

(1) Still grossing in 2018.

(2) Released in 2016. BO for 2017 only.

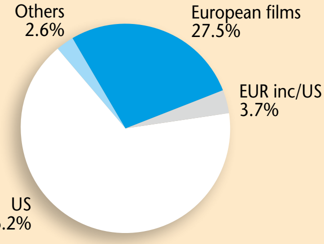
(3) Unofficial cumulated BO.

Sources: *Variety*, comScore, OBS

European Union

Population 2017 e	510.3 million
GDP per capita 2017 e	33 537 USD
Gross box office 2017 e	7.02 bn EUR (7.93 bn USD)
Admissions 2017 e	984.4 million
Average ticket price 2017 e	7.1 EUR (8.1 USD)
Average admissions per capita 2017 e	1.9
Screens 2016 | 2017	32 391 | 33 053
Digital screens 2016 | 2017	30 084 | 30 735
Digital 3D screens 2016 | 2017	14 397 | 14 565

Market shares 2017 e



EU admissions remain strong

The European Audiovisual Observatory estimates that total admissions in the 28 European Union Member States decreased only slightly by 0.8% to 984 million in 2017. While this is 7.6 million less than in 2016, it still represents the second highest admission level registered in the EU since 2004. GBO revenues crossed the EUR 7 billion barrier for the third consecutive year amounting to an estimated EUR 7.02 billion, down 0.3% from 2016. The average ticket price in the EU remained stable at EUR 7.1.

Admissions grew in a heterogeneous manner across Europe in 2017: cinema attendance increased in 14 and decreased in 7 EU markets, while remaining stable in 6 of the 27 EU markets for which data were available. Geographically speaking the moderate decline in EU cinema attendance was primarily caused by a major drop in Italian admissions (-14.7 million). Out of the five major EU markets, only the UK and Germany registered a moderate increase in cinema attendance while admissions reached record levels in Poland, the Netherlands, Romania and the Slovak Republic.

Increase in admissions to European films

In contrast to 2015 and 2016 it was European films which were responsible for keeping EU cinema attendance high, as admissions to US and other non-European films declined by around 19 million. Market share for US films declined from 67.5% to 66.2%. In contrast, admissions to European films and European films produced in Europe with incoming US investment (EUR inc) increased and market share of European films in the EU grew from 26.3% to an estimated 27.5%, the second highest level in the past five years.

This of course did not change the fact that EU box office charts were dominated by US films which once more accounted for 22 out of the top 25 titles. As in past years it was mostly family animation films and various franchise sequels, prequels and spin-offs which featured among the top films. *Despicable Me 3* topped the EU charts and was the only film to sell more than 30 million tickets in 2017. It was followed by Disney's *Beauty and the Beast* (29.8 million) and *Star Wars: Episode VIII - The Last Jedi* (28.8 million).

Two UK incoming investment films, *Dunkirk* and *Kingsman: The Golden Circle*, made it into the top 25 as the market share of EUR INC remained comparatively stable at 3.7% (compared to 3.5% in 2016). Leaving EUR INC films aside, the British family comedy *Paddington 2* was the most successful European film (and the only one to feature among the top 25) selling 9.1 million tickets, ahead of Luc Besson's *Valerian and the City of a Thousand Planets* (8.2 million).

EU production decrease

In 2017 the estimated number of theatrical feature films produced in the EU decreased from 1 741 to 1 676 theatrical films. This is the first decline in EU production levels in years. EU film production volume breaks down into an estimated 1 072 fiction films (64%) and 604 feature documentaries (36%). The decrease in production activity was primarily linked to a declining number of 100% national fiction films.

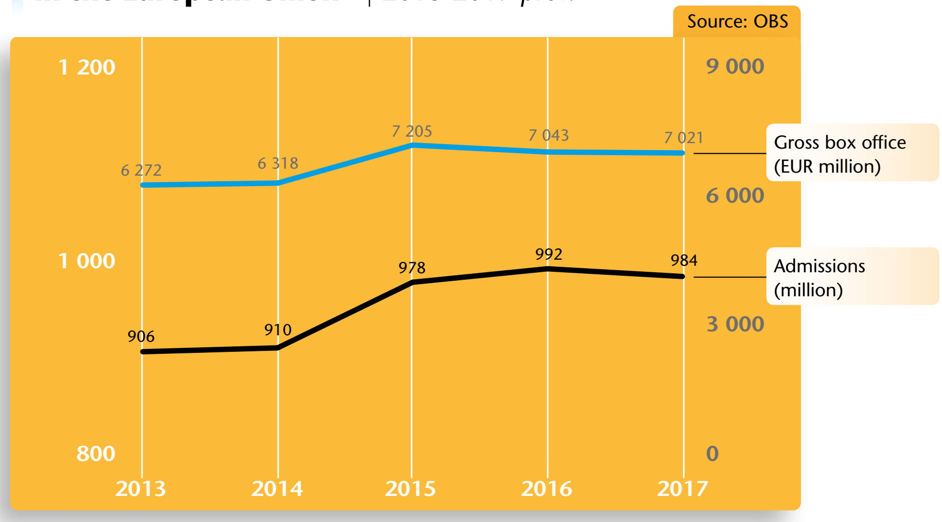
Source: European Audiovisual Observatory (OBS)

Note: all 2017 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 with members in 34 MEDIA countries, 628 cities, 1 050 cinemas and 2 536 screens.

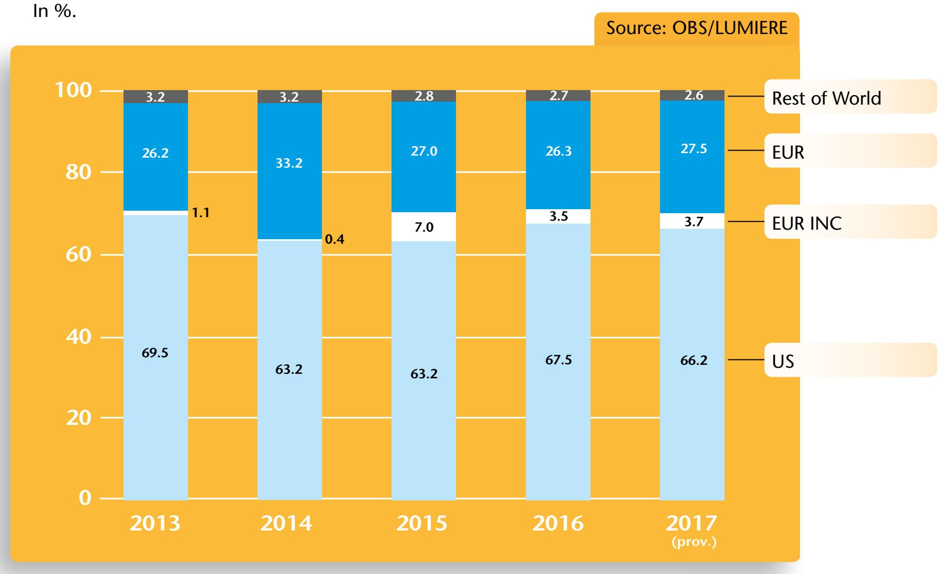
Admissions and gross box office in the European Union [(1)] | 2013-2017 *prov.*



(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 | 2013-2017 [e]

In %.



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

Number of feature films produced in the European Union | 2013-2017 *prov.*

In units.

Country		2013	2014	2015	2016	*prov.* 2017	Sources
Austria	100% national fiction	18	10	15	13	10	Austrian Film Institute
	maj. co-prod. fiction	5	6	1	3	5	Austrian Film Institute
	min. co-prod. fiction	2	4	7	7	9	Austrian Film Institute
	Feature documentaries	21	25	17	21	18	Austrian Film Institute
Belgium (1)	100% national fiction	12	12	13	16	14	CFWB/VAF
	maj. co-prod. fiction	17	20	17	21	22	CFWB/VAF
	min. co-prod. fiction	33	36	31	28	38	CFWB/VAF
	Feature documentaries	5	5	8	17	15	CFWB/VAF
Bulgaria	100% national fiction	0	2	10	6	11	National Film Center
	maj. co-prod. fiction	4	1	2	5	4	National Film Center
	min. co-prod. fiction	0	0	5	7	5	National Film Center
	Feature documentaries	11	10	8	11	4	National Film Center
Cyprus e	100 % national fiction	0	1	2	2	2	Min. Cult./IMDB/OBS
	maj. co-prod. Fiction	0	1	1	0	0	Min. Cult./IMDB/OBS
	min. co-prod. Fiction	1	1	1	1	1	Min. Cult./IMDB/OBS
	Feature documentaries	0	0	1	0	2	Min. Cult./IMDB/OBS
Croatia	100% national fiction	14	7	5	6	6	Croatian Audiovisual Centre
	maj. co-prod. fiction	2	4	4	4	2	Croatian Audiovisual Centre
	min. co-prod. fiction	8	5	5	6	9	Croatian Audiovisual Centre
	Feature documentaries	0	3	1	1	16	Croatian Audiovisual Centre
Czech Rep.	100% national fiction	19	21	20	24	16	Czech Film Fund
	maj. co-prod. fiction	8	8	7	17	8	Czech Film Fund
	min. co-prod. fiction	2	6	9	7	5	Czech Film Fund
	Feature documentaries	18	26	20	31	25	Czech Film Fund
Denmark (2)	100% national fiction	13	14	14	15	13	Danish Film Institute
	maj. co-prod. fiction	9	7	9	8	8	Danish Film Institute
	min. co-prod. fiction	9	7	8	8	9	Danish Film Institute
	Feature documentaries	33	27	40	31	24	Danish Film Institute
Estonia (2)	100% national fiction	4	3	1	7	3	Estonian Film Institute
	maj. co-prod. fiction	3	1	3	2	3	Estonian Film Institute
	min. co-prod. fiction	0	2	2	3	5	Estonian Film Institute
	Feature documentaries	12	13	19	8	7	Estonian Film Institute
Finland (3)	100% national fiction	14	18	14	15	16	Finnish Film Foundation
	maj. co-prod. fiction	5	1	3	3	1	Finnish Film Foundation
	min. co-prod. fiction	6	5	4	5	5	Finnish Film Foundation
	Feature documentaries	18	23	24	22	19	Finnish Film Foundation
France	100% national fiction	122	124	126	125	147	CNC
	maj. co-prod. fiction	50	44	66	55	38	CNC
	min. co-prod. fiction	59	53	61	59	72	CNC
	Feature documentaries	38	37	47	44	43	CNC
Germany (2)	100% national fiction	79	84	76	82	80	SPIO
	maj. co-prod. fiction	38	22	24	41	27	SPIO
	min. co-prod. fiction	37	43	45	43	34	SPIO
	Feature documentaries	82	85	91	90	106	SPIO
Greece (2) e	100% national fiction	12	13	21	27	9	Greek Film Center/OBS
	maj. co-prod. fiction	3	0	0	2	4	Greek Film Center/OBS
	min. co-prod. fiction	2	0	0	2	8	Greek Film Center/OBS
	Feature documentaries	23	27	17	21	15	Greek Film Center/OBS
Hungary	100% national fiction	27	11	13	15	12	National Film Office (NMHH)
	maj. co-prod. fiction	2	1	2	3	2	National Film Office (NMHH)
	min. co-prod. fiction	3	3	3	1	2	National Film Office (NMHH)
	Feature documentaries	6	0	3	1	3	National Film Office (NMHH)
Ireland	100% national fiction	4	6	4	6	~	Irish Film Board
	maj. co-prod. fiction	9	6	7	10	~	Irish Film Board
	min. co-prod. fiction	6	13	6	4	~	Irish Film Board
	Feature documentaries	15	7	15	9	~	Irish Film Board
Italy	100% national fiction	114	150	126	142	153	MiBACT
	maj. co-prod. fiction	14	14	22	23	18	MiBACT
	min. co-prod. fiction	7	7	5	7	5	MiBACT
	Feature documentaries	32	30	32	52	59	MiBACT

Continued

Number of feature films produced in the European Union | 2013-2017 *prov.*

In units.

Country		2013	2014	2015	2016	*prov.* 2017	Sources
Latvia (2)	100% national fiction	2	1	1	2	3	National Film Centre of Latvia
	maj. co-prod. fiction	1	5	2	2	2	National Film Centre of Latvia
	min. co-prod. fiction	1	1	0	3	1	National Film Centre of Latvia
	Feature documentaries	9	17	14	13	14	National Film Centre of Latvia
Lithuania (2)	100% national fiction	7	8	6	8	6	Lithuanian Film Centre
	maj. co-prod. fiction	1	3	2	2	4	Lithuanian Film Centre
	min. co-prod. fiction	2	1	0	1	0	Lithuanian Film Centre
	Feature documentaries	6	3	1	2	1	Lithuanian Film Centre
Luxembourg e	100% national fiction	0	0	3	1	1	OBS/LFF
	maj. co-prod. fiction	1	3	5	0	3	OBS/LFF
	min. co-prod. fiction	17	17	10	16	7	OBS/LFF
	Feature documentaries	6	1	2	3	2	OBS/LFF
Malta e	Total	2	3	1	3	2	IMDB/OBS
The Netherlands	100% national fiction	19	22	24	19	19	Netherlands Film Fund
	maj. co-prod. fiction	18	21	19	10	10	Netherlands Film Fund
	min. co-prod. fiction	14	19	20	21	25	Netherlands Film Fund
	Feature documentaries	16	22	19	32	33	Netherlands Film Fund
Poland	100% national fiction	19	30	28	39	36	Polish Film Institute
	maj. co-prod. fiction	3	4	4	1	6	Polish Film Institute
	min. co-prod. fiction	3	3	3	6	13	Polish Film Institute
	Feature documentaries	6	9	14	8	16	Polish Film Institute
Portugal	100% national fiction	2	2	6	5	12	ICA
	maj. co-prod. fiction	1	1	9	8	0	ICA
	min. co-prod. fiction	5	3	2	4	8	ICA
	Feature documentaries	5	7	14	10	18	ICA
Romania	100% national fiction	16	27	27	27	21	CNC
	maj. co-prod. fiction	7	3	8	7	6	CNC
	min. co-prod. fiction	3	7	1	7	3	CNC
	Feature documentaries	11	10	7	8	11	CNC
Slovakia	100% national fiction	3	4	5	2	4	Slovak Film Institute
	maj. co-prod. fiction	4	3	5	4	5	Slovak Film Institute
	min. co-prod. fiction	7	5	5	8	12	Slovak Film Institute
	Feature documentaries	6	15	11	12	6	Slovak Film Institute
Slovenia (2)	100% national fiction	9	5	9	4	6	Slovenian Film Center
	maj. co-prod. fiction	1	1	1	4	5	Slovenian Film Center
	min. co-prod. fiction	2	4	5	4	1	Slovenian Film Center
	Feature documentaries	4	2	4	8	9	Slovenian Film Center
Spain	100% national fiction	76	26	69	98	15	ICAA
	maj. co-prod. fiction	37	68	58	23	80	ICAA
	min. co-prod. fiction	31	32	16	13	32	ICAA
	Feature documentaries	91	98	111	120	120	ICAA
Sweden (2)	100% national fiction	34	26	21	16	18	Swedish Film Institute
	maj. co-prod. fiction	1	4	7	6	7	Swedish Film Institute
	min. co-prod. fiction	8	7	4	7	13	Swedish Film Institute
	Feature documentaries	18	19	18	25	30	Swedish Film Institute
United Kingdom (4)	100% national fiction	195	182	150	151	100	British Film Institute
	maj. co-prod. fiction	20	11	14	9	5	British Film Institute
	min. co-prod. fiction	22	21	16	15	8	British Film Institute
	Feature documentaries	90	87	94	56	30	British Film Institute
	Inward features (5)	49	65	72	65	69	British Film Institute
Total fiction films EU 28 (6) e		***1 100***	***1 075***	***1 112***	***1 148***	***1 072***	OBS
Total feature documentaries EU 28 (6) e		***531***	***556***	***587***	***593***	***604***	OBS
Total feature films EU 28 (6) e		***1 631***	***1 631***	***1 699***	***1 741***	***1 676***	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 2017 is largely 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 | 2013-2017 *prov.*

In millions.

ISO	Country	2013	2014	2015	2016	*prov.* 2017	*2017/16*	Sources
AT	**Austria** [e]	15.2	14.3	15.9	15.1	14.6	***-3.5%***	Austrian Film Institute (ÖFI)
BE	**Belgium** [e]	20.9	20.9	21.1	19.4	19.6	***0.8%***	SPF Economie, VAF, CFWB, FCB, ABDF/VFDB
BG	**Bulgaria**	4.8	4.9	5.3	5.5	5.6	***0.8%***	National Film Center (NFC)
CY	**Cyprus** [e]	0.7	0.7	0.7	0.7	0.7	***6.4%***	Min. Cult.
CZ	**Czech Republic**	11.1	11.6	13.0	15.6	15.2	***-2.5%***	Czech Film Fund (SFK)
DE	**Germany**	129.7	121.7	139.2	121.1	122.3	***1.0%***	FFA
DK	**Denmark**	12.9	11.9	13.8	13.0	12.5	***-3.8%***	Statistics Denmark
EE	**Estonia**	2.6	2.6	3.1	3.3	3.5	***6.7%***	Estonian Film Institute (EFI)
ES	**Spain** [e]	78.7	88.0	96.1	101.8	100.2	***-1.6%***	ICAA
FI	**Finland** [e]	7.7	7.3	8.7	8.7	9.0	***3.6%***	Finnish Film Foundation
FR	**France**	193.7	209.1	205.4	213.1	209.4	***-1.7%***	CNC
GB	**United Kingdom**	165.5	157.5	171.9	168.3	170.6	***1.4%***	CAA / BFI
GR	**Greece** [e]	9.2	9.0	9.8	10.0	10.1	***0.7%***	Greek Film Center (GFC)
HR	**Croatia**	4.0	3.8	3.9	4.3	4.5	***5.7%***	Croatian Audiovisual Centre (HAC)
HU	**Hungary** [e]	10.1	11.0	13.0	14.6	14.9	***2.1%***	National Film Office (NMHH)
IE	**Ireland** [e]	14.7	14.4	15.2	15.8	16.1	***2.1%***	Irish Film Board, MEDIA LIVE
IT	**Italy** [e]	105.7	98.3	106.7	113.8	99.2	***-12.9%***	SIAE / Cinetel / ANICA
LT	**Lithuania**	3.3	3.2	3.3	3.7	4.1	***10.8%***	Lithuanian Film Centre (LFC)
LU	**Luxembourg** [e]	1.2	1.1	1.3	1.1	1.2	***6.2%***	CNA / Media Salles
LV	**Latvia**	2.4	2.3	2.4	2.5	2.5	***-1.6%***	National Film Centre of Latvia (NFC)
MT	**Malta**	0.7	0.7	0.7	0.7	~	~	National Statistics Office Malta
NL	**Netherlands**	30.8	30.8	33.0	34.2	36.0	***5.3%***	NFF / MaccsBox - NVB & NVF
PL	**Poland**	36.3	40.5	44.7	52.1	56.6	***8.7%***	Polish Film Institute
PT	**Portugal**	12.5	12.1	14.6	14.9	15.6	***4.8%***	Instituto do Cinema e do Audiovisual (ICA)
RO	**Romania**	9.0	10.2	11.2	13.0	13.9	***6.5%***	Centrul National al Cinematografiei
SE	**Sweden**	16.6	16.3	17.0	17.8	16.9	***-4.9%***	Swedish Film Institute
SI	**Slovenia**	2.3	1.9	2.1	2.3	2.3	***-1.6%***	Slovenian Film Centre (SFC)
SK	**Slovak Republic**	3.7	4.1	4.6	5.7	6.7	***18.1%***	UFD / Slovak Film Institute (SKFI/AIC)
	EU 28 - Total [e]	***906***	***910***	***978***	***992***	***984***	***-0.8%***	European Audiovisual Observatory

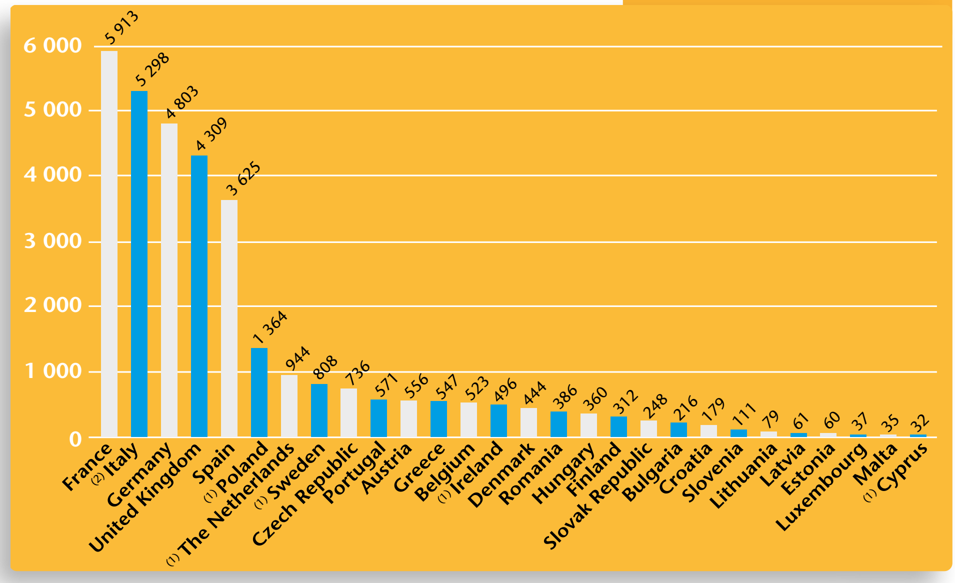
Source: OBS

Number of screens in the European Union by country

December 2017 e

In units.

Sources: OBS, National data sources



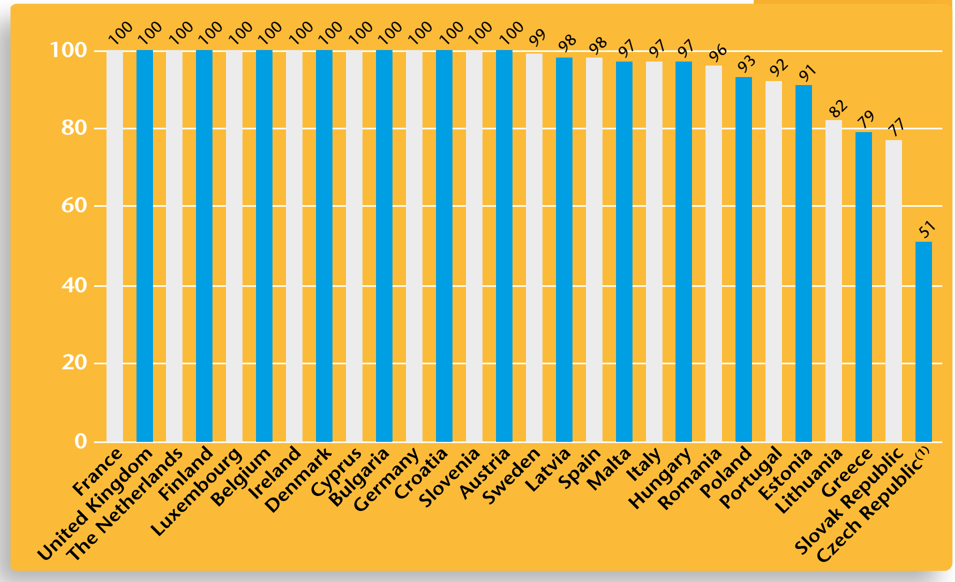
(1) Estimated as of December 2016. (2) Including screens with screenings on less than 60 days.

Digital screen penetration in the European Union by country

December 2017 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 above 90%.

The tables below offer provisional rankings based on the analysis of partially fragmentary data for 26 EU member states representing 93% of all admissions in the EU.

Top 25 films by admissions in the European Union | 2017 *prov.*

	Original title	Country of origin	Director	*prov.* Admissions
1	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	32 258 272
2	Beauty and the Beast	US	Bill Condon	29 777 742
3	Star Wars: Episode VIII - The Last Jedi	US	Rian Johnson	28 800 308
4	The Fate of the Furious	US/CN/JP	F. Gary Gray	21 679 516
5	Fifty Shades Darker	US/CN	James Foley	20 255 774
6	Pirates of the Caribbean: Dead Men Tell…	US	Espen Sandberg, Joachim Rønning	19 733 309
7	The Boss Baby	US	Tom McGrath	18 566 281
8	It	US/CA	Andy Muschietti	17 946 069
9	Dunkirk	GB INC/US/FR/NL	Christopher Nolan	17 150 314
10	Guardians of the Galaxy Vol. 2	US	James Gunn	17 055 181
11	Sing (1)	US/JP	G. Jennings, C. Lourdelet	15 179 417
12	La La Land (2)	US	Damien Chazelle	14 713 212
13	Thor: Ragnarok	US	Taika Waititi	14 496 518
14	Spider-Man: Homecoming	US	Jon Watts	12 552 546
15	Cars 3	US	Brian Fee	11 336 021
16	Logan	US	James Mangold	10 757 698
17	Murder on the Orient Express	US/MT	Kenneth Branagh	10 708 646
18	War for the Planet of the Apes	US	Matt Reeves	9 987 905
19	Coco	US	Lee Unkrich, Adrian Molina	9 770 257
20	Smurfs: The Lost Village	US/HK	Kelly Asbury	9 612 014
21	Wonder Woman	US/CN/HK	Patty Jenkins	9 384 219
22	Paddington 2	GB/FR	Paul King	9 093 158
23	Blade Runner 2049	US/GB/HU/CA	Denis Villeneuve	8 848 364
24	The LEGO Batman Movie	US	Chris McKay	8 736 003
25	Kingsman: The Golden Circle	GB INC/US	Matthew Vaughn	8 677 376

(1) 5 317 896 admissions in the EU in 2016. (2) 172 871 admissions in the EU in 2016. Source: OBS/LUMIERE

Top 25 European films (including EUR inc) by admissions in the European Union | 2017 *prov.*

	Original title	Country of origin	Director	*prov.* Admissions
1	Dunkirk	GB INC/US/FR/NL	Christopher Nolan	17 150 314
2	Paddington 2	GB/FR	Paul King	9 093 158
3	Kingsman: The Golden Circle	GB INC/US	Matthew Vaughn	8 677 376
4	Valerian and the City of a Thousand Planets	FR/CN/US/DE/AE	Luc Besson	8 155 288
5	Fack ju Göhte 3	DE	Bora Dagtekin	6 511 430
6	Baby Driver	GB/US	Edgar Wright	4 906 096
7	Raid dingue (R.A.I.D. Special Unit)	FR/BE	Dany Boon	4 805 349
8	Alibi.com	FR	Philippe Lacheau	4 022 564
9	Demain tout commence (Two is a Family) (1)	FR/GB	Hugo Gélin	3 599 469
10	Ballerina (2)	FR/CA	Eric Summer, Éric Warin	3 572 312
11	Le sens de la fête	FR/CA/BE	Olivier Nakache, Eric Toledano	3 570 181
12	T2 Trainspotting	GB	Danny Boyle	3 539 758
13	Perfectos desconocidos (Perfect Strangers)	ES/IT	Álex de la Iglesia	3 224 004
14	Tadeo Jones 2: El secreto del Rey Midas	ES	David Alonso, Enrique Gato	3 174 373
15	Victoria & Abdul	GB/US	Stephen Frears	3 126 711
16	Listy do M. 3 (Letters to Santa 3)	PL	Tomasz Konecki	3 071 982
17	The Snowman	GB INC/US/SE	Tomas Alfredson	2 770 554
18	Épouse-moi mon pote (Marry Me, Dude)	FR	Tarek Boudali	2 533 503
19	Botoks	PL	Patryk Vega	2 470 572
20	Seven Sisters	GB/FR/BE	Tommy Wirkola	2 370 806
21	The Son of Bigfoot	BE/FR	Ben Stassen, Jeremy Degruson	2 369 844
22	Bullyparade: Der Film	DE	Michael Herbig	2 139 952
23	Au revoir là-haut (See You Up There)	FR/CA	Albert Dupontel	1 980 536
24	L'ora legale	IT	Ficarra, Picone	1 896 315
25	L'école buissonnière (The School of Life)	FR	Nicolas Vanier	1 890 780

(1) 1 937 519 admissions in the EU in 2016. (2) 1 456 716 admissions in the EU in 2016. Source: OBS/LUMIERE

Top 25 EU films by admissions in the Europa Cinemas Network (1) | 2017 e

	Original title	Country of origin (2)	Director	prov. Admissions
1	The Square	SE/DE/FR/DK	Ruben Östlund	818 308
2	Victoria & Abdul	GB/US	Stephen Frears	546 452
3	Toivon tuolla puolen (The Other Side of Hope)	FI/DE	Aki Kaurismäki	518 550
4	Loving Vincent	PL/GB/CH/NL	D. Kobiela, H. Welchman	449 791
5	Toni Erdmann	DE/AT/CH	Maren Ade	389 698
6	Elle	FR/DE/BE	Paul Verhoeven	361 666
7	Demain tout commence (Two Is a Family)	FR/GB	Hugo Gélin	356 928
8	Ce qui nous lie (Back to Burgundy)	FR	Cédric Klapisch	331 207
9	120 battements par minute (120 Beats Per…)	FR	Robin Campillo	328 739
10	T2 Trainspotting	GB	Danny Boyle	307 822
11	Sage femme (The Midwife)	FR	Martin Provost	278 848
12	Wilde Maus (Wild Mouse)	AT/DE	Josef Hader	270 426
13	Happy End	FR/AT/DE	Michael Haneke	267 455
14	Perfetti sconosciuti (Perfect Strangers)	IT	Paolo Genovese	267 359
15	Lady Macbeth	GB	William Oldroyd	265 841
16	Paddington 2	GB/FR	Paul King	263 495
17	Au revoir là-haut (See You Up There)	FR/CA	Albert Dupontel	256 172
18	The Party	GB	Sally Potter	255 714
19	WEIT. Die Geschichte von einem Weg…	DE	P. Allgaier, G. Weisser	247 984
20	Teströl és lélekröl (On Body and Soul)	HU	Ildikó Enyedi	240 690
21	Viceroy's House	GB/IN/SE	Gurindher Chadha	232 780
22	Le Jeune Karl Marx (The Young Karl Marx)	FR/BE/DE	Raoul Peck	230 434
23	Aurore	FR	Blandine Lenoir	219 868
24	The Killing of a Sacred Deer	IE/GB/US	Yorgos Lanthimos	213 771
25	L'Amant double (Double Lover)	FR/BE/DE	François Ozon	212 220

(1) Data based on Europa Cinemas members in 34 MEDIA countries, 628 cities, 1 059 cinemas, 2 536 screens.
(2) Country of origin and production year as allocated in LUMIERE database.

Sources: Europa Cinemas, OBS

Top 25 European films (incl EUR inc) by admissions in the US & Canada | 2017 e

Admissions estimated based on average ticket price of USD 8.97.

	Original title	Country of origin	Director	Distributor	Admissions e
1	Dunkirk	GB INC/US/FR/NL	Christopher Nolan	Warner Bros.	21 165 522
2	Baby Driver	GB/US	Edgar Wright	Sony Pictures	12 114 240
3	Kingsman: The Golden…	GB INC/US	Matthew Vaughn	20th Century Fox	11 260 541
4	47 Meters Down	GB/DO/US	Johannes Roberts	Entertainment Studios	4 978 234
5	Valerian and the City of…	FR/CN/US/DE/AE	Luc Besson	STX Entertainment	4 548 243
6	The Foreigner	GB INC/US/CN	Martin Campbell	STX Entertainment	3 864 438
7	Ballerina	FR/CA	E. Summer, É. Warin	The Weinstein Co	2 852 135
8	Victoria & Abdul	GB/US	Stephen Frears	Focus Features	2 496 607
9	The Promise	ES/US	Terry George	Open Road	924 076
10	I Am Not Your Negro	FR	Raoul Peck	Magnolia Pictures	800 440
11	Fantastic Beasts and…	GB INC/US	David Yates	Warner Bros.	761 909
12	The Snowman	GB INC/US/SE	Tomas Alfredson	Universal Pictures	752 812
13	Loving Vincent	PL/GB/US	D. Kobiela, H. Welchman	Good Deed Entertain.	622 150
14	The Man Who Invented…	GB/IE/CA/US	Bharat Nalluri	Bleecker Street	618 939
15	Call Me by Your Name	IT/FR/BR/US	Luca Guadagnino	Sony Classics	439 186
16	A United Kingdom	GB/US/CZ	Amma Asante	Fox Searchlight	438 447
17	Friend Request	DE	Simon Verhoeven	Entertainment Studios	422 368
18	A Monster Calls	ES/US	J.A. Bayona	Focus Features	410 037
19	Their Finest	GB/SE	Lone Scherfig	STX Entertainment	404 885
20	Maudie	IE/CA	Aisling Walsh	Sony Classics	402 685
21	My Cousin Rachel	GB INC/US	Roger Michell	Fox Searchlight	305 209
22	Kedi (Cat)	TR/US	Torun Ceyda	Oscilloscope Pictures	279 944
23	Tulip Fever	GB INC/US	Justin Chadwick	The Weinstein Co	272 546
24	T2 Trainspotting	GB	Danny Boyle	Sony Pictures	269 887
25	The Killing of a Sacred Deer	IE/GB/US	Yorgos Lanthimos	A24 Films	257 516

Note: A total of 238 European films (including 15 EUR inc films) were identified to be on release in the US and Canada in 2017, generating cumulative admissions of 76.5 million (6.3% market share)

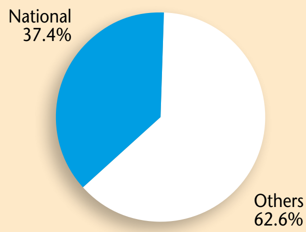
Sources: comScore, OBS/LUMIERE

France

Population 2017 e	67.0 million
GDP per capita 2017 e	39 673 USD
Gross box office 2017 e	1.38 bn EUR (1.56 bn USD)
Admissions 2017 e	209.4 million
Average ticket price 2017 e	6.6 EUR (7.5 USD)
Average admissions per capita 2017 e	3.1
Screens 2016 | 2017 (1)	5 842 | 5 913
Digital screens 2016 | 2017 (1)	5 842 | 5 913
Digital 3D screens 2016 | 2017 (2)	3 020 | 3 025

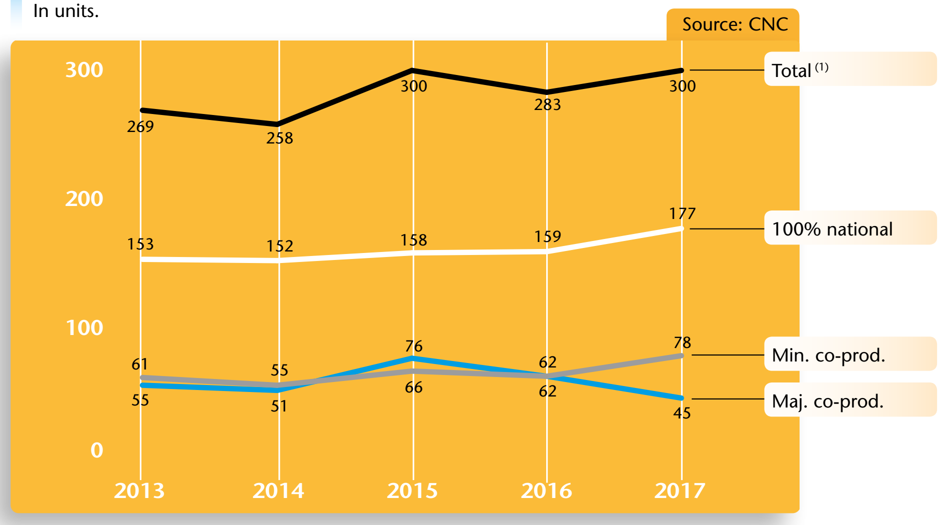
(1) Source: CNC (2) MEDIA Salles

Market shares 2017 e



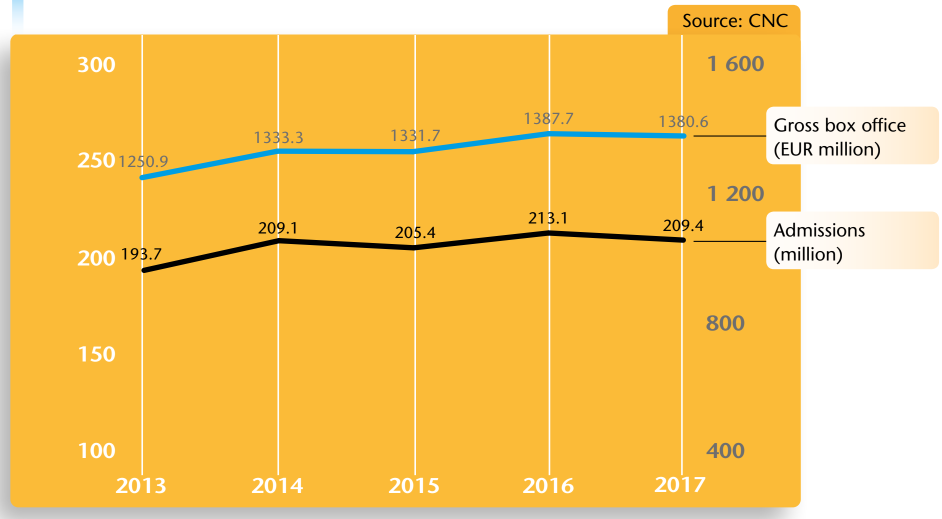
Number of French feature films produced | 2013-2017

In units.



(1) Officially recognised films.

Admissions and gross box office in France | 2013-2017



Top 20 films by admissions in France | 2017 (1)

	Original title	Country of origin	Director	Distributor	Admissions e
1	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	UPI	5 737 949
2	Raid dingue (R.A.I.D. Special Unit)	FR/BE	Dany Boon	Pathé Distribution	4 570 887
3	Valerian and the City of a Thousand…	FR/CN/…	Luc Besson	EuropaCorp	4 041 205
4	Coco	US	L. Unkrich, A. Molina	Walt Disney Studios	4 025 594
5	The Boss Baby	US	Tom McGrath	20th Century Fox	3 956 359
6	The Fate of the Furious	US/CN/JP	F. Gary Gray	UPI	3 862 436
7	Pirates of the Caribbean: Dead…	US	E. Sandberg, J. Rønning	Walt Disney Studios	3 675 956
8	Sing	US/JP	G. Jennings, C. Lourdelet	UPI	3 599 807
9	Alibi.com	FR	Philippe Lacheau	StudioCanal	3 581 337
10	Beauty and the Beast	US	Bill Condon	Walt Disney Studios	3 568 108
11	Guardians of the Galaxy Vol. 2	US	James Gunn	Walt Disney Studios	3 232 533
12	Fifty Shades Darker	US/CN	James Foley	UPI	3 139 755
13	Le sens de la fête	FR/CA/BE	O. Nakache, E. Toledano	Gaumont Distrib.	2 985 000
14	War for the Planet of the Apes	US	Matt Reeves	20th Century Fox	2 883 962
15	Cars 3	US	Brian Fee	Walt Disney Studios	2 766 256
16	La La Land	US	Damien Chazelle	SND Films	2 746 663
17	Star Wars: Episode VIII - The Last Jedi	US	Rian Johnson	Walt Disney Studios	2 603 952
18	Dunkirk	GB INC/…	Christopher Nolan	Warner Bros.	2 553 899
19	Thor: Ragnarok	US	Taika Waititi	Walt Disney Studios	2 503 292
20	Épouse-moi mon pote (Marry Me, …)	FR	Tarek Boudali	StudioCanal	2 467 399

(1) Covering film releases between 28/12/2016 and 26/12/2017.

Source: *Le Film Français*

Distribution and exhibition

2017 saw French cinema attendance decline by 1.7% to 209 million. This is the third highest level in the past 50 years, surpassed only in 2011 (217 million) and 2016 (213 million) and marks the fourth consecutive year of admissions exceeding 200 million. GBO remained strong, decreasing by only 0.5% to EUR 1.38 billion, the second highest level in history after 2016's record high of EUR 1.39 billion. Despite these strong results France was overtaken for the first time by Russia as Europe's largest theatrical market in terms of admissions.

The slight decline in French admissions was caused by an estimated 9% drop in admissions to US films, while national and other European / non-European films sold more tickets than in 2016. French box office was once more dominated by a mixture of US family animations and superhero franchise films as well as local mainstream comedies. *Despicable Me 3* topped the charts selling 5.7 million tickets as another three family animations, *Coco, Boss Baby* and *Sing*, ranked among the top 10. Danny Boon's latest comedy *Raid dingue* took second place and became the most successful French title of the year ahead of *Valerian and the City of a Thousand Planets*. A total of five French films made it into the top 20 and contributed largely to national market share increasing from 35.8% to 37.4%. US market share on the other hand dropped from 52.9% to 48.8%.

Releasing only 9 films in 2017 Walt Disney led the French distribution market with a market share of 13%, followed by UPI (12%), 20th Century Fox and Warner Bros (8 % each).

Production and funding

With 300 feature films approved by the country's national funding body, the CNC, in 2017 French film production equalled the record set back in 2015. This figure breaks down into 222 French initiative films and 78 minority co-productions. In 2017, total investment in film production in France fell by 4.4% to EUR 1.33 billion, EUR 1.09 billion of which was invested in French initiative films. This decrease can be explained by the absence of exceptionally expensive productions like *Valerian* and *Renegades* which had boosted investment volumes in 2016. The average production cost of French initiative films consequently decreased from EUR 5.5 million to EUR 4.9 million. In consultation with the industry the CNC reformed its film production approval rules, which form the basis for receiving support from the CNC. The new points system came into effect on 1 January 2018.

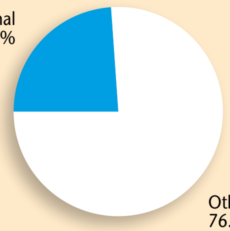
Sources: CNC, *Le Film Français, Cineuropa*, OBS

Germany

Population 2017 e	82.7 million
GDP per capita 2017 e	44 184 USD
Gross box office 2017 e	1.06 bn EUR (1.19 bn USD)
Admissions 2017 e	122.3 million
Average ticket price 2017 e	8.6 EUR (9.8 USD)
Average admissions per capita 2017 e	1.5
Screens 2016 | 2017 (1)	4 739 | 4 803
Digital screens 2016 | 2017 (2)	4 739 | 4 803
Digital 3D screens 2016 | 2017 (2)	2 190 | 2 220

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

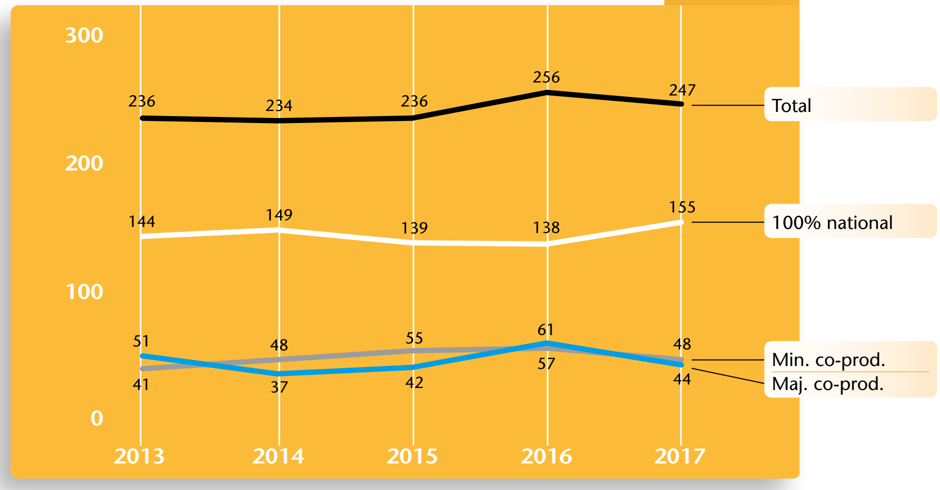
Market shares 2017 e



Number of German feature films produced (1) | 2013-2017

In units.

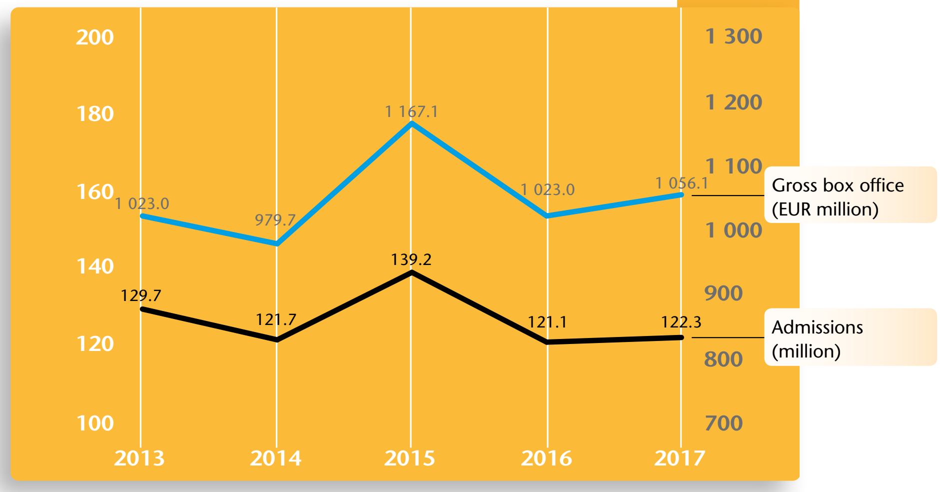
Source: SPIO



(1) Films on first release.

Admissions and gross box office in Germany | 2013-2017

Source: FFA



Top 20 films by admissions in Germany | 2017

	Original title	Country of origin	Director	Distributor	Admissions
1	Fack ju Göhte 3 (Suck Me Shakespeer 3)	DE	Bora Dagtekin	Constantin Film	5 948 094
2	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	Universal Pictures	4 640 958
3	Star Wars: Episode VIII - The Last Jedi	US	Rian Johnson	Walt Disney Studios	4 396 028
4	Fifty Shades Darker	US/CN	James Foley	Universal Pictures	3 445 046
5	Beauty and the Beast	US	Bill Condon	Walt Disney Studios	3 424 482
6	The Fate of the Furious	CN/US/JP	F. Gary Gray	Universal Pictures	3 240 759
7	It	US/CA	Andy Muschietti	Warner Bros.	3 168 314
8	Pirates of the Caribbean: Dead Men…	US	E. Sandberg, J. Rønning	Walt Disney Studios	2 693 004
9	Guardians of the Galaxy Vol. 2	US	James Gunn	Walt Disney Studios	2 514 467
10	Baywatch	US/CN/GB	Seth Gordon	Paramount	1 973 845
11	The Boss Baby	US	Tom McGrath	20th Century Fox	1 972 963
12	Bullyparade: Der Film	DE	Michael Herbig	Warner Bros.	1 895 054
13	La La Land	US	Damien Chazelle	StudioCanal	1 762 726
14	Bibi & Tina: Tohuwabohu total	DE	Detlev Buck	DCM Film Distr.	1 654 385
15	Thor: Ragnarok	US	Taika Waititi	Walt Disney Studios	1 483 970
16	Cars 3	US	Brian Fee	Walt Disney Studios	1 314 551
17	Smurfs: The Lost Village	US/HK	Kelly Asbury	Sony Pict. Releasing	1 306 653
18	Passengers	US	Morten Tyldum	Sony Pict. Releasing	1 264 704
19	Split	US/JP	M. Night Shyamalan	Universal Pictures	1 216 492
20	Transformers: The Last Knight	US/CN	Michael Bay	Paramount	1 189 752

Source: FFA

Distribution and exhibition

Given the lack of a major sports event and a strong film line-up, many had expected the German market to bounce back in a more pronounced manner in 2017, after registering the lowest cinema attendance in over 20 years in 2016. While delivering what can be characterised as solid results, the German market failed to meet these growth expectations in 2017 as admissions only increased by 1% from 121.1 to 122.3 million. In contrast – supported by an increase in the average ticket price – GBO grew by 3.2% to EUR 1.06 billion, the second highest level in history and the third year in a row above the one billion euros benchmark.

The moderate increase in admissions seems to be primarily driven by German films as their estimated market share increased from 22.7% to 23.9%, while admissions and market share for US films as well as other European films decreased slightly. The third instalment of the comedy franchise *Fack Ju Göhte (Suck Me Shakespeer)* clearly stood out, not only among local releases but topping the German charts, selling over 5.9 million tickets, ahead of US studio blockbusters. In contrast to 2016, when no single film sold more than four million tickets, a total of three films managed to do so in 2017. On the other hand exhibitors saw mid-range films struggle to catch consumer attention among the high number of film releases. The latter actually decreased in 2017 with "only" 587 new film releases, 23 less than in the record year 2016. Walt Disney topped Germany's distribution market in 2017 with only 11 films on release (of which 8 were new releases), taking 16.4% of total admissions, ahead of Universal (15.9%) and Warner Bros. (13.1%).

Production and funding

After reaching a peak in 2016 (256 films), German feature film production decreased slightly in 2017, with 247 national feature films, including minority co-productions, being released. In 2017, the BKM increased its economically-oriented film funding programme by launching a second fund for major productions, the so-called DFFF II. It has a financing volume of EUR 75 million in 2018 and is aimed at supporting theatrical films with overall production costs of at least EUR 20 million and a minimum German spend of EUR 8 million. Administered by the FFA, the funding amounts to 25 % of the German spend capped at EUR 25 million per project. At the same time DFFF I will be retained with a financing volume of EUR 50 million. Matching the new DFFF II, the percentage level of financial aid will be increased from 20 % to 25% for projects with a German spend exceeding EUR 8 million.

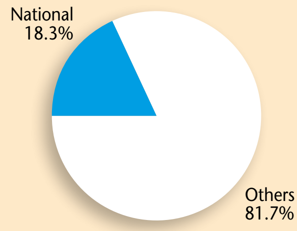
Sources: FFA, SPIO, *Blickpunkt Film, filmecho-filmwoche*, OBS

Italy

Population 2017 e	60.6 million
GDP per capita 2017 e	31 619 USD
Gross box office 2017 e	612.5 M EUR (692 M USD)
Admissions 2017 e	99.2 million
Average ticket price 2017 e	6.2 EUR (7.0 USD)
Average admissions per capita 2017 e	1.6
Screens 2016 | 2017 (1)	5 104 | 5 298
Digital screens 2016 | 2017 (2)	3 630 | 3 698
Digital 3D screens 2016 | 2017 (2)	1 380 | 1 385

(1) Source: SIAE. (Number of screens with at least 60 days of activity in 2016 = 3 847)
(2) Source: MEDIA Salles (counting only screens with at least 60 days of activity)

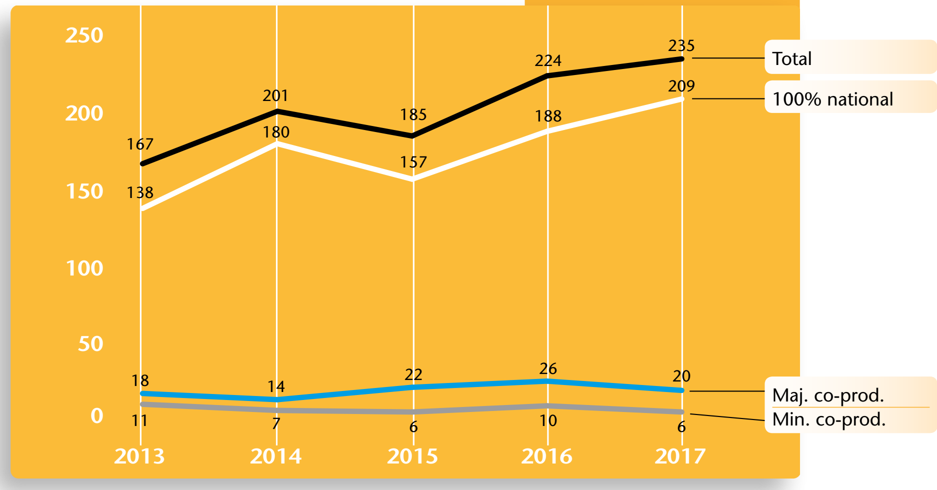
Market shares 2017 e



Number of Italian feature films produced | 2013-2017

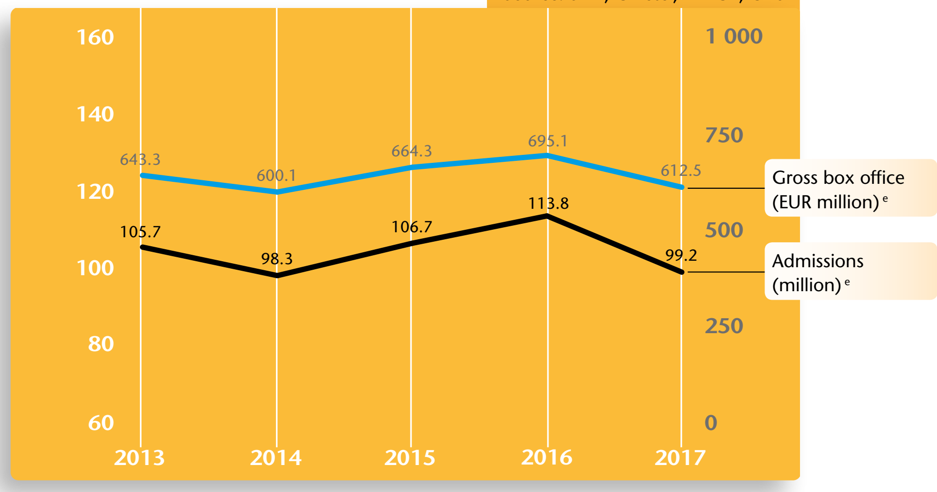
In units.

Source: DG Cinema - MiBACT



Admissions and gross box office in Italy | 2013-2017 e

Source: SIAE, Cinetel, ANICA, OBS



Top 20 films by admissions in Italy | 2017

	Original title	Country of origin	Director	Distributor	Admissions
1	Beauty and the Beast	US	Bill Condon	Walt Disney	3 219 203
2	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	Universal	2 782 012
3	Fifty Shades Darker	US/CN	James Foley	Universal	2 161 515
4	The Fate of the Furious	CN/US/JP	F. Gary Gray	Universal	2 076 230
5	It	US/CA	Andy Muschietti	Warner Bros.	2 035 660
6	Murder on the Orient Express	US/MT	Kenneth Branagh	20th Century Fox	1 924 810
7	Pirates of the Caribbean: Dead Men…	US	E. Sandberg, J. Rønning	Walt Disney	1 835 673
8	L'ora legale	IT	Ficarra, Picone	Medusa Film	1 807 170
9	Star Wars: Episode VIII - The Last Jedi	US	Rian Johnson	Walt Disney	1 804 321
10	Mister Felicità	IT	Alessandro Siani	01 Distribution	1 686 802
11	Collateral Beauty	US	David Frankel	Warner Bros.	1 566 531
12	Sing	US/JP	G. Jennings, C. Lourdelet	Universal	1 480 039
13	La La Land	US	Damien Chazelle	01 Distribution	1 422 831
14	Dunkirk	GB INC/…	Christopher Nolan	Warner Bros.	1 302 393
15	Spider-Man: Homecoming	US	Jon Watts	Warner Bros.	1 300 202
16	Thor: Ragnarok	US	Taika Waititi	Walt Disney	1 261 548
17	Cars 3	US	Brian Fee	Walt Disney	1 217 796
18	The Boss Baby	US	Tom McGrath	20th Century Fox	1 166 829
19	Moana	US	R. Clements, J. Musker, …	Walt Disney	1 160 835
20	Demain tout commence (Two Is A…)	FR/GB	Hugo Gélin	Lucky Red	1 108 677

Source: Cinetel

Distribution and exhibition

After riding the crest of the wave in 2016, Italian films suffered a massive drop in admissions, which caused Italian cinema attendance to decline from 114 million to an estimated 99 million admissions (-13%). Boosted by breakout success *Quo Vado?*, which had generated almost 9.4 million admissions, Italian films had sold almost 33 million tickets in 2016, capturing a market share of 29%. In contrast, cumulative admissions to local films almost halved in 2017 (~18 million) causing national market share to plummet to 18%, the lowest level since 1993. In 2017 only two local titles made it into the top 20: *L'ora legale*, a comedy about corruption in politics, selling 1.8 million tickets, and romantic comedy *Mister Felicità* (1.7 million). Both were considered to be disappointing results for top local comedies, which used to achieve much higher results in past years. Some market observers consequently diagnosed audience loss of interest in comedy fare, while others blamed the proliferation of films online as well as piracy for the decline. Led by *Beauty and the Beast* and *Despicable Me 3*, Italian box office charts were dominated by US studio blockbusters. Cumulatively US films slightly increased admissions and US market share jumped from 55% to 65%, the highest level since 2000.

GBO dropped almost proportionally with underlying admissions, falling by 12% to EUR 613 million. Just as in 2016, Warner Bros led the Italian distribution market, taking 19.3% of total admissions, followed by Universal (17.9%), Walt Disney (13.3%) and 01 Distribution (10.1%). Like in Germany, the number of new film releases decreased somewhat, from 554 to 536 in 2017.

Production and funding

Italian feature film production volume hit a record high of 235 films produced in 2017, driven by an increase in 100% national films. The Italian film industry is now hoping to benefit from the enactment of the new film law (Nuova Legge Cinema e Audiovisivo) which took effect in January 2017 and has been implemented through a series of decrees throughout the year. Among many other measures, a new Film Fund, administered by the Ministry of Culture MiBACT, was set up and equipped with a budget of at least EUR 400 million per year. This effectively increased state film funding by 60%. An automatic funding scheme was introduced, while selective funding – now aiming primarily at debut and second films – was reduced. The new law furthermore aims to improve Italy's tax credit schemes, by providing six different kinds of tax credits, among other things to support the development of movie theatres and the digitisation of artistic heritage.

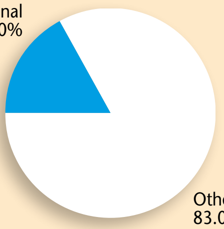
Sources: DG Cinema-MiBACT, ANICA, Cinetel, *Cineuropa, Screen International, Variety*, OBS

Spain

Population 2017 e	46.5 million
GDP per capita 2017 e	28 212 USD
Gross box office 2017 e	598.9 M EUR (676.8 M USD)
Admissions 2017 e	100.2 million
Average ticket price 2017 e	6.0 EUR (6.8 USD)
Average admissions per capita 2017 e	2.2
Screens 2016 | 2017 (1)	3 568 | 3 625
Digital screens 2016 | 2017 (2)	3 395 | 3 490
Digital 3D screens 2016 | 2017 (2)	1 120 | 1 130

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

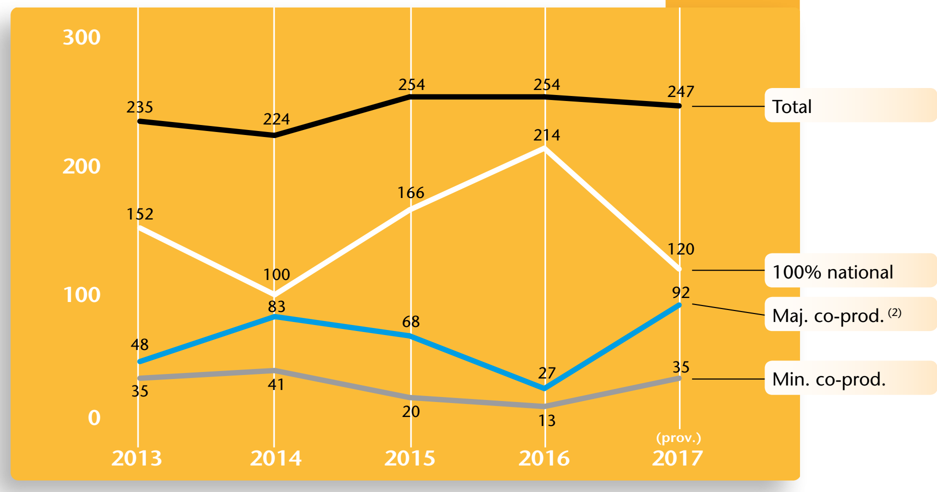
Market shares 2017 e



Number of Spanish feature films produced (1) | 2013-2017

In units.

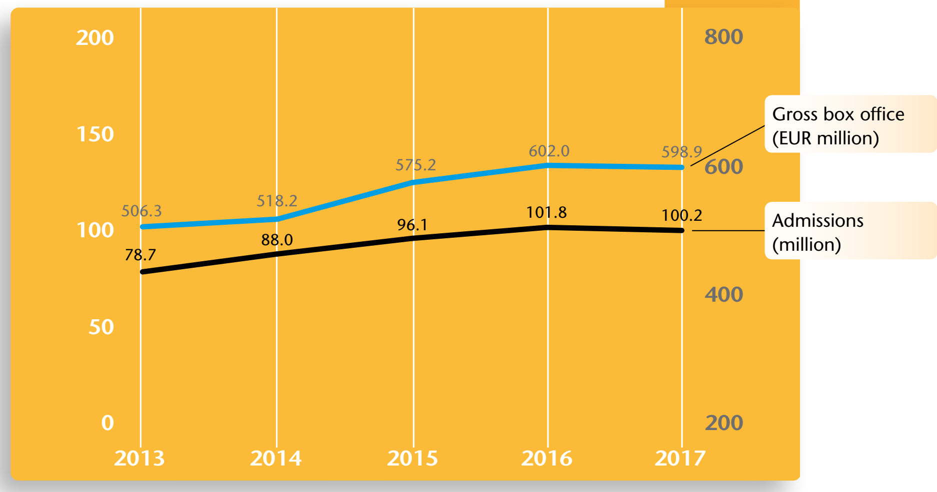
Source: ICAA



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

Admissions and gross box office in Spain | 2013-2017 *prov.*

Source: ICAA



Top 20 films by admissions in Spain | 2017 *prov.*

	Original title	Country of origin	Director	Distributor	Admissions
1	Beauty and the Beast	US	Bill Condon	Walt Disney	3 757 962
2	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	UPI	3 698 361
3	Star Wars: Episode VIII - The Last Jedi	US	Rian Johnson	Walt Disney	3 346 350
4	Perfectos desconocidos (Perfect ...)	ES/IT	Álex de la Iglesia	UPI	3 220 506
5	Tadeo Jones 2: El secreto del Rey…	ES	D. Alonso, E. Gato	Paramount Spain	3 173 873
6	Coco	US	Lee Unkrich, Adrian Molina	Walt Disney	2 908 284
7	The Boss Baby	US	Tom McGrath	Hispano Foxfilms	2 386 038
8	Pirates of the Caribbean: Dead Men…	US	E. Sandberg, J. Rønning	Walt Disney	2 200 950
9	Fifty Shades Darker	US/CN	James Foley	UPI	2 136 395
10	The Fate of the Furious	US/CN/JP	F. Gary Gray	UPI	2 102 754
11	Jumanji: Welcome to the Jungle	US	Jake Kasdan	Sony Pictures	1 965 315
12	It	US/CA	Andy Muschietti	Warner Bros.	1 792 660
13	Spider-Man: Homecoming	US	Jon Watts	Sony Pictures	1 747 469
14	La La Land	US	Damien Chazelle	UPI	1 720 192
15	Guardians of the Galaxy Vol. 2	US	James Gunn	Walt Disney	1 667 333
16	Es por tu bien	ES	Carlos Therón	Walt Disney	1 586 163
17	Ferdinand	US	Carlos Saldanha	Hispano Foxfilms	1 580 643
18	Sing	US/JP	G. Jennings, C. Lourdelet	UPI	1 549 019
19	War for the Planet of the Apes	US	Matt Reeves	Hispano Foxfilms	1 514 345
20	Thor: Ragnarok	US	Taika Waititi	Walt Disney	1 436 010

Sources: ICAA, comScore

Distribution and exhibition

After growing for three years in a row, cinema attendance in Spain dropped slightly by 1.6% to 100 million admissions in 2017. GBO decreased marginally to EUR 599 million, 0.5% down on 2016. While showing signs of continuing recovery, 2017 admissions results are still well below the levels registered in Spain up until 2009. In order to stimulate further growth the Spanish government announced in September 2017 that they would lower sales tax on cinema tickets from 21% to 10%.

For the first time since 2013 the Spanish box office was topped by a US rather than a local blockbuster. Disney's *Beauty and the Beast* led the charts ahead of *Despicable Me 3*, confirming the strong appeal of family animation films in Spain which accounted for five out of the top seven films in 2017. Selling 3.2 million tickets *Perfectos desconocidos*, the Spanish remake of the Italian comedy *Perfect Strangers* became the most successful domestic title of 2017, ahead of the family animation sequel *Tadeo Jones 2: El secreto del Rey Midas*. As in 2016 a total of six local films sold more than 1 million tickets, but in comparison to previous years 2017 lacked a domestic breakout success. Cumulative admissions to Spanish films consequently declined by an estimated 1.8 million and national market share fell from 18.5% to 17%. UPI led the Spanish distribution market capturing an estimated 21% of total admissions, followed by Walt Disney (18%), Warner Bros. (13%) and Hispano Foxfilms (12%).

Production and funding

In terms of cumulative figures Spanish film production activity remained comparatively stable with a total of 247 films certified by ICAA, the country's national public funding body, seven films less than in 2015 and 2016. The composition of Spain's film production volume however changed fundamentally in comparison to 2016: while the production of 100% national films almost halved from 214 to 120 films, the number of international co-productions more than tripled from 40 to 127.

With a comparatively low amount of public funding, the Spanish film production industry largely depends on broadcaster financing as broadcasters have been obliged to invest 6% of their budgets into the production of film and audiovisual content. Broadcaster investment in film production may however decrease in 2018 as Spain's Constitutional Court ruled this obligation to be illegal. At the same time Spanish producers' associations are lobbying for the creation of a National Public Fund to Support the Audiovisual Sector (FASA) with a proposed endowment of EUR 158 million.

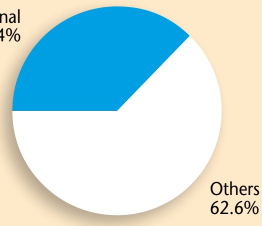
Sources: ICAA, Spain Film Commission, *Screen International*, *Variety*, *The Hollywood Reporter*, OBS

United Kingdom

Population 2017 e	65.8 million
GDP per capita 2017 e	38 847 USD
Gross box office 2017 e	1.28 bn GBP (1.65 bn USD)
Admissions 2017 e	170.6 million
Average ticket price 2017 e	7.5 GBP (9.7 USD)
Average admissions per capita 2017 e	2.6
Screens 2016 | 2017 (1)	4 150 | 4 309
Digital screens 2016 | 2017 (2)	4 150 | 4 320
Digital 3D screens 2016 | 2017 (2)	2 050 | 2 060

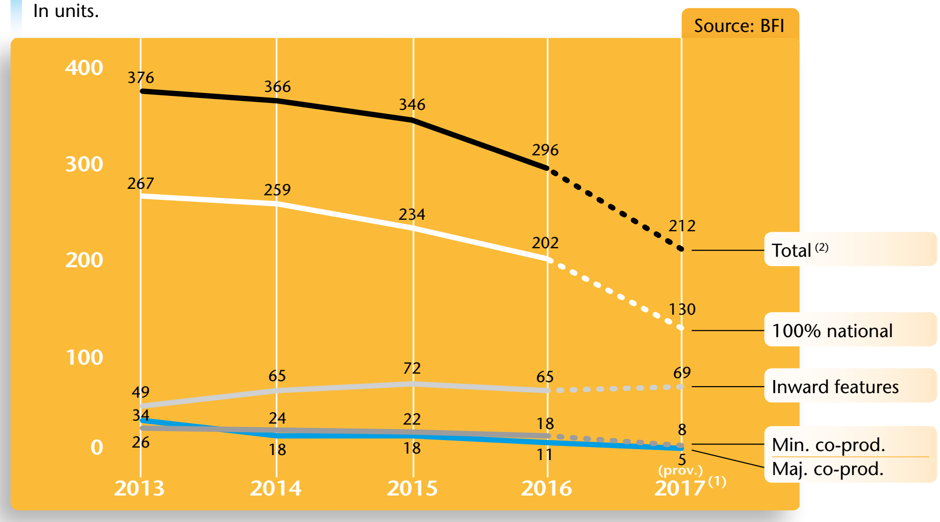
(1) Source: BFI (2) Source: MEDIA Salles

Market shares 2017 e



Number of films produced in the United Kingdom | 2013-2017 *prov.* (1)

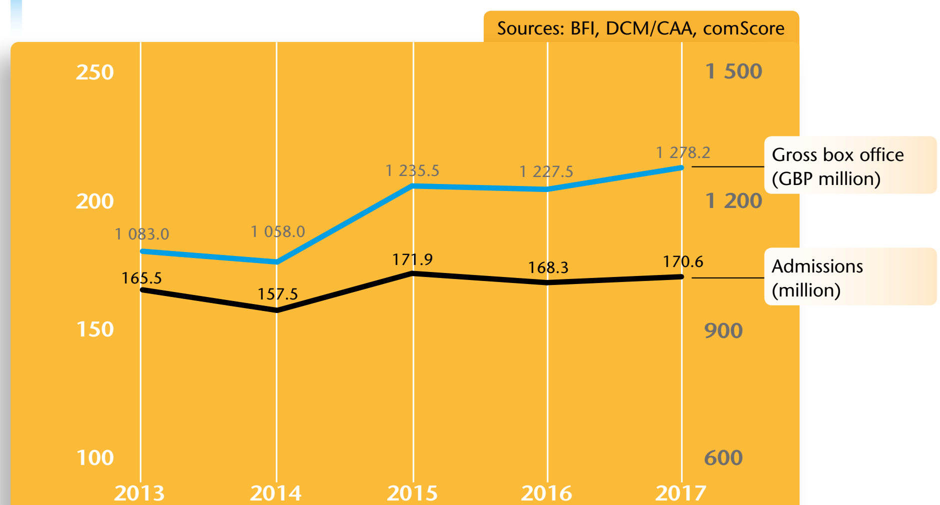
In units.



(1) The seemingly strong decline of film productions in 2017 is linked to a time lag in identifying film productions with budgets below GBP 500 000.

(2) Including inward feature co-productions.

Admissions and gross box office in the United Kingdom | 2013-2017



Top 20 films by admissions in the United Kingdom & Ireland [(1)] | 2017 [e]

Estimated admissions based on average ticket price of GBP 7.49.

	Original title	Country of origin	Director	Distributor	Admissions [e]
1	Beauty and the Beast	US	Bill Condon	Walt Disney	9 670 884
2	Star Wars: Episode VIII - The Last Jedi	US	Rian Johnson	Walt Disney	9 119 897
3	Dunkirk	GB INC/US/...	Christopher Nolan	Warner Bros.	7 564 364
4	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	Universal Pict.	6 373 854
5	Guardians of the Galaxy Vol. 2	US	James Gunn	Walt Disney	5 474 313
6	Paddington 2	GB/FR	Paul King	StudioCanal	5 025 362
7	It	US/CA	Andy Muschietti	Warner Bros.	4 317 374
8	Thor: Ragnarok	US	Taika Waititi	Walt Disney	4 144 180
9	Spider-Man: Homecoming	US	Jon Watts	Sony Pictures	4 069 610
10	La La Land	US	Damien Chazelle	Lionsgate	4 061 421
11	The Fate of the Furious	US/CN/JP	F. Gary Gray	Universal Pict.	3 955 347
12	Sing	US/JP	G. Jennings, C. Lourdelet	Universal Pict.	3 895 642
13	The Boss Baby	US	Tom McGrath	20th Century Fox	3 890 138
14	The LEGO Batman Movie	US	Chris McKay	Warner Bros.	3 662 841
15	Kingsman: The Golden Circle	GB INC/US	Matthew Vaughn	20th Century Fox	3 322 547
16	Murder on the Orient Express	US/MT	Kenneth Branagh	20th Century Fox	3 192 356
17	Logan	US	James Mangold	20th Century Fox	3 186 962
18	Fifty Shades Darker	US/CN	James Foley	Universal Pictures	3 073 927
19	Wonder Woman	US/CN/HK	Patty Jenkins	Warner Bros.	2 961 947
20	War for the Planet of the Apes	US	Matt Reeves	20th Century Fox	2 768 585

Source: BFI, comScore

Distribution and exhibition

Cinema attendance in the UK increased in 2017 by 1.4% to 170.6 million admissions. This is the second highest result in the past five years and slightly above the ten year average figure of 168.4 million. Supported by a continuing rise in the average ticket price, GBO climbed to a record high of GBP 1.28 billion. Sticking to tradition, the UK theatrical market was dominated by US studio titles with only one independent UK film, *Paddington 2*, making it into the top 20. Cumulatively UK qualifying films took a market share of 37.4%, splitting into 28% for US studio backed films like *Star Wars: The Last Jedi*, and a 9.5% share for UK independent films. Like in many other European markets, the number of first releases decreased somewhat, slipping from 2016's 900 films and event releases to 874.

Despite only six film releases (and another 10 holdovers) Disney finished as top distributor for the second year, netting 19.2% of total GBO in the UK and Ireland. Warner Bros took second place (16.2%), ahead of Universal (15.6%) and 20th Century Fox (15.0%).

Production and funding

The number of UK film productions has been declining steadily over the past five years. According to BFI interim figures, a total of 212 UK feature films – including inward investment films – started principal photography in 2017, compared to 376 in 2013. Boosted by high incentives and a comparatively low British Pound the UK has been experiencing a production boom with local production spend almost doubling since 2012 (GBP 1 billion) to reach a new record high of GBP 1.91 billion in 2017: 18 US studio titles accounted for 71% of production spend, 51 independent inward investment films for 20%, while domestic films (129 films) and international co-productions (13 films) registered the lowest level in years accounting for 8% and 2% respectively.

As part of its five-year strategic plan the BFI introduced important changes to its Film Fund guidelines in late 2017. In order to better reflect new forms of filmmaking and taking into account the ever increasing difficulty for early and risky works to secure a theatrical release, the BFI is now taking a more relaxed approach to form, length and theatricality. It is furthermore considering to fully finance features with budgets up to GBP 1 million and set itself concrete diversity targets.

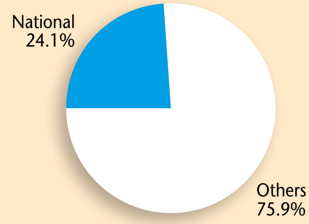
Sources: British Film Institute (BFI), DCM, *Screen International*, comScore, OBS

Russian Federation

Population 2017 e	143.4 million
GDP per capita 2017 e	10 248 USD
Gross box office 2017 e	53.28 bn RUB (913 M USD)
Admissions 2017 e	212.2 million
Average ticket price 2017 e	251.1 RUB (4.3 USD)
Average admissions per capita 2017 e	1.5
Screens 2016 | 2017 (1)	4 370 | 4 793
Digital screens 2016 | 2017 (2)	4 364 | 4 786
Digital 3D screens 2016 | 2017 (2)	3 417 | 3 773

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

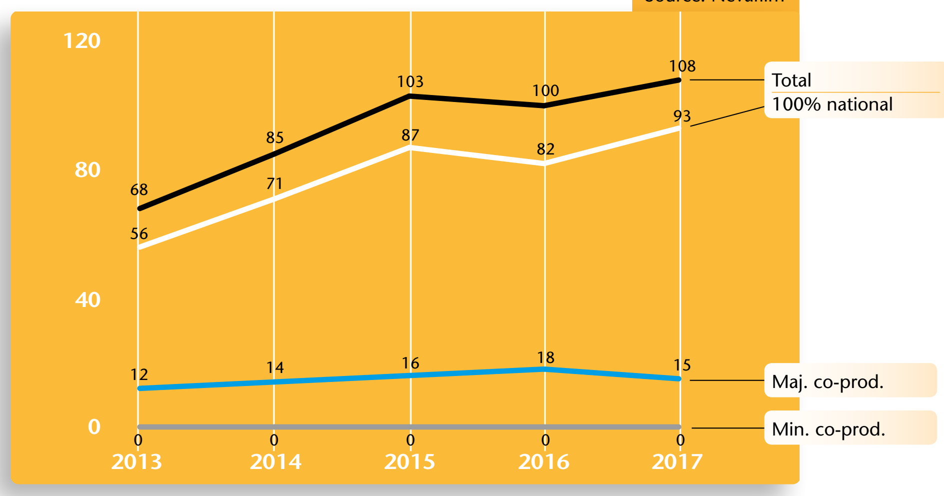
Market shares 2017 e



Number of Russian feature films produced (1) | 2013-2017

In units.

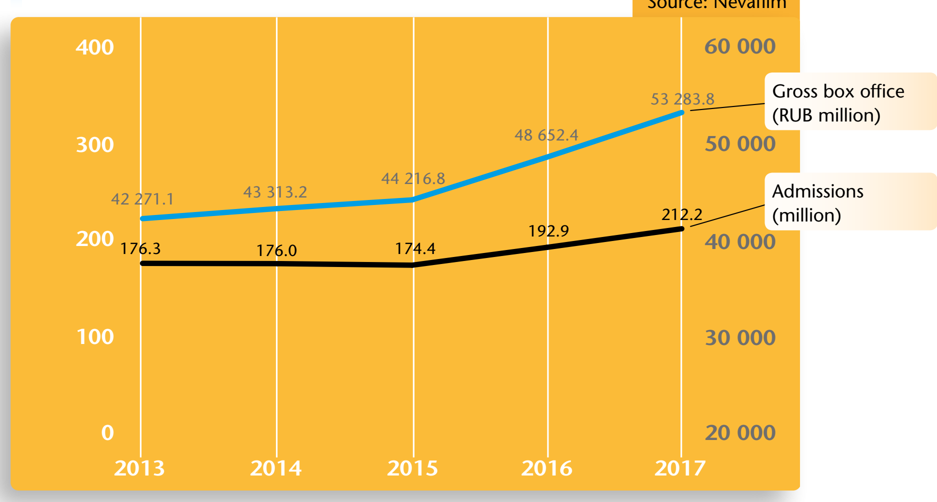
Source: Nevafilm



(1) Updated time series based on year of release. Does not include regional films and alternative content productions.

Admissions and gross box office in Russia (1) | 2013-2017

Source: Nevafilm



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

Top 20 films by admissions in the Russian Federation [(1)] | 2017

	Original title	Country of origin	Director	Distributor	Admissions [e]
1	Pirates of the Caribbean: Dead Men…	US	E. Sandberg, J. Rønning	Walt Disney/Sony	7 962 691
2	Posledniy bogatyr (The Last Warrior)	RU	Dmitriy Dyachenko	Walt Disney/Sony	7 309 367
3	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	UPI	6 623 483
4	The Boss Baby	US	Tom McGrath	20th Century Fox	6 234 951
5	Guardians of the Galaxy Vol. 2	US	James Gunn	Walt Disney/Sony	5 257 746
6	The Fate of the Furious	US/CN/JP	F. Gary Gray	UPI	5 249 809
7	Viking	RU	Andrey Kravchuk	Central Partnership	5 232 482
8	Thor: Ragnarok	US	Taika Waititi	Walt Disney/Sony	4 253 096
9	It	US/CA	Andy Muschietti	Caro Premier	4 083 058
10	Prityazhenie (Attraction)	RU	Fedor Bondarchuk	Walt Disney/Sony	3 831 855
11	Sing	US/JP	G. Jennings, C. Lourdelet	UPI	3 820 124
12	Spider-Man: Homecoming	US	Jon Watts	Walt Disney/Sony	3 456 713
13	Logan	US	James Mangold	20th Century Fox	3 361 901
14	Transformers: The Last Knight	US/CN	Michael Bay	Central Partnership	3 351 809
15	The Mummy	US	Alex Kurtzman	UPI	3 251 499
16	Tri bogatyrya i Morskoy tsar	RU	Konstantin Feoktistov	Nashe Kino	3 226 037
17	Assassin's Creed	US/FR/…	Justin Kurzel	20th Century Fox	3 201 994
18	Murder on the Orient Express	US/MT	Kenneth Branagh	20th Century Fox	3 180 401
19	Salyut-7	RU	Klim Shipenko	Nashe Kino	2 955 644
20	Valerian and the City of a Thousand…	FR/CN/…	Luc Besson	Nashe Kino	2 908 200

(1) Data refer to the CIS, excluding Ukraine.

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

Distribution and exhibition

2017 was another year of strong growth for the Russian cinema market. Admissions increased by 10% to a record high of 212.2 million tickets sold and GBO grew by 9.5% to RUB 53.3 billion, the highest level on record. However, measured in US dollars, (913 million) GBO was still well below the levels observed between 2011 and 2014. These results make Russia for the first time Europe's largest market in terms of admissions.

In contrast to 2016, box office growth was primarily driven by local blockbusters rather than US studio films which "merely" confirmed their strong results from 2016. *Pirates of the Caribbean: Dead men Tell No Tales* topped the Russian box office ahead of *Posledniy bogatyr (The Last Warrior)*, the highest grossing Russian film of all times. A total of five Russian films featured among the top 20, compared to only two in 2016, causing national market share to grow from 17.6% to 24.1%. This increase comes amidst the background of several planned measures to boost national films at the expense of foreign, particularly US, films. During 2017 the Russian Ministry of Culture proposed several draft legislations to this effect, including the stipulation that any single movie released theatrically can take no more than 35% of all screenings on any given day. It also proposed to slingshot distribution fees per film from USD 60 to over USD 80 000, which would later on be reimbursed for local films. This proposal was however ditched after an outcry from both exhibitors and distributors and replaced by a proposal to introduce a 3% tax on cinema tickets, the proceeds of which will be used for supporting national film productions. The Ministry, which is responsible for issuing exhibition licenses, furthermore has the power to reschedule the release of foreign films to protect release width for local films. Walt Disney / Sony Pictures once more led the distribution market, taking an estimated market share of 29.4% of total admissions, ahead of UPI (14.7%), Central Partnership (13.7%) and 20th Century Fox CIS (13.5%).

Production and funding

Along with box office growth, Russian film production levels increased from 100 to 108 national feature films being released in 2017. This is the highest level registered in recent history. However, only 7 percent of all Russian films manage to break even according to the estimate of the Russian Cinema Fund, the country's main agency providing public film funding. In order to improve the financial situation of homegrown films the Cinema Fund plans to provide additional funding for the exhibition of Russian films abroad. The funding can be spent on dubbing, subtitling, marketing and advertising.

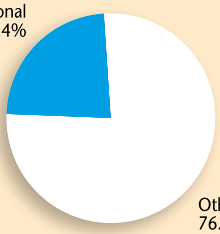
Sources: Nevafilm Research, *The Hollywood Reporter, Screen International*, OBS

Poland

Population 2017 e	38.0 million
GDP per capita 2017 e	13 429 USD
Gross box office 2017 e	1.07 bn PLN (284.8 M USD)
Admissions 2017 e	56.6 million
Average ticket price 2017 e	18.9 PLN (5.0 USD)
Average admissions per capita 2017 e	1.5
Screens 2016 | 2017 (1)	1 364 | ~
Digital screens 2016 | 2017 (2)	1 224 | 1 250
Digital 3D screens 2016 | 2017 (2)	710 | 710
National films released 2016 | 2017	54 | 71

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

Market shares 2017 e



Top 10 films by admissions in Poland | 2017

	Original title	Country of origin	Director	Distributor	Admissions
1	Listy do M. 3 (Letters to Santa 3)	PL	Tomasz Konecki	Kino Swiat	2 984 653
2	Botoks	PL	Patryk Vega	Kino Swiat	2 314 882
3	Star Wars: Episode VIII - The Last Jedi	US	Rian Johnson	Disney	1 826 598
4	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	UIP	1 804 144
5	Sing	US/JP	G. Jennings, C. Lourdelet	UIP	1 637 699
6	Fifty Shades Darker	US/CN	James Foley	UIP	1 475 238
7	Sztuka kochania (The Art of Loving)	PL	Jacek Bromski	Next Film	1 459 376
8	Pirates of the Caribbean: Dead Men Tell…	US	E. Sandberg, J. Rønning	Disney	1 367 866
9	Smurfs: The Lost Village	US/HK	Kelly Asbury	UIP	1 253 641
10	The Fate of the Furious	US/CN/JP	F. Gary Gray	UIP	1 045 812

Sources: Polski Instytut Sztuki Filmowej (PISF)/ boxoffice.pl

Distribution and exhibition

In 2017 Polish box office grew considerably for the fourth year in a row. Admission levels were up 9% on 2016 record levels reaching a new record high of 56.6 million. Driven by a slight increase in average ticket price, GBO takings surpassed the PLN 1 billion barrier for the first time in history, climbing to PLN 1.07 billion (USD 285 million).

As in 2016 the Polish box office was topped by two domestic films. Selling almost 3 million tickets in 2017, the third part of the Christmas-themed romantic comedy series, *Letters to Santa 3*, led the charts and became the most successful Polish film in history, followed by medical thriller *Botoks* (2.3 million). Along with *The Art of Loving* a total of three national films ranked among the top 10 films, compared to five in 2016. Cumulatively Polish films took a market share of 23.4%, slightly down from 25.0%. While Polish films hence confirmed their strong results of 2016, box office growth in 2017 was driven in equal parts by increased admissions to US, European and films from other parts of the world. UIP led Poland's distribution market in 2017, taking 25.8% of total GBO, followed by Kino Swiat (19.2%), Disney (13.7%) and Monolith (10.7%).

Production and funding

A total of 71 Polish films, including 14 minority co-productions, were produced in 2017: 17 films more than in 2016 and the highest production level in recent history. Film production in Poland is publicly supported by the Polish Film Institute (PISF) as well as a network of 12 regional funds. In 2017 the PISF granted approximately USD 36 million for film production and set a new operational priority for micro budget productions. A new director of the PISF was appointed in late 2017 following the surprise dismissal of the previous incumbent. In 2017 the Polish government announced plans to introduce a 25% cash rebate system on qualifying Polish production costs available for local as well as international film and high-end TV drama productions. The PISF expects the cash rebate system to be introduced in the first half of 2018.

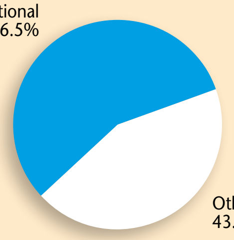
Sources: Polish Film Institute (PISF), *FilmNewEurope*, *Variety*, OBS

Turkey

Population 2017 e	79.8 million
GDP per capita 2017 e	10 434 USD
Gross box office 2017 e	871.0 M TRY (239.1 M USD)
Admissions 2017 e	71.2 million
Average ticket price 2017 e	12.2 TRY (3.4 USD)
Average admissions per capita 2017 e	0.9
Screens 2016 | 2017 (1)	2 826 | 3 013
Digital screens 2016 | 2017 (2)	2 443 | 2 630
Digital 3D screens 2016 | 2017 (2)	629 | 700
National films released 2016 | 2017	138 | 148

(1) Source: Antrakt - Deniz Yavuz (2) Source: MEDIA Salles

Market shares 2017 e



Top 10 films by admissions in Turkey | 2017

	Original title	Country of origin	Director	Distributor	Admissions
1	Recep Ivedik 5	TR	Togan Gökbakar	CGV Mars Dagıtım	7 437 050
2	Ayla (Ayla: The Daughter of War)	TR	Can Ulkay	Warner Bros.	5 287 656
3	Aile Arasinda	TR	Ozan Aciktan	CGV Mars Dagıtım	3 384 109
4	Çalgı Çengi Ikimiz	TR	Selçuk Aydemir	Pinema	2 798 016
5	The Fate of the Furious	US/CN/JP	F. Gary Gray	UIP	2 656 286
6	Yol Arkadasım	TR	Bedran Güzel	CGV Mars Dagıtım	1 961 301
7	Olanlar Oldu	TR	Hakan Algül	CGV Mars Dagıtım	1 811 081
8	Pirates of the Caribbean: Dead Men…	US	E. Sandberg, J. Rønning	UIP	1 529 857
9	Moana	US	R. Clements, J. Musker, …	UIP	1 337 112
10	Kolonya Cumhuriyeti	TR	Murat Kepez	CGV Mars Dagıtım	1 114 318

Source: Antrakt - Deniz Yavuz

Distribution and exhibition

Following a two year period of stagnating cinema attendance, the Turkish cinema market grew by over 22% to a whopping 71.2 million ticket sales in 2017. This is the highest level registered since the 1980s and further strengthens Turkey's position as Europe's 7th largest theatrical market in terms of admissions. Spurred by increasing ticket price GBO revenues increased by almost 26% and reached a record high of TRY 871 million. Measured in US dollars the increase in GBO is of course significantly less pronounced due to the devaluation of the Turkish lira.

Turkey is the only European market where local films manage to capture a market share of over 50%. And 2017 proved no exception with Turkish films accounting for seven of the top 10 films and 56.5% of total admissions. Selling over 7.4 million tickets the 5th instalment of the comedy franchise *Recep Ivedik* clearly stood out and became the highest grossing Turkish film in history. Among Europe's largest theatrical markets, Turkey is the by far most concentrated. In 2017, the top 10 titles accounted for 40% and the top three distributors cumulatively took over 77% of total admissions, led by the vertically integrated CGV Mars Media Group (33%) – which also leads the exhibition market – followed by UIP (27%) and Warner Bros (17%).

Production and funding

A total of 148 Turkish films were released in 2017. This is the highest production level in decades. While a few local studios which mainly produce comedy blockbusters are in a position to self-finance production, the vast majority of Turkish filmmakers struggle to finance their films. In 2017 only 29 out of the 148 newly released films benefitted from the Ministry's public support which amounted to TRY 25.6 million (USD 7 million). Smaller funding opportunities and prizes provided by film festivals are therefore an important financing source. In this context, broad sections of the Turkish film industry were upset to see the national feature film competition section of the Antalya Film Festival, one of the two largest festivals in the country, being cancelled/merged with the international section which caused cinema associations to boycott the festival.

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

Other Western Europe

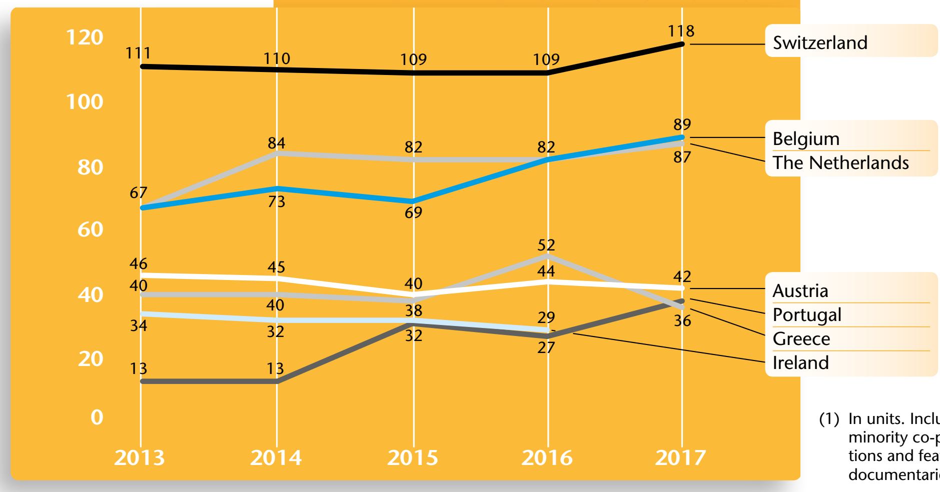
	Austria	Belgium	Greece	Ireland	Netherlands	Portugal	Switzerland
Population 2017 e (million)	8.8	11.4	10.8	4.8	17.1	10.3	8.4
GDP per capita 2017 e (USD)	46 436	43 243	18 945	68 604	48 272	20 575	80 837
Gross box office 2017 (M USD)	148.3	181.9	73.5	128.8	341.0	92.3	208.4
Admissions 2017 (million)	14.6	19.6	10.1	16.1	36.0	15.6	13.5
Average ticket price 2017 (USD)	10.2	9.3	7.3	8.0	9.5	5.9	15.4
Average admissions per capita 2017	1.7	1.7	0.9	3.4	2.1	1.5	1.6
Screens 2017 e (1)	556	523	547	496 (3)	944 (3)	571	581
Digital screens 2017 (2)	561	525	390	505	959	526	573
Digital 3D screens 2017 (2)	338	180	155	265	514	255	310
National market shares 2017 e	5.7%	8.4%	10.0%	2.4%	12.0%	2.6%	7.3%

(1) National data source (2) Source: MEDIA Salles (3) 2016

Number of feature films produced by selected Western European countries (1) | 2013-2017

In units.

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

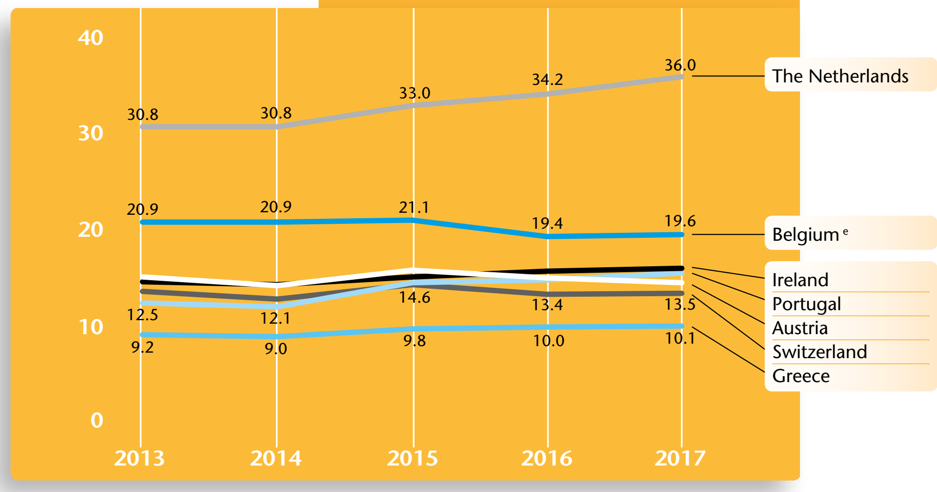


(1) In units. Including minority co-productions and feature documentaries.

Admissions in selected Western European countries | 2013-2017

In millions.

Sources: OFI /SPF Economie, Cinedata, VAF, CFWB / IFB, CSA / GFC / MaccsBox - NVB & NVF / ICA / OFS / OBS



Top 10 films by admissions in the Netherlands | 2017

	Original title	Country of origin	Director	Distributor	Admissions
1	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	UPI	1 337 380
2	Pirates of the Caribbean: Dead…	US	E. Sandberg, J. Rønning	Walt Disney	1 018 634
3	Beauty and the Beast	US	Bill Condon	Walt Disney	850 280
4	The Fate of the Furious	US/CN/JP	F. Gary Gray	UPI	848 174
5	The Boss Baby	US	Tom McGrath	Warner Bros.	800 978
6	Sing	US/JP	G. Jennings, C. Lourdelet	UPI	798 401
7	Star Wars: Episode VIII - The…	US	Rian Johnson	Walt Disney	764 026
8	Dunkirk	GB INC/US…	Christopher Nolan	Warner Bros.	755 660
9	Fifty Shades Darker	US/CN	James Foley	UPI	685 802
10	It	US/CA	Andy Muschietti	Warner Bros.	580 667

Sources: MaccsBox - NVB & NVF

Top 10 films by admissions in Belgium | 2017

	Original title	Country of origin	Director	Distributor	Admissions
1	Beauty and the Beast	US	Bill Condon	Walt Disney	674 558
2	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	Sony Pictures Universal	629 941
3	Star Wars: Episode VIII - The…	US	Rian Johnson	Walt Disney	560 739
4	The Fate of the Furious	US/CN/JP	F. Gary Gray	Sony Pictures Universal	531 116
5	Pirates of the Caribbean: Dead…	US	E. Sandberg, J. Rønning	Walt Disney	512 599
6	Fifty Shades Darker	US/CN	James Foley	Sony Pictures Universal	469 579
7	The Boss Baby	US	Tom McGrath	20th Century Fox	449 123
8	Dunkirk	GB INC/US…	Christopher Nolan	Warner Bros.	396 955
9	It	US/CA	Andy Muschietti	Warner Bros.	374 426
10	La La Land	US	Damien Chazelle	Belga Film	344 930

Sources: CFWB, VAF, Cinedata

Top 10 films by admissions in Portugal | 2017

	Original title	Country of origin	Director	Distributor	Admissions
1	The Fate of the Furious	US/CN/JP	F. Gary Gray	NOS Luso. Audiovisuais	787 724
2	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	NOS Luso. Audiovisuais	589 240
3	Beauty and the Beast	US	Bill Condon	NOS Luso. Audiovisuais	535 513
4	Fifty Shades Darker	US/CN	James Foley	NOS Luso. Audiovisuais	436 536
5	Pirates of the Caribbean: Dead…	US	E. Sandberg, J. Rønning	NOS Luso. Audiovisuais	410 212
6	The Boss Baby	US	Tom McGrath	Big Picture 2 Films	356 064
7	Star Wars: Episode VIII - The…	US	Rian Johnson	NOS Luso. Audiovisuais	346 370
8	The Emoji Movie	US	Tony Leondis	Big Picture 2 Films	314 160
9	Baywatch	US/CN/GB	Seth Gordon	NOS Luso. Audiovisuais	289 413
10	Coco	US	L. Unkrich, A. Molina	NOS Luso. Audiovisuais	277 917

Source: ICA

Top 10 films by admissions in Austria | 2017

	Original title	Country of origin	Director	Distributor	Admissions
1	Fack ju Göhte 3 (Suck Me…)	DE	Bora Dagtekin	Constantin	538 819
2	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	Universal Pictures	505 498
3	Fifty Shades Darker	US/CN	James Foley	Universal Pictures	454 919
4	Star Wars: Episode VIII - The…	US	Rian Johnson	Walt Disney	451 287
5	The Fate of the Furious	US/CN/JP	F. Gary Gray	Universal Pictures	441 131
6	Beauty and the Beast	US	Bill Condon	Walt Disney	401 072
7	Baywatch	US/CN/GB	Seth Gordon	Const/PPI	335 073
8	It	US/CA	Andy Muschietti	Warner Bros.	333 908
9	Pirates of the Caribbean: Dead…	US	E. Sandberg, J. Rønning	Walt Disney	320 150
10	Guardians of the Galaxy Vol. 2	US	James Gunn	Walt Disney	292 703

Sources: Austrian Film Institute (OFI) / comScore

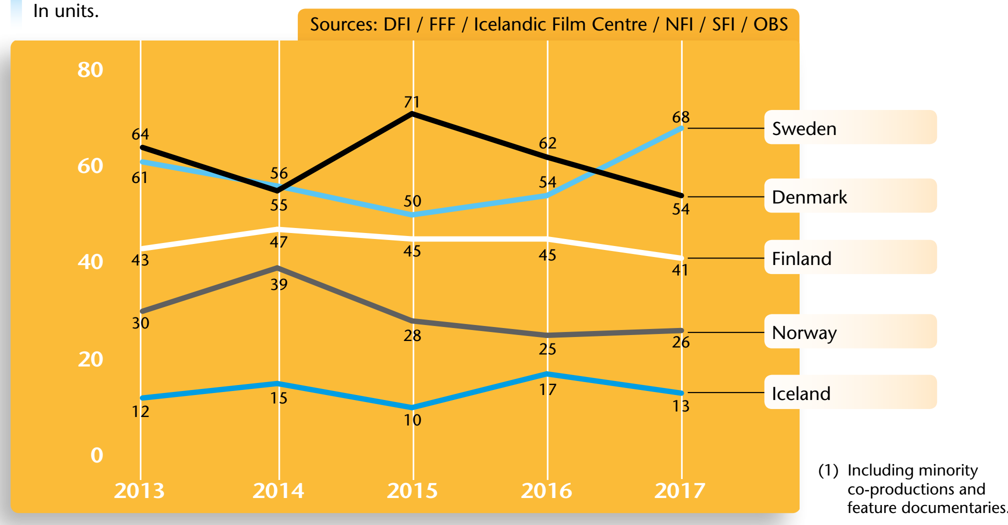
Nordic countries

	Denmark	Finland	Iceland	Norway	Sweden
Population 2017 e (million)	5.7	5.5	0.3	5.3	10.0
GDP per capita 2017 e (USD)	56 335	45 693	73 092	73 615	53 248
Gross box office 2017 (M USD)	164.1	101.1	15.8	166.4	226 (3)
Admissions 2017 (million)	12.5	9.0	1.4	11.8	16.9
Average ticket price 2017 (USD)	13.1	11.2	11.5	14.1	12.7 (3)
Average admissions per capita 2017	2.2	1.6	4.1	2.2	1.7
Screens 2017 e (1)	444	312	40	443	808 (3)
Digital screens 2017 (2)	444	320	39	443	850
Digital 3D screens 2017 (2)	262	230	30	289	540
National market shares 2017 e	20.2%	27.0%	8.9%	18.1%	17.2%

(1) National data source (2) Source: MEDIA Salles (3) 2016

Number of feature films produced by Nordic countries (1) | 2013-2017

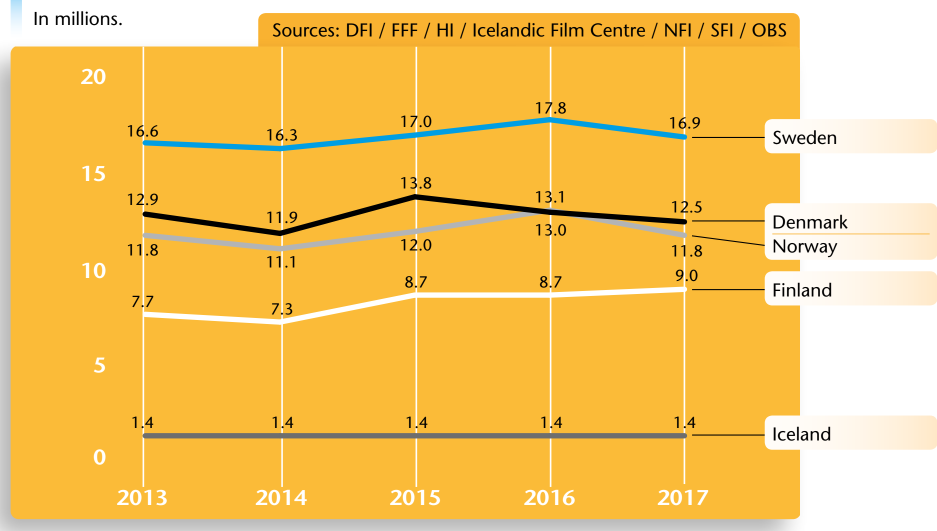
In units.



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

Admissions in Nordic countries | 2013-2017

In millions.



Top 10 films by admissions in Sweden | 2017

	Original title	Country of origin	Director	Distributor	Admissions
1	Solsidan	SE	M. & F. Herngren	SF Film	784 094
2	Star Wars: Episode VIII - The Last Jedi	US	Rian Johnson	Walt Disney	697 045
3	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	Universal/UIP	613 266
4	Beauty and the Beast	US	Bill Condon	Walt Disney	524 111
5	It	US/CA	Andy Muschietti	Warner/Fox	500 389
6	Moana	US	R. Clements, J. Musker, …	Walt Disney	475 918
7	Pirates of the Caribbean: Dead Men…	US	E. Sandberg, J. Rønning	Walt Disney	475 858
8	Hundraettåringen som smet från…	SE	M. & F. Herngren	Walt Disney	398 456
9	The Boss Baby	US	Tom McGrath	20th Century Fox	381 831
10	Fifty Shades Darker	US/CN	James Foley	Universal/UIP	381 309

Source: Swedish Film Institute

Top 10 films by admissions in Denmark | 2017

	Original title	Country of origin	Director	Distributor	Admissions
1	Star Wars: Episode VIII - The Last Jedi	US	Rian Johnson	Walt Disney	477 852
2	Beauty and the Beast	US	Bill Condon	Walt Disney	399 227
3	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	UIP	383 667
4	Fifty Shades Darker	US/CN	James Foley	UIP	331 658
5	Alle for Tre (Three Heists and…)	DK	Rasmus Heide	Nordisk Film Distr.	322 025
6	Moana	US	R. Clements, J. Musker, …	Walt Disney	315 999
7	Dunkirk	GB INC/US/…	Christopher Nolan	SF Studios	303 625
8	The Fate of the Furious	US/CN/JP	F. Gary Gray	UIP	275 656
9	The Boss Baby	US	Tom McGrath	SF Studios	265 830
10	Dræberne fra Nibe (Small Town…)	DK	Ole Bornedal	Nordisk Film Distr.	254 619

Sources: Statistics Denmark / DFI

Top 10 films by admissions in Norway | 2017

	Original title	Country of origin	Director	Distributor	Admissions
1	Star Wars: Episode VIII - The Last Jedi	US	Rian Johnson	Walt Disney	401 785
2	Askeladden - I Dovregubbens hall	NO	Mikkel B. Sandemose	Nordisk Film Distr.	354 196
3	Beauty and the Beast	US	Bill Condon	Walt Disney	349 392
4	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	UIP	322 630
5	Pirates of the Caribbean: Dead Men…	US	E. Sandberg, J. Rønning	Walt Disney	316 113
6	Moana	US	R. Clements, J. Musker, …	Walt Disney	298 201
7	The Fate of the Furious	US/CN/JP	F. Gary Gray	UIP	285 088
8	The Boss Baby	US	Tom McGrath	20th Century Fox	278 181
9	Fifty Shades Darker	US/CN	James Foley	UIP	245 449
10	It	US/CA	Andy Muschietti	SF Norway	240 566

Source: Film og Kino

Top 10 films by admissions in Iceland | 2017

	Original title	Country of origin	Director	Distributor	Admissions
1	Star Wars: Episode VIII - The Last Jedi	US	Rian Johnson	Samfilm	50 645
2	Ég man þig	IS	Óskar Thór Axelsson	Sena	47 368
3	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	Myndform	44 009
4	Undir trénu	IS/FR	H.G.Sigurðsson	Sena	42 427
5	Beauty and the Beast	US	Bill Condon	Samfilm	38 552
6	Thor: Ragnarok	US	Taika Waititi	Samfilm	38 039
7	Guardians of the Galaxy Vol. 2	US	James Gunn	Samfilm	36 961
8	The Fate of the Furious	US/CN/JP	F. Gary Gray	Myndform	29 256
9	Dunkirk	GB INC/US/…	Christopher Nolan	Samfilm	28 074
10	The LEGO Batman Movie	US	Chris McKay	Samfilm	27 443

Source: Icelandic Film Centre

Baltics and Central Europe

	Czech Republic	Estonia	Hungary	Latvia	Lithuania	Slovenia	Slovakia
Population 2017 e (million)	10.6	1.3	9.8	2.0	2.8	2.1	5.4
GDP per capita 2017 e (USD)	19 818	19 618	13 460	15 403	16 443	23 277	17 491
Gross box office 2017 (M USD)	86.0	21.9	75.4	20.7	23.1	13.2	39.0
Admissions 2017 (million)	15.2	3.5	14.9	2.5	4.1	2.3	6.7
Average ticket price 2017 (USD)	5.6	6.2	5.1	8.3	5.7	5.7	5.8
Average admissions per capita 2017	1.4	2.7	1.5	1.3	1.4	1.1	1.2
Screens 2017 e (1)	736	60	360	61	79	111	248
Digital screens 2017 (2)	513	73	331	60	58	111	189
Digital 3D screens 2017 (2)	299	39	188	30	32	44	100
Films produced 2017	54	18	19	20	11	21	21
National market shares 2017 e	22.2%	8.0%	9.7%	7.8%	21.4%	7.3%	21.4%

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

Top 10 films by admissions in the Czech Republic | 2017

	Original title	Country of origin	Director	Distributor	Admissions
1	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	CinemArt	610 882
2	Pirates of the Caribbean: Dead Men…	US	E. Sandberg, J. Rønning	Falcon	567 665
3	Po strnisti bos (Barefoot)	CZ/SK/DK	Jan Sverák	Bioscop	505 282
4	Star Wars: Episode VIII - The Last Jedi	US	Rian Johnson	Falcon	439 677
5	Thor: Ragnarok	US	Taika Waititi	Falcon	431 793
6	Spunti na vode	CZ	Jirí Chlumský	Bioscop	401 979
7	Smurfs: The Lost Village	US/HK	Kelly Asbury	Falcon	394 431
8	Beauty and the Beast	US	Bill Condon	Falcon	390 246
9	Fifty Shades Darker	US/CN	James Foley	CinemArt	377 567
10	Andel Páne 2 (Angel of the Lord 2)	CZ	Jirí Strach	Falcon	365 376

Sources: Czech State Cinematography Fund, Unie Filmovvych Distributoru

Top 10 films by admissions in Hungary | 2017

	Original title	Country of origin	Director	Distributor	Admissions
1	Star Wars: Episode VIII - The Last Jedi	US	Rian Johnson	Forum-Hungary	751 257
2	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	UIP-Dunafilm	585 132
3	Kincsem	HU	Gábor Herendi	Forum-Hungary	456 499
4	Thor: Ragnarok	US	Taika Waititi	Forum-Hungary	368 327
5	The Fate of the Furious	US/CN/JP	F. Gary Gray	UIP-Dunafilm	341 954
6	Pirates of the Caribbean: Dead Men…	US	E. Sandberg, J. Rønning	Forum-Hungary	334 191
7	It	US/CA	Andy Muschietti	Intercom	305 901
8	Guardians of the Galaxy Vol. 2	US	James Gunn	Forum-Hungary	295 892
9	Beauty and the Beast	US	Bill Condon	Forum-Hungary	290 945
10	Baywatch	US/CN/GB	Seth Gordon	UIP-Dunafilm	287 401

Source: National Film Office

Top 10 films by admissions in Slovakia | 2017

	Original title	Country of origin	Director	Distributor	Admissions
1	Vsetko alebo nic (All or Nothing)	SK/CZ/PL	Marta Ferencová	Continental Film	340 535
2	The Line	SK/UA	Peter Bebjak	Continental Film	329 349
3	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	CinemaArt	296 178
4	Únos	SK	M. Cengel-Solcanská	Continental Film	278 763
5	The Boss Baby	US	Tom McGrath	CinemaArt	195 362
6	Fifty Shades Darker	US/CN	James Foley	CinemaArt	189 138
7	Smurfs: The Lost Village	US/HK	Kelly Asbury	Itafilm	134 238
8	The Fate of the Furious	US/CN/JP	F. Gary Gray	CinemaArt	130 640
9	It	US/CA	Andy Muschietti	Continental Film	117 046
10	Cuky Luky film	SK	Karel Janák	Itafilm	116 139

Sources: Slovak Film Institute, UFD

South-Eastern Europe

	BA (1)	Bulgaria	Croatia	Cyprus	Georgia	Montenegro	FYROM (2)	Romania
Population 2017 e (million)	3.5	7.1	4.2	0.9	3.7	0.6	2.1	19.6
GDP per capita 2017 e (USD)	4 540	7 924	12 863	24 741	4 123	7 071	5 500	10 372
Gross box office 2017 (M USD)	2.7 (3)	29.2	20.3	6.8	4.2	1.2	1.4	65.8
Admissions 2017 (million)	0.9 (3)	5.6	4.5	0.7	1.3	0.3	0.4 (3)	13.9
Average ticket price 2017 (USD)	2.9 (3)	5.2	4.5	9.1	3.3	4.1	4.0 (3)	4.7
Average admissions per capita 2017	0.3 (3)	0.8	1.1	0.9	0.3	0.5	0.2 (3)	0.7
Screens 2017 e (4)	34 (3)	216	179	32	23	22 (3)	–	386
Digital screens 2017 (5)	~	225	190	35	23	6 (3)	~	369
Digital 3D screens 2017 (5)	~	167	130	14	17	~	~	216
Films produced 2017	11 (3)	24	33	5	19	5 (3)	17 (3)	41
National market shares 2017 e	0.2% (3)	9.2%	2.6%	–	5.5%	–	–	2.3%

(1) Bosnia-Herzegovina (2) Former Yugoslav Republic of Macedonia (3) 2016 (4) National data source (5) Source: MEDIA Salles

Top 10 films by admissions in Romania | 2017

	Original title	Country of origin	Director	Distributor	Admissions
1	The Fate of the Furious	US/CN/JP	F. Gary Gray	Ro-Image 2000	677 152
2	Pirates of the Caribbean: Dead Men…	US	E. Sandberg, J. Rønning	Forum Film	412 387
3	Fifty Shades Darker	US/CN	James Foley	Ro-Image 2000	367 536
4	Thor: Ragnarok	US	Taika Waititi	Forum Film	348 605
5	Beauty and the Beast	US	Bill Condon	Forum Film	303 050
6	Star Wars: Episode VIII - The Last Jedi	US	Rian Johnson	Forum Film	302 151
7	The Boss Baby	US	Tom McGrath	Odeon Cineplex	281 082
8	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	Ro-Image 2000	269 187
9	Justice League	US	Zack Snyder	Vertical Ent.	263 832
10	Assassin's Creed	US/FR/GB/…	Justin Kurzel	Odeon Cineplex	250 179

Source: Centrul National al Cinematografiei

Top 10 films by admissions in Bulgaria | 2017

	Original title	Country of origin	Director	Distributor	Admissions
1	The Fate of the Furious	US/CN/JP	F. Gary Gray	Forum Film	273 110
2	Star Wars: Episode VIII - The Last Jedi	US	Rian Johnson	Forum Film	218 647
3	Beauty and the Beast	US	Bill Condon	Forum Film	196 958
4	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	Forum Film	186 894
5	Pirates of the Caribbean: Dead Men…	US	E. Sandberg, J. Rønning	Forum Film	180 714
6	xXx: Return of Xander Cage	US/CN/CA	D.J. Caruso	Forum Film	139 892
7	Smurfs: The Lost Village	US/HK	Kelly Asbury	Aleksandra	139 864
8	Fifty Shades Darker	US/CN	James Foley	Forum Film	136 058
9	The Boss Baby	US	Tom McGrath	Aleksandra	133 457
10	Heights	BG/MK	Victor Bojinov	A Plus Films	130 470

Source: Bulgarian National Film Center

Top 10 films by admissions in Croatia | 2017

	Original title	Country of origin	Director	Distributor	Admissions
1	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	Blitz	162 334
2	Star Wars: Episode VIII - The Last Jedi	US	Rian Johnson	2iFilm	132 540
3	The Fate of the Furious	US/CN/JP	F. Gary Gray	Blitz	125 178
4	Fifty Shades Darker	US/CN	James Foley	Blitz	116 585
5	The Boss Baby	US	Tom McGrath	Blitz	107 416
6	It	US/CA	Andy Muschietti	Blitz	106 771
7	Wonder	US/HK	Stephen Chbosky	Blitz	99 163
8	Smurfs: The Lost Village	US/HK	Kelly Asbury	CF	85 989
9	La La Land	US	Damien Chazelle	Blitz	85 027
10	Thor: Ragnarok	US	Taika Waititi	2iFilm	79 702

Source: HAVCR (Croatian Audiovisual Centre)

North America

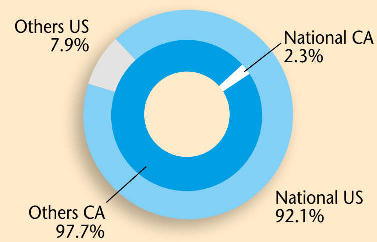
	North America	US	Canada
Population 2017 e (million)	362.1	325.4	36.6
GDP per capita 2017 e (USD)	58 006	59 495	44 773
Gross box office 2017 e (M USD) (1)	11 100.0	10 524.8 (2)	765.7
Admissions 2017 e (million) (1)	1 240.0	1 216.75 (2)	97.26 (3)
Average ticket price 2017 e (USD)	9.0	8.6 (2)	7.9 (2)
Average admissions per capita 2017 e	3.4	3.8 (2)	2.7 (2)
Screens 2017 e	43 500	40 393	3 107
Digital screens 2017 e	43 216	40 109	3 107
Digital 3D screens 2017 e	16 978	15 530	1 448

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

(2) 2016.

(3) March 2016 to March 2017.

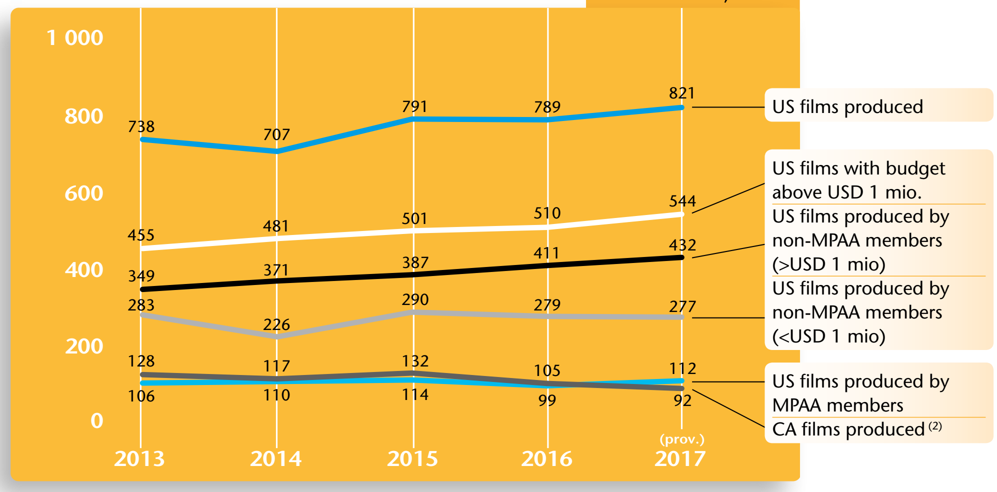
Market shares 2017 e



Number of US (1) and Canadian feature films produced | 2013-2017

In units.

Sources: MPAA, CMPA

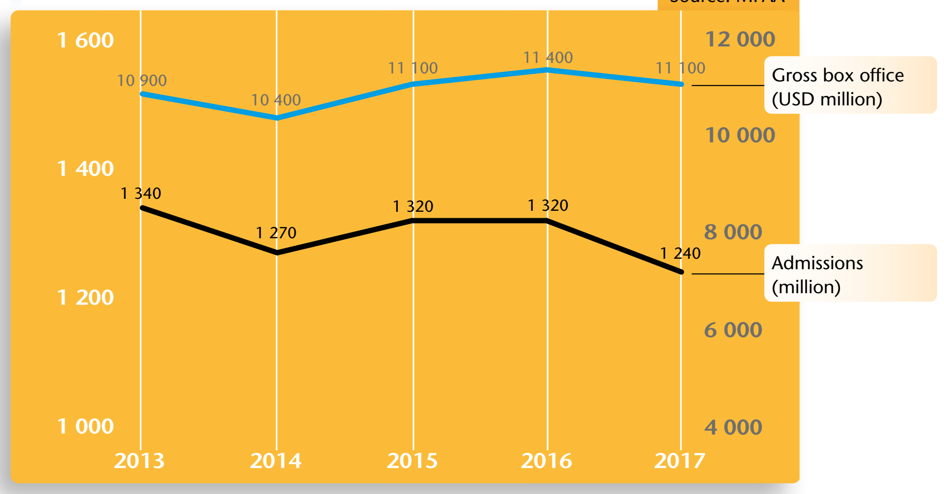


(1) English-language films (Including co-productions). Does not include documentaries, films with budgets below USD 200 000, student films and works not intended for theatrical release.

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

Admissions and gross box office in the US & Canada | 2013-2017

Source: MPAA



Top 20 films by admissions in North America | 2017 e

	Original title	Country of origin	Director	Distributor	Admissions
1	Beauty and the Beast	US	Bill Condon	Walt Disney	56 630 804
2	Star Wars: Episode VIII - The Last Jedi	US	Rian Johnson	Walt Disney	52 213 283
3	Wonder Woman	US/CN/HK	Patty Jenkins	Warner Bros.	46 355 438
4	Guardians of the Galaxy Vol. 2	US	James Gunn	Walt Disney	43 799 224
5	Spider-Man: Homecoming	US	Jon Watts	Sony Pictures	37 550 353
6	It	US/CA	Andy Muschietti	Warner Bros.	36 795 701
7	Thor: Ragnarok	US	Taika Waititi	Walt Disney	34 873 060
8	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	Universal Pictures	29 733 066
9	Logan	US	James Mangold	20th Century Fox	25 424 389
10	The Fate of the Furious	US/CN/JP	F. Gary Gray	Universal Pictures	25 394 200
11	Justice League	US	Zack Snyder	Warner Bros.	25 207 748
12	Dunkirk	GB INC/US/…	Christopher Nolan	Warner Bros.	21 165 522
13	The LEGO Batman Movie	US	Chris McKay	Warner Bros.	19 747 233
14	Get Out	US/JP	Jordan Peele	Universal Pictures	19 740 096
15	The Boss Baby	US	Tom McGrath	20th Century Fox	19 663 261
16	Pirates of the Caribbean: Dead Men…	US	E. Sandberg, J. Rønning	Walt Disney	19 388 637
17	Coco	US	L. Unkrich, A. Molina	Walt Disney	19 367 691
18	Kong: Skull Island	US/CN	Jordan Vogt-Roberts	Warner Bros.	18 882 337
19	Hidden Figures	US	Theodore Melfi	20th Century Fox	18 700 316
20	Cars 3	US	Brian Fee	Walt Disney	17 179 899

Sources: LUMIERE/OBS, comScore

Distribution and exhibition

Cinema attendance in North America took a slump in 2017, as the number of admissions plummeted to 1.24 billion, down 6.1% on the previous year, a record low since at least 1992. The downturn was mainly due to poor box office performance during the summer. In turn, due to a growing average ticket price, GBO fell by only 2.6% to USD 11.1 billion, on a par with 2015 levels.

The number of films released continued to increase in 2017, rising from 718 to 777 titles. Once again, the box office showed a high concentration, with 20 films generating 47% of total admissions. Disney's remake of *Beauty and the Beast* was the box office winner for 2017, taking 56.6. million admissions, followed by the latest instalment of the *Star Wars* franchise, *The Last Jedi*, (52.2 million) and *Wonder Woman* (46.4 million). In Canada, the bilingual Quebec franchise *Bon Cop, Bad Cop 2* topped the list of domestic productions, followed by the French-language comedy *De père en flic 2*.

The overall number of screens in the US and Canada remained stable in the 2017, totaling 43 500 screens. In the US 585 analog theatres converted to digital or shut down during the year resulting in an almost complete digitisation rate (99%).

Production and funding

US production volume increased on the previous year, with a total of 821 titles being produced in 2017 (compared to 789 in 2016). The surge was driven by the upward trend for productions over USD 1 million, particularly by the recovery of Hollywood studio productions, up to 112 titles after dropping to 99 in 2016, while the number of low-budget productions by non-MPAA members remained practically stable with 277 films (versus 279 in 2016).

In the US, a much-debated tax reform introduced in December 2017 affects the national film industry on two main levels: on the one hand, it removes the deduction limit of USD 15 million for US-based qualified production costs, which now however can only be claimed after the film is released; on the other hand, corporate tax rates were lowered from 35% to 21%.

Canada produced 92 feature films in fiscal year 2016-2017, 13 less than in 2016 and marking a 10-year low. However, the total production investment grew by 3.6% to CAD 318 million, implying an increase of the average budget of nearly 30%. French-language productions represented about one third of national films produced, contributing CAD 101 million in investment spend. After Canada joined the Council of Europe's *Eurimages* co-production fund in 2017, three Canadian co-productions were selected for funding in its first year of membership.

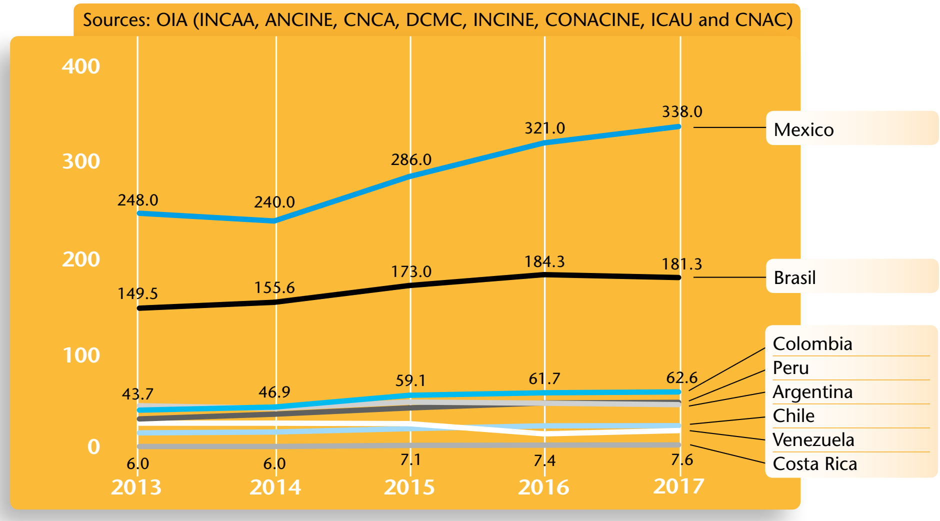
Sources: MPAA, CMPA, Telefilm Canada, *Variety, The Hollywood Reporter,* comScore, OBS

Latin America

	Argentina	Brazil	Chile	Colombia	Costa Rica	Mexico	Peru	Venezuela
Population 2017 (million)	44.1	207.7	18.4	49.3	5.0	123.5	31.8	31.4
GDP per capita 2017 (M USD)	14 062	10 020	14 315	6 238	11 857	9 249	6 598	6 850
Gross box office 2017 (M USD) [e]	292.5	851.5	136.7	184.6	38.3	853.5	174.0	~
Admissions 2017 (million)	49.4	181.3	27.6	62.6	7.6	338.0	51.8	22.5
Average ticket price 2017 (USD)	5.9	4.7	4.9	2.9	5.0	2.5	3.4	~
Average admissions per capita 2017 [e]	1.1	0.9	1.5	1.3	1.5	2.7	1.6	0.7
Screens 2017	963	3 220	411	1 082	150	6 633	625	427
Digital screens 2017 [e]	913	3 220	410	1 082	150	6 633	625	407
National market shares 2017	13.2%	9.6%	0.7%	5.9%	7.4%	7.0%	9.9%	3.0%

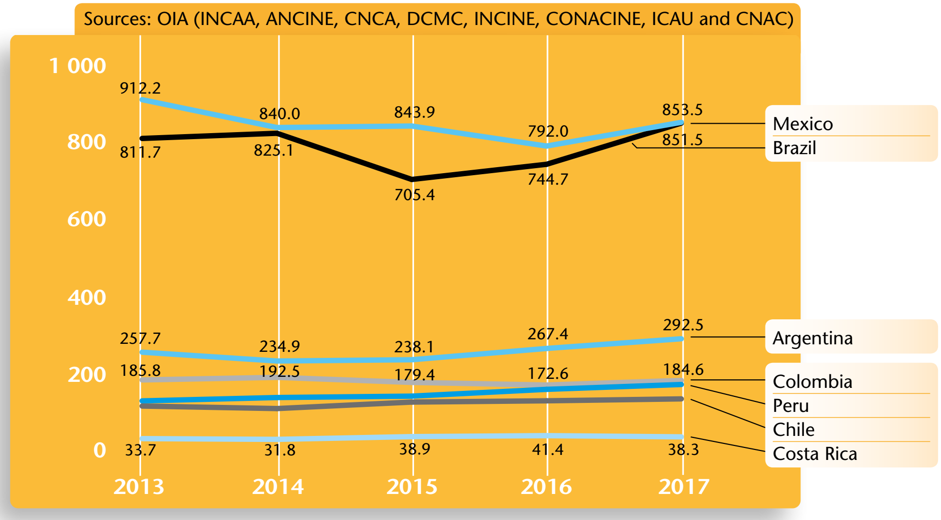
Admissions in Latin America | 2013-2017

In millions.



Gross box office in Latin America | 2013-2017 [e]

In USD million.



Overview

After a 16% surge in attendance in 2015 and a further hike by 6.7% in 2016, aggregated attendance levels in the eight key Latin American markets covered slowed down in 2017, increasing by 2.5% year-on-year. This was mostly due to the deceleration of the two powerhouses of Latin American box office, Mexico and Brazil, but also of Peru and Chile, which had recently shown double-digit year-on-year growth up until 2017.

602 films were produced in the eight countries covered in 2017, 34 more than the year before. In fact, production volume went up by 21.6% over the last five years – by 6% year-on-year, triggered by remarkable growth in Argentina and Brazil. Moreover, Costa Rica produced 12 films in 2017, ten more than the year before, while Venezuela produced 10 films less than in 2016 (16 features in 2017). Chilean production *A Fantastic Woman (Una mujer fantástica)* won Chile's first Foreign Language Film Oscar.

The Latin American theatrical infrastructure has been growing at a rather constant pace since the beginning of the decade – by 50% over the last decade and by 4.5% on 2016, up to 13 511 screens in 2017, with Venezuela being the only country with a relevant drop (-4.9% year-on-year, down to 427 screens). Almost all territories are currently fully (or almost) digitised, with Argentina and Venezuela (94.8% and 95.3% digital penetration rate respectively) lagging slightly behind.

Mexico

Attendance levels have almost doubled over the last decade in the largest Latin American market; with 338 million admissions in 2017 (a 5.3% hike on the previous year), GBO rose by 7.8% y-o-y. In a BO chart clearly dominated by American blockbusters, Mexican-Chilean co-production *Do It Like a Man (Hazlo como hombre)* and coming-of-age comedy *3 Idiots (3 Idiotas)* were the highest-grossing domestic productions of the year, the former becoming the fifth most-watched movie ever in the country. Overall, Mexican films got 7% of the domestic market share (down from 10% in 2016, yet in line with the average in recent years).

In turn, production volume broke its all-time record with 176 films shot in the country in 2017, far surpassing the levels of the golden era of Mexican cinema in the 1950s. However, only part of these productions got a theatrical release (88 features in 2017, well in line with the previous year).

Not only did Mexico become fully digitized in 2017, but it also unveiled more than 400 screens during the year - that is, a 6.6% y-o-y growth, up to 6 633 screens, with the country having the largest level of screens per capita among the key Latin American markets.

Brazil

Despite attendance levels decreasing for the first time in over a decade - by just 1.6% on 2016, down to 181.3 million admissions, GBO reached an all-time record of BRR 2.7 billion (USD 851.5 million).

Domestic comedy sequel *My Mother Is A Character 2 (Minha Mãe é uma Peça 2: O Filme)* was the highest grossing Brazilian production of the year, making it to the top 10 Box Office list and becoming the third most-watched, highest grossing film ever in the country. In spite of this, the 9.6% market share for local productions was lower than in previous years.

Production levels continued to grow (by 13% on 2016, up to 160 films in 2017). Amidst increasing international cooperation - mainly with other Latin American countries, 2017 saw Brazil ratifying a co-production agreement with the UK and starting talks for another with France.

Argentina

Attendance levels fell for the second consecutive year (by 2.9% year-on-year, down to 49.4 million admissions in 2017). The 13.2% market share for local productions was slightly lower than the average of recent years; comedy *10 Days Without Mom (Mamá se fué de viaje)* became the highest-grossing domestic production of the year, making it into the top 10 box office list.

Production volume in the country more than doubled over the last decade, with growth accelerating in 2017 (220 films produced; that is, a 10.6% year-on-year hike). However, only part of the films produced in the country usually get a theatrical release.

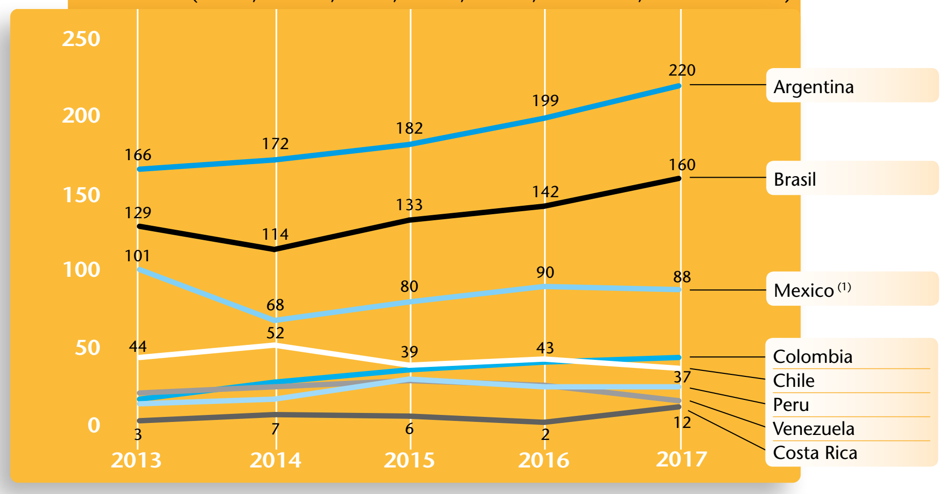
In turn, the Mendoza province unveiled a series of actions aiming at promoting production in the region, including the setting up of a fund and a film commission, as well as the reduction of taxes for film production.

Sources: Observatorio Iberoamericano del Audiovisual (OIA), INCAA, IMCINE, ANCINE, *Screen International, Variety,* OBS

Number of national feature films released in Latin America | 2013-2017

In units.

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

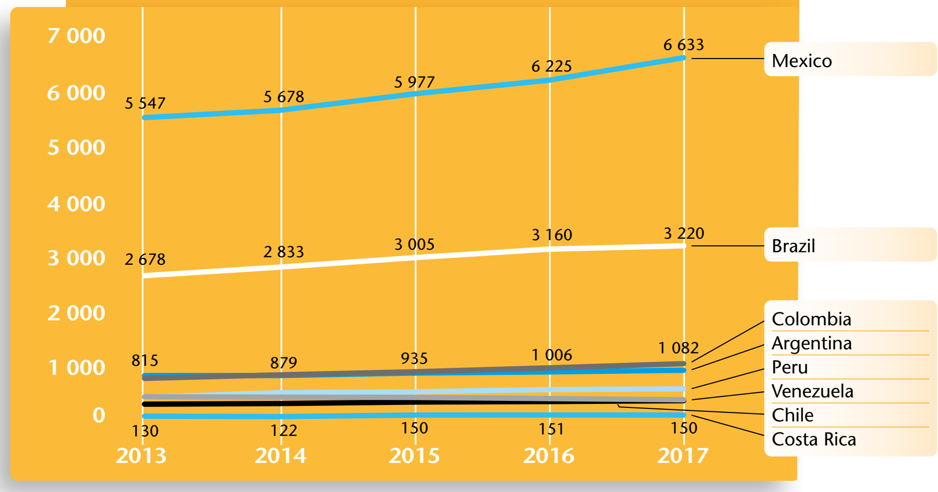


(1) Films released.

Number of screens in Latin America | 2013-2017

In units.

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



Top 10 films by admissions in Mexico | 2017

	Original title	Country of origin	Director	Admissions
1	Coco	US	Lee Unkrich, Adrian Molina	23 387 924
2	The Fate of the Furious	US/CN/JP	F. Gary Gray	14 210 108
3	Despicable Me 3	US	Pierre Coffin, Kyle Balda, Eric Guillon	14 048 161
4	Beauty and the Beast	US	Bill Condon	11 318 716
5	It	US/CA	Andy Muschietti	10 517 931
6	How to Be a Latin Lover	US	Ken Marino	10 279 385
7	The Boss Baby	US	Tom McGrath	10 039 306
8	Spider-Man: Homecoming	US	Jon Watts	9 846 562
9	Justice League	US	Zack Snyder	9 291 111
10	Wonder Woman	US/CN/HK	Patty Jenkins	8 346 131

Sources: OIA & INCINE

Top 10 films by admissions in Brazil | 2017

	Original title	Country of origin	Director	Admissions
1	Despicable Me 3	US	Pierre Coffin, Kyle Balda, Eric Guillon	8 989 024
2	The Fate of the Furious	US/CN/JP	F. Gary Gray	8 505 215
3	Justice League	US	Zack Snyder	8 442 364
4	Beauty and the Beast	US	Bill Condon	8 308 489
5	Wonder Woman	US/CN/HK	Patty Jenkins	7 011 338
6	Spider-Man: Homecoming	US	Jon Watts	6 686 736
7	Logan	US	James Mangold	6 400 985
8	Thor: Ragnarok	US	Taika Waititi	6 359 663
9	Minha Mãe é uma Peça 2: O Filme	BR	César Rodrigues	5 213 465
10	Moana	US	R. Clements, J. Musker, C. Williams, D. Hall	5 147 838

Sources: OIA & ANCINE

Top 10 films by admissions in Argentina | 2017

	Original title	Country of origin	Director	Admissions
1	Despicable Me 3	US	Pierre Coffin, Kyle Balda, Eric Guillon	3 872 217
2	The Fate of the Furious	US/CN/JP	F. Gary Gray	2 745 900
3	Beauty and the Beast	US	Bill Condon	2 078 692
4	It	US/CA	Andy Muschietti	1 917 292
5	Mamá se fue de viaje	AR	Ariel Winograd	1 703 057
6	Moana	US	R. Clements, J. Musker, C. Williams, D. Hall	1 510 806
7	The Boss Baby	US	Tom McGrath	1 428 330
8	Pirates of the Caribbean: Dead Men…	US	Espen Sandberg, Joachim Rønning	1 358 353
9	Cars 3	US	Brian Fee	1 302 999
10	Annabelle 2	US	David Sandberg	1 216 762

Sources: OIA & INCAA

Top 10 films by admissions in Chile | 2017

	Original title	Country of origin	Director	Admissions
1	Despicable Me 3	US	Pierre Coffin, Kyle Balda, Eric Guillon	1 643 278
2	The Fate of the Furious	US/CN/JP	F. Gary Gray	1 271 909
3	It	US/CA	Andy Muschietti	1 291 173
4	Moana	US	R. Clements, J. Musker, C. Williams, D. Hall	1 138 144
5	The Boss Baby	US	Tom McGrath	1 009 775
6	Beauty and the Beast	US	Bill Condon	947 426
7	Spider-Man: Homecoming	US	Jon Watts	846 975
8	Annabelle 2	US	David Sandberg	868 256
9	Pirates of the Caribbean: Dead Men…	US	Espen Sandberg, Joachim Rønning	830 030
10	Coco	US	Lee Unkrich, Adrian Molina	939 259

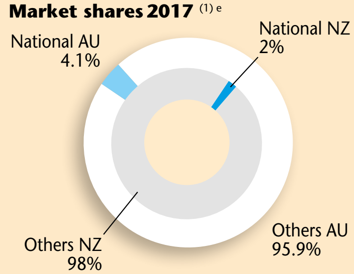
Sources: OIA & CNCA

Australia and New Zealand

	Australia	New Zealand
Population 2017 e (million)	24.8	4.8
GDP per capita 2017 e (USD)	56 135	41 629
Gross box office 2017 (M USD)	920.5	134.7
Admissions 2017 (million)	85.0	15.8
Average ticket price 2017 (USD)	10.8	8.5
Average admissions per capita 2017	3.4	3.4
Screens 2017	2 210	421
Digital screens 2017 e	1 879	421
Digital 3D screens 2017	972	184

(1) By GBO

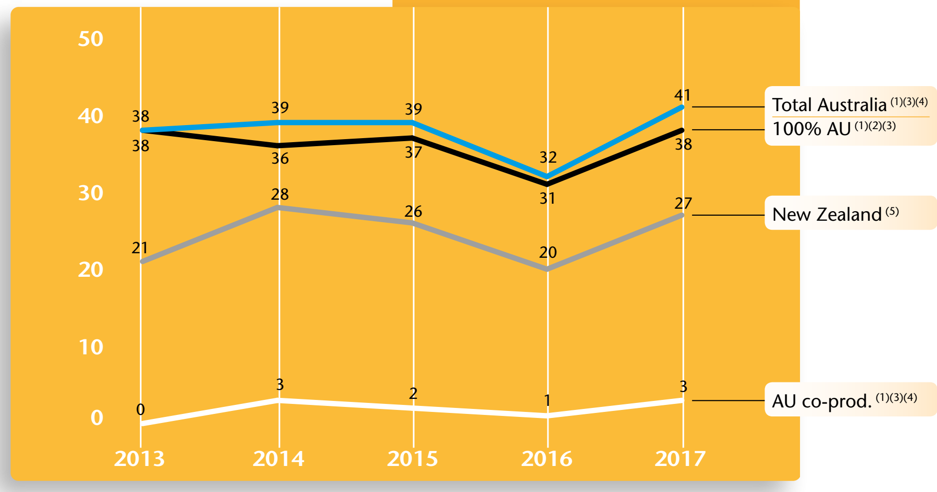
Market shares 2017 (1) e



Number of Australian and New Zealand feature films produced | 2013-2017

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.

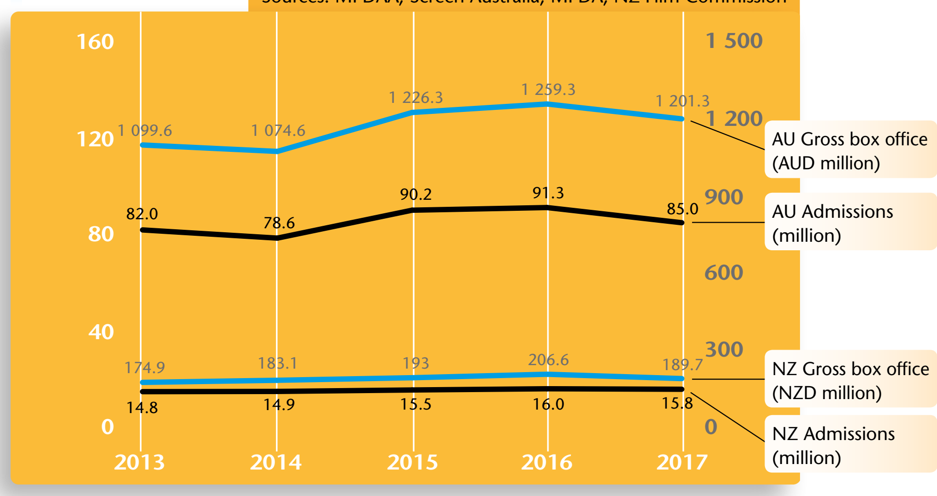
(3) Refers to the fiscal year ending that year.

(4) Does not include unofficial co-productions.

(5) Restated series. Feature films made in NZ with a theatrical release in the country or a paid screening in a NZ public film festival and/or available on a SVOD or TVOD platform; PDV only films are not included; official co-productions included.

Admissions and gross box office in Australia and New Zealand | 2013-2017

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



Top 10 films by admissions in Australia | 2017 [e]

Estimated admissions based on average ticket price of AUD 14.1.

	Original title	Country of origin	Director	Distributor	Admissions [e]
1	Beauty and the Beast	US	Bill Condon	Walt Disney	3 400 750
2	Star Wars: Episode VIII - The Last Jedi	US	Rian Johnson	Walt Disney	3 229 969
3	Thor: Ragnarok	US	Taika Waititi	Walt Disney	2 489 954
4	Guardians of the Galaxy Vol. 2	US	James Gunn	Walt Disney	2 336 331
5	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	Universal	2 335 128
6	Wonder Woman	US/CN/HK	Patty Jenkins	Warner Bros.	2 219 959
7	Lion	AU/GB/US	Garth Davis	Transmission	2 089 650
8	The Fate of the Furious	US/CN/JP	F. Gary Gray	Universal	2 016 081
9	Spider-Man: Homecoming	US	Jon Watts	Sony Pictures	1 822 503
10	It	US/CA	Andy Muschietti	Warner Bros.	1 679 781

Source: MPDAA

Top 10 films by admissions in New Zealand | 2017 [e]

Estimated admissions based on average ticket price of NZD 12.0.

	Original title	Country of origin	Director	Distributor	Admissions [e]
1	Thor: Ragnarok	US	Taika Waititi	Walt Disney	583 841
2	Beauty and the Beast	US	Bill Condon	Walt Disney	537 909
3	Star Wars: Episode VIII - The Last Jedi	US	Rian Johnson	Walt Disney	486 980
4	Dunkirk	GB/NL/...	Christopher Nolan	Warner Bros.	485 946
5	Moana	US	R. Clements, J. Musker...	Walt Disney	456 590
6	Guardians of the Galaxy Vol. 2	US	James Gunn	Walt Disney	448 513
7	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	Paramount/Universal	448 171
8	The Fate of the Furious	US/CN/JP	F. Gary Gray	Paramount/Universal	424 326
9	Wonder Woman	US/CN/HK	Patty Jenkins	Warner Bros.	408 288
10	Lion	AU/GB/US	Garth Davis	Transmission	355 705

Source: MPDA

Distribution and exhibition

After two consecutive above average years, 2017 saw a 6.9% year-on-year decrease in cinema admissions in Australia, down to 85 million tickets. However this was just slightly below the average in the last five years. New Zealand's admissions also dropped by 1.3% on 2016, down to 15.8 million tickets in 2017. GBO followed suit in both countries; however, while Australia's 4.6% decrease can be explained by the drop in admissions along with inflation, New Zealand's drop (by 8.2% on 2016, down to NZD 189.7) was disproportionate to the mild decrease in attendance, bringing the average ticket price in the country to its lowest since 2013 (NZD 12 in 2017) after years of continuous growth.

Australia's market share for local productions (4.1% of the GBO in 2017) more than doubled 2016's figures, mostly thanks to Australian co-production *Lion*. In turn, the market share for domestic films in New Zealand came back to normal (2% in 2017) after breaking all records the preceding year. With New Zealand fully digitised since 2014 and an 85% digital penetration rate in Australia, the number of screens grew year on year by 3.4% and 4.2% respectively.

Production and funding

Australia produced 41 films in 2017, 9 more than the previous year, accounting for a total spend of AUD 284 million. With Asian films accounting for a larger slice of the pie than local productions, Australia seems determined to increase its ties with Asia. With the financial support from Screen Australia, Archlight Films launched a China-Australia development fund; moreover, the Australian Academy for Film and TV unveiled its new Asian Film Award.

In turn, New Zealand produced 27 features in 2017. Moreover, the government committed to a NZD 304 million (USD 216 million) investment in the film industry over the next four years, most of which will be used to subsidise foreign productions shooting in the country.

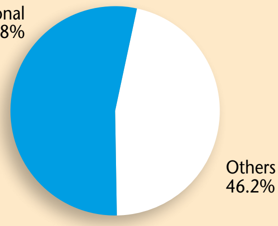
Sources: Screen Australia, MPDAA, MPDA, NZ Film Commission, *Variety*, *Screen International*, OBS

People's Republic of China

Population 2017 e	1 390.9 million
GDP per capita 2017 e	8 583 USD
Gross box office 2017 e	55.90 bn CNY (8.27 bn USD)
Admissions 2017 e	1.62 billion
Average ticket price 2017 e	34.5 CNY (5.1 USD)
Average admissions per capita 2017 e	1.2
Screens 2016 | 2017 e	41 179 | 50 776
Digital screens 2016 | 2017 e	37 500 | 47 097
Digital 3D screens 2016 | 2017 e	32 943 | ~

(1) By GBO

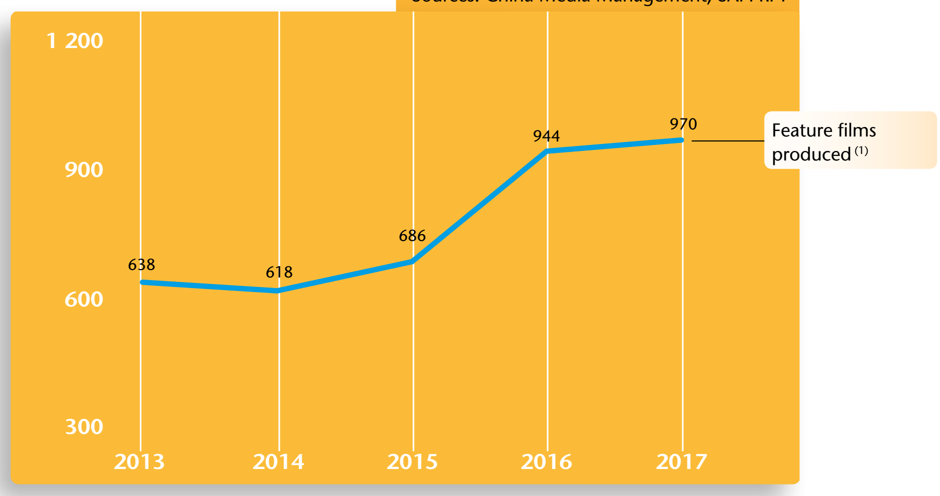
Market shares 2017 (1)



Number of feature films produced in China | 2013-2017 e

In units.

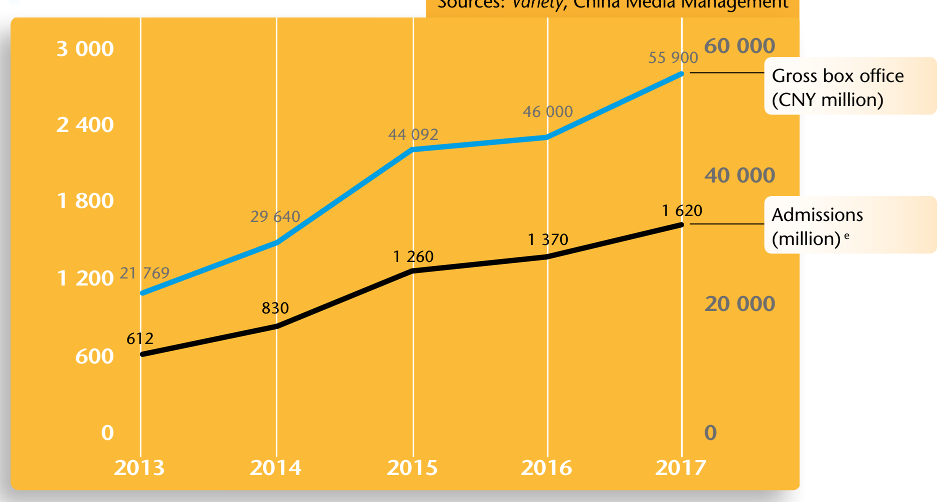
Sources: China Media Management, SAPPRFT



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

Admissions and gross box office in China | 2013-2017 e

Sources: *Variety*, China Media Management



Top 20 films by admissions in China | 2017

	Original title	Country of origin	Director	Admissions
1	Wolf Warrior 2	CN	Wu Jing	154 914 724
2	The Fate of the Furious	US/CN/JP	F. Gary Gray	69 809 635
3	Never Say Die	CN	Song Yang, Zhang Chi-Yu	63 374 909
4	Kung Fu Yoga	CN/HK/IN	Stanley Tong	44 835 219
5	Dangal	IN/US	Nitesh Tiwari	41 240 378
6	Journey To The West: Demons Strike Back	CN	Hark Tsui	40 345 452
7	Transformers: The Last Knight	US/CN	Michael Bay	41 817 568
8	Kong: Skull Island	US/CN	Jordan Vogt-Roberts	31 985 496
9	Pirates Of The Caribbean: Dead Men Tell No Tales	US	J. Ronning, E. Sandberg	32 316 780
10	Coco	US	Lee Unkrich, Adrian Molina	31 760 035
11	Resident Evil: The Final Chapter	US/FR/DE	Paul W.S. Anderson	30 400 785
12	xXx: Return Of Xander Cage	US/CN/CA	D.J. Caruso	31 129 356
13	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	28 241 531
14	Duckweed	CN	Han Han	29 359 971
15	Youth	CN	Feng Xiaogang	28 134 394
16	Logan	US	James Mangold	21 432 095
17	Spider-Man: Homecoming	US	Jon Watts	20 564 848
18	Buddies In India	CN	Wang Bao-qiang	20 320 295
19	War For The Planet Of The Apes	US	Matt Reeves	20 761 023
20	Thor: Ragnarok	US	Taika Waititi	22 101 443

Source: comScore

Distribution and exhibition

After overtaking the US as the top market by number of admissions in 2016, China surpassed the former as the top market by GBO during the first quarter of 2018. After a sharp deceleration in 2016 the country's box office returned to double-digit growth in 2017 when GBO jumped 21.5% up to CNY 55.9 billion (USD 8.3 billion) in 2017. Moreover, attendance levels grew at almost the same pace, by 18.2% year-on-year, to reach 1.62 billion tickets in 2017 - almost eight times higher than a decade ago. In turn, the average ticket price has remained relatively steady over the last few years, increasing by 2.8% year-on-year in 2017, up to CNY 34.5 (USD 5.1). The market share for national productions decreased slightly on 2016, down to 53.8% of the GBO. Action film sequel *Wolf Warrior 2* topped the box office chart, becoming the highest grossing film ever in the country with 154.9 million admissions.

When it comes to theatrical infrastructure, the Middle Kingdom reveals its true potential; 9 597 new screens were unveiled in 2017 (equivalent to approximately the number of screens in France and the UK combined), mostly in tier-2 and tier-3 cities, accounting for a 23% hike on 2016 and amounting to a total of 50 776 screens. More impressively, China has multiplied its number of screens by more than ten in less than a decade. The current ratio of screens per inhabitant along with China's economic indicators do not suggest this growth will come to an end anytime soon. Current Sino-American tensions over trade tariffs may jeopardize ongoing negotiations on Hollywood film quotas in the country. In turn, China removed quotas for Taiwanese films and increased those for Indian productions.

Production and funding

With 970 films produced in the country in 2017, production volume seems to have stabilised – only 26 more than the previous year. Nevertheless, only a small portion of those films got a relevant theatrical release. China signed a co-production agreement with Denmark and is currently working on another with Japan.

In early 2018, the media and entertainment industries regulator SAPPRFT unveiled plans to set up a *"people's theatre front"*. With wording reminiscent of the Cultural Revolution, 5 000 screens around the country will receive government support to screen domestic films that *"guide thought and educate the people"*.

As part of a profound restructuring of the country's bureaucracy, the National Congress of the Communist Party held in 2017 decided to abolish SAPPRFT; a new body is to be created under direct control of the Publicity Department of the Communist Party.

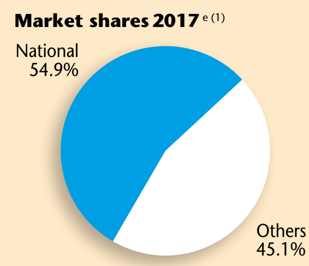
Sources: China Media Management, SAPPRFT, *Variety,* IHS Markit

Japan

Population 2017 e	126.7 million
GDP per capita 2017 e	38 550 USD
Gross box office 2017	228.6 bn JPY (2.04 bn USD)
Admissions 2017	174.5 million
Average ticket price 2017	1 310 JPY (11.7 USD)
Average admissions per capita 2017	1.4
Screens 2016 | 2017	3 472 | 3 525
Digital screens 2016 | 2017	3 392 | 3 453
Digital 3D screens 2016 | 2017	1 184 | 1 214

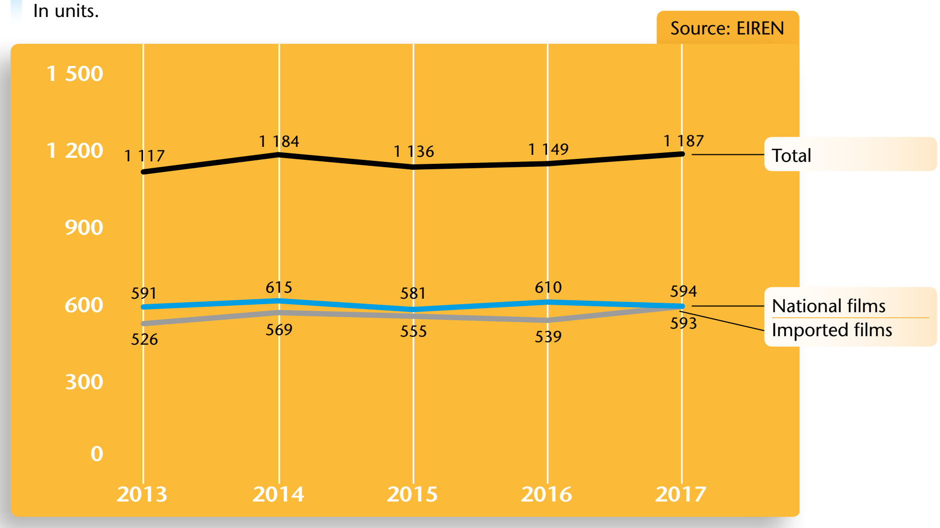
(1) By GBO

Market shares 2017 e (1)

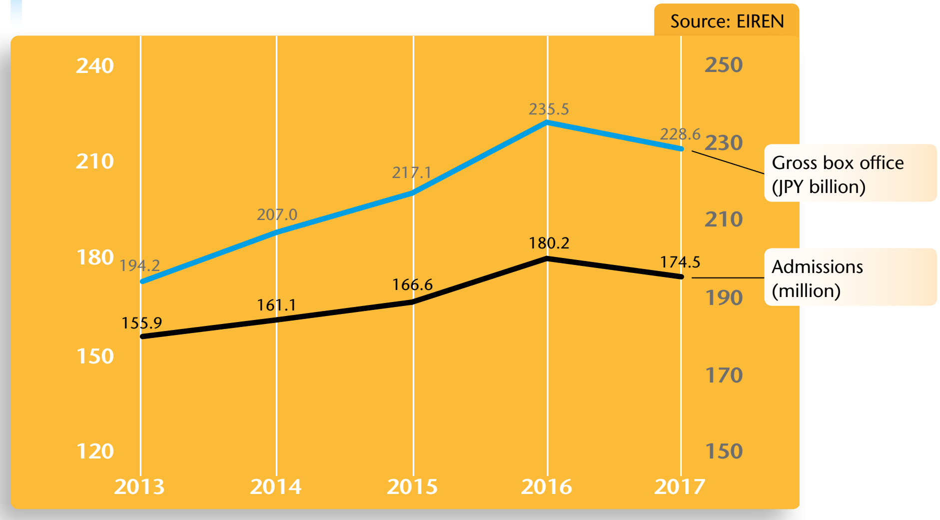


Number of films released in Japan | 2013-2017

In units.



Admissions and gross box office in Japan | 2013-2017



Top 20 films by admissions in Japan | 2017 e

Estimated admissions based on average ticket price of JPY 1 310.

	Original title	Country of origin	Director	Distributor	Admissions e
1	Beauty and the Beast	US	Bill Condon	Walt Disney	9 465 649
2	Fantastic Beasts and Where to Find…	GB INC/US	David Yates	Warner Bros.	5 603 053
3	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	Toho-Towa	5 580 153
4	Detective Conan: Crimson Love Letter	JP	Kôbun Shizuno	Toho	5 259 542
5	Pirates of the Caribbean: Dead Men…	US	E. Sandberg, J. Rønning	Walt Disney	5 122 137
6	Moana	US	R. Clements, J. Musker, …	Walt Disney	3 938 931
7	Sing	US/JP	G. Jennings, C. Lourdelet	Toho Towa	3 900 763
8	Rogue One	US	Gareth Edwards	Walt Disney	3 534 351
9	Doraemon: Great Adventure in the…	JP	Atsushi Takahashi	Toho	3 381 679
10	La La Land	US	Damien Chazelle	Gaga/Pony Canyon	3 374 046
11	Resident Evil: The Final Chapter	US/FR/DE	Paul W. S. Anderson	Sony Pictures	3 259 542
12	The Fate of the Furious	US/CN/JP	F. Gary Gray	Toho Towa	3 091 603
13	Gintama	JP	Yûichi Fukuda	WB	2 931 298
14	Pokémon the Movie: I Choose You!	JP	Kunihiko Yuyama	Toho	2 709 924
15	Let Me Eat Your Pancreas	JP	Sho Tsukikawa	Toho	2 687 023
16	Mary and the Witch's Flower	JP	H. Yonebayashi	Toho	2 511 450
17	Yo-kai Watch the Movie: The Great…	JP	Takahashi. Ushiro, …	Toho	2 488 550
18	Spider-Man: Homecoming	US	Jon Watts	Sony Pictures	2 137 405
19	Sword Art Online The Movie: Ordinal…	JP	Tomohiko Ito	Aniplex	1 923 664
20	Mumon: The Land of Stealth	JP	Yoshihiro Nakamura	Toho	1 916 031

Sources: EIREN, OBS

Distribution and exhibition

In 2017 Japan registered a decline in attendance levels on the previous year, with admissions falling by 3% to 174.5 million, still the second best result since 1974.

Given the stable average ticket price coupled with the decrease in admissions, GBO also dwindled, decreasing by 3% on 2016, down to JPY 228.6 billion billion (USD 2.04 billion). By contrast, the number of theatrical screens, now almost fully digitised, grew by 1.5%, up to 3 525 screens in 2017, confirming the upward trend of the last 4 years.

In an industry traditionally driven by local content, 38 local titles grossed JPY1 billion or higher, while only 24 foreign films achieved the same benchmark. Despite 9 domestic productions in the top 20 box office earners, the market share for domestic films fell to 54.9%, down from to 63.1% in 2016. This was mainly due to the unprecedented success of the Japanese animation megahit *Your Name*, which took more than 18 million admissions in 2016, versus less than 9.5 million for the 2017 box office winner.

In 2017, the top 20 titles accounted for 42.9% of the GBO, showing less concentration than in the previous year (48.1%). Disney's *Beauty and the Beast* remake led the box office in 2017, followed by *Fantastic Beasts and Where to Find Them* and *Despicable Me 3*, while the top grossing domestic films were the latest instalments of the *Detective Conan, Doraemon* and *Pokémon* animation franchises.

Production and funding

While the total number of releases grew to 1 187 titles, 594 Japanese films got a first release in 2017, marking a 2.6% drop on the previous year and bucking a long-standing growth trend.

Animation plays a paramount role in the national film landscape. According to the Association of Japanese Animations (AJA), the local industry grew for the fourth year in a row with total revenues from overseas sales rising to JPY 767.6 billion in 2016 (USD 6.8 billion), an increase of more than 30% on the previous year. This growth was boosted by export revenues for the record hit *Your Name*, licensing deals with China as well as increasing fees from major streaming platforms. However, many Japanese animation studios are already working at full capacity, and low wages for junior animators, as well as a rapidly aging population might aggravate a shortage for specialised talent in the field.

In line with the *Cool Japan* initiative, the government reacted to the threat of a shrinking domestic market with a strategic plan to promote Japanese IP abroad by fostering international co-production agreements and bolstering overseas revenues.

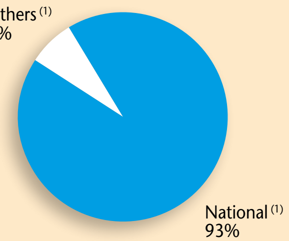
Sources: EIREN, UNIJAPAN, AJA, *Variety, The Hollywood Reporter*

India

Population 2017 [e]	1 316.9 million
GDP per capita 2017 [e]	1 852 USD
Gross box office 2017 [e]	104.2 bn INR (1.6 bn USD)
Admissions 2017 [e]	1.98 billion
Average ticket price 2017 [e]	52.6 INR (0.8 USD)
Average admissions per capita 2017 [e]	1.5
Screens 2016 | 2017 [e]	11 194 | 11 209
D-Cinema screens 2016 [e] | 2017 [e]	9 515 | 9 530
3D screens 2016 | 2017 [e]	1 183 | ~

(1) 2015

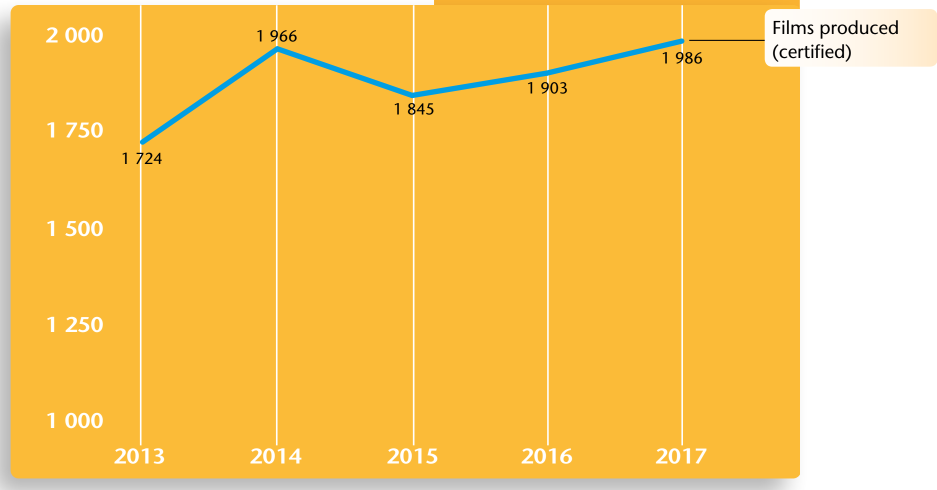
Market shares 2017



Number of Indian feature films certified (1) | 2013-2017

In units.

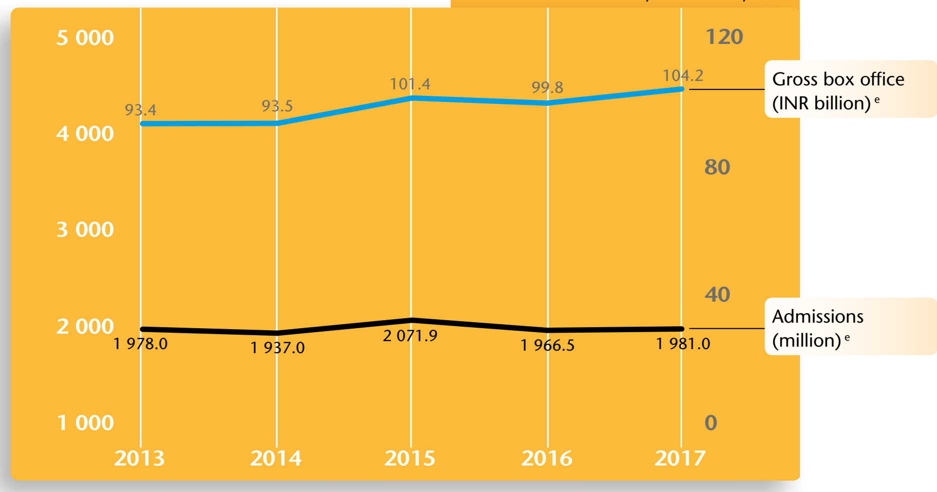
Source: Central Board of Film Certification



(1) Based on fiscal year ending in March of the stated year.

Admissions and gross box office in India | 2013-2017 [e]

Sources: FICCI-KPMG, IHS Markit, OBS



Top 10 Bollywood films by gross box office in India | 2017

GBO calculated using an average exchange rate of 1 USD = 65.12 INR.

	Original title	Country of origin	Director	Gross box office (in USD)
1	Baahubali 2: The Conclusion (1)	IN	S.S. Rajamouli	78 510 948
2	Tiger Zinda Hai	IN	Ali Abbas Zafar	52 078 571
3	Golmaal Again	IN	Rohit Shetty	31 588 641
4	Judwaa 2	IN	David Dhawan	21 190 125
5	Raees	IN	Rahul Dholakia	21 114 885
6	Toilet: Ek Prem Katha	IN	Shree Narayan Singh	20 614 306
7	Kaabil	IN	Sanjay Gupta	19 478 024
8	Tubelight	IN	Kabir Khan	18 618 135
9	Jolly LLB 2	IN	Subhash Kapoor	17 965 541
10	Badrinath Ki Dulhania	IN	Shashank Khaitan	17 904 120

(1) Version in Hindi.

Source: Koimoi.com

Top 10 US films by gross box office in India | 2017

	Original title	Country of origin	Director	Gross box office (in USD)
1	The Fate of the Furious	US/CN/JP	F. Gary Gray	15 895 988
2	Annabelle 2	US	David Sandberg	9 587 644
3	Thor: Ragnarok	US	Taika Waititi	9 354 533
4	Spider-Man: Homecoming	US	Jon Watts	8 221 174
5	Justice League	US	Zack Snyder	6 482 737
6	The Mummy	US/CN	Alex Kurtzman	4 937 629
7	It	US/CA	Andy Muschietti	3 945 379
8	Jumanji: Welcome to the Jungle	US	Jake Kasdan	3 228 599
9	Despicable Me 3	US	Pierre Coffin, Kyle Balda, Eric Guillon	2 266 057
10	The Boss Baby	US	Tom McGrath	2 089 797

Source: comScore

Distribution and exhibition

In 2017 Indian GBO increased by 4.4% on the previous year to INR 104.2 billion (USD 1.6 billion). In turn, admissions grew by 0.7% to an estimated 1.98 billion tickets sold, 14.5 million more than in 2016. The local theatrical market is dominated by national films, which regularly account for more than 90% of total admissions. The Indian film industry comprises a series of regional, language-based production systems, the most prominent being the Hindi-language sector (Bollywood). In spite of representing only 17% of the features released, Hindi films generated almost 40% of the BO takings in 2017. The box office for Bollywood films shows a high concentration, with 50 films generating almost 98% of the takings. The Hindi-dubbed version of the Tamil-Telugu fantasy *Baahubali 2: The Conclusion* topped the Bollywood chart, grossing USD 78.5 million and becoming one of the top earners of all time in India.

Films in other Indian languages (including Tamil and Telugu) made for 75% of the total releases and contributed to over 50% of the annual box office. The blockbuster *The Fate of the Furious* became the highest-grossing US film for the year, taking almost USD 16 million at the box office.

India is still severely under-screened with eight screens per million inhabitants (compared to 124.1 in the US and 36.5 in China) suggesting significant potential for further growth. This particularly affects peripheral districts and smaller cities, mainly due to single screens being shut down. At the same time, multiplexes have been consolidating their presence in urban areas, increasing by 83% since 2013. In 2017, while representing less than 29% of the total screens, multiplexes generated about 50% of theatrical revenue.

Production and funding

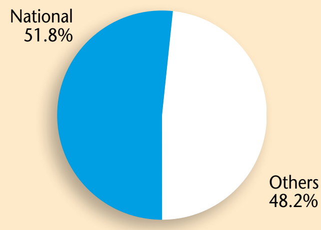
The number of national features certified for release in India rose to 1 986 in 2017, up by 4.4% on 2016. Rising production costs coupled with rampant piracy and scarce government support are major obstacles to the economy of the Indian film sector, leading local studios to turn towards ancillary sources of revenue, such as in-cinema advertising, video on demand and mobile platforms. In 2018, India signed an agreement with Israel, making qualified coproductions eligible for incentives in both countries.

Sources: CBFC, KPMG, FICCI, Ernst & Young (EY), *Variety*, OBS, IHS Markit, Deloitte, comScore

South Korea

Population 2017 e	51.5 million
GDP per capita 2017 e	29 730 USD
Gross box office 2017	1 756.6 bn KRW (1.6 bn USD)
Admissions 2017	219.9 million
Average ticket price 2017	7 989 KRW (7.1 USD)
Average admissions per capita 2017	4.3
Screens 2016 | 2017	2 575 | ~
Digital screens 2016 | 2017	2 575 | ~
Digital 3D screens 2016 | 2017	~ | ~

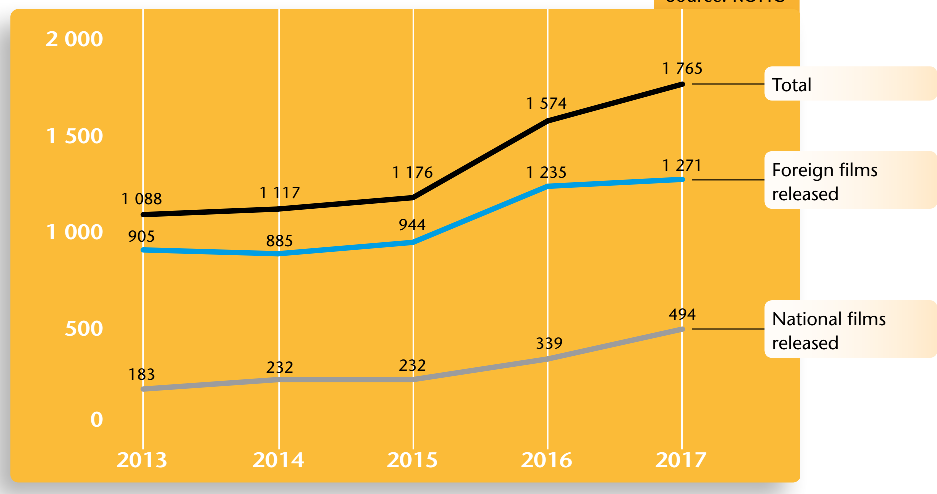
Market shares 2017 e



Number of Korean feature films released | 2013-2017

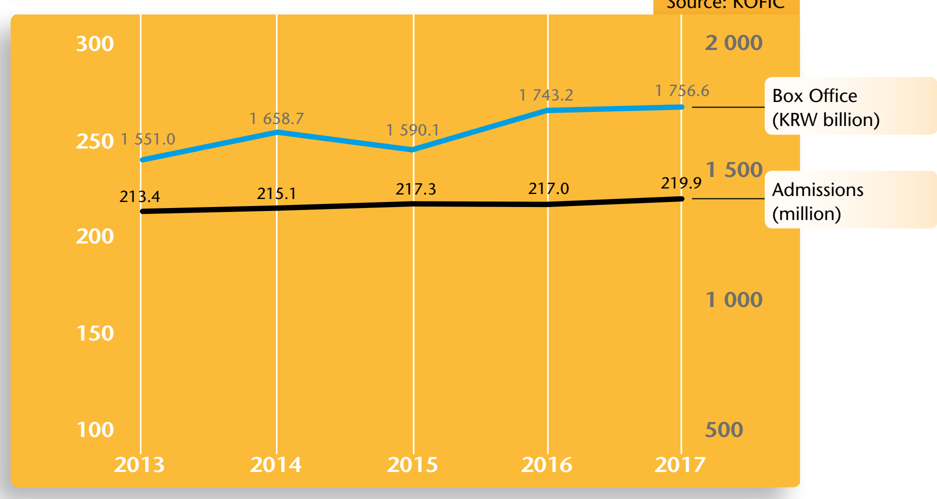
In units.

Source: KOFIC



Admissions and gross box office in South Korea | 2013-2017

Source: KOFIC



Top 20 films by admissions in South Korea | 2017

	Original title	Country of origin	Director	Distributor	Admissions
1	A Taxi Driver	KR	Hun Jang	Showbox	12 186 327
2	Along with the Gods: The Two Worlds	KR	Yong-hwa Kim	Lotte	8 539 572
3	Confidential Assignment	KR	Sung-hoon Kim	CJ	7 817 631
4	Spider-Man: Homecoming	US	Jon Watts	Sony	7 258 678
5	The Outlaws	KR	Yoon-Seong Kang	Megabox/Kiwi Media	6 879 844
6	The Battleship Island	KR	Seung-wan Ryoo	CJ	6 592 151
7	Midnight Runners	KR	Joo-hwan Kim	Lotte	5 653 270
8	The King	KR	Jae-rim Han	Next Entertain. World	5 317 383
9	Beauty and the Beast	US	Bill Condon	Walt Disney	5 138 330
10	Kingsman: The Golden Circle	GB INC/US	Matthew Vaughn	20th Century Fox	4 945 484
11	Thor: Ragnarok	US	Taika Waititi	Walt Disney	4 853 778
12	The Swindlers	KR	Chang Won Jang	Showbox	4 018 035
13	Steel Rain	KR	Woo-seok Yang	Next Entertain. World	4 014 288
14	The Fortress	KR	Dong-hyuk Hwang	CJ	3 849 087
15	The Mummy	US/CN	Alex Kurtzman	Universal	3 689 325
16	The Fate of the Furious	US/CN/JP	F. Gary Gray	Universal	3 653 238
17	Your name	JP	Makoto Shinkai	Megabox	3 637 599
18	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	Universal	3 324 874
19	I Can Speak	US	Hyun-seok Kim	Lotte/Little Big Pict.	3 279 296
20	Pirates of the Caribbean: Dead Men…	US	E. Sandberg, J. Rønning	Walt Disney	3 049 894

Source: KOFIC

Distribution and exhibition

2017 saw South Korean GBO increase (by 0.8%) for the third year in a row, reaching KRW 1 756.6 billion (USD 1 553.7 million) and marking a new record high. Cinema attendance also climbed to 219.9 million admissions, +1.3% on 2016, continuing the steady growth trend of the last six years. The total number of theatrical releases soared to 1 765 films in 2017, 191 more than in the previous year and representing an increase of 62% on 2013.

National productions dominated the box office with seven films out of the 10 top-grossing titles in 2017. Historical action thriller *A Taxi Driver* topped the box office with 12.2 million tickets sold, and was the only film to top 10 million admissions. It was followed by *Along with the Gods: The Two Worlds* (8.5 million admissions), the first release of the fantasy franchise based on the local *webtoon* of the same name, and the action film *Confidential Assignment* (7.8 million admissions). On a cumulative basis South Korean films captured a market share of 51.8% in 2017, slightly down from 53.7% in 2016. In turn, the latest instalment of the superhero franchise *Spider-Man* became the most successful US studio title in 2017, ahead of Disney's *Beauty and the Beast* and spy comedy *Kingsman: The Golden Circle.*

CJ Entertainment was the main local distributor accounting for 14.2% of the admissions, followed by Lotte (11.6%) and Showbox (11.0%).

Production and funding

South Korean production figures reached a new record high in 2017 with as many as 494 local titles released during the year.

Complementing the existing 25% cash rebate for foreign productions, in 2017 the Ministry of Culture introduced new tax breaks for film and television productions (up to 10% of eligible expenses). The incentive aims at boosting industry growth and generating positive effects on tourism and exports, with an expected increase in investment of KRW 471.4 billion (USD 422 million) over five years.

On the other hand, film exports suffered from the protraction of the Chinese boycott of Korean content, as no South Korean films were distributed in China in 2017, in retaliation to the deployment of the THAAD missile system. However, seven South Korean films were invited to the Beijing International Film Festival in April 2018, in a sign of the possible easing of tensions.

Political turbulence in 2017 also affected the film and cultural industries as the former chairman of the Korean Film Council (KOFIC) resigned over a government blacklist excluding a group of filmmakers and media personalities (including award-winning director Park Chan-wook) from state funding.

Sources: Korean Film Council (KOFIC), *Variety, Screen Daily, The Hollywood Reporter,* OBS

Other Asia

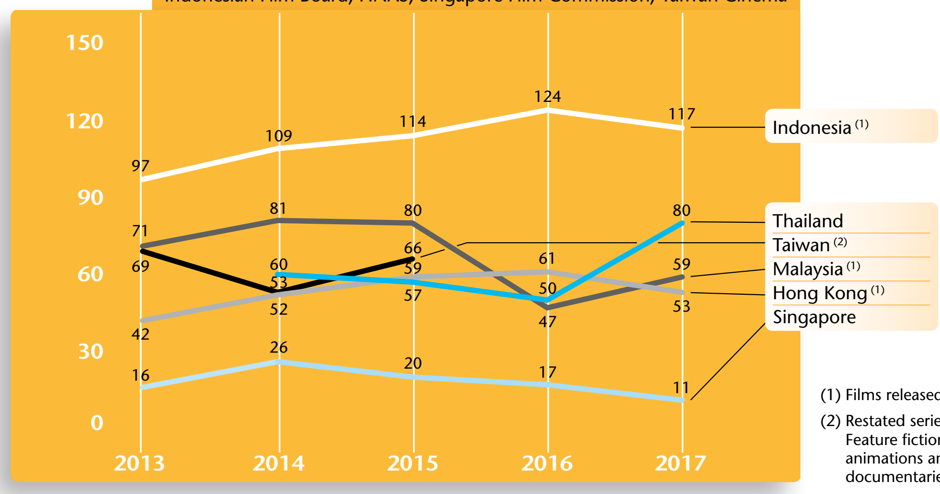
	Hong Kong	Indonesia	Malaysia	Philippines	Singapore	Taiwan	Thailand
Population 2017 e (million)	7.4	262.0	32.1	106.3	5.7	23.6	69.1
GDP per capita 2017 e (USD)	44 999	3 859	9 660	3 022	53 880	24 227	6 336
Gross box office 2017 e (M USD)	237.9	235.0 (2)	228.9	191.2 (3)	140.6	263.4 (3)	164.2 (3)
Admissions 2017 e (million)	25.7 (2)	89.5 (2)	72.8	83.5 (3)	19.4	32.8 (2)	32.8 (2)
Average ticket price 2017 e (USD)	9.8 (2)	2.5 (2)	3.1	2.3 (3)	7.2	9.1 (3)	4.6 (3)
Average admissions per capita 2017 e	3.5 (2)	0.3 (2)	2.3	0.8 (3)	3.4	1.4 (2)	0.5 (2)
Screens 2017 e	230 (2)	1 412	1 094	824 (2)	257	776 (2)	1 154 (2)
Digital screens 2017 e	230 (2)	1 412	1 029 (2)	824 (2)	244 (2)	776 (2)	1 154 (2)
3D screens 2017 e	204 (2)	825 (2)	310 (2)	164 (2)	92 (2)	468 (2)	412 (2)
National market shares 2017 e	13.0%	38.1% (5)	5.9%	~	4.3%	17.5% (4)	~

(1) By GBO (2) 2016 (3) 2015 (4) 2014 (5) By GBO in 2016

Number of feature films produced in selected Asian countries | 2013-2017

In units.

Sources: OBS, IHS Markit, *Variety*, Hong Kong Box Office, Pusbangfilm, Indonesian Film Board, FINAS, Singapore Film Commission, Taiwan Cinema



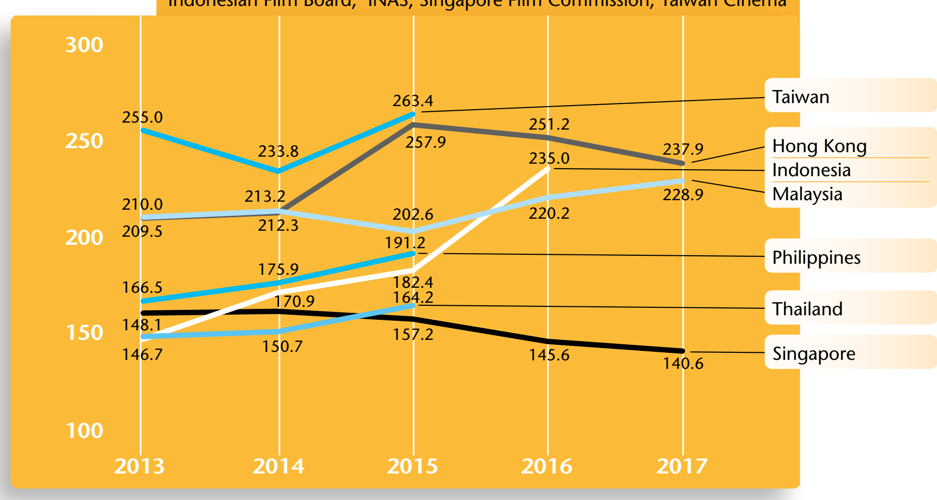
(1) Films released.

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

Gross box office in selected Asian countries | 2013-2017 e

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

Sources: OBS, IHS Markit, Hong Kong Box Office Ltd, Pusbangfilm, Indonesian Film Board, INAS, Singapore Film Commission, Taiwan Cinema



Top 10 films by gross box office in Hong Kong | 2017

	Original title	Country of origin	Director	Distributor	Admissions
1	Beauty and the Beast	US	Bill Condon	Walt Disney	868 009
2	Thor: Ragnarok	US	Taika Waititi	Walt Disney	636 405
3	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	Universal	744 917
4	The Fate of the Furious	US/CN/JP	F. Gary Gray	Universal	564 879
5	Wonder Woman	US/CN/HK	Patty Jenkins	Warner Bros.	563 433
6	Justice League	US	Zack Snyder, Joss Whedon	Warner Bros.	557 184
7	Logan	US	James Mangold	20th Century Fox	500 025
8	Star Wars: The Last Jedi	US	Rian Johnson	Walt Disney	371 954
9	The Mummy	US/CN	Alex Kurtzman	Universal	505 614
10	Kingsman: The Golden Circle	GB INC/US	Matthew Vaughn	20th Century Fox	451 320

Source: comScore

Top 10 films by gross box office in Singapore | 2017

	Original title	Country of origin	Director	Distributor	Admissions
1	Thor: Ragnarok	US	Taika Waititi	Walt Disney	738 875
2	Wonder Woman	US/CN/HK	Patty Jenkins	Warner Bros.	748 852
3	The Fate of the Furious	US/CN/JP	F. Gary Gray	Universal	682 886
4	Justice League	US	Zack Snyder, Joss Whedon	Warner Bros.	677 149
5	Beauty and the Beast	US	Bill Condon	Walt Disney	695 857
6	Spider-Man: Homecoming	US	Jon Watts	Sony	668 369
7	Guardians of the Galaxy Vol. 2	US	James Gunn	Walt Disney	549 850
8	Transformers: The Last Knight	US/CN	Michael Bay	Paramount	541 636
9	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	Universal	507 459
10	Logan	US	James Mangold	20th Century Fox	484 119

Source: comScore

Distribution and exhibition

Attendance figures for 2017 are not yet available for several markets, which makes an analysis of aggregate data impossible. As for individual countries, data show a decline in GBO revenues in Hong Kong (down 5.3% to HKD 1.85 billion, USD 237.9 million) and Singapore (down 3.4% to SGD 194.1 million, USD 140.6 million).

In turn, Malaysia registered growth in 2017, with total admissions increasing by 1.8% to 72.8 million and GBO reaching MYR 983.6 million (USD 228.9), 3.9% up on 2016. 2017 also saw the striking success of the Malaysian action comedy franchise *Abang Long Fadil 2,* that took MYR 18.2 million (USD 4.2 million) during the year and became the highest-grossing domestic film ever. No local features appeared in the top 10 films by GBO in Hong Kong and Singapore, as US studio blockbusters dominated the charts in both markets, topped respectively by *Beauty and the Beast* and *Thor: Ragnarok.* In Hong Kong, the market share of national films dropped to 13% in 2017, down from 18.1% in the previous year.

While remaining largely under-screened (only 5.3 screens per million population), Indonesia registered a constant screen expansion over the last five years, unveiling 159 new screens in 2017 to reach a total of 1 412.

Production and funding

In 2017, production volume waned in Hong Kong (-8 films), Indonesia (-7) and Singapore (-6), while increasing in Thailand (+ 30 films) and Malaysia (+12), in the latter case, possibly as the result of the introduction of a generous tax incentive for both domestic and foreign productions.

Though no data are available for Filipino productions, local arthouse cinema offerings continued to gather considerable acclaim at international festivals, with Lav Diaz's 4-hour long *Season of the Devil* making its premiere at the 2018 Berlinale. Local independent comedy *Kita Kita* also became a sleeper hit in the Philippines in 2017, passing the PHP 300 million mark (USD 6.0 million) at the box office.

Sources: IHS Markit, Hong Kong Box Office Ltd, HTDC, FINAS, Singapore Film Commission/IMDA, Pusbangfilm, Indonesian Film Board, Thailand Film Office, *Forbes, Variety,* comScore

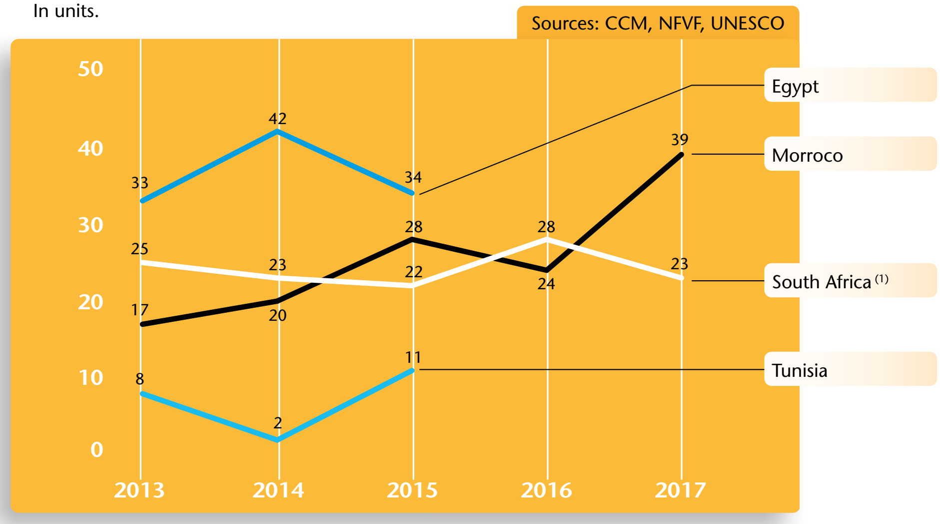
Africa

	Algeria	Egypt	Morocco	South Africa	Tunisia
Population 2017 e (million)	41.5	92.3	34.9	56.5	11.3
GDP per capita 2017 e (USD)	4 225	3 685 (1)	3 177	6 089	3 518
Gross box office 2017 e (in M USD)	0.0 (4)	20.7	7.6	89.6	~
Admissions 2017 e (million)	0.0 (4)	6.0	1.7	19.9	0.3 (5)
Admissions per capita 2017 e	0.0 (4)	0.07	0.05	0.35	~
Average ticket price 2017 e (in USD)	0.7 (4)	3.8	4.6	4.5	2.3 (4)
Screens 2017 e	~	416 (2)	61	782	11 (1)
Digital screens 2017 e	~	166 (2)	55	782	~
National market shares 2017 e	~	80.0% (3)	28.5%	3.8% (6)	~

(1) 2016 (2) 2015 (3) 2012 (4) 2009 (5) 2008 (6) By GBO

Number of feature films produced in selected African countries | 2013-2017

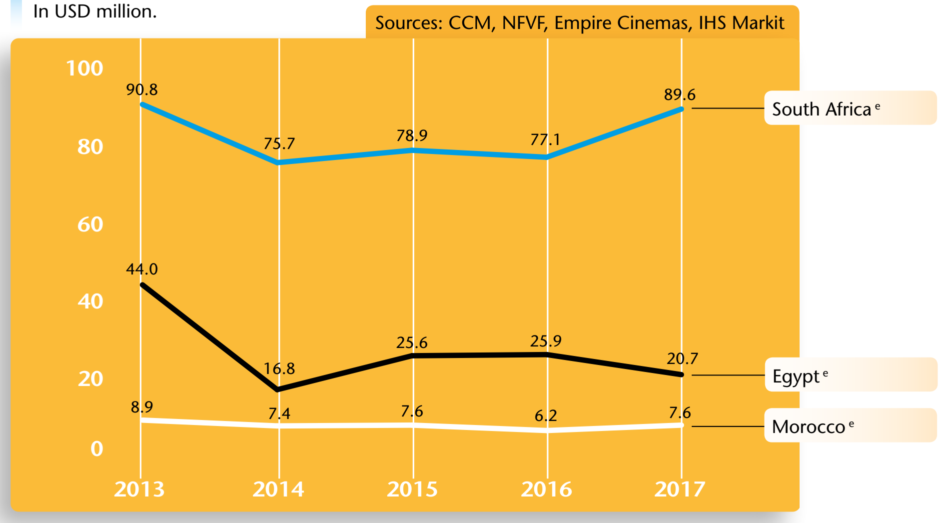
In units.



(1) Films released.

Gross box office in selected African countries | 2013-2017

In USD million.



Top 10 films by gross box office in South Africa | 2017

	Original title	Country of origin	Director	Gross Box Office (in USD)
1	The Fate of the Furious	US/CN/JP	F. Gary Gray	5 475 003
2	Jumanji: Welcome to the Jungle	US	Jake Kasdan	4 132 930
3	Despicable Me 3	US	Pierre Coffin, Kyle Balda, Eric Guillon	3 441 933
4	Beauty and the Beast	US	Bill Condon	2 844 316
5	Fifty Shades Darker	US/CN	James Foley	2 477 305
6	Star Wars: Episode VIII - The Last Jedi	US	Rian Johnson	2 390 959
7	Thor: Ragnarok	US	Taika Waititi	2 381 076
8	Spider-Man: Homecoming	US	Jon Watts	2 351 384
9	Justice League	US	Zack Snyder	2 313 618
10	The Boss Baby	US	Tom McGrath	2 015 057

Source: NFVF

Top 10 films by admissions in Morocco | 2017

	Original title	Country of origin	Director	Admissions
1	Lahnech	MA	Driss Mrini	95 979
2	Au pays des merveilles	MA	Jihane El Bahhar	94 026
3	Lhajjates	MA	Mohamed Achaour	68 267
4	The Fate of the Furious	US/CN/JP	F. Gary Gray	60 967
5	La Main de Fadma	MA	Ahmed El Maanouni	47 910
6	Burn Out	MA	Nour Eddine Lakhmari	44 571
7	xXx: Return of Xander Cage	US/CN/CA	D.J. Caruso	42 112
8	Annabelle 2	US	David Sandberg	39 259
9	Beauty and the Beast	US	Bill Condon	37 844
10	Despicable Me 3	US	Pierre Coffin, Kyle Balda, Eric Guillon	32 255

Source: Centre Cinématographique Marocain (CCM)

South Africa

Although GBO grew by 4.9% on 2016, up to ZAR 1.19 billion (USD 89.6 million), 2017 was a particularly low year for domestic productions, with just 3.8% market share for South African films; romantic comedy *Keeping Up with the Kandasamys* stood out as the highest grossing local production in 2017. Overall, 23 South African films were released (five less than in 2016).

In addition, for the last two years part of the local industry has shown its concern for what they perceive as growing uncertainty in the management of the country's tax rebate.

Morocco and Egypt

Moroccan box office got back on track after a significant drop in attendance in 2016, with admissions up to 1.7 million in 2017; that is a 9.8% year-on-year surge. The market share for domestic productions (28.5% in 2017) was also on the rise, with local comedy *Lahnech* topping the charts. With 39 feature films shot, Moroccan production boomed in 2017, up by 38% year-on-year. Theatrical infrastructure remains the Achilles' heel of the country, with only 61 screens for a population of almost 35 million inhabitants.

Egypt's attendance level grew by 9.1% year-on-year, up to 6 million admissions in 2017, with GBO amounting to EGP 370 million (USD 20.7 million). In addition, the inaugural edition of the *El Gouna Film Festival* took place in Egypt in September 2017.

Nigeria

Allegedly 2 500 films are produced every year in the country; however, the lack of facilities along with the low professionalisation of the entire film-making process and rampant piracy make it difficult to cash in on them. It is estimated that *Nollywood* generates an annual revenue of more than USD 7 billion; however, only a small portion of it comes from theatrical exhibition in Nigeria (reportedly USD 11.5 million in 2016, around 30% of it going to local productions) – not surprising with a theatrical infrastructure of circa 150 screens in a country with 188.7 million inhabitants.

In early 2018 romantic comedy sequel *The Wedding Party 2: Destination Dubai* overtook 2016's first instalment as Nigeria's highest grossing production of all times, aiming at distribution in 15 territories worldwide.

Sources: CCM, NFVF, *Variety,* Quartz Africa, IHS Markit, Ster Kinekor Entertainment, OBS

Middle East

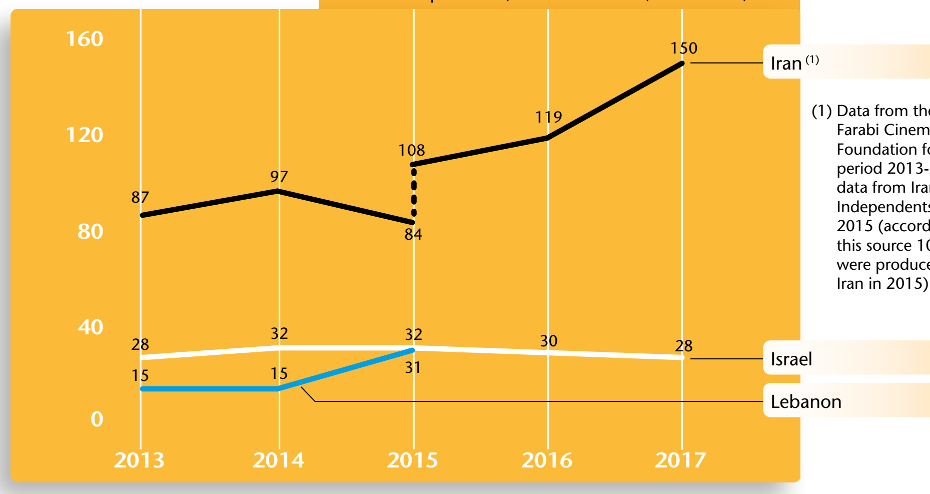
	Iran	Israel	Kuwait	Lebanon	Qatar	Saudi Arabia	United Arab Emirates
Population 2017 e (million)	81.4	8.7	4.3	4.5	2.7	32.4	10.1
GDP per capita 2017 e (USD)	5 252	39 974	27 237	11 684	60 812	20 957	37 346
Gross box office 2017 e (in M USD)	55.1	177.8	51.1	36.2	39.3	~	244.4
Admissions 2017 e (million)	22.9	16.0	4.5	4.0	3.0	~	20.2
Admissions per capita 2017 e	0.3	1.8	1.0	0.9	1.1	~	2.0
Average ticket price 2017 e (USD)	2.4	11.1	11.4	9.1	13.2	~	12.1
Screens 2017 e	504	430	73 (3)	125 (2)	~	~	460 (1)
Digital screens 2017 e	504	430	~	~	~	~	460 (1)
National market shares 2017 e	99.2%	10.0%	~	22.9%	~	~	~

(1) 2016 (2) 2015 (3) 2014

Number of films produced in selected Middle East countries | 2013-2017 e

In units.

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

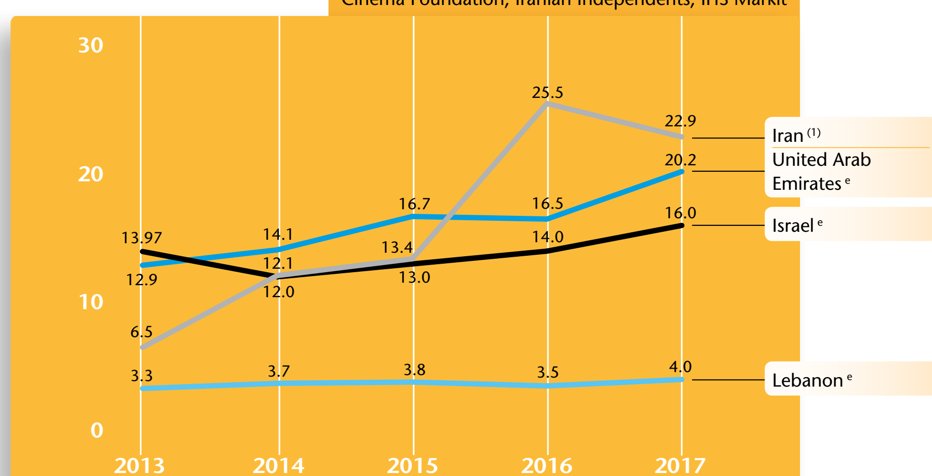


(1) Data from the Farabi Cinema Foundation for the period 2013-2015; data from Iranian Independents since 2015 (according to this source 108 films were produced in Iran in 2015)

Admissions in selected Middle Eastern countries | 2013-2017 e

In millions.

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



(1) Data from the *Farabi Cinema Foundation* for the period 2013-2015 and from *Iranian Independents* since 2016. According to the latter, there were 14 million admissions in Iran in 2015.

Top 10 films by admissions in the United Arab Emirates | 2017

	Original title	Country of origin	Director	Distributor	Admissions
1	The Fate Of The Furious	US/CN/JP	F. Gary Gray	Universal Pictures	766 062
2	Baahubali 2: The Conclusion	IN	S.S. Rajamouli	PHF	665 825
3	Beauty And The Beast	US	Bill Condon	Walt Disney	498 641
4	Spider-Man: Homecoming	US	Jon Watts	Columbia	380 327
5	Despicable Me 3	US	P. Coffin, K. Balda, E. Guillon	Universal Pictures	360 601
6	The Boss Baby	US	Tom McGrath	20th Century Fox	353 850
7	Kong: Skull Island	US	Jordan Vogt-Roberts	Warner Bros.	353 109
8	Thor: Ragnarok	US	Taika Waititi	Walt Disney	342 105
9	Logan	US	James Mangold	20th Century Fox	341 129
10	Wonder Woman	US/CN/HK	Patty Jenkins	Warner Bros.	329 317

Source: Empire Cinemas

United Arab Emirates

2017 saw an all-time attendance high in UAE, with admissions up by 22.4% on 2016 – that is, 20.2 million tickets sold, and GBO growing in parallel to UAD 897 million (USD 244.4 million). While local production did not seem to take off, the Emirates consolidated their position as a location hub in the region thanks to generous fiscal incentives. Following the launch of the Dubai-based Arab Film institute at the end of 2016, the institution unveiled the first edition of the Arab Film Awards in 2017.

Israel

Israeli admissions have been on the rise for the last four years, very notably in 2017, with 14.3% year-on-year growth, up to 16 million tickets. After a very good 2016 for local productions, the market share for Israeli films went down to 10%, in line with the average over the last five years; this was in great part due to the success of local comedy *Maktub*, which sold more than 600 000 tickets. In addition, the country unveiled 20 screens, making for a total of 430 screens in 2017. In an attempt to attract Bollywood productions to the country, Israel inked a co-production agreement with India in 2018.

Despite worldwide recognition and a long list of accolades including the Grand Jury Prize in Venice and a landslide victory at the Ophir Awards (the Israeli Academy Awards), *Foxtrot* did not escape controversy at home, being accused by the Minister of Culture of *"self-flagellation and cooperation with the anti-Israel narrative"*.

Iran

The removal of economic sanctions in 2016 ushered in GDP growth of around 13% year-on-year for two consecutive years. This has been reflected in the Iranian box office; although admissions dropped by 10.2% on an outstanding 2016, down to 22.9 million in 2017, attendance levels were more than three times higher than five years before. In turn, GBO grew by 7.5% year-on-year, up to IRR 1.8 trillion (USD 55.1 million) thanks to a hike in average ticket prices.

Iranian releases monopolised the box office with just a 0.8% market share for foreign productions. Local comedy sequel *Sperm Whale: Roya's Selection* crowned the BO list with 5.4 million admissions. Production volume increased by 26% on 2016, up to 150 films in 2017, 12 of which were international co-productions. In addition, 79 screens were unveiled in the country in 2017, making for a total of 504 screens.

Saudi Arabia

Towards the end of 2017 Saudi Arabia announced a series of modernisation measures, including among others the lifting of the ban on public cinema theatres which had applied over the last 35 years. This measure could give birth in the medium term to the largest theatrical market in the Middle East; according to the Saudi government there will be more than 2 000 screens operating in the country by 2030, generating an estimated GBO of SAR 90 million (USD 24 million); construction plans are already underway.

Sources: IHS Markit, Empire Cinemas, Iranian Independents, Israel Film Fund, Israeli Cinema Industry Association, *Variety,* OBS

Sources

FOCUS 2018 was prepared by the European Audiovisual Observatory. We would like to thank the following sources:

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