MARCHÉ DU FILM
FESTIVAL DE CANNES

MARCHÉ DU FILM 2019

FOCUS

WORLD FILM MARKET TRENDS
TENDANCES DU MARCHÉ MONDIAL DU FILM

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

MARCHÉ DU FILM
FESTIVAL DE CANNES

MARCHÉ DU FILM LOVES FESTIVALS

MARCHÉ DU FILM OPENING NIGHT - 15 May
Shanghai International Film Festival

DOC TALKS & DOC DAY - 17 to 21 May
CPH:DOX, DOK Leipzig, IDFA, Visions du Réel, Doc Alliance

FRONTIERES PLATFORM - 18 & 19 May
Fantasia International Film Festival

GOES TO CANNES - 18 to 20 May
Annecy, HAF (Hong Kong), Los Cabos, Málaga, New Horizons' (Poland), Thessaloniki

FANTASTIC 7 - 19 May
Bucheon, Cairo, Guadalajara, Macao, Sitges, SXSW, Toronto

MIXER FESTIVALS - 22 May
Film Freeway

CINANDO AWARDS - 22 May
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focus 2019

World Film Market Trends
Tendances du marché mondial du film

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MARCHÉ DU FILM
FESTIVAL DE CANNES

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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.

Editorial

FOCUS has now been a publication for more than two decades and I am very proud of our long-term relationship with the European Audiovisual Observatory. For the last 60 years the Marché du Film has continued to evolve, while the film industry itself is changing dramatically at the present time. FOCUS remains more than ever an essential reference guide for professional attendees. 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 invaluable insight into the world of film market trends.

Jérôme Paillard

Executive Director
Marché du Film

FOCUS est une publication depuis plus de deux décennies et je suis très fier de notre relation de longue date avec l'Observatoire Européen de l'Audiovisuel. Depuis 60 ans, le Marché du Film a connu une évolution ininterrompue, et l'industrie cinématographique elle-même est en plein changement. FOCUS est une référence incontournable pour les participants professionnels. Elle vous aidera non seulement à appréhender les pratiques en constante mutation de l'industrie cinématographique, et vous fournira également des informations plus spécifiques sur les secteurs de la production et 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 à 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

We are very pleased to collaborate once again with the Marché du Film and we proudly present the 21st edition of *FOCUS – World Film Market Trends*, which provides an overview of the development of theatrical markets worldwide. The Observatory's work, however, has an even greater reach also targeting more specific topics. For example, our most recent research into how European films are financed and LUMIERE VOD, our new directory of European films available via on-demand services in Europe. Get our free analyses of the film industry on www.obs.coe.int and discuss our findings with us at our conferences! Our traditional Cannes conference is next (18th May at 9:30) and will address the issue of film financing in Europe. Come and join us in the Olympia Cinema!

Susanne Nikoltchev

Executive Director
European Audiovisual Observatory

Nous sommes très heureux de notre nouvelle collaboration avec le Marché du Film et fiers de vous présenter la 21e édition du *FOCUS – Tendances du marché mondial du film*, qui donne un aperçu de la dynamique des marchés du cinéma dans le monde. Les travaux de l'Observatoire ont cependant une portée bien plus grande en ciblant des sujets spécifiques. Il en va ainsi de notre tout dernier rapport sur le financement des films européens ou encore de LUMIERE VOD, le nouveau répertoire sur les films européens disponibles sur les services de VOD en Europe. Retrouvez gratuitement nos études sur l'industrie cinématographique sur www.obs.coe.int et venez en débattre avec nous à l'occasion de nos conférences ! La prochaine est celle de Cannes (18 mai à 9h30) et portera sur le financement des films en Europe. Venez nous rejoindre au Cinéma Olympia !

Susanne Nikoltchev

Directrice exécutive
Observatoire européen de l'audiovisuel

focus 2019

Contents

Introduction 7

World 11

Europe

European Union 14
France 22
Germany 24
Italy 26
Spain 28
United Kingdom 30
Russian Federation 32
Poland 34
Turkey 35
Other Western Europe 36
Nordic Countries 38
Baltics and Central Europe 40
South-Eastern Europe 41

Americas

North America 42
Latin America 44

Australia and New Zealand 48

Asia

China 50
Japan 52
India 54
South Korea 56
Other Asia 58

Africa 60

Middle East 62

Sources 64

MARCHÉ DU FILM
FESTIVAL DE CANNES

THE MOST INSPIRING DAYS

CANNES XR
14 – 19 May - *Palais -1, aisle 14*

NEXT
14 – 23 May - *Palais -1, aisle 18*

ANIMATION DAY
19 May - 9:30 - *Olympia 1*

FANTASTIC FANATICS MIXER
19 May - 18:00 - *Plages des Palmes*

DOC DAY
21 May - 9:30 - *Plage Gray d'Albion* - **15:30** - *Olympia 1*

DOC LOVERS MIXER
21 May - 18:00 - *Plages des Palmes*

SHOOT THE BOOK
21 May - 10:30 - *Palais +4, Ambassadeurs*

FESTIVALS & SALES AGENTS MIXER
22 May - 18:00 - *Plages des Palmes*

www.marchedufilm.com/en/global-events

As usual, this 2019 edition of the Film Focus provides a worldwide picture of the production, distribution and exploitation of films. This flagship publication of the Observatory for the Marché du Film de Cannes is one of the many ways we provide essential and unbiased information and data on the audiovisual sector. Some other recent film-related projects highlight our aim to contribute to better informed decisions.

Analysing film financing

The Observatory published the first ever analysis of over 400 European fiction film financing plans. Key takeaways include the diversity of the film production landscape in terms of budgets and the influence of market size; the variety of financing sources, with the lead role played by direct public support; the key role of pre-sales, especially for higher-budget films; the widespread involvement of broadcasters; the still limited use of private equity and debt financing, and even more notably the heterogeneity of national landscapes as regards the film financing structure.

Mapping the systems to promote European works

One of the key factors accounting for the differences between the film financing structures in Europe is obviously the legal framework for the promotion of European films and audiovisual programmes. The Observatory mapped the national legal frameworks for the promotion of European works in 31 European countries – a project entrusted to us by the association of European Film Agencies Directors (EFADs). The report proposes an invaluable and detailed analysis of existing financial investment obligations, levies and means of promotion through quotas and prominence obligations.

Assessing international cooperation

Co-production is one of the ways to improve the circulation of films. Figures suggest that the number of co-productions is increasing, that they perform better in cinemas, and that they are more widely available, even beyond the majority co-producing country. The Observatory report on "The legal framework for international co-productions" provides a comprehensive overview of international funds and bilateral and multilateral agreements as well as a checklist of points to be included in any watertight co-production contract.

The Observatory also provides revolving figures on how European films get exported – both inside and outside Europe. This year's analysis shows that about half of the export admissions to European films originate from outside Europe.

Computing VOD in the equation

Video-On-Demand is often heralded as a game changer for the exploitation of films – and maybe also their financing. The Observatory tackles the issues from different angles. We recently published a short analysis on how recent European films make it to VOD. The conclusion was ambivalent: on the one hand, a relatively high share (62%) of

Breakdown of cumulative sample financing volume of European live-action fiction films released in 2016

In %.

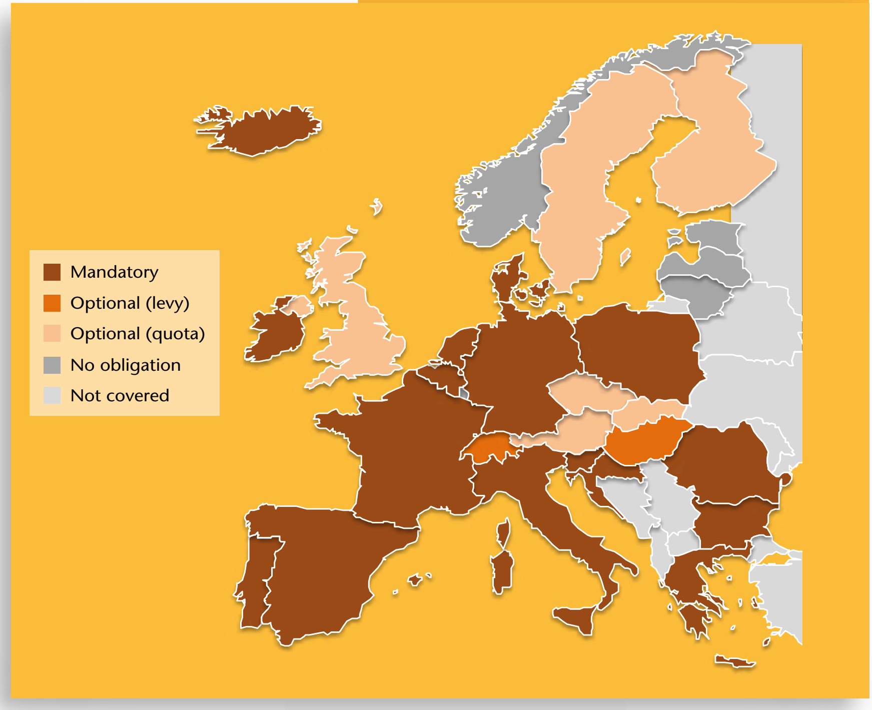
Sources: OBS, *Fiction film financing in Europe: A sample analysis of films released in 2016 (2018)*

Rank	Financing sources	*Financing share - full data sample*	*Financing share - excluding France*
1	Direct public funding	29%	41%
2	Broadcaster investments	25%	15%
3	Pre-sales (excl. TV)	16%	11%
4	Producer investments (excl. TV)	15%	16%
5	Fiscal incentives	10%	8%
6	Debt financing	2%	3%
7	Other financing sources	1%	3%
8	Private equity cash investments	1%	1%
9	In-kind investments	0%	2%
Total sample financing volume (in M EUR)		*1 411.7*	*679.0*

Financial investment obligations for public service broadcasters in independent European works | 2019

In millions.

Source: OBS, *Mapping of national rules for the promotion of European works in Europe (2019)*



European films released in cinemas is available on VOD; but, on the other hand they are, on average, available in only 4.7 countries.

The Observatory is also dedicated to promote transparency on the supply of films (and TV content) through VOD services. This year's research reveals in particular that European non-national films represent the majority of European films available on VOD – with strong variations between catalogues and countries. The Observatory took a further step in giving access to the composition of the VOD catalogues with the launch of a new online service, LUMIERE VOD – THE EUROPEAN FILM DIRECTORY. This project, entrusted to us and supported by the Creative Europe Programme of the European Union, was made possible thanks to the cooperation of the VOD services themselves – both European and US-based.

Disseminating film research

The Observatory produces its own research but also relies on several networks of partners. Among them is the European Film Agencies Research Network (EFARN). The EFARN is not only essential to the Observatory as a network of providers of national data on admissions to films; it is also where collaborative projects (such as the one to analyse the structure of film financing) are discussed and carried out. To further disseminate the work of the EFARN members, we have set up the EFARN Film Research Library (filmresearch.eu), a compilation of data and studies from film agencies. We hope it will contribute to foster exchanges on film related research.

Gilles Fontaine
Head of the Market Information Department

Martin Kanzler
Film Analyst

Patrizia Simone
Film Analyst

Top 10 markets worldwide by gross box office | 2014-2018 e

In USD billion. Converted at average annual exchange rates. Ranked by 2018 values.

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

Rank	Market	2014	2015	2016	2017	2018	Annual growth rate 5 years	Annual growth rate 1 year
1	US & Canada	10.36	11.14	11.37	11.12	11.88	3.5%	6.8%
2	China	4.82	6.81	6.60	8.27	9.24	17.6%	11.7%
3	Japan	1.70	1.80	2.17	2.04	2.02	4.4%	-1.2%
4	United Kingdom	1.74	1.90	1.66	1.65	1.71	-0.5%	3.7%
5	South Korea	1.49	1.37	1.45	1.60	1.65	2.6%	3.1%
6	France	1.77	1.48	1.54	1.56	1.58	-2.9%	1.1%
7	India	1.47	1.50	1.48	1.60	1.50	0.5%	-6.5%
8	Germany	1.30	1.29	1.13	1.19	1.06	-4.9%	-10.7%
9	Australia	0.87	0.89	0.91	0.92	0.93	1.6%	1.1%
10	Mexico	0.84	0.84	0.79	0.85	0.85	0.2%	-0.6%
World total e		36.4	38.4	38.8	40.6	41.1	3.1%	1.2%
Growth rate - World			5.5%	1.0%	4.6%	1.2%	3.1%	1.2%
Growth rate - Top 10			10.1%	0.3%	5.8%	5.2%	5.3%	5.2%
Growth rate - Top 10 without China			3.1%	1.4%	0.1%	2.8%	1.8%	2.8%

Top 10 markets worldwide by admissions | 2014-2018 e

In million. Ranked by 2018 admissions.

Sources: OBS, IHS Markit, National data sources

Rank	Market	2014	2015	2016	2017	2018 e	Annual growth rate e 5 years	Annual growth rate e 1 year
1	India e	1 937	2 073	1 860	1 907	2 022	1.1%	6.0%
2	China	830	1 260	1 370	1 620	1 720	20.0%	6.2%
3	US & Canada	1 268	1 321	1 315	1 240	1 304	0.7%	5.2%
4	Mexico	240	286	321	338	320	7.5%	-5.3%
5	South Korea	215	217	217	220	216	0.2%	-1.6%
6	Russian Federation	176	174	193	212	202	3.5%	-4.7%
7	France	209	205	213	209	201	-1.0%	-4.0%
8	United Kingdom	157	172	168	171	177	3.0%	3.7%
9	Japan	161	167	180	175	169	1.2%	-3.0%
10	Brazil	156	173	184	181	161	0.9%	-11.1%
World total e		6 671	7 498	7 560	7 818	7 954	4.5%	1.7%
Growth rate - World e		2.2%	12.4%	0.8%	3.4%	1.7%	4.5%	1.7%
Growth rate - Top 10 e		8.8%	13.1%	-0.4%	4.2%	3.5%	5.0%	3.5%
Growth rate - Top 10 e without China		5.0%	5.9%	-2.8%	0.0%	2.6%	1.4%	2.6%

Top 10 markets worldwide by number of screens | 2014-2018 e

In units. Ranked by 2018 values.

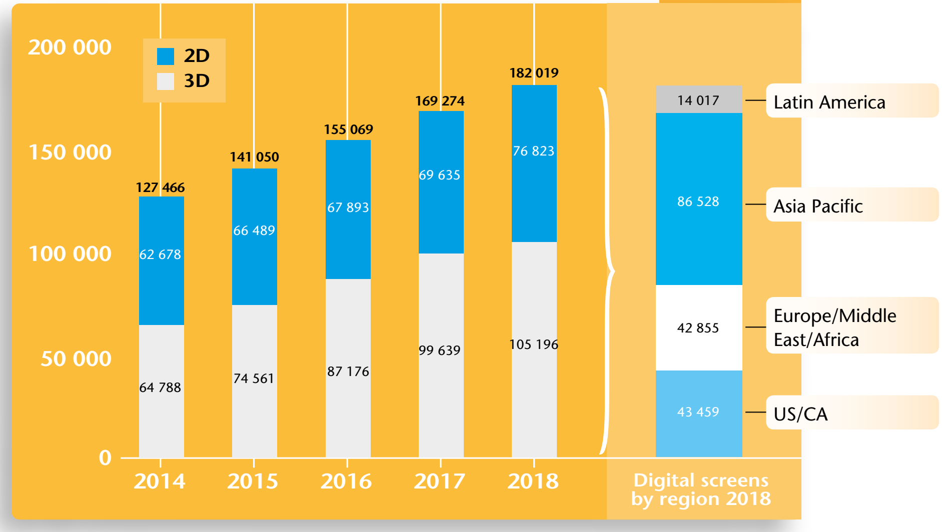
Sources: OBS, MPAA, IHS Markit

Rank	Market	2014	2015	2016	2017	2018	Annual growth rate 5 years	Annual growth rate 1 year
1	China	24 607	31 627	41 179	50 776	60 079	25.0%	18.3%
2	US & Canada	43 265	43 661	43 531	43 216	43 459	2.0%	0.6%
3	India	11 109	11 179	11 194	11 209	11 280	0.4%	0.6%
4	Mexico	5 678	5 977	6 225	6 633	7 024	5.5%	5.9%
5	France	5 653	5 741	5 842	5 913	5 981	1.4%	1.2%
6	Russia	3 829	4 021	4 370	4 800	5 215	8.0%	8.6%
7	Italy	5 044	5 053	5 104	5 315	5 205	0.8%	-2.1%
8	Germany	4 637	4 692	4 739	4 803	4 849	1.1%	1.0%
9	UK	3 909	4 046	4 150	4 264	4 340	2.6%	1.8%
10	Spain	3 694	3 588	3 568	3 625	3 589	-0.7%	-1.0%
World total		*142 215*	*152 142*	*163 928*	*171 755*	*186 859*	*7.1%*	*8.8%*
Growth rate - World e			*7.0%*	*7.7%*	*4.8%*	*8.8%*	*7.1%*	*8.8%*
Growth rate - Top 10 e			*7.3%*	*8.6%*	*8.4%*	*7.2%*	*7.9%*	*7.2%*
Growth rate - Top 10 e (without China and India)			*1.4%*	*1.0%*	*1.7%*	*1.0%*	*1.3%*	*1.0%*

Worldwide number of digital and 3D screens | 2014-2018 e

In units.

Source: MPAA



Top 10 markets worldwide by feature film production (1) | 2014-2018 e

In units. Ranked by 2018 values.

Sources: OBS, IHS Markit, National data sources

Rank	Market	2014	2015	2016	2017	2018	Annual growth rate 5 years	Annual growth rate 1 year
1	India (2)	1966	1845	1903	1986	1813	-2.0%	-8.7%
2	China	618	686	944	970	1082	15.0%	11.5%
3	Japan	615	581	610	594	613	-0.1%	3.2%
4	US (3)	482	495	511	549	576	4.6%	4.9%
5	South Korea	232	232	339	494	454	18.3%	-8.1%
6	France	258	300	283	300	300	3.8%	0.0%
7	Italy	201	185	224	234	272	7.9%	16.2%
8	Spain	224	254	254	279	264	4.2%	-5.4%
9	Germany (5)	234	236	256	247	247	1.4%	0.0%
10	UK (6)	364	361	327	315	202 (6)	-13.7%	-35.9%
World total e		7 455	7 648	7 893	8 026	8 204	2.4%	2.2%
Growth rate - World e			2.6%	3.2%	1.7%	2.2%	2.4%	2.2%
Growth rate - Top 10 e			-0.4%	9.2%	5.6%	-0.8%	3.3%	-0.8%
Growth rate - Top 10 e (without China and India)			1.3%	6.1%	7.4%	-2.8%	3.8%	0.5%

(1) Country data include minority co-productions.

(2) Films certified.

(3) Does not include feature films with budgets under USD 1 million, feature documentaries or student films.

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

(5) Feature films released.

(6) The apparent decline of film productions in 2018 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 | 2018

In USD million. GBO for 2018 only. Does not include carryovers.

	Original title	Country of origin	Studio	North American box office	International box office	Global box office
1	Avengers: Infinity War	US	Walt Disney	678.82	1 369.54	2 048.36
2	Black Panther	US	Walt Disney	700.06	648.31	1 348.37
3	Jurassic World: Fallen Kingdom	US	Universal Pictures	417.72	891.74	1 309.46
4	Incredibles 2	US	Walt Disney	608.58	634.16	1 242.75
5	Venom (1)	US/CN	Sony Pictures	213.31	642.24	855.55
6	Aquaman (1)	US	Warner Bros.	194.36	602.04	796.40
7	Mission: Impossible - Fallout	US/CN/FR/NO	Paramount	220.16	570.96	791.12
8	Deadpool 2	US	20th Century Fox	318.49	418.04	736.53
9	Bohemian Rhapsody (1)	GB INC/US	20th Century Fox	189.81	519.25	709.07
10	Fantastic Beasts: The Crimes of…	GB INC/US	Warner Bros.	156.78	470.90	627.68
11	Ant-Man and the Wasp	US	Walt Disney	216.65	406.00	622.65
12	Operation Red Sea (2)	CN/MA/HK	Bona Film	1.54	611.52	613.06
13	Ready Player One	US	Warner Bros.	137.69	443.30	580.99
14	Jumanji: Welcome to the Jungle (3)	US	Sony Pictures	235.51	319.23	554.74
15	Detective Chinatown 2	CN	Wanda Pictures, …	1.98	530.16	532.14
16	The Meg	US/CN	Warner Bros.	145.44	384.40	529.84
17	Hotel Transylvania 3: Summer Vacation	US	Sony Pictures	166.23	359.80	526.03
18	The Grinch	US/CN	Universal Pictures	266.28	207.86	474.14
19	Dying to Survive (2)	CN	Dirty Monkey, …	~	463.14	463.14
20	Rampage	US	Warner Bros.	101.03	325.40	426.43

(1) Still grossing in 2019.

(2) Unofficial cumulated BO.

(3) Released in 2017. BO for 2018 only.

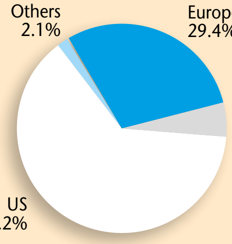
Sources: *Variety*, Comscore, OBS

European Union

Population 2018 e	512.7 million
GDP per capita 2018 e	43 148 USD
Gross box office 2018 e	6.80 bn EUR (8.03 bn USD)
Admissions 2018 e	955.6 million
Average ticket price 2018 e	7.1 EUR (8.1 USD)
Average admissions per capita 2018 e	1.9
Screens 2017 | 2018 (1) e	33 026 | 33 112
Digital screens 2017 | 2018 (2)	30 802 | 31 246
Digital 3D screens 2017 | 2018 (2)	14 565 | 14 607

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

Market shares 2018 e



EU cinema attendance drops in 2018

The European Audiovisual Observatory estimates that, after three years of above average admission levels, cinema attendance in the 28 European Union Member States decreased by 2.9% to 956 million tickets sold. This is 28.7 million less than in 2017 and the fourth lowest level registered in the EU since 2009. For the first time since 2014 GBO revenues did not cross the EUR 7 billion barrier but fell by 3.3% to EUR 6.80 billion (USD 8.03 billion). The average ticket price in the EU remained stable at EUR 7.1.

Just as in 2017, admissions developed in quite a heterogeneous manner across Europe in 2018: cinema attendance increased in eight and decreased in 16 EU markets, while remaining practically stable in 3 of the 27 EU markets for which data were available. Geographically speaking the decline in EU cinema attendance was primarily caused by a major drop in German admissions (-16.9 million) as well as a comparatively poor year-on-year performance in France (-8.3 million) and Italy (-7.0 million). Out of the five major EU markets, only the United Kingdom registered an increase in cinema attendance of 3.7% to 177 million admissions. This is the highest admissions level in the UK since 1970.

Decrease in admissions to US films

The decrease of EU cinema attendance in 2018 was primarily caused by a decline in admissions to US films which also led to a drop in US market share from 66.2% to 63.2%. In contrast, admissions to European films and European films produced in Europe with incoming US investment (EUR inc) increased and saved EU admissions from a more pronounced slump. The market share of European films in the EU grew from 27.9% to an estimated 29.4%, the second highest level in the past five years.

This of course did not change the fact that EU box office charts continued to be dominated by US films which accounted for 23 out of the top 25 titles. As in past years it was mostly family films and various franchise sequels, prequels and spin-offs which featured among the top films. *Avengers: Infinity War* topped the EU charts and was the only film to sell more than 30 million tickets in 2018, followed by *Incredibles 2* (27.9 million).

Two UK incoming investment films, *Bohemian Rhapsody* and *Fantastic Beasts: The Crimes of Grindelwald*, made it into the top 25 as the market share of EUR inc films increased from 4.2% to 5.4%. Leaving EUR inc films aside, the British historical drama *Darkest Hour* was the most successful European film selling 6.6 million tickets, ahead of *La ch'tite famille* (6.4 million), Dany Boon's spin-off of his breakout success *Bienvenue chez les Ch'tis* from 2008.

EU production increases again

After decreasing for the first time in 2017, EU film production volume continued its longstanding growth trend as the estimated number of theatrical feature films produced in the EU increased from 1 737 to 1 847 films. EU film production volume breaks down into an estimated 1 142 fiction films (62%) and 705 feature documentaries (38%). The increase in production activity was primarily linked to a growing number of international co-productions and feature documentaries.

Source: European Audiovisual Observatory (OBS)

Note: all 2018 figures for the EU are provisional estimates. "Inc" refers to films produced in a "host" country with US incoming investment.

CINEMA D'EUROPA MEDIA SALLES

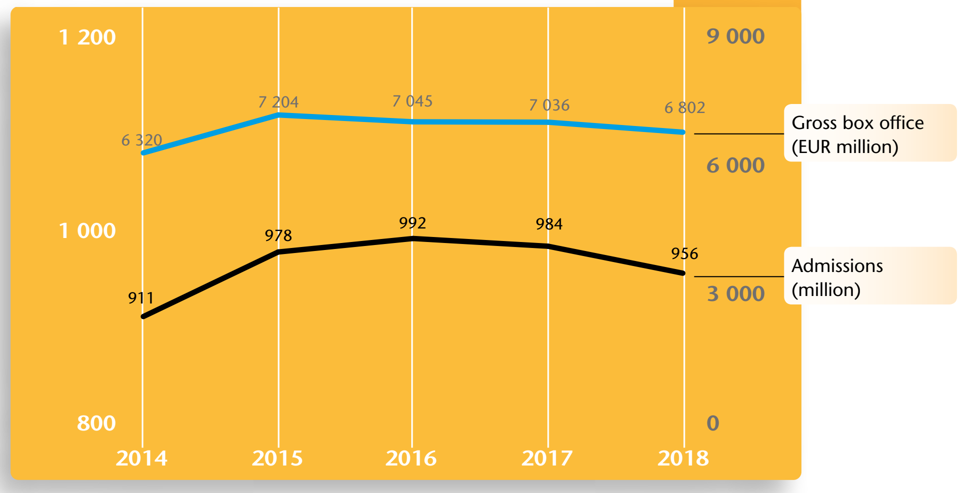
Information on the number of European digital screens is provided by MEDIA Salles and refers only to digital screens equipped with DLP Cinema or SXRD technology. MEDIA Salles operates in the framework of the EU's Creative Europe MEDIA sub-programme and supports the promotion of European films through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

EUROPA CINEMAS CREATIVE EUROPE · MEDIA SUB-PROGRAMME

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, 674 cities, 1 121 cinemas and 2 709 screens.

Admissions and gross box office in the European Union (1) | 2014-2018 *prov.*

Source: OBS

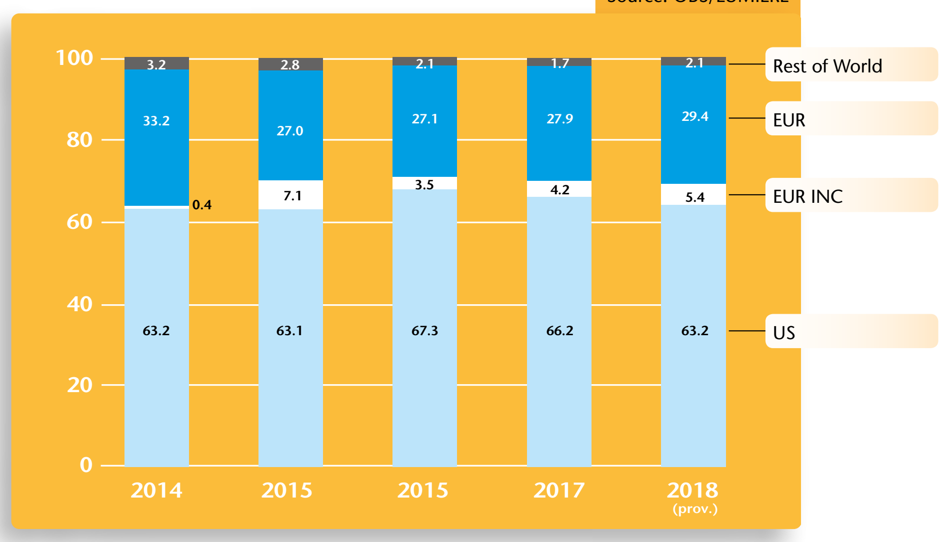


(1) National currencies converted to EUR at average annual exchange rates.

Breakdown of European Union admissions by nationality of films | 2014-2018e

In %.

Source: OBS/LUMIERE



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

Number of feature films produced in the European Union | 2014-2018 *prov.*

In units.

Country		2014	2015	2016	2017	*prov.* 2018	Sources
Austria	100% national fiction	10	15	13	9	12	Austrian Film Institute
	maj. co-prod. fiction	6	1	3	6	5	Austrian Film Institute
	min. co-prod. fiction	4	7	7	9	10	Austrian Film Institute
	Feature documentaries	25	17	21	20	25	Austrian Film Institute
Belgium (1)	100% national fiction	12	13	16	14	14	CFWB / VAF
	maj. co-prod. fiction	20	17	21	22	13	CFWB / VAF
	min. co-prod. fiction	33	31	28	38	31	CFWB / VAF
	Feature documentaries	5	8	17	15	17	CFWB / VAF
Bulgaria	100% national fiction	2	10	18	10	5	National Film Center
	maj. co-prod. fiction	1	2	6	4	1	National Film Center
	min. co-prod. fiction	0	5	7	5	5	National Film Center
	Feature documentaries	10	8	11	4	10	National Film Center
Cyprus e	100 % national fiction	1	2	0	2	3	OBS / Min. Cult
	maj. co-prod. Fiction	1	1	0	1	0	OBS / Min. Cult
	min. co-prod. Fiction	1	1	3	2	0	OBS / Min. Cult
	Feature documentaries	0	1	0	1	0	OBS / Min. Cult
Croatia	100% national fiction	7	5	6	6	10	Croatian Audiovisual Centre
	maj. co-prod. fiction	4	4	4	2	4	Croatian Audiovisual Centre
	min. co-prod. fiction	5	5	6	9	8	Croatian Audiovisual Centre
	Feature documentaries	3	1	1	16	14	Croatian Audiovisual Centre
Czech Rep.	100% national fiction	21	20	24	16	23	State Cinematography Fund
	maj. co-prod. fiction	8	7	17	8	13	State Cinematography Fund
	min. co-prod. fiction	6	9	7	5	11	State Cinematography Fund
	Feature documentaries	26	20	31	25	30	State Cinematography Fund
Denmark (2)	100% national fiction	14	14	15	13	13	Danish Film Institute
	maj. co-prod. fiction	7	9	8	8	9	Danish Film Institute
	min. co-prod. fiction	7	8	8	9	10	Danish Film Institute
	Feature documentaries	27	40	31	24	25	Danish Film Institute
Estonia (2)	100% national fiction	3	1	7	3	6	Estonian Film Institute
	maj. co-prod. fiction	1	3	2	3	1	Estonian Film Institute
	min. co-prod. fiction	2	2	3	5	3	Estonian Film Institute
	Feature documentaries	13	19	8	7	11	Estonian Film Institute
Finland (3)	100% national fiction	18	14	15	20	18	Finnish Film Foundation
	maj. co-prod. fiction	1	3	3	2	1	Finnish Film Foundation
	min. co-prod. fiction	5	4	5	1	6	Finnish Film Foundation
	Feature documentaries	23	24	22	18	24	Finnish Film Foundation
France	100% national fiction	124	126	125	147	141	CNC
	maj. co-prod. fiction	44	66	55	38	48	CNC
	min. co-prod. fiction	53	61	59	72	55	CNC
	Feature documentaries	37	47	44	43	56	CNC
Germany (2)	100% national fiction	84	76	82	80	78	SPIO
	maj. co-prod. fiction	22	24	41	27	35	SPIO
	min. co-prod. fiction	43	45	43	34	40	SPIO
	Feature documentaries	85	91	90	106	94	SPIO
Greece (2) e	100% national fiction	8	14	6	11	9	OBS
	maj. co-prod. fiction	5	1	5	3	2	OBS
	min. co-prod. fiction	9	7	10	6	3	OBS
	Feature documentaries	9	8	6	6	6	OBS
Hungary	100% national fiction	11	13	15	12	15	National Film Office (NMHH)
	maj. co-prod. fiction	1	2	3	2	2	National Film Office (NMHH)
	min. co-prod. fiction	3	3	1	2	1	National Film Office (NMHH)
	Feature documentaries	0	3	1	3	0	National Film Office (NMHH)
Ireland	100% national fiction	6	4	6	2	3	Screen Ireland
	maj. co-prod. fiction	6	7	10	12	14	Screen Ireland
	min. co-prod. fiction	13	6	4	6	12	Screen Ireland
	Feature documentaries	7	15	9	7	14	Screen Ireland
Italy	100% national fiction	150	126	142	153	147	MiBACT
	maj. co-prod. fiction	14	22	23	18	23	MiBACT
	min. co-prod. fiction	7	5	7	5	10	MiBACT
	Feature documentaries	30	32	52	59	93	MiBACT

Continued

Number of feature films produced in the European Union | 2014-2018 *prov.*

In units.

Country		2014	2015	2016	2017	*prov.* 2018	Sources
Latvia (2)	100% national fiction	1	1	2	3	5	National Film Centre of Latvia
	maj. co-prod. fiction	5	2	2	2	3	National Film Centre of Latvia
	min. co-prod. fiction	1	0	3	1	1	National Film Centre of Latvia
	Feature documentaries	17	14	13	13	17	National Film Centre of Latvia
Lithuania (2)	100% national fiction	8	6	8	6	9	Lithuanian Film Centre
	maj. co-prod. fiction	3	2	2	4	2	Lithuanian Film Centre
	min. co-prod. fiction	1	0	1	0	3	Lithuanian Film Centre
	Feature documentaries	3	1	2	1	9	Lithuanian Film Centre
Luxembourg e	100% national fiction	0	3	1	1	0	OBS / LFF
	maj. co-prod. fiction	3	5	0	3	3	OBS / LFF
	min. co-prod. fiction	17	10	16	7	8	OBS / LFF
	Feature documentaries	1	2	3	2	3	OBS / LFF
Malta e	Total	3	1	3	2	4	IMDB / OBS
The Netherlands	100% national fiction	22	24	19	19	23	NFF
	maj. co-prod. fiction	21	20	10	10	11	NFF
	min. co-prod. fiction	19	19	21	25	21	NFF
	Feature documentaries	22	19	32	33	31	NFF
Poland	100% national fiction	30	28	39	36	25	Polish Film Institute
	maj. co-prod. fiction	4	4	1	6	4	Polish Film Institute
	min. co-prod. fiction	3	3	6	17	5	Polish Film Institute
	Feature documentaries	9	14	8	16	8	Polish Film Institute
Portugal	100% national fiction	2	6	5	12	13	ICA
	maj. co-prod. fiction	1	9	8	0	8	ICA
	min. co-prod. fiction	3	2	4	8	2	ICA
	Feature documentaries	7	14	10	18	19	ICA
Romania	100% national fiction	27	27	27	22	32	CNC
	maj. co-prod. fiction	3	8	7	6	10	CNC
	min. co-prod. fiction	7	1	7	2	1	CNC
	Feature documentaries	10	7	8	11	7	CNC
Slovakia	100% national fiction	4	5	2	4	1	Slovak Film Institute
	maj. co-prod. fiction	3	5	4	5	6	Slovak Film Institute
	min. co-prod. fiction	5	5	8	12	12	Slovak Film Institute
	Feature documentaries	15	11	12	6	14	Slovak Film Institute
Slovenia (2)	100% national fiction	5	9	4	5	2	Slovenian Film Center
	maj. co-prod. fiction	1	1	4	6	4	Slovenian Film Center
	min. co-prod. fiction	4	5	4	1	3	Slovenian Film Center
	Feature documentaries	2	4	8	9	12	Slovenian Film Center
Spain	100% national fiction	26	69	98	117	96	ICAA
	maj. co-prod. fiction	68	58	23	19	26	ICAA
	min. co-prod. fiction	32	16	13	18	4	ICAA
	Feature documentaries	98	111	120	125	131	ICAA
Sweden (2)	100% national fiction	26	21	16	18	22	SFI
	maj. co-prod. fiction	4	7	6	7	9	SFI
	min. co-prod. fiction	7	4	7	13	0	SFI
	Feature documentaries	19	18	25	30	20	SFI
United Kingdom (4)	100% national fiction	187	157	171	147	103	BFI
	maj. co-prod. fiction	11	15	7	6	5	BFI
	min. co-prod. fiction	21	15	17	9	13	BFI
	Feature documentaries	89	111	71	78	30	BFI
	Inward features (5)	56	63	61	75	51	BFI
Total fiction films EU 28 (6) e		***1 080***	***1 115***	***1 159***	***1 120***	***1 142***	OBS
Total feature documentaries EU 28 (6) e		***535***	***591***	***589***	***617***	***705***	OBS
Total feature films EU 28 (6) e		***1 615***	***1 706***	***1 748***	***1 737***	***1 847***	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 2018 is linked to a time lag in identifying film productions with budgets below GBP 500 000.

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

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

Admissions in the European Union | 2014-2018 *prov.*

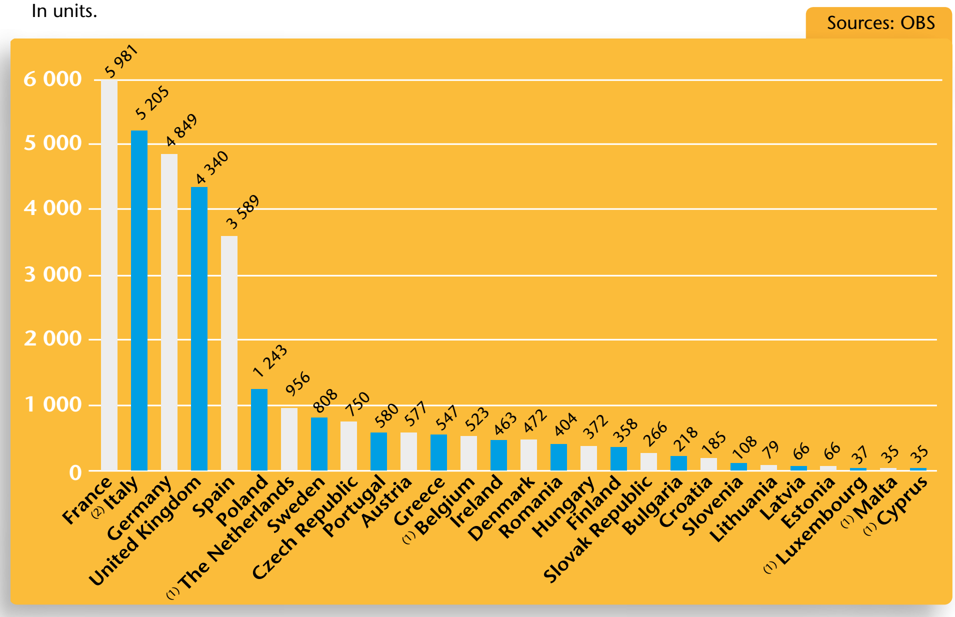
In millions. Provisional data.

ISO	Country	2014	2015	2016	2017	*prov.* 2018	2018/17	Sources
AT	**Austria** [e]	14.3	15.9	15.1	14.6	12.9	***-11.4%***	Austrian Film Institute
BE	**Belgium** [e]	21.6	21.1	19.4	19.6	18.8	***-3.9%***	VAF / CFWB / Cinedata
BG	**Bulgaria**	4.9	5.3	5.5	5.6	4.9	***-12.1%***	National Film Center (NFC)
CY	**Cyprus** [e]	0.7	0.7	0.7	0.7	0.8	***1.3%***	Min. Cult.
CZ	**Czech Republic**	11.6	13.0	15.6	15.2	16.3	***7.3%***	Czech Film Fund
DE	**Germany**	121.7	139.2	121.1	122.3	105.4	***-13.8%***	FFA
DK	**Denmark**	11.9	13.8	13.0	11.9	13.0	***9.0%***	Statistics Denmark / Danish Film Institute
EE	**Estonia**	2.6	3.1	3.3	3.5	3.6	***3.4%***	Estonian Film Institute
ES	**Spain** [e]	88.0	96.1	101.8	100.2	98.9	***-1.3%***	ICAA
FI	**Finland** [e]	7.3	8.7	8.7	8.8	8.1	***-8.3%***	Finnish Film Foundation
FR	**France**	209.1	205.4	213.2	209.4	201.1	***-4.0%***	CNC
GB	**United Kingdom**	157.5	171.9	168.3	170.6	177.0	***3.7%***	BFI / DCM
GR	**Greece** [e]	9.0	9.8	10.0	10.1	9.4	***-7.2%***	Greek Film Center
HR	**Croatia**	3.8	3.9	4.3	4.5	4.6	***1.5%***	Croatian Audiovisual Centre
HU	**Hungary** [e]	11.0	13.0	14.6	14.9	15.5	***3.6%***	National Film Office
IE	**Ireland** [e]	14.4	15.2	15.8	16.1	15.8	***-2.1%***	Screen Ireland
IT	**Italy** [e]	98.3	106.7	113.8	99.6	92.6	***-7.0%***	SIAE / Cinetel / ANICA
LT	**Lithuania**	3.2	3.3	3.7	4.1	4.3	***5.1%***	Lithuanian Film Centre
LU	**Luxembourg** [e]	1.1	1.3	1.1	1.2	1.1	***-10.3%***	CNA
LV	**Latvia**	2.3	2.4	2.5	2.5	2.5	***1.9%***	National Film Centre of Latvia
MT	**Malta**	0.7	0.7	0.7	0.8	-	-	National Statistics Office Malta
NL	**Netherlands**	30.8	33.0	34.2	36.0	35.7	***-0.8%***	NFF / MaccsBox - NVB & NVF
PL	**Poland**	40.5	44.7	52.1	56.6	59.7	***5.5%***	Polish Film Institute
PT	**Portugal**	12.1	14.6	14.9	15.6	14.7	***-5.9%***	Instituto do Cinema e do Audiovisual
RO	**Romania**	10.2	11.2	13.0	13.9	13.3	***-3.8%***	Centrul National al Cinematografiei
SE	**Sweden**	16.3	17.0	17.8	16.9	16.4	***-3.1%***	Swedish Film Institute
SI	**Slovenia**	1.9	2.1	2.3	2.4	2.5	***8.3%***	Slovenian Film Centre
SK	**Slovak Republic**	4.1	4.6	5.7	6.7	6.0	***-10.9%***	Slovak Film Institute / UFD
	EU 28 - Total [e]	***911***	***978***	***992***	***984***	***956***	***-2.9%***	European Audiovisual Observatory

Source: OBS

Number of screens in the EU by country
December 2018 e

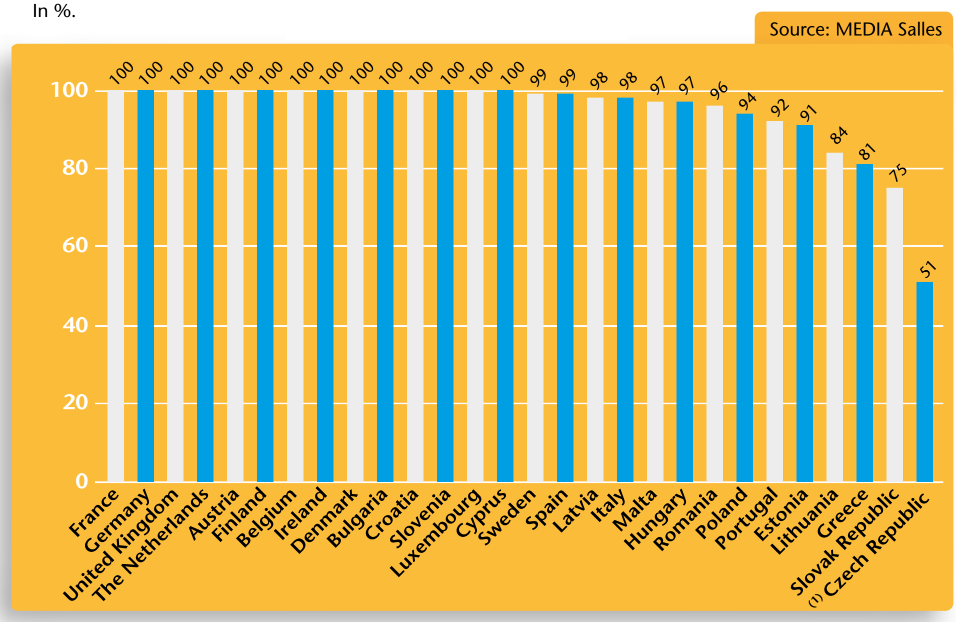
In units.



(1) Estimated as of December 2017. (2) Including screens with screenings on less than 60 days.

Digital screen penetration in the EU by country
December 2018 e

In %.



(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 total admissions in the EU.

Top 25 films by admissions in the European Union | 2018 *prov.*

	Original title	Country of origin	Director	*prov.* Admissions
1	Avengers: Infinity War	US	Anthony Russo, Joe Russo	30 994 883
2	Incredibles 2	US	Brad Bird	27 885 265
3	Bohemian Rhapsody	GB INC/US	Bryan Singer	26 413 548
4	Jurassic World: Fallen Kingdom	US	J.A. Bayona	22 125 822
5	Fantastic Beasts: The Crimes of Grindelwald	GB INC/US	David Yates	20 162 345
6	Mamma Mia! Here We Go Again	US/GB/JP	Ol Parker	19 921 320
7	Black Panther	US	Ryan Coogler	18 936 504
8	Hotel Transylvania 3: Summer Vacation	US	Genndy Tartakovsky	18 344 645
9	Fifty Shades Freed	US	James Foley	17 647 914
10	Deadpool 2	US	David Leitch	16 365 965
11	The Grinch	US/CN	Yarrow Cheney, Scott Mosier	13 822 945
12	Peter Rabbit	US/AU	Will Gluck	13 282 299
13	Venom	US/CN	Ruben Fleischer	12 840 350
14	Mission: Impossible - Fallout	US/CN/FR/NO	Christopher McQuarrie	12 456 615
15	A Star Is Born	US	Bradley Cooper	11 912 983
16	Jumanji: Welcome to the Jungle (1)	US	Jake Kasdan	9 941 367
17	The Nun	US	Corin Hardy	9 678 162
18	Solo: A Star Wars Story	US	Ron Howard	9 168 764
19	The Greatest Showman (2)	US	Michael Gracey	9 037 004
20	The Meg	US/CN	Jon Turteltaub	8 845 242
21	Ant-Man and the Wasp	US	Peyton Reed	8 691 322
22	Ready Player One	US	Steven Spielberg	8 611 061
23	Aquaman	US	James Wan	8 069 283
24	Mary Poppins Returns	US	Rob Marshall	7 564 967
25	Maze Runner: The Death Cure	US	Wes Ball	7 535 598

(1) 7 451 034 admissions in the EU in 2017. (2) 2 264 045 admissions in the EU in 2017. Source: OBS/LUMIERE

Top 25 European films (including EUR inc) by admissions in the European Union | 2018 *prov.*

	Original title	Country of origin	Director	*prov.* Admissions
1	Bohemian Rhapsody	GB INC/US	Bryan Singer	26 413 548
2	Fantastic Beasts: The Crimes of Grindelwald	GB INC/US	David Yates	20 162 345
3	Johnny English Strikes Again	GB/US/FR	David Kerr	7 128 046
4	Darkest Hour	GB/US	Joe Wright	6 593 948
5	La ch'tite famille	FR/BE	Dany Boon	6 428 659
6	Les Tuche 3 (The Magic Tuche)	FR	Olivier Baroux	5 965 078
7	Kler (Clergy)	PL/CZ	Wojciech Smarzowski	5 362 662
8	Le grand bain (Sink or Swim)	FR/BE	Gilles Lellouche	4 387 141
9	Taxi 5	FR	Franck Gastambide	4 138 811
10	Early Man	GB/US	Nick Park	3 691 935
11	The Commuter	GB/US/FR	Jaume Collet-Serra	3 609 532
12	Campeones (Champions)	ES	Javier Fesser	3 407 713
13	Tout le monde debout (Rolling to You)	FR/BE	Franck Dubosc	2 865 089
14	Paddington 2 (1)	GB/FR	Paul King	2 581 839
15	Alad'2 (Aladdin 2)	FR	Lionel Steketee	2 428 603
16	Belle and Sebastian 3 (Friends for Life)	FR	Clovis Cornillac	2 409 748
17	Astérix: Le secret de la potion magique	FR/BE	Alexandre Astier, Louis Clichy	2 320 092
18	Kobiety Mafii (Women of Mafia)	PL	Patryk Vega	2 159 649
19	Loving Pablo	ES/BG	Fernando León de Aranoa	2 127 849
20	Jim Knopf und Lukas der Lokomotivführer	DE	Dennis Gansel	2 000 548
21	Todos lo saben (Everybody Knows)	ES/FR/IT	Asghar Farhadi	1 980 643
22	Zimna wojna (Cold War)	PL/FR/GB	Pawel Pawlikowski	1 972 598
23	Die kleine Hexe (The Little Witch)	DE/CH	Mike Schaerer	1 816 105
24	Le jeu (The Game)	FR/BE	Fred Cavayé	1 782 774
25	Superlópez	ES	Javier Ruiz Caldera	1 776 175

(1) 9 170 946 admissions in the EU in 2017. Source: OBS/LUMIERE

Top 25 EU films by admissions in the Europa Cinemas Network (1) | 2018 e

	Original title	Country of origin (2)	Director	prov. Admissions
1	Zimna wojna (Cold War)	PL/FR/GB	Pawel Pawlikowski	974 847
2	Darkest Hour	GB/US	Joe Wright	921 342
3	Chiamami col tuo nome (Call Me By Your Name)	IT/FR/BR/US	Luca Guadagnino	846 531
4	Todos lo saben (Everybody Knows)	ES/FR/IT	Asghar Farhadi	616 281
5	The Children Act	GB/US	Richard Eyre	578 224
6	Loving Vincent	PL/GB/CH/NL	D. Kobiela & H. Welchman	468 685
7	Le Sens de la fête (C'est la vie)	FR/CA/BE	O. Nakache & E. Toledano	431 665
8	The Leisure Seeker	IT/FR	Paolo Virzi	405 975
9	Aus dem Nichts (In The Fade)	DE/FR	Fatih Akin	389 429
10	The Death of Stalin	FR/BE/GB/CA	Armando Iannucci	363 950
11	Girl	BE/NL	Lukas Dhont	353 597
12	The Wife	GB/SE/US	Bjorn Runge	337 823
13	Den skyldige (The Guilty)	DK	Gustav Möller	290 859
14	Dogman	IT/FR	Matteo Garrone	279 481
15	Kler (Clergy)	PL/CZ	Wojciech Smarzowski	276 571
16	Das schweigende Klassenzimmer (The Silent...)	DE	Lars Kraume	258 992
17	Der Vorname (How About Adolf?)	DE	Sönke Wortmann	239 919
18	The Bookshop	ES/GB/DE	Isabel Coixet	231 955
19	Pope Francis - A Man of His Word	VA/IT/CH/DE/FR	Wim Wenders	230 936
20	Le grand bain (Sink or Swim)	FR/BE	Gilles Lellouche	229 766
21	Early Man	GB/US	Nick Park	223 794
22	Campeones (Champions)	ES	Javier Fesser	223 418
23	The Guernsey Literary And Potato Peel Pie Society	GB INC/US/FR	Mike Newell	221 649
24	Le Brio	FR/BE	Yvan Attal	221 526
25	Maria by Callas	FR	Tom Volf	221 402

(1) Data based on Europa Cinemas members in 34 MEDIA countries, 674 cities, 1 121 cinemas, 2 709 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 | 2018 e

Admissions estimated based on average ticket price of USD 9.11.

	Original title	Country of origin	Director	Distributor	Admissions e
1	Bohemian Rhapsody	GB INC/US	Bryan Singer	20th Century Fox	20 858 978
2	Fantastic Beasts: The Crimes ...	GB INC/US	David Yates	Warner Bros.	17 165 602
3	Paddington 2	GB/FR	Paul King	Warner Bros.	4 459 279
4	The Commuter	GB/US/FR	Jaume Collet-Serra	Lionsgate	3 963 344
5	Darkest Hour	GB/US	Joe Wright	Focus Features	3 754 886
6	The Strangers: Prey at Night	GB/US	Johannes Roberts	Aviron Pictures	2 664 283
7	The Favourite	GB/IE/US	Yorgos Lanthimos	Fox Searchlight	1 896 874
8	Call Me by Your Name	IT/FR/BR/US	Luca Guadagnino	Sony Pictures	1 384 273
9	Three Identical Strangers	GB	Tim Wardle	Neon Rated	1 343 604
10	Mary Queen of Scots	GB/US	Josie Rourke	Focus Features	1 229 882
11	Early Man	GB/US	Nick Park	Lionsgate	901 586
12	The Wife	GB/SE/US	Björn Runge	Sony Pictures	891 907
13	The Death of Stalin	FR/BE/GB/CA	Armando Iannucci	IFC Films	874 098
14	Hotel Artemis	GB/US	Drew Pearce	Open Road	731 531
15	They Shall Not Grow Old	GB/NZ	Peter Jackson	Warner Bros.	622 010
16	2001: A Space Odyssey	GB/US	Stanley Kubrick	Warner Bros.	621 238
17	Colette	GB/US/HU	Wash Westmoreland	Bleecker Street	560 264
18	Johnny English Strikes Again	GB/US/FR	David Kerr	Universal	481 153
19	7 Days in Entebbe	GB/US	José Padilha	Focus Features	362 801
20	The Leisure Seeker	IT/FR	Paolo Virzì	Sony Pictures	350 305
21	Robin Hood	GB INC/US	Ridley Scott	Universal	344 602
22	The Sisters Brothers	FR/ES/RO/US/BE	Jacques Audiard	Annapurna Pictures	342 754
23	Whitney	GB/US	Kevin Macdonald	Roadside Attractions	330 028
24	American Animals	GB/NL/US	Bart Layton	The Orchard	311 531
25	You Were Never Really Here	GB INC/FR/US	Lynne Ramsay	Amazon Studios	275 690

Note: A total of 181 European films (including 15 EUR inc films) were identified among the top 600 films on release in the US and Canada in 2018, generating cumulative admissions of 71.5 million (5.5% market share)

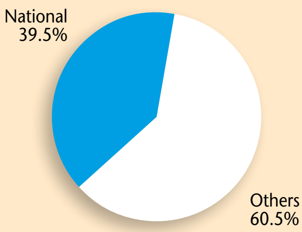
Sources: Comscore, OBS/LUMIERE

France

Population 2018 e	67.2 million
GDP per capita 2018 e	42 419 USD
Gross box office 2018 e	1.34 bn EUR (1.58 bn USD)
Admissions 2018 e	201.1 million
Average ticket price 2018 e	6.6 EUR (7.8 USD)
Average admissions per capita 2018 e	3.0
Screens 2017 | 2018 (1)	5 913 | 5 981
Digital screens 2017 | 2018 (2)	5 913 | 5 981
Digital 3D screens 2017 | 2018 (2)	3 025 | 3 030

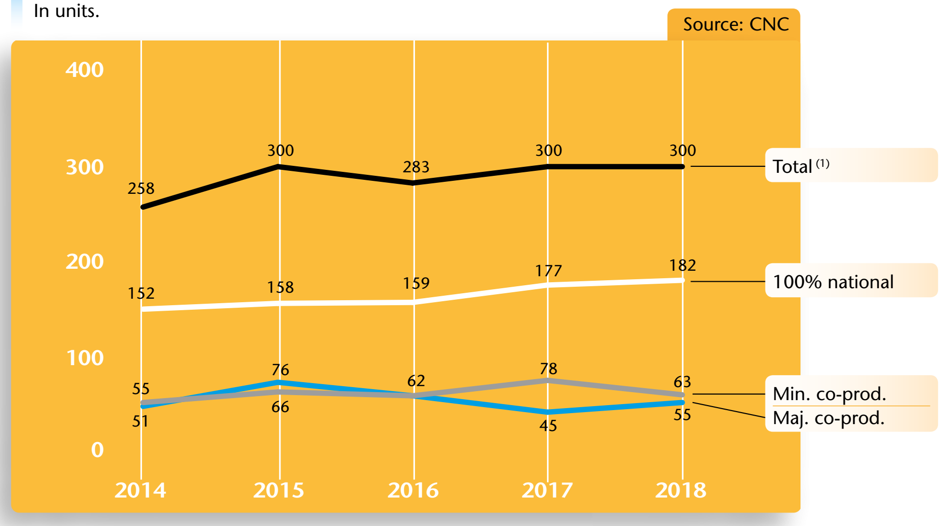
(1) Source: CNC (2) MEDIA Salles

Market shares 2018 e



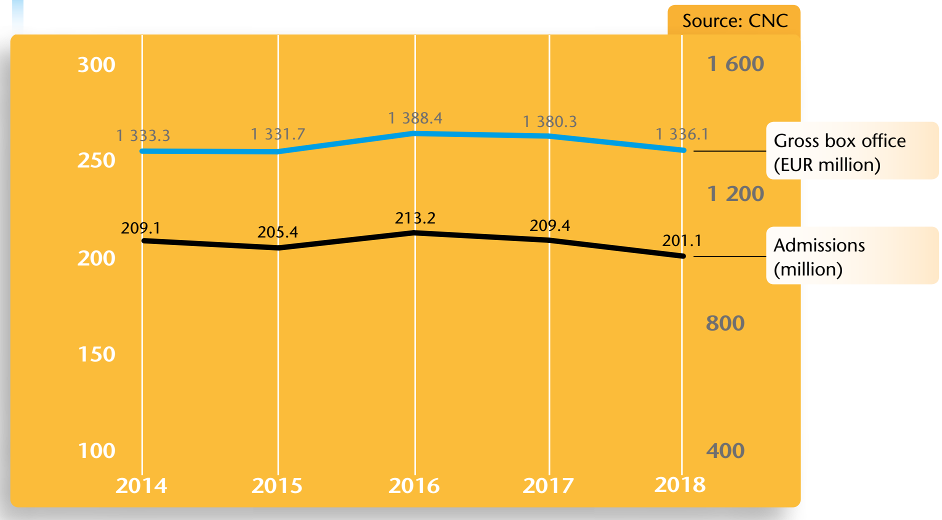
Number of French feature films produced | 2014-2018

In units.



(1) Officially recognised films.

Admissions and gross box office in France | 2014-2018



Top 20 films by admissions in France | 2018 (1)

	Original title	Country of origin	Director	Distributor	Admissions e
1	Incredibles 2	US	Brad Bird	Walt Disney	5 849 783
2	Les Tuche 3 (The Magic Tuche)	FR	Olivier Baroux	Pathé Distribution	5 687 100
3	La ch'tite famille	FR/BE	Dany Boon	Pathé Distribution	5 626 049
4	Avengers: Infinity War	US	Anthony & Joe Russo	Walt Disney	5 141 500
5	Le grand bain (Sink or Swim)	FR/BE	Gilles Lellouche	StudioCanal	4 162 550
6	Fantastic Beasts: The Crimes of…	GB INC/US	David Yates	Warner Bros.	3 700 901
7	Black Panther	US	Ryan Coogler	Walt Disney	3 688 170
8	Taxi 5	FR	Franck Gastambide	EuropaCorp/ARP	3 653 933
9	Jurassic World: Fallen Kingdom	US	J.A. Bayona	UPI	3 642 158
10	Bohemian Rhapsody	GB INC/US	Bryan Singer	20th Century Fox	3 546 367
11	Hotel Transylvania 3: Summer…	US	Genndy Tartakovsky	Sony Pictures	3 076 040
12	Mission: Impossible - Fallout	US/CN/FR/NO	C. McQuarrie	Paramount Pict.	3 021 982
13	Maze Runner: The Death Cure	US	Wes Ball	20th Century Fox	2 846 645
14	Fifty Shades Freed	US	James Foley	UPI	2 767 753
15	Deadpool 2	US	David Leitch	20th Century Fox	2 599 594
16	Tout le monde debout (Rolling to…)	FR/BE	Franck Dubosc	Gaumont Distrib.	2 419 376
17	Alad'2 (Aladdin 2)	FR	Lionel Steketee	Pathé Distribution	2 340 362
18	Venom	US/CN	Ruben Fleischer	Sony Pictures	2 288 459
19	Ready Player One	US	Steven Spielberg	Warner Bros.	2 280 758
20	Astérix: Le secret de la potion magique	FR/BE	A. Astier, L. Clichy	SND Films	2 102 757

(1) Covering film releases and admissions between 27/12/2017 and 25/12/2018.

Source: *Le Film Français*

Distribution and exhibition

French cinema attendance dropped by 4% to 201 million admissions in 2018. This marks the fifth consecutive year of admissions exceeding 200 million even though it represents the second lowest level in the past decade. GBO decreased by 3.2% to EUR 1.34 billion, the third highest level in history after 2016 and 2017.

Factors contributing to the decline in admissions included the soccer World Cup which was won by France, heat waves, strikes as well as the comparatively poor performance of US blockbusters. Despite representing 13 out of the top 20 films, cumulative admissions to US films declined by 11% as US market share dropped from 51% to 45%. In contrast, admissions to French and other European films increased but could not make up for the loss of US film admissions. French box office was once more dominated by a mixture of US superhero franchise films, family animations and local mainstream comedies. *Incredibles 2* topped the charts selling 5.8 million tickets, followed by two French comedy franchises *Les Tuche 3* and *La ch'tite famille*. A total of six French films made it into the top 20 and contributed largely to the increase in national market share from 37.5% to 39.5%, the highest level since 2014. As in 2017 Walt Disney led the competitive French distribution market with a market share of 12.7%, ahead of UPI (9.6%), Warner Bros (9.2%) and 20th Century Fox (9.1%).

After intense industry negotiations an agreement on new rules on media chronology was reached in December 2018. According to the new rules exploitation windows have been shortened allowing the public speedier access to works on both TV and VOD platforms.

Production and funding

With 300 feature films approved by the country's national funding body, the CNC, in 2018 French film production equalled the record levels of 2015 and 2017. In 2018 the average production cost of French initiative films amounted to EUR 4.0 million, compared to EUR 4.9 million in 2017 and EUR 5.1 million ten years ago. Total investment in film production in France plummeted by 15% to EUR 1.13 billion in 2018, EUR 957 million of which was invested in French initiative films. These are the third lowest levels registered in the past decade and reflect a sharp decline in financing from traditional distribution deals and TV channels. In an effort to further promote gender equality France has introduced a new subsidy bonus of 15% on top of the subsidy received from the CNC for films with women in key positions, effective from January 2019.

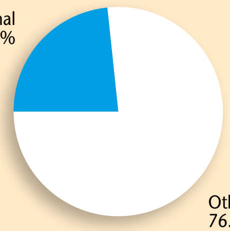
Sources: CNC, *Le Film Français*, *Variety*, OBS

Germany

Population 2018 e	82.9 million
GDP per capita 2018 e	47 535 USD
Gross box office 2018 e	899.30 M EUR (1.06 bn USD)
Admissions 2018 e	105.4 million
Average ticket price 2018 e	8.5 EUR (10.1 USD)
Average admissions per capita 2018 e	1.3
Screens 2017 | 2018 (1)	4 803 | 4 849
Digital screens 2017 | 2018 (2)	4 803 | 4 848
Digital 3D screens 2017 | 2018 (2)	2 220 | 2 220

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

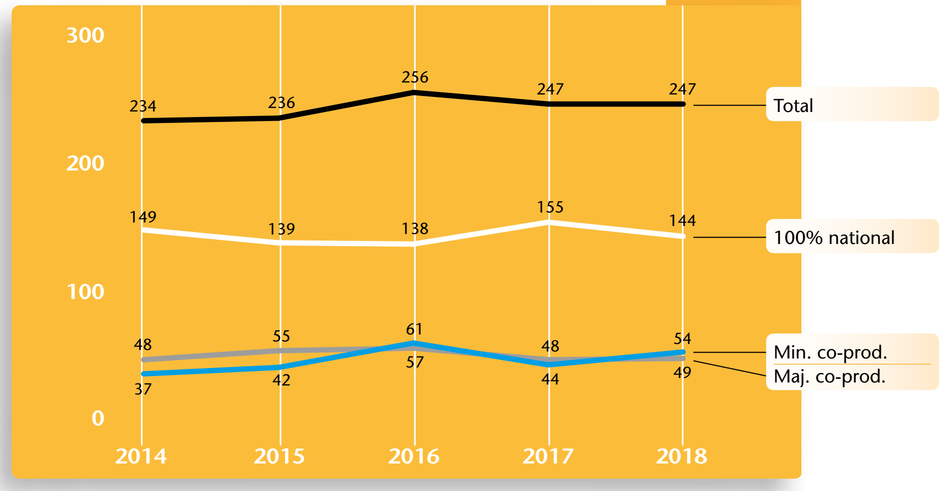
Market shares 2018 e



Number of German feature films produced (1) | 2014-2018

In units.

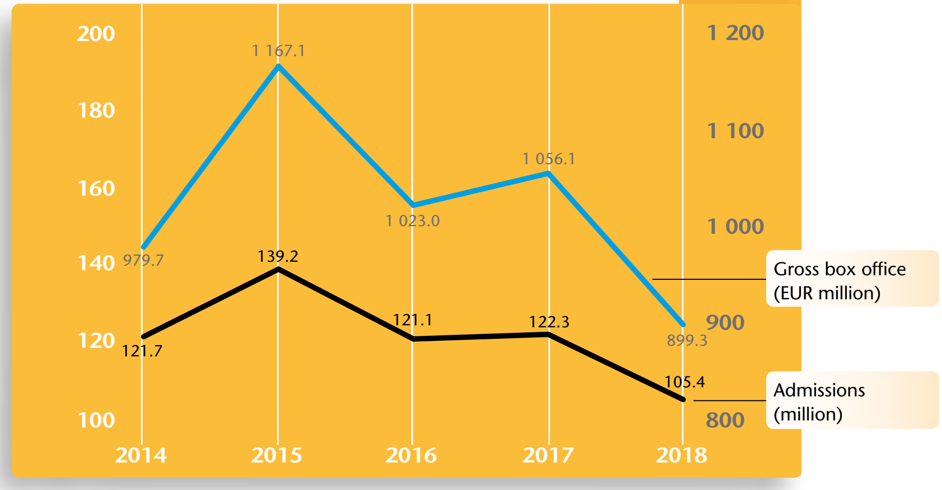
Source: SPIO



(1) Films on first release.

Admissions and gross box office in Germany | 2014-2018

Source: FFA



Top 20 films by admissions in Germany | 2018

	Original title	Country of origin	Director	Distributor	Admissions
1	Fantastic Beasts: The Crimes of…	GB INC/US	David Yates	Warner Bros.	3 589 309
2	Avengers: Infinity War	US	Anthony & Joe Russo	Walt Disney Studios	3 399 185
3	Fifty Shades Freed	US	James Foley	Universal Pictures	3 007 580
4	Incredibles 2	US	Brad Bird	Walt Disney Studios	2 916 732
5	Hotel Transylvania 3: Summer…	US	Genndy Tartakovsky	Sony Pict. Releasing	2 538 116
6	Jurassic World: Fallen Kingdom	US	J.A. Bayona	Universal Pictures	2 403 661
7	Deadpool 2	US	David Leitch	20th Century Fox	2 242 445
8	Mamma Mia! Here We Go Again	GB/US	Ol Parker	Universal Pictures	2 179 839
9	Bohemian Rhapsody	GB INC/US	Bryan Singer	20th Century Fox	2 049 780
10	The Grinch	US/CN	Y. Cheney, S. Mosier	Universal Pictures	1 966 133
11	Jim Knopf und Lukas der Lokomotivf…	DE	Dennis Gansel	Warner Bros.	1 813 006
12	Black Panther	US	Ryan Coogler	Walt Disney Studios	1 797 443
13	Die kleine Hexe (The Little Witch)	DE/CH	Mike Schaerer	StudioCanal	1 582 668
14	Peter Rabbit	US/AU	Will Gluck	Sony Pict. Releasing	1 526 827
15	Star Wars: Episode VIII - The Last Jedi	US	Rian Johnson	Walt Disney Studios	1 509 581
16	Dieses bescheuerte Herz (This Crazy…	DE	Marc Rothemund	Constantin Film	1 417 681
17	Venom	US/CN	Ruben Fleischer	Sony Pict. Releasing	1 373 487
18	Solo: A Star Wars Story	US	Ron Howard	Walt Disney Studios	1 364 133
19	Mission: Impossible - Fallout	US/CN/FR/NO	C. McQuarrie	Paramount	1 285 749
20	Der Vorname (How About Adolf?)	DE	Sönke Wortmann	Constantin Film	1 272 832

Source: FFA

Distribution and exhibition

German cinema attendance plummeted 13.9% to 105.5 million admissions in 2018. This is the lowest level since the German reunification in 1990. The steep drop comes after a marginal 1% increase in 2017 which had followed a 13% fall in 2016. Impacted by a 33% drop in 3D admissions whose market share fell to 16.3%, the lowest level since the roll-out of 3D in 2009, the average ticket price decreased for the first time in 14 years by 9 cents to EUR 8.54. As a result, GBO dropped even more sharply than admissions, falling by 14.8% to EUR 899 million. This is the first time since 2012 that Germany's box office earnings failed to reach the one billion benchmark that clearly. The number of first releases continued to decrease for the second year in a row, declining from 587 in 2017 to 576 film releases.

Both US as well as local films registered declining admissions while German films managed to keep their market share relatively stable, capturing 23.5% of the market despite no local film featuring in the top 10 ranking which was exclusively dominated by US studio titles. Two children's films *Jim Knopf und Lukas der Lokomotivführer* (1.8 million admissions) and *Die Kleine Hexe* (1.6 million) became the two most successful local productions. 2018 was also characterised by the lack of breakout successes with no single film selling more than four million tickets in 2018, in contrast to three films in 2017 and eight in 2015. Universal topped Germany's distribution market in 2018 taking 18.8% of total admissions, ahead of Warner Bros. (16.8%) and Walt Disney (14.2%).

Production and funding

German feature film production remained stable with 247 national feature films, including minority co-productions, released in 2018, the same number as in 2017. On the funding side the DFFF, Germany's main public funding program for theatrical films, revamped its guidelines in October 2018 and expanded the rebate system for the VFX sector. Instead of requiring a physical shoot in the country, the new regulations require a simple EUR 2 million local spend in order to qualify for the DFFF II's 25% rebate. Combined with regional funding, VFX support can now go up to 45%. At the same time and complementing the DFFF, the Ministry of Culture also took over the responsibility for the EUR 15 million German Motion Picture Fund (GMPF) which supports the production of films and series to be released on TV or VOD platforms. Good news also came earlier this year for the FFA as Netflix finally agreed to make financial contributions to the national film fund from September 2019 onwards.

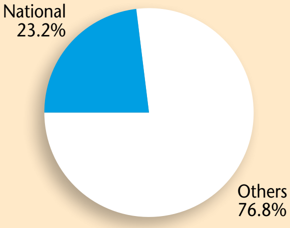
Sources: FFA, SPIO, BKM, *Blickpunkt Film, filmecho/filmwoche, Variety,* OBS

Italy

Population 2018 e	60.5 million
GDP per capita 2018 e	33 725 USD
Gross box office 2018 e	588.6 M EUR (695 M USD)
Admissions 2018 e	92.6 million
Average ticket price 2018 e	6.4 EUR (7.5 USD)
Average admissions per capita 2018 e	1.5
Screens 2017 | 2018 (1)	5 315 | 5 205
Digital screens 2017 | 2018 (2)	3 743 | 3 766
Digital 3D screens 2017 | 2018 (2)	1 385 | 1 390

(1) Source: SIAE. But only 3 849 screens with at least 60 days of activity in 2017.
(2) Source: MEDIA Salles (counting only screens with at least 60 days of activity).

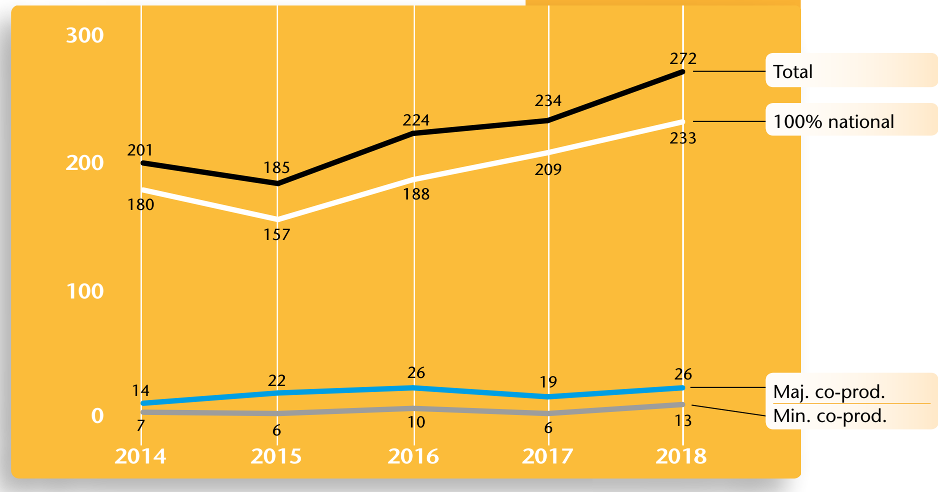
Market shares 2018 e



Number of Italian feature films produced | 2014-2018

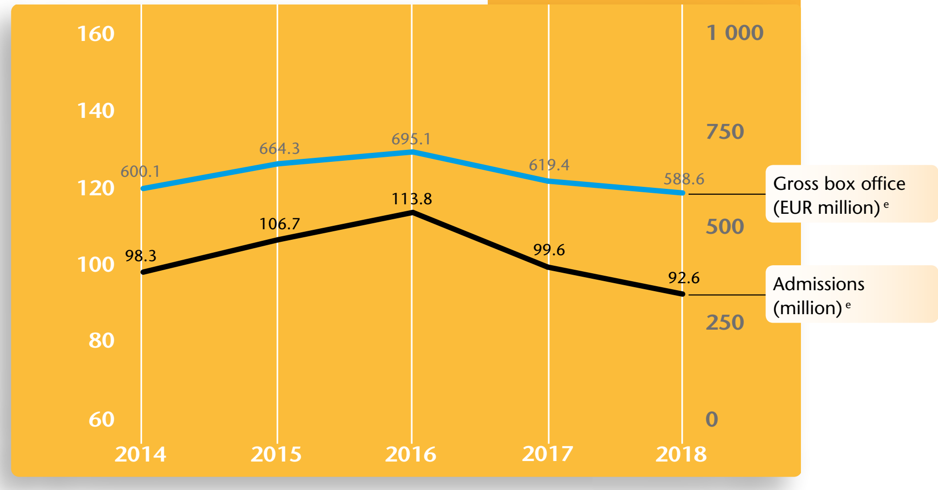
In units.

Source: DG Cinema - MiBACT



Admissions and gross box office in Italy | 2014-2018 e

Source: SIAE, ANICA, Cinetel, OBS



Top 20 films by admissions in Italy | 2018

	Original title	Country of origin	Director	Distributor	Admissions
1	Bohemian Rhapsody	GB INC/US	Bryan Singer	20th Century Fox	3 000 297
2	Avengers: Infinity War	US	Anthony & Joe Russo	Walt Disney	2 645 814
3	Fifty Shades Freed	US	James Foley	Universal	2 043 606
4	Hotel Transylvania 3: Summer Vacation	US	Genndy Tartakovsky	Warner Bros.	1 934 922
5	Incredibles 2	US	Brad Bird	Walt Disney	1 874 635
6	Fantastic Beasts: The Crimes of…	GB INC/US	David Yates	Warner Bros.	1 825 777
7	Jurassic World: Fallen Kingdom	US	J.A. Bayona	Universal	1 638 151
8	Jumanji: Welcome to the Jungle	US	Jake Kasdan	Warner Bros.	1 510 844
9	The Nutcracker and the Four Realms	US	J. Johnston, L. Hallström	Walt Disney	1 478 701
10	Mary Poppins Returns	US	Rob Marshall	Walt Disney	1 455 921
11	A casa tutti bene (There Is No Place…)	IT	Gabriele Muccino	01 Distribution	1 437 629
12	The Shape of Water	US	Guillermo del Toro	20th Century Fox	1 363 279
13	Coco	US	L. Unkrich, A. Molina	Walt Disney	1 327 125
14	Benedetta follia	IT	Carlo Verdone	Filmauro/Universal	1 309 063
15	Venom	US/CN	Ruben Fleischer	Warner Bros.	1 236 407
16	Come un gatto in tangenziale	IT	Riccardo Milani	Vision Distribution	1 176 915
17	Wonder	US	Stephen Chbosky	01 Distribution	1 151 364
18	Black Panther	US	Ryan Coogler	Walt Disney	1 064 295
19	Deadpool 2	US	David Leitch	20th Century Fox	1 051 322
20	The Post	US	Steven Spielberg	01 Distribution	1 027 588

Source: Cinetel

Distribution and exhibition

Italian box office continued its recent downward trend with cinema attendance dropping by 7% to 92.6 million admissions. This decline follows a 12% plunge in 2017 and represents the lowest level in ticket sales since 1995. GBO decreased by 5% to an estimated EUR 589 million, the lowest level since the turn of the century, as the average ticket price increased by 12 cents to EUR 6.35.

In contrast to 2017, when Italian films suffered a massive drop in admissions, the decline in 2018 was caused by the comparatively poor performance of US blockbusters, whose market share dropped from 65% to 59% despite accounting for all the top 10 films. The persistently low number of US and local blockbuster releases during the summer months is regarded as an important factor for the low turnout. On a more positive note, Italian films regained traction in 2018. Led by dramedy *A casa tutti bene* (1.4 million admissions, rank 11) and comedy *Benedetta follia* (1.3 million, rank 14) local films attracted more admissions and increased their market share from 17.6% to 23.2% in 2018. Warner Bros led the Italian distribution market, taking 19.1% of total admissions, followed by Universal (14.6%), Walt Disney (14.4%), 20th Century Fox (11.6%) and 01 Distribution (11.5%).

Following a controversy about the simultaneous release of *On My Skin* in theatres and on Netflix, theatrical windows were regulated by a Ministerial Decree announced in November 2018, enforcing a time lag of 105 days between the theatrical release of a film and its availability on other platforms. This represents the country's first legislative intervention concerning theatrical windows and effectively enshrines an already well-established practice into law. The law foresees two important exceptions for limited releases selling less than 50 000 tickets in the first 21 days as well as for films with a short-time release of up to 3 days, in which cases the window can be reduced to 60 and 10 days respectively.

Production and funding

Italian feature film production on the other hand continued to grow thanks to a significant increase in feature documentaries and hit a record high of 272 films produced in 2018. The Italian film industry is hoping to benefit from the implementation of the new film law from 2017 through a series of decrees which is pouring some EUR 400 million annually into all industry sectors, including the exhibition sector where public support aims to incentivize the refurbishment of existing and the construction of new cinemas, which should contribute to winning back cinema audiences.

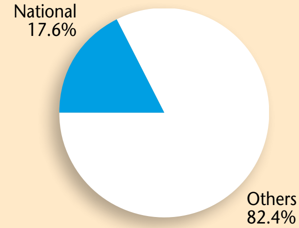
Sources: DG Cinema-MiBACT, ANICA, Cinetel, *Cineuropa, Screen International, Variety,* OBS

Spain

Population 2018 [e]	46.7 million
GDP per capita 2018 [e]	30 689 USD
Gross box office 2018 [e]	585.7 M EUR (691.8 M USD)
Admissions 2018 [e]	98.9 million
Average ticket price 2018 [e]	5.9 EUR (7.0 USD)
Average admissions per capita 2018 [e]	2.1
Screens 2017 | 2018 (1)	3 625 | 3 589
Digital screens 2017 | 2018 (2)	3 467 | 3 483
Digital 3D screens 2017 | 2018 (2)	1 130 | 1 120

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

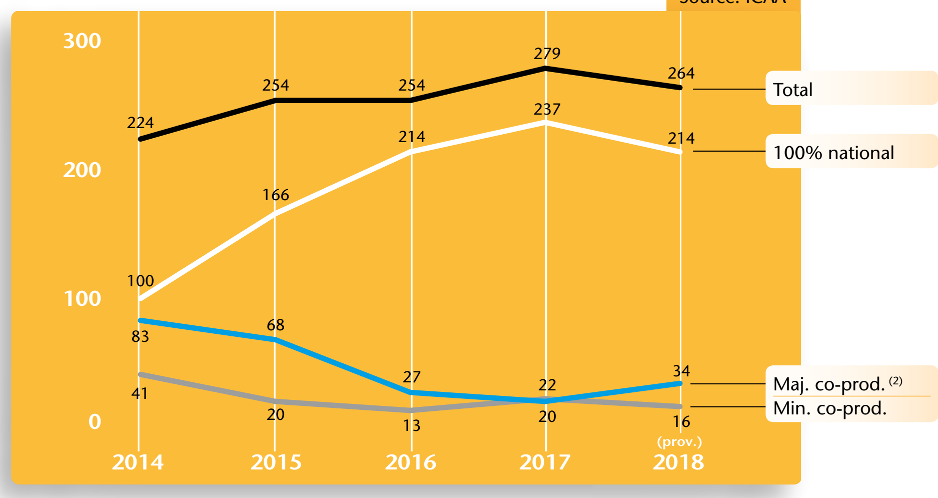
Market shares 2018 [e]



Number of Spanish feature films produced (1) | 2014-2018

In units.

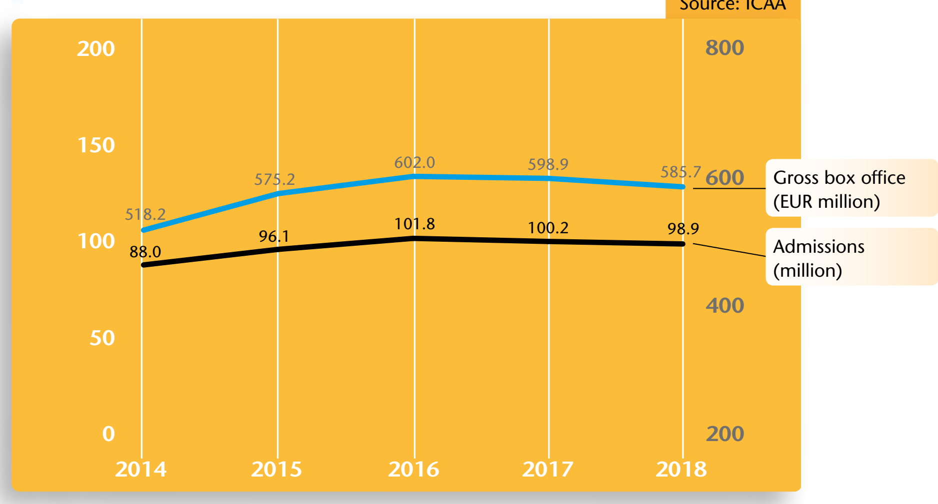
Source: ICAA



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

Admissions and gross box office in Spain | 2014-2018 *prov.*

Source: ICAA



Top 20 films by admissions in Spain | 2018 *prov.*

	Original title	Country of origin	Director	Distributor	Admissions
1	Jurassic World: Fallen Kingdom	US	J.A. Bayona	UPI	3 873 352
2	Incredibles 2	US	Brad Bird	Walt Disney	3 747 760
3	Bohemian Rhapsody	GB INC/US	Bryan Singer	Hispano Foxfilms	3 500 206
4	Avengers: Infinity War	US	Anthony & Joe Russo	Walt Disney	3 446 812
5	Campeones (Champions)	ES/MX	Javier Fesser	UPI	3 250 299
6	Hotel Transylvania 3: Summer Vacation	US	Genndy Tartakovsky	Sony Pictures	2 371 174
7	Fifty Shades Freed	US	James Foley	UPI	1 945 654
8	The Meg	US/CN	Jon Turteltaub	Warner Bros.	1 778 964
9	Superlópez	ES	Javier Ruiz Caldera	Walt Disney	1 776 175
10	The Nun	US	Corin Hardy	Warner Bros.	1 754 000
11	Fantastic Beasts: The Crimes of…	GB INC/US	David Yates	Warner Bros.	1 720 890
12	Ralph Breaks the Internet	US	R., P. Johnston	Walt Disney	1 605 886
13	Mamma Mia! Here We Go Again	US/GB/JP	Ol Parker	UPI	1 544 784
14	The Shape of Water	US	Guillermo del Toro	Hispano Foxfilms	1 526 497
15	Venom	US/CN	Ruben Fleischer	Sony Pictures	1 521 339
16	Deadpool 2	US	David Leitch	Hispano Foxfilms	1 510 582
17	El mejor verano de mi vida (The Best…	ES	Dani de la Orden	A Contracorriente	1 423 546
18	Peter Rabbit	US/AU	Will Gluck	Sony Pictures	1 293 894
19	Black Panther	US	Ryan Coogler	Walt Disney	1 259 659
20	Perfectos desconocidos (Perfect…	ES/IT	Álex de la Iglesia	UPI	1 257 599

Sources: ICAA, Comscore

Distribution and exhibition

After logging in over 100 million admissions in 2016 and 2017, Spanish cinema attendance once again dropped below this threshold in 2018 as admissions dipped 1.3% to 98.9 million. This decline comes despite the long awaited lowering of the sales tax on cinema tickets from 21% to 10%, which many had hoped would have a more positive impact on ticket sales. However, taking the upgrading efforts of several major cinema chains as a sign of a positive outlook for the future and the effect of the soccer World Cup as an explanation for the slight decline, market experts interpret 2018 results as sustaining the longer-term recovery of the Spanish theatrical market which had started in 2014. The lower sales tax was partly passed on to consumers and resulted in a slightly lower average ticket price which caused GBO to decline by 2.2% to EUR 586 million.

For the second time in the past five years the Spanish box office was topped by a US rather than a local blockbuster. J.A. Bayona's *Jurassic World: Fallen Kingdom* led the charts ahead of *Incredibles 2*, *Bohemian Rhapsody* and *Avengers: Infinity War*. With 3.2 million tickets sold sports comedy *Campeones* was the most successful domestic title of 2018, ahead of the action comedy *Superlópez*. A total of five local films, all of which comedies, sold more than 1 million tickets, confirming the strong appeal of local comedies to Spanish audiences. In contrast to the overall market cumulative admissions to Spanish films increased slightly and national market share rose from 17.0% to 17.6%. UPI led the Spanish distribution market once more, capturing an estimated 21% of total admissions, followed by Walt Disney (19%), Hispano Foxfilms (16%) and Warner Bros. (12%).

Production and funding

Spanish film production activity remained stable with a total of 264 films certified by ICAA, the country's national public funding body, in 2018. Over the past five years Spain saw the number of 100% national films more than double while the number of international co-productions more than halved. Boosted by tax incentives, Spain has been attracting an increasing number of foreign film and high-end TV drama shoots making it sometimes more advantageous for Spanish production companies to offer production services to international productions than to co-produce them. A new law regulating state aid came into effect in mid-2018 adapting most forms of public aid to better meet the needs of the film industry, including an increase in the maximum permitted cost limit for animation projects, which represent an important sector for the Spanish film industry.

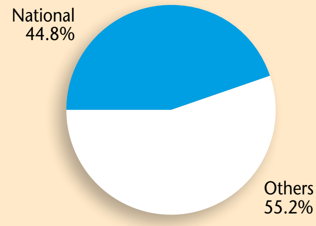
Sources: ICAA, Spain Film Commission, *Screen International, Variety, Hollywood Reporter*, OBS

United Kingdom

Population 2018 e	66.2 million
GDP per capita 2018 e	40 026 USD
Gross box office 2018 e	1.28 bn GBP (1.71 bn USD)
Admissions 2018 e	177.0 million
Average ticket price 2018 e	7.2 GBP (9.7 USD)
Average admissions per capita 2018 e	2.7
Screens 2017 | 2018 (1)	4 264 | 4 340
Digital screens 2017 | 2018 (2)	4 262 | 4 424
Digital 3D screens 2017 | 2018 (2)	2 060 | 2 090

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

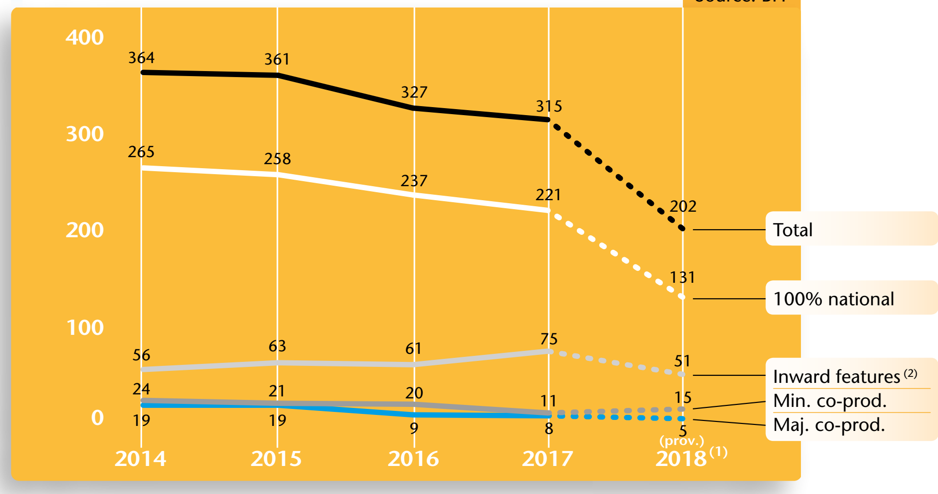
Market shares 2018 e



Number of films produced in the United Kingdom | 2014-2018 *prov.* (1)

In units.

Source: BFI

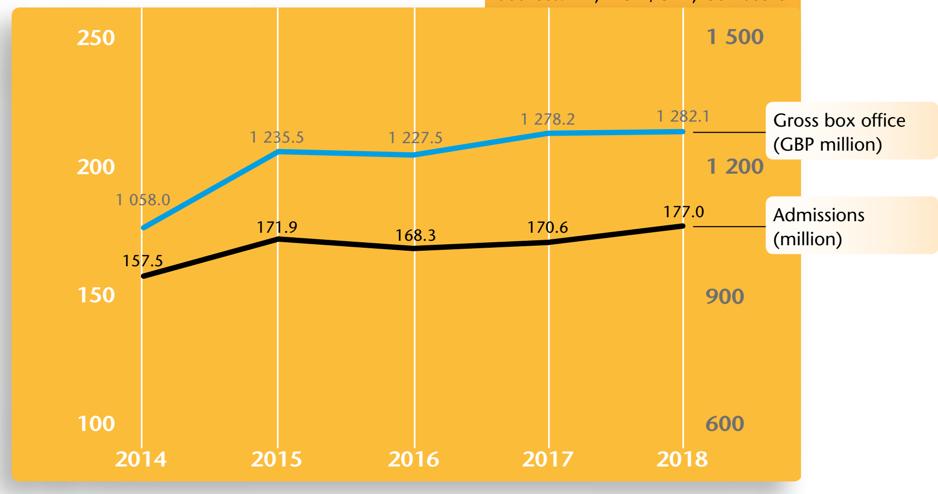


(1) The apparent decline of film productions in 2018 is linked to a time lag in identifying film productions with budgets below GBP 500 000.

(2) Including inward investemt features except features involving only VFX work in the UK.

Admissions and gross box office in the United Kingdom | 2014-2018

Sources: BFI, DCM/CAA, Comscore



Top 20 films by admissions in the United Kingdom & Ireland | 2018 [e]

Estimated admissions based on average ticket price of GBP 7.28.

	Original title	Country of origin	Director	Distributor	Admissions [e]
1	Avengers: Infinity War	US	Anthony & Joe Russo	Walt Disney	9 140 315
2	Mamma Mia! Here We Go Again	US/GB/JP	Ol Parker	Universal Pictures	8 322 648
3	Incredibles 2	US	Brad Bird	Walt Disney	7 168 837
4	Black Panther	US	Ryan Coogler	Walt Disney	6 563 796
5	Bohemian Rhapsody	GB INC/US	Bryan Singer	20th Century Fox	6 098 004
6	The Greatest Showman	US	Michael Gracey	20th Century Fox	5 555 786
7	Jurassic World: Fallen Kingdom	US	J.A. Bayona	Universal Pictures	5 296 380
8	Peter Rabbit	US/AU	Will Gluck	Sony Pictures	5 218 399
9	Fantastic Beasts: The Crimes of…	GB INC/US	David Yates	Warner Bros.	4 267 554
10	Deadpool 2	US	David Leitch	20th Century Fox	4 228 854
11	A Star Is Born	US	Bradley Cooper	Warner Bros.	3 384 986
12	The Grinch	US/CN	Y. Cheney, S. Mosier	Universal Pictures	3 295 294
13	Mary Poppins Returns	US	Rob Marshall	Walt Disney	3 245 565
14	Darkest Hour	GB/US	Joe Wright	Universal Pictures	3 218 450
15	Mission: Impossible - Fallout	US/CN/FR/NO	Christopher McQuarrie	Paramount	3 082 160
16	Jumanji: Welcome to the Jungle	US	Jake Kasdan	Sony Pictures	2 607 745
17	Venom	US/CN	Ruben Fleischer	Sony Pictures	2 570 368
18	Solo: A Star Wars Story	US	Ron Howard	Walt Disney	2 525 893
19	Hotel Transylvania 3: Summer…	US	Genndy Tartakovsky	Sony Pictures	2 479 780
20	Coco	US	L. Unkrich, A. Molina	Walt Disney	2 363 367

Source: BFI, Comscore

Distribution and exhibition

2018 turned out to be a record year for UK cinema. Not only was the UK the only major EU market to register an increase in admissions, UK cinema attendance reached its highest level of admissions since 1970 as admissions grew by 3.7% to 177 million tickets sold. Despite a 3.3% drop in the average ticket price from GBP 7.50 to GBP 7.24, GBO climbed to yet another record high of GBP 1.28 billion.

The UK theatrical market was once again dominated by US studio titles with only one independent UK film, *Darkest Hour*, making it into the top 20 in 2018. As elsewhere in Europe the top 20 were dominated by sequels, franchises and remakes which took up 16 places. Thanks to the exceptionally strong performance of several US studio backed films like *Avengers: Infinity War* and *Mamma Mia: Here We Go Again!* the market share of UK qualifying films increased from 27.9% to 33.3%. At the same time the market share of independent UK films was also up from 9.5% to 11.7% leading to a cumulative market share of UK films of 44.8%. This is the highest market share since records began in 2001. Walt Disney finished as top distributor for the second year, netting 19.2% of total GBO in the UK and Ireland. Universal Pictures took second place (19.1%), ahead of 20th Century Fox (14.4%) and Warner Bros. (13.8%).

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 202 UK feature films - including inward investment films – started principal photography in 2018, compared to 364 in 2014.

Boosted by high incentives and a comparatively low British Pound local production spend had reached a record high of GBP 2.2 billion in 2017. Final figures are not yet available for 2018, but provisional figures show a production spend of GBP 1.92 billion (USD 2.56 billion), the second highest level on record. 25 US studio titles accounted for 74% of production spend, while 31 independent inward investment films and 130 domestic films both accounted for 12%. International co-productions (18 films) registered the lowest level in years accounting for only 1% of total spend.

In early 2019 the UK signed the updated version of the European Convention on Cinematographic Coproduction. This is interpreted by some as a symbolic step amidst Brexit discussions to confirm the UK's determination to continue working with Europe.

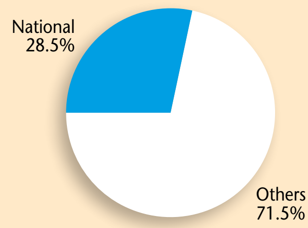
Sources: British Film Institute (BFI), DCM, *Screen International,* Comscore, OBS

Russian Federation

Population 2018 e	143.4 million
GDP per capita 2018 e	10 248 USD
Gross box office 2018 e	50.85 bn RUB (813 M USD)
Admissions 2018 e	202.2 million
Average ticket price 2018 e	251.5 RUB (4.0 USD)
Average admissions per capita 2018 e	1.4
Screens 2017 | 2018 (1)	4 800 | 5 215
Digital screens 2017 | 2018 (2)	4 786 | 5 215
Digital 3D screens 2017 | 2018 (2)	3 709 | 4 010

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

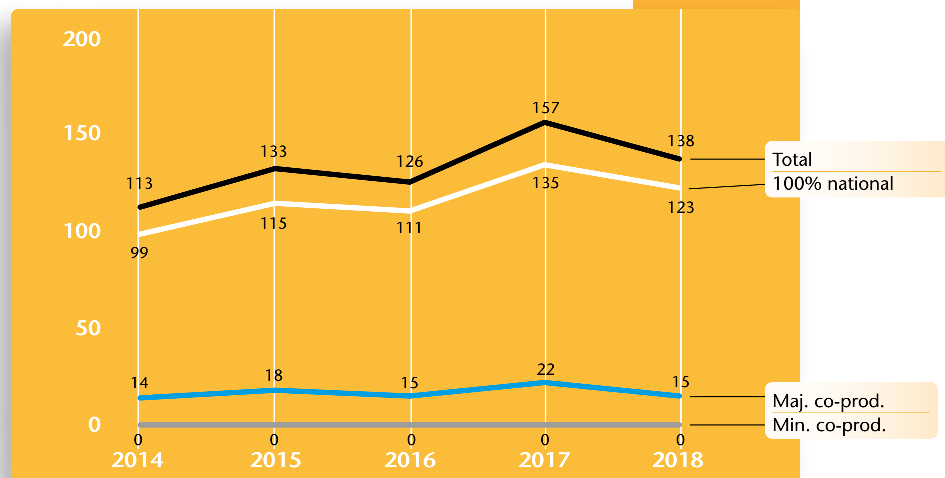
Market shares 2018 e



Number of Russian feature films produced | 2014-2018

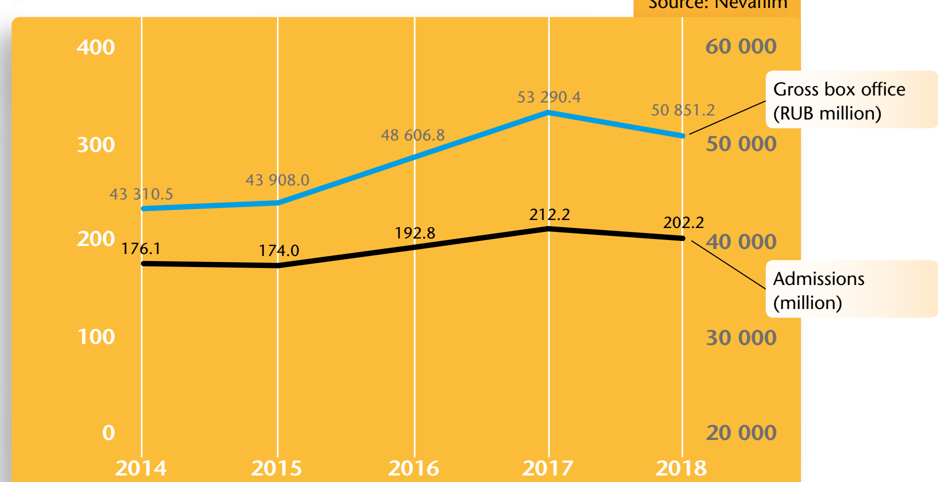
In units.

Source: Nevafilm



Admissions and gross box office in Russia (1) | 2014-2018

Source: Nevafilm



(1) Excluding admissions and box office for regional films and alternative content screenings.

Top 20 films by admissions in the Russian Federation (1) | 2018

	Original title	Country of origin	Director	Distributor	Admissions e
1	Dvizhenie vverkh (Three Seconds)	RU	Anton Megerdichev	Central Partnership	11 530 709
2	Venom	US/CN	Ruben Fleischer	Walt Disney/Sony	7 101 554
3	Avengers: Infinity War	US	Anthony & Joe Russo	Walt Disney/Sony	6 624 683
4	Lyod (Ice)	RU	Oleg Trofim	Walt Disney/Sony	6 080 784
5	Fantastic Beasts: The Crimes of…	GB INC/US	David Yates	Caro Premier	5 434 293
6	Hotel Transylvania 3: Summer Vacation	US	Genndy Tartakovsky	Walt Disney/Sony	5 407 301
7	Deadpool 2	US	David Leitch	20 Century Fox	4 801 285
8	Jurassic World: Fallen Kingdom	US	J.A. Bayona	UPI	4 149 122
9	Incredibles 2	US	Brad Bird	Walt Disney/Sony	4 055 376
10	Bohemian Rhapsody	GB INC/US	Bryan Singer	20 Century Fox	3 541 707
11	Aquaman	AU/US	James Wan	Caro Premier	3 428 489
12	Black Panther	US	Ryan Coogler	Walt Disney/Sony	3 381 540
13	The Meg	US/CN	Jon Turteltaub	Caro Premier	3 373 181
14	Trener (The Coach)	RU	Danila Kozlovsky	Central Partnership	3 278 691
15	Ralph Breaks the Internet	US	R. Moore, P. Johnston	Walt Disney/Sony	3 233 929
16	Jumanji: Welcome to the Jungle	US	Jake Kasdan	Walt Disney/Sony	3 002 937
17	Smallfoot	US	K. Kirkpatrick, J. Reisig	Caro Premier	2 989 163
18	Tri bogatyrya i printsessa Egipta	RU	Konstantin Feoktistov	Nashe Kino	2 909 692
19	Ant-Man and the Wasp	US	Peyton Reed	Walt Disney/Sony	2 864 492
20	Politseyskiy s Rublyovki. Novogodniy…	RU	Ilya Kulikov	Caroprokat	2 700 899

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

Sources: Nevafilm Research

Distribution and exhibition

After breaking records in 2017, Russian cinema attendance declined by 4.7% to 202 million admissions in 2018. This makes Russia Europe's largest market in terms of admissions for the second consecutive year, marginally ahead of France. GBO decreased proportionally by 4.6% to RUB 50.9 billion. This is the second highest box office result in Russia's recent history. Measured in US dollars however, GBO amounted to only USD 813 million which is well below the levels observed between 2011 and 2014.

As in 2017 Russian films performed exceptionally well and saved the market from a more pronounced decline. *Three Seconds*, a film celebrating Russia's victory against the US basketball team at the 1972 Olympic Games in Munich, became a run-away success selling over 11.5 million admissions and topped the charts in 2018. A total of 5 Russian films featured among the top 20 and national market share jumped from 23.8% to a record high of 28.5%. This represents a significant increase in terms of both admissions and market share for Russian films which generally captured between 16% and 18% of admissions between 2010 and 2016. The growing strength of Russian cinema is driven by the increasing number of local, often patriotically themed blockbusters, as well as protectionist measures by Russia's ministry of culture. Nevertheless US studio films continued to dominate overall box office, representing 15 out of the top 20 titles, but cumulative admissions to US films declined as US market share decreased from 56.7% to 54.8%. This is the lowest level in the past five years. A new bill effectively restricting the screenings of films without an official exhibition licence in film festivals entered into force in November 2018 and may jeopardise many Russian film festivals.

Walt Disney / Sony Pictures once more led the distribution market, taking an estimated market share of 31.0% of total admissions, ahead of Central Partnership (13.6%), Caro Premier (13.5%), UPI (11.0%), and 20th Century Fox (10.2%).

Production and funding

Russian film production levels – including regional films - decreased from a record high of 157 in 2017 to 138 feature films released in 2018. This is still the second highest level registered in recent history. Public support for the production and distribution of Russian films comes from the National Cinema Fund which focuses on films with larger commercial potential, and the Ministry of Culture, which is responsible e.g. for debut and experimental films. In late 2018 Russian tycoon Roman Abramovich announced the launch a private film fund with an annual budget of USD 15 million. The plan is to fund between 10 and 15 titles a year.

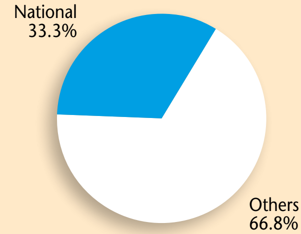
Sources: Nevafilm Research, *Hollywood Reporter, Screen International,* OBS

Poland

Population 2018 [e]	38.0 million
GDP per capita 2018 [e]	15 050 USD
Gross box office 2018 [e]	1.1 bn PLN (312.3 M USD)
Admissions 2018 [e]	59.7 million
Average ticket price 2018 [e]	18.9 PLN (5.2 USD)
Average admissions per capita 2018 [e]	1.6
Screens 2017 | 2018 [(1)]	1 304 | 1 243
Digital screens 2017 | 2018 [(2)]	1 250 | 1 270
Digital 3D screens 2017 | 2018 [(2)]	710 | 720
National films produced 2017 | 2018	73 | 42

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

Market shares 2018 [e]



Top 10 films by admissions in Poland | 2018

	Original title	Country of origin	Director	Distributor	Admissions
1	Kler (Clergy)	PL	Wojciech Smarzowski	Kino Swiat	5 183 080
2	Kobiety Mafii (Women of Mafia)	PL	Patryk Vega	Kino Swiat	2 037 202
3	Planeta Singli 2 (Planet Single 2)	PL	Sam Akina	Kino Swiat	1 685 864
4	Dywizjon 303. Historia prawdziwa	PL/GB	Denis Delic	Mówi Serwis	1 516 443
5	Incredibles 2	US	Brad Bird	Disney	1 446 260
6	Wonder	US	Stephen Chbosky	Monolith	1 376 894
7	Fifty Shades Freed	US	James Foley	UIP	1 364 357
8	Hotel Transylvania 3: Summer Vacation	US	Genndy Tartakovsky	UIP	1 338 859
9	The Grinch	US/CN	Yarrow Cheney, Scott Mosier	UIP	1 297 688
10	Bohemian Rhapsody	GB INC/US	Bryan Singer	Imperial Cinepix	1 227 207

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

Distribution and exhibition

2018 was a strong year for the Polish film industry. Cinema attendance continued to grow for the fifth year in a row and reached a record high of 59.7 million admissions, up 5.5% from 2017. This is the highest level since 1989. GBO takings surpassed the PLN 1 billion barrier for the second consecutive year, climbing by 5% to PLN 1.13 billion (USD 312 million) as the average ticket price remained stable at PLN 18.9 (USD 5.2).

The increase in cinema attendance was primarily due to the exceptionally strong performance of Polish films. For the first time in recent history the Polish box office was topped by four domestic titles. Selling almost 5.2 million tickets in 2018, *Kler (Clergy)*, a film based on real life scandals in the Catholic church, led the charts and became the most successful Polish film in the past decade, followed by the action drama *Kobiety mafii (Women in Mafia)* (2.0 million). Cumulatively Polish films sold almost 20 million admissions, 6.6 million more than in 2017. National market share hence jumped from 23.4% to 33.3% in 2018, the highest level since 2001. In contrast, admissions to US films declined somewhat leading to market shares of 52%, down from 62%. Kino Swiat led Poland's distribution market in 2018, taking 31.7% of total admissions, followed by UIP (19.2%), Disney (10.1%) and Monolith (9.1%).

Production and funding

After reaching a record high of 73 films produced in 2017, Polish film production volume dropped to 42 films in 2018. The average budget of a Polish full-length feature film amounted to USD 1.4 million. Film production in Poland is publicly supported by the Polish Film Institute (PISF), which has an annual budget of USD 29.5 million for production, as well as a network of 12 regional funds. From 2019 onwards Poland is offering a 30% cash rebate for incoming film, TV, documentary and animation productions that shoot in Poland. The rebate will be administered by the PISF which has an annual budget of USD 52 million for the incentive. The rebate is capped at USD 4 million per project. The PISF furthermore introduced a new grant category in 2018 to support micro-budget productions directed by first filmmakers.

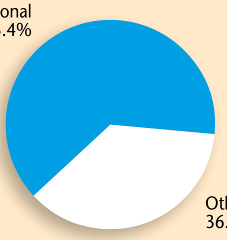
Sources: Polish Film Institute (PISF), *FilmNewEurope, Variety,* OBS

Turkey

Population 2018 e	80.8 million
GDP per capita 2018 e	10 434 USD
Gross box office 2018 e	896.9 M TRY (185.0 M USD)
Admissions 2018 e	70.4 million
Average ticket price 2018 e	12.7 TRY (2.6 USD)
Average admissions per capita 2018 e	0.9
Screens 2017 | 2018 (1)	2 695 | 2 652
Digital screens 2017 | 2018 (2)	2 630 | 2 652
Digital 3D screens 2017 | 2018 (2)	680 | 704
National films released 2017 | 2018	145 | 175

(1) Source: DG Sinema (2) Source: MEDIA Salles

Market shares 2018 e



Top 10 films by admissions in Turkey | 2018

	Original title	Country of origin	Director	Distributor	Admissions
1	Müslüm	TR	Ketche, Can Ulkay	CGV Mars Dagıtım	6 311 619
2	Arif v 216	TR	Kivanc Baruonu	CGV Mars Dagıtım	4 968 462
3	Ailecek Saskiniz	TR	Selçuk Aydemir	CGV Mars Dagıtım	4 034 858
4	Yol Arkadasim 2	TR	Bedran Güzel	CJET	2 335 735
5	Deliha 2	TR	Gupse Ozay	CGV Mars Dagıtım	2 106 154
6	Avengers: Infinity War	US	Anthony & Jo Russo	UIP	1 910 545
7	Aile Arasinda	TR/KR	Ozan Aciktan	CGV Mars Dagıtım	1 904 856
8	Hefedim Sensin	TR	Kivanc Baruonu	CJET	1 646 492
9	Rafadan Tayfa Dehliz Macerasi	TR	Ismail Fidan	CGV Mars Dagıtım	1 538 932
10	Enes Batur Hayal mi Gerçek mi?	TR	Kamil Cetin	Tme	1 483 598

Source: Antrakt - Deniz Yavuz

Distribution and exhibition

2018 was a good year for the Turkish cinema sector. With 70.4 million tickets sold cinema attendance reached its second highest level since the 1980s, only 1% below 2017's record level of 71.2 million. Boosted by an increase in the average ticket price GBO revenues actually grew by 3.0% to reach a new record high of TRY 897 million. However, measured in US dollars box office earnings actually declined by 23% due to the double-digit devaluation of the Turkish lira throughout 2018.

As in past years Turkey was the only European market where local films managed to gain a market share of over 50%. In 2018 Turkish films even accounted for all top 10 films and cumulatively captured a record market share of 63.4% of total admissions. *Müslüm*, a biopic about a famous Turkish singer, topped the charts selling more than 6.3 million tickets, followed by war drama *Ayla* (5.6 million) and the mainstream comedy *Aile Arasinda* (5.3 million). All top 10 titles managed to sell more than two million tickets cumulatively capturing 55% of total admissions. With US films taking a further 27.5% of the market, it becomes evident that the market niche left for international and especially local art-house films is a very small one given the highly concentrated nature of the Turkish cinema market. The distribution market is dominated by the vertically integrated CGV Mars Media Group which captured a market share of 43.5% in 2018, followed by UIP (18%) and TME Films (12%).

Production and funding

A total of 175 Turkish films were released in 2018, 30 more than in 2017. This is the highest production level in decades. In early 2019 a new cinema law was adopted and will become effective as from July. Besides establishing boards to evaluate the support applications, the new law aims to put an end to the so called "popcorn" dispute which came to the fore in 2018 when leading film producers accused CGV Mars of unfair revenue sharing as CGV was selling cinema going packages which combined a discounted ticket price, which has to be shared with producers, with popcorn or other merchandise at full price. The new cinema law now prohibits the sale of cinema tickets in combination with other products and limits the duration of ads before and during breaks at screenings.

Sources: Antrakt – Deniz Yavuz, DG Sinema, SE-YAP, *Daily Sabah, Hurriety Daily*

Other Western Europe

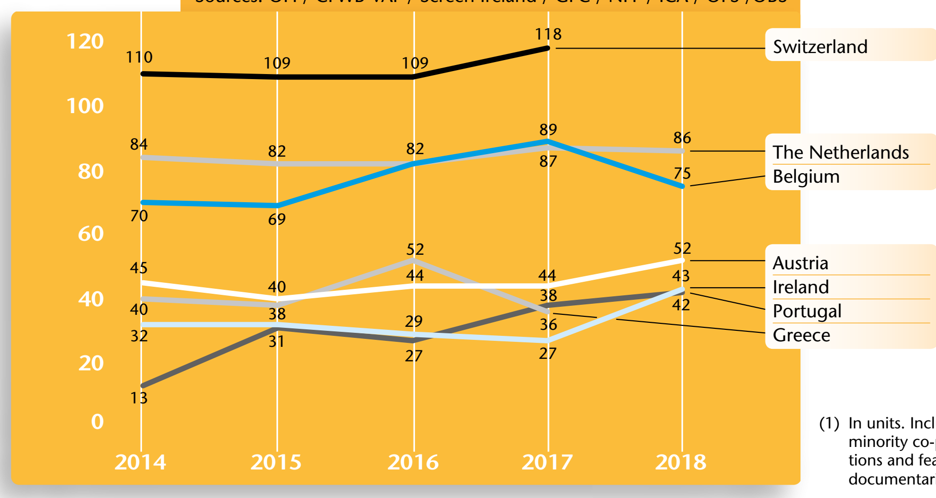
	Austria	Belgium	Greece	Ireland	Netherlands	Portugal	Switzerland
Population 2018 e (million)	8.8	11.4	10.7	4.8	17.2	10.3	8.5
GDP per capita 2018 e (USD)	49 796	46 316	20 567	74 493	52 016	21 663	83 264
Gross box office 2018 (M USD)	140.0	189.0	70.9	139.6	369.0	92.6	182.7
Admissions 2018 (million)	12.9	18.8	9.4	15.8	35.7	14.7	11.7
Average ticket price 2018 (USD)	10.8	10.1	7.6	8.9	10.3	6.3	15.6
Average admissions per capita 2018	1.5	1.6	0.9	3.3	2.1	1.4	1.4
Screens 2018 e (1)	577	523 (3)	547 (3)	463	956 (3)	580	605
Digital screens 2018 (2)	576	495	444	520	970	528	582
Digital 3D screens 2018 (2)	347	180	160	266	506	255	319
National market shares 2018 e	6.2%	11.0%	7.1%	2.5%	11.2%	1.9%	8.5%

(1) National data source (2) Source: MEDIA Salles (3) 2017

Number of feature films produced by selected Western European countries (1) | 2014-2018

In units.

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

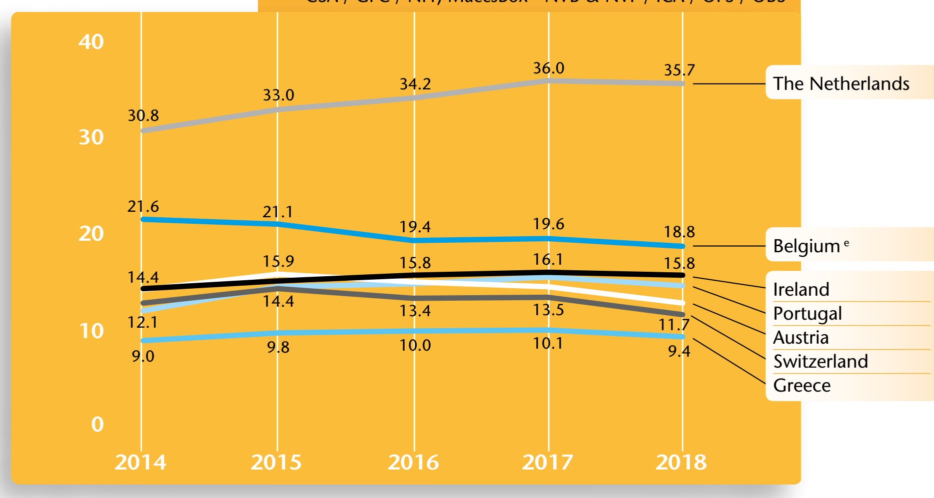


(1) In units. Including minority co-productions and feature documentaries.

Admissions in selected Western European countries | 2014-2018

In millions.

Sources: OFI / Cinedata, VAF, CFWB / Screen Ireland, CSA / GFC / NFF, MaccsBox - NVB & NVF / ICA / OFS / OBS



Top 10 films by admissions in the Netherlands | 2018

	Original title	Country of origin	Director	Distributor	Admissions
1	Bohemian Rhapsody	GB INC/US	Bryan Singer	Warner Bros.	1 372 246
2	Mamma Mia! Here We Go Again	US/GB/JP	Ol Parker	UPI	963 669
3	Fantastic Beasts: The Crimes…	GB INC/US	David Yates	Warner Bros.	926 530
4	Avengers: Infinity War	US	Anthony & Joe Russo	Walt Disney	874 267
5	Incredibles 2	US	Brad Bird	Walt Disney	852 167
6	Jurassic World: Fallen Kingdom	US	J.A. Bayona	UPI	805 262
7	Black Panther	US	Ryan Coogler	Walt Disney	775 082
8	Ferdinand	US	Carlos Saldanha	Warner Bros.	655 346
9	Mission: Impossible - Fallout	US/CN/FR/NO	Christopher McQuarrie	UPI	636 704
10	Fifty Shades Freed	US	James Foley	UPI	604 816

Sources: MaccsBox - NVB & NVF

Top 10 films by admissions in Belgium | 2018

	Original title	Country of origin	Director	Distributor	Admissions
1	Jurassic World: Fallen Kingdom	US	J.A. Bayona	Sony Pictures	505 295
2	Incredibles 2	US	Brad Bird	Walt Disney	498 193
3	Fantastic Beasts: The Crimes…	GB INC/US	David Yates	Warner Bros.	483 086
4	Fifty Shades Freed	US	James Foley	Sony Pictures	455 265
5	Avengers: Infinity War	US	Anthony & Joe Russo	Walt Disney	453 609
6	Niet Schieten	BE	Stijn Coninx	Kinepolis Film Distr.	375 067
7	Jumanji: Welcome to the Jungle	US	Jake Kasdan	Sony Pictures	373 758
8	Patser (Gangsta)	BE	Adil El Arbi, Bilall Fallah	Kinepolis Film Distr.	368 000
9	Hotel Transylvania 3: Summer…	US	Genndy Tartakovsky	Sony Pictures	359 858
10	Bohemian Rhapsody	GB INC/US	Bryan Singer	20th Century Fox	346 118

Sources: CFWB, VAF, Cinedata

Top 10 films by admissions in Portugal | 2018

	Original title	Country of origin	Director	Distributor	Admissions
1	Incredibles 2	US	Brad Bird	NOS Luso. Audio.	606 276
2	Bohemian Rhapsody	GB INC/US	Bryan Singer	Big Picture 2 Films	474 015
3	Hotel Transylvania 3: Summer…	US	Genndy Tartakovsky	Big Picture 2 Films	444 323
4	Fifty Shades Freed	US	James Foley	NOS Luso. Audio.	430 487
5	Avengers: Infinity War	US	Anthony & Joe Russo	NOS Luso. Audio.	408 441
6	Deadpool 2	US	David Leitch	Big Picture 2 Films	385 993
7	A Star Is Born	US	Bradley Cooper	NOS Luso. Audio.	365 124
8	Mamma Mia! Here We Go Again	US/GB/JP	Ol Parker	NOS Luso. Audio.	361 841
9	Johnny English Strikes Again	GB/US/FR	David Kerr	NOS Luso. Audio.	323 351
10	Mission: Impossible - Fallout	US/CN/FR/NO	Christopher McQuarrie	NOS Luso. Audio.	308 818

Source: ICA

Top 10 films by admissions in Austria | 2018

	Original title	Country of origin	Director	Distributor	Admissions
1	Mamma Mia! Here We Go Again	US/GB/JP	Ol Parker	Universal Pictures	480 496
2	Avengers: Infinity War	US	Anthony & Joe Russo	Walt Disney	411 857
3	Fifty Shades Freed	US	James Foley	Universal Pictures	402 824
4	Fantastic Beasts: The Crimes…	GB INC/US	David Yates	Warner Bros.	339 966
5	Hotel Transylvania 3: Summer…	US	Genndy Tartakovsky	Sony Pictures	337 222
6	The Grinch	US/CN	Y. Cheney, S. Mosier	Universal Pictures	333 969
7	Bohemian Rhapsody	GB INC/US	Bryan Singer	Fox Int'l	322 633
8	Deadpool 2	US	David Leitch	Fox Int'l	300 581
9	Jurassic World: Fallen Kingdom	US	J.A. Bayona	Universal Pictures	282 438
10	Incredibles 2	US	Brad Bird	Walt Disney	236 800

Sources: Austrian Film Institute (OFI) / Comscore

Nordic countries

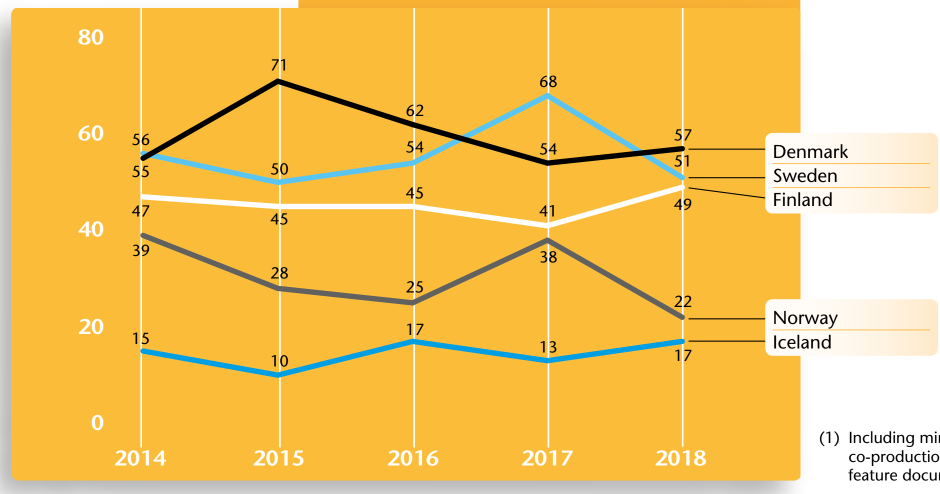
	Denmark	Finland	Iceland	Norway	Sweden
Population 2018 e (million)	5.8	5.5	0.3	5.3	10.1
GDP per capita 2018 e (USD)	60 634	49 207	83 750	75 341	57 783
Gross box office 2018 (M USD)	180.0	106.7	16.7	169.2	230.7 (3)
Admissions 2018 (million)	13.0	8.1	1.4	12.1	16.4
Average ticket price 2018 (USD)	13.8	13.2	11.5	14.0	13.7 (3)
Average admissions per capita 2018	2.2	1.5	4.1	2.3	1.6
Screens 2018 e (1)	472	358	43	470	808 (4)
Digital screens 2018 (2)	470	344	43	470	841
Digital 3D screens 2018 (2)	262	229	30	301	520
National market shares 2018 e	29.8%	23.6%	11.3%	25.1%	18.7%

(1) National data source (2) Source: MEDIA Salles (3) 2017 (4) 2016

Number of feature films produced by Nordic countries (1) | 2014-2018

In units.

Sources: DFI / FFF / Icelandic Film Centre / NFI / SFI / OBS

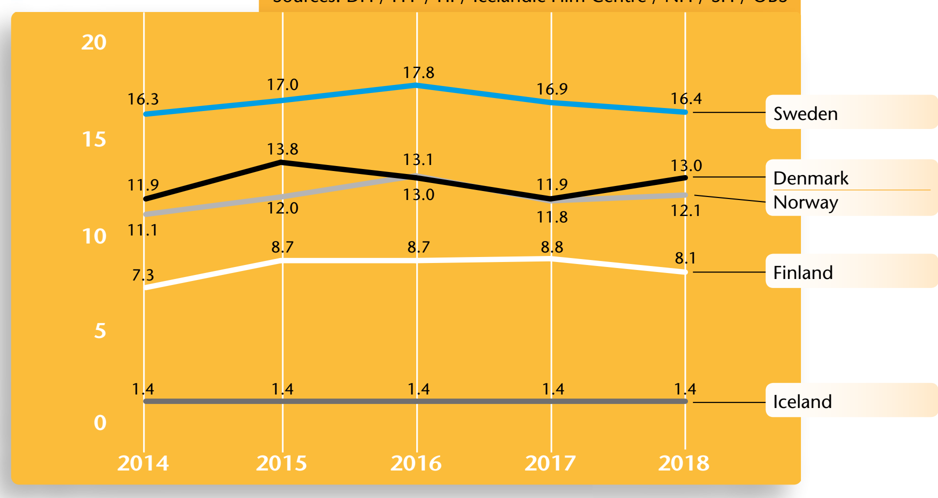


(1) Including minority co-productions and feature documentaries.

Admissions in Nordic countries | 2014-2018

In millions.

Sources: DFI / FFF / HI / Icelandic Film Centre / NFI / SFI / OBS



Top 10 films by admissions in Sweden | 2018

	Original title	Country of origin	Director	Distributor	Admissions
1	Mamma Mia! Here We Go Again	US/GB/JP	Ol Parker	UIP	1 067 716
2	A Star Is Born	US	Bradley Cooper	Warner/Fox	534 733
3	Avengers: Infinity War	US	Anthony & Joe Russo	Walt Disney	504 671
4	Coco	US	L. Unkrich, A. Molina	Walt Disney	480 741
5	Bohemian Rhapsody	GB INC/US	Bryan Singer	20th Century Fox	475 797
6	Black Panther	US	Ryan Coogler	Walt Disney	450 891
7	Ted - för kärlekens skull	SE	Hannes Holm	Fox/Nordisk	413 670
8	Incredibles 2	US	Brad Bird	Walt Disney	410 738
9	Jurassic World: Fallen Kingdom	US	J.A. Bayona	UIP/Universal	391 021
10	Solsidan (Sunny Side)	SE	M. Herngren, F. Herngren	SF Film	387 435

Source: Swedish Film Institute

Top 10 films by admissions in Denmark | 2018

	Original title	Country of origin	Director	Distributor	Admissions
1	Journal 64 (The Purity of Vengeance)	DK/DE	Christoffer Boe	Nordisk Film Distr.	765 111
2	Så længe jeg lever (The Way to…)	DK	Ole Bornedal	Nordisk Film Distr.	409 811
3	Lykke-Per (A Fortunate Man)	DK	Bille August	Nordisk Film Distr.	394 876
4	Incredibles 2	US	Brad Bird	Walt Disney	381 972
5	Avengers: Infinity War	US	Anthony & Joe Russo	Walt Disney	363 843
6	Bohemian Rhapsody	GB INC/US	Bryan Singer	Nordisk Film Distr.	355 766
7	Mamma Mia! Here We Go Again	US/GB/JP	Ol Parker	UIP	348 603
8	Coco	US	L. Unkrich, A. Molina	Walt Disney	347 683
9	Ternet ninja (Checkered Ninja)	DK	Christoffersen, Matthesen	Nordisk Film Distr.	328 333
10	Den tid på året (That Time of Year)	DK	Paprika Steen	Nordisk Film Distr.	327 756

Sources: Statistics Denmark / DFI

Top 10 films by admissions in Norway | 2018

	Original title	Country of origin	Director	Distributor	Admissions
1	Mamma Mia! Here We Go Again	US/GB/JP	Ol Parker	UIP	708 436
2	Skjelvet (The Quake)	NO	John Andreas Andersen	Nordisk Film Distr.	589 620
3	Den 12. mann (The 12th Man)	NO	Harald Zwart	Nordisk Film Distr.	426 166
4	Månelyst i Flåklypa (Louis & Luca…)	NO	Rasmus A. Sivertsen	Nordisk Film Distr.	423 116
5	Mission: Impossible - Fallout	US/CN/FR/NO	Christopher McQuarrie	UIP	388 901
6	Incredibles 2	US	Brad Bird	Walt Disney	370 939
7	Avengers: Infinity War	US	Anthony & Joe Russo	Walt Disney	345 559
8	Bohemian Rhapsody	GB INC/US	Bryan Singer	20th Century Fox	334 967
9	The Grinch	US/CN	Y. Cheney, S. Mosier	UIP	281 481
10	Deadpool 2	US	David Leitch	20th Century Fox	275 823

Source: Film og Kino

Top 10 films by admissions in Finland | 2018

	Original title	Country of origin	Director	Distributor	Admissions
1	Mamma Mia! Here We Go Again	US/GB/JP	Ol Parker	Finnkino	371 503
2	Ilosia aikoja, Mielensäpahoittaja	FI	Tiina Lymi	Nordisk Film Theat.	347 429
3	Bohemian Rhapsody	GB INC/US	Bryan Singer	Nordisk Film Theat.	299 906
4	Avengers: Infinity War	US	Anthony & Joe Russo	Walt Disney	234 354
5	BlacKkKlansman	US	Spike Lee	Finnkino	225 554
6	Incredibles 2	US	Brad Bird	Walt Disney	225 421
7	Deadpool 2	US	David Leitch	Nordisk Film Theat.	200 140
8	Oma maa	FI	Markku Pölönen	Nordisk Film Theat.	191 527
9	Fantastic Beasts: The Crimes of…	GB INC/US	David Yates	SF Film Finland	169 204
10	Johnny English Strikes Again	GB/US/FR	David Kerr	Finnkino	162 449

Source: Finnish Film Foundation

Baltics and Central Europe

	Czech Republic	Estonia	Hungary	Latvia	Lithuania	Slovenia	Slovakia
Population 2018 e (million)	10.6	1.3	9.8	1.9	2.8	2.1	5.4
GDP per capita 2018 e (USD)	22 468	21 964	14 742	17 241	18 312	19 128	25 330
Gross box office 2018 (M USD)	101.0	24.4	78.3	21.7	26.5	15.1	39.0
Admissions 2018 (million)	16.3	3.6	15.5	2.5	4.3	2.5	6.0
Average ticket price 2018 (USD)	6.2	6.7	5.1	8.6	6.2	5.9	6.5
Average admissions per capita 2018	1.5	2.8	1.6	1.3	1.5	1.2	1.1
Screens 2018 e (1)	750	66	372	66	79	108	266
Digital screens 2018 (2)	527	81	332	65	62	108	197
Digital 3D screens 2018 (2)	300	43	194	28	32	44	102
Films produced 2018	77	21	18	26	23	21	33
National market shares 2018 e	23.3%	17.9%	6.6%	22.1%	27.8%	5.3%	4.2%

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

Top 10 films by admissions in the Czech Republic | 2018

	Original title	Country of origin	Director	Distributor	Admissions
1	Bohemian Rhapsody	GB INC/US	Bryan Singer	CinemArt	1 073 638
2	Avengers: Infinity War	US	Anthony & Joe Russo	Falcon	631 252
3	Po cem muzi touzí (What Men Long…)	CZ	Rudolf Havlik	CinemArt	558 988
4	Hotel Transylvania 3: Summer Vacation	US	Genndy Tartakovsky	Falcon	491 501
5	Fantastic Beasts: The Crimes of…	GB INC/US	David Yates	Vertical Entertainment	473 131
6	Jurassic World: Fallen Kingdom	US	J.A. Bayona	CinemArt	407 221
7	Venom	US/CN	Ruben Fleischer	Falcon	388 925
8	Fifty Shades Freed	US	James Foley	CinemArt	360 449
9	Incredibles 2	US	Brad Bird	Falcon	351 163
10	Tátova volha (Patrimony)	CZ	Jirí Vejdelek	CinemArt	348 082

Sources: Czech Film Fund / Unie Filmovvych Distributoru

Top 10 films by admissions in Hungary | 2018

	Original title	Country of origin	Director	Distributor	Admissions
1	Mamma Mia! Here We Go Again	US/GB/JP	Ol Parker	UIP-Dunafilm	576 327
2	Avengers: Infinity War	US	Anthony & Joe Russo	Forum-Hungary	573 476
3	Bohemian Rhapsody	GB INC/US	Bryan Singer	Forum-Hungary	534 939
4	Jurassic World: Fallen Kingdom	US	J.A. Bayona	UIP-Dunafilm	417 546
5	Hotel Transylvania 3: Summer Vacation	US	Genndy Tartakovsky	Intercom	406 281
6	Deadpool 2	US	David Leitch	Forum-Hungary	386 405
7	Valami Amerika 3 (A Kind of America 3)	HU	Gábor Herendi	Vertigo	372 567
8	Venom	US/CN	Ruben Fleischer	Intercom	356 676
9	The Grinch	US/CN	Y. Cheney, S. Mosier	UIP-Dunafilm	341 891
10	Fantastic Beasts: The Crimes of…	GB INC/US	David Yates	Intercom	321 454

Source: National Film Office

Top 10 films by admissions in Slovakia | 2018

	Original title	Country of origin	Director	Distributor	Admissions
1	Bohemian Rhapsody	GB INC/US	Bryan Singer	CinemaArt	323 147
2	Hotel Transylvania 3: Summer Vacation	US	Genndy Tartakovsky	Itafilm	288 582
3	A Star Is Born	US	Bradley Cooper	Continental Film	245 785
4	Fifty Shades Freed	US	James Foley	CinemaArt	199 327
5	Avengers: Infinity War	US	Anthony & Joe Russo	Saturn Entertainment	182 574
6	The Grinch	US/CN	Y. Cheney, S. Mosier	CinemaArt	147 001
7	Jurassic World: Fallen Kingdom	US	J.A. Bayona	CinemaArt	145 250
8	Deadpool 2	US	David Leitch	CinemaArt	144 720
9	Fantastic Beasts: The Crimes of…	GB INC/US	David Yates	Continental Film	136 613
10	Incredibles 2	US	Brad Bird	Saturn Entertainment	130 904

Source: Slovak Film Institute / UFD

South-Eastern Europe

	BA (3)	Bulgaria	Croatia	Cyprus	Georgia	Montenegro	Romania
Population 2018 e (million)	3.5	7.1	4.1	0.9	3.7	0.6	19.5
GDP per capita 2018 e (USD)	4 837	8 701	13 958	26 742	4 529	7 623	11 817
Gross box office 2018 (M USD)	3.6	27.8	23.1	7.2	4.5	1.3	66.8
Admissions 2018 (million)	1.2	4.9	4.6	0.8	1.3	0.3	13.3
Average ticket price 2018 (USD)	3.0	5.7	5.0	9.5	3.5	4.5	5.0
Average admissions per capita 2018	0.3	0.7	1.1	0.9	0.3	0.5	0.7
Screens 2018 e (1)	34	218	185	32	26	22	404
Digital screens 2018 (2)	~	225	185	35	26	~	386
Digital 3D screens 2018 (2)	~	171	120	13	19	~	227
Films produced 2018	11	21	36	~	11	5	50
National market shares 2018 e	0.5%	7.9%	1.2%	~	4.3%	0.4%	3.2%

(1) National data source (2) Source: MEDIA Salles (3) Bosnia-Herzegovina

Top 10 films by admissions in Romania | 2018

	Original title	Country of origin	Director	Distributor	Admissions
1	Venom	US/CN	Ruben Fleischer	Intercomfilm	426 023
2	Avengers: Infinity War	US	Anthony & Joe Russo	Forum Film	423 564
3	Jumanji: Welcome to the Jungle	US	Jake Kasdan	Intercomfilm	397 872
4	Fifty Shades Freed	US	James Foley	Ro-Image 2000	369 137
5	Bohemian Rhapsody	GB INC/US	Bryan Singer	Odeon Cineplex	365 531
6	Hotel Transylvania 3: Summer Vacation	US	Genndy Tartakovsky	Intercomfilm	362 398
7	Aquaman	US	James Wan	Vertical Ent.	352 736
8	Deadpool 2	US	David Leitch	Odeon Cineplex	345 584
9	Black Panther	US	Ryan Coogler	Forum Film	328 567
10	The Nun	US	Corin Hardy	Vertical Ent.	302 168

Source: Centrul National al Cinematografiei

Top 10 films by admissions in Bulgaria | 2018

	Original title	Country of origin	Director	Distributor	Admissions
1	Hotel Transylvania 3: Summer Vacation	US	Genndy Tartakovsky	Aleksandra	170 178
2	Avengers: Infinity War	US	Anthony & Joe Russo	Forum Film	145 446
3	Bohemian Rhapsody	GB INC/US	Bryan Singer	Aleksandra	142 244
4	Venom	US/CN	Ruben Fleischer	Aleksandra	133 619
5	The Grinch	US/CN	Y. Cheney, S. Mosier	Forum Film	128 292
6	Fifty Shades Freed	US	James Foley	Forum Film	122 530
7	Jurassic World: Fallen Kingdom	US	J.A. Bayona	Forum Film	117 468
8	Prityazhenie (Attraction)	BG	Martin Makariev	BS Films	112 934
9	Incredibles 2	US	Brad Bird	Forum Film	107 499
10	Peter Rabbit	US/AU	Will Gluck	Aleksandra	97 714

Source: Bulgarian National Film Center

Top 10 films by admissions in Croatia | 2018

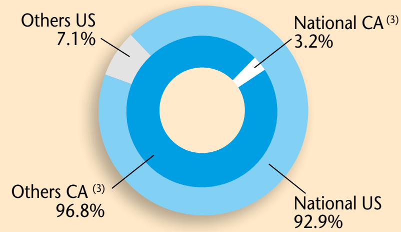
	Original title	Country of origin	Director	Distributor	Admissions
1	Bohemian Rhapsody	GB INC/US	Bryan Singer	Blitz Film & Video	193 487
2	The Grinch	US/CN	Y. Cheney, S. Mosier	Editus	154 443
3	A Star Is Born	US	Bradley Cooper	Blitz Film & Video	131 989
4	Avengers: Infinity War	US	Anthony & Joe Russo	2iFilm	125 962
5	Deadpool 2	US	David Leitch	Blitz Film & Video	122 021
6	Mamma Mia! Here We Go Again	US/GB/JP	Ol Parker	Editus	110 995
7	Hotel Transylvania 3: Summer Vacation	US	Genndy Tartakovsky	Continental Film	106 814
8	The Nun	US	Corin Hardy	Blitz Film & Video	90 235
9	Venom	US/CN	Ruben Fleischer	Continental Film	88 283
10	Aquaman	US	James Wan	Blitz Film & Video	87 820

Source: Croatian Audiovisual Centre

North America

	North America	US	Canada
Population 2018 e (million)	364.5	327.5	37.0
GDP per capita 2018 e (USD)	60 263	61 687	47 658
Gross box office 2018 e (M USD) (1)	11 881.4	10 867.6	1 003.3
Admissions 2018 e (million) (1)	1 304.2	1 185.1	109.4
Average ticket price 2018 e (USD) (1)	9.11	9.17	9.17
Average admissions per capita 2018 e	3.6	3.6	3.0
Screens 2018 e	43 459	40 317	3 142
Digital screens 2018 e	43 459	40 317	3 142
Digital 3D screens 2018 e	16 933	15 477	1 456

Market shares 2018 e

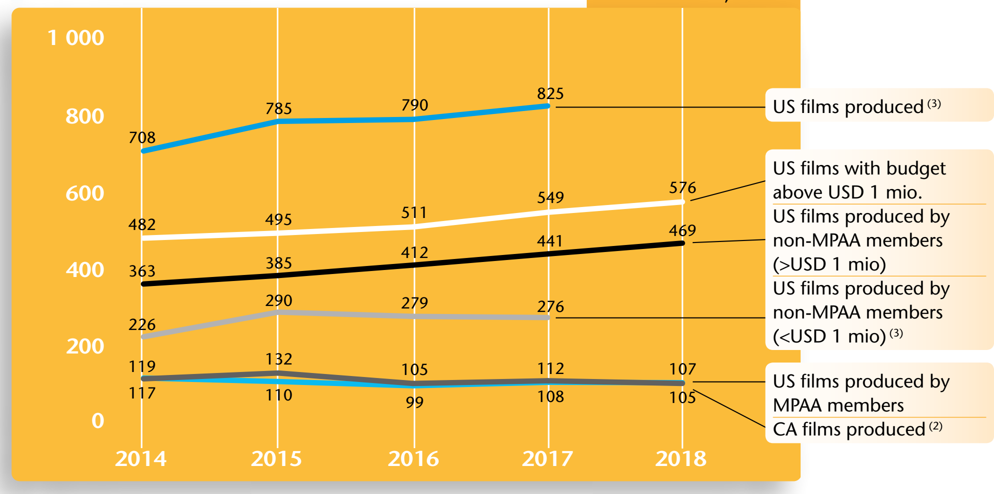


(1) North American figures differ slightly from US and Canada combined as different sources were used: MPAA for North America and Comscore for US and CA. (2) Arithmetic mean. (3) 2017

Number of US (1) and Canadian feature films produced | 2014-2018

In units.

Sources: MPAA, CMPA



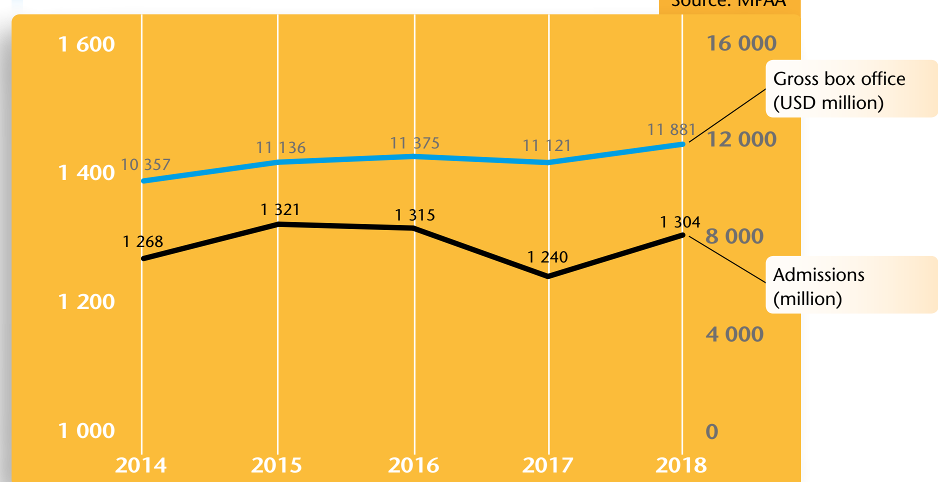
(1) English-language films (including co-productions). Does not include documentaries, films with budgets below USD 200 000, student films and works not intended for theatrical release.

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

(3) MPAA stopped publishing information on films with budgets under USD 1 million.

Admissions and gross box office in the US & Canada | 2014-2018

Source: MPAA



Top 20 films by admissions in North America | 2018 [e]

	Original title	Country of origin	Director	Distributor	Admissions
1	Black Panther	US	Ryan Coogler	Walt Disney	76 342 374
2	Avengers: Infinity War	US	Anthony & Joe Russo	Walt Disney	74 025 679
3	Incredibles 2	US	Brad Bird	Walt Disney	66 366 603
4	Jurassic World: Fallen Kingdom	US	J.A. Bayona	Universal Pictures	45 552 863
5	Deadpool 2	US	David Leitch	20th Century Fox	36 050 182
6	The Grinch	US/CN	Y. Cheney, S. Mosier	Universal Pictures	29 275 216
7	Aquaman	US	James Wan	Warner Bros.	24 975 015
8	Mission: Impossible - Fallout	US/CN/FR/NO	Christopher McQuarrie	Paramount	24 008 626
9	Ant-Man and the Wasp	US	Peyton Reed	Walt Disney	23 625 817
10	Solo: A Star Wars Story	US	Ron Howard	Walt Disney	23 311 616
11	Venom	US/CN	Ruben Fleischer	Sony Pictures	23 268 376
12	A Star Is Born	US	Bradley Cooper	Warner Bros.	21 971 196
13	Jumanji: Welcome to the Jungle	US	Jake Kasdan	Sony Pictures	21 401 036
14	Bohemian Rhapsody	GB INC/US	Bryan Singer	20th Century Fox	20 858 978
15	A Quiet Place	US	John Krasinski	Paramount	20 504 292
16	Ralph Breaks the Internet	US	Rich Moore, Phil Johnston	Walt Disney	19 899 582
17	Crazy Rich Asians	US	Jon Chu	Warner Bros.	18 979 777
18	Hotel Transylvania 3: Summer…	US	Genndy Tartakovsky	Sony Pictures	18 127 986
19	Halloween	US	David Gordon Green	Universal Pictures	17 376 447
20	Fantastic Beasts: The Crimes…	GB INC/US	David Yates	Warner Bros.	17 165 602

Sources: LUMIERE/OBS, Comscore

Distribution and exhibition

After declining in 2017, North American GBO rebounded in 2018, reaching a new record high of USD 11.9 billion, up 6.8% on the previous year. As the average ticket price increased only marginally, the upturn in box office collections was primarily due to a rise in admissions (1.3 billion, up 5.2% compared to 2017), driven by the good box office performance of several breakout hits.

Bucking a long-established growing trend, the number of films released dropped to 758 in 2018, down from 785 in 2017. In line with previous years, admissions were highly concentrated at the top end, as the top 20 films accounted for 52.9% of the total ticket sold.

Two superhero blockbusters took the top slots in the box office chart, as *Black Panther* ranked first (taking 76.3 million admissions), followed by *Avengers: Infinity War* (74.0 million admissions). Disney's *Incredibles 2* came third with 66.4 million tickets sold, becoming the highest-grossing animation film ever in North America. In Canada, the most successful local productions were three Quebec features: the comedy *1991* (325 993 admissions), followed by the biopic *La Bolduc* and the thriller *La chute de l'empire américain*.

The total number of screens increased to 43 459, with 243 new screens opening during 2018. The theatrical infrastructure in US and Canada is now fully digitised.

Production and funding

The number of US film productions with a budget of at least USD 1 million grew to 576 titles in 2018, compared to 549 for the previous year, while from 2018 figures for films with a budget under USD 1 million are no longer tracked by MPAA. The hike in the number of films produced was led by non-MPAA members (469 titles compared to 441 in 2017) while Hollywood major studio productions remained stable (107 titles, one less than in 2017). The US media landscape is undergoing considerable consolidation, with AT&T merging with Time Warner and Disney acquiring 20th Century Fox (which reduces the number of the largest Hollywood studios from six to five). 2019 has seen Netflix join the ranks of the MPAA; the first non-Hollywood studio to become a member of the association.

Canada produced 105 feature films during the fiscal year 2017-2018, down from 112 in 2016-2017, for a total production investment of CAD 303 million (USD 227.8 million), up 5.9% on the previous year. The investment in French-language production fell by 26% to CAD 74 million (USD 55.6 million). Public funding continued to play an important role for the sector, accounting for 58% of the total financing investment of Canadian feature films.

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

Latin America

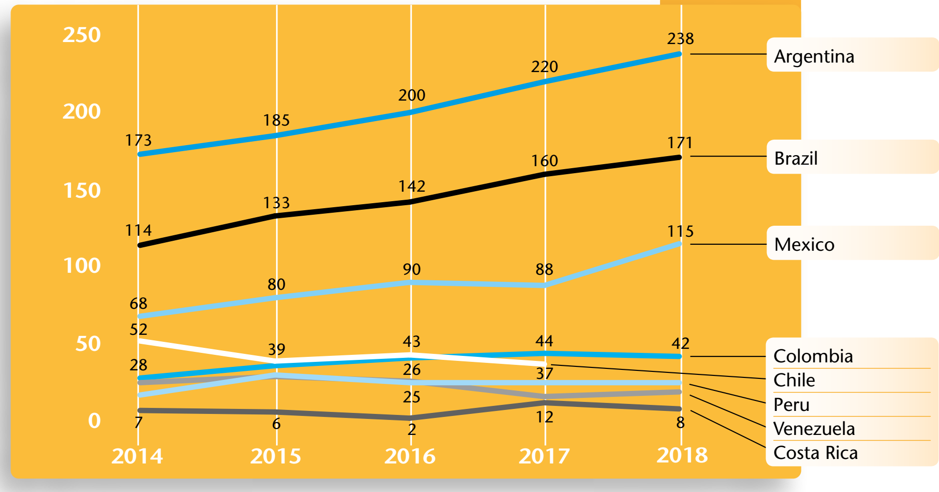
	Argentina	Brazil	Chile	Colombia	Costa Rica
Population 2018 e (million)	44.6	209.2	18.6	49.8	5.0
GDP per capita 2018 e (USD)	14 342	10 514.6	14 274.4	6 472.3	12 144.5
Gross box office 2018 (M USD)	210.2	666.4	140.8	187.5	38.7
Admissions 2018 (million)	46.4	161.1	27.8	64.0	7.4
Average ticket price 2018 (USD)	4.5	4.1	5.1	2.9	5.2
Average admissions per capita 2018	1.0	0.8	1.5	1.3	1.5
Screens 2018	982	3 356	411 (1)	1 090	170
Digital screens 2018 e	939	3 356	410 (1)	1 090	155
Digital 3D screens 2018 e	560	1 756	~	473	9
National market shares 2018	14.7%	15.1%	2.5% e	3.4%	0.1%

(1) 2017

Number of national feature films released in Latin America | 2014-2018

In units.

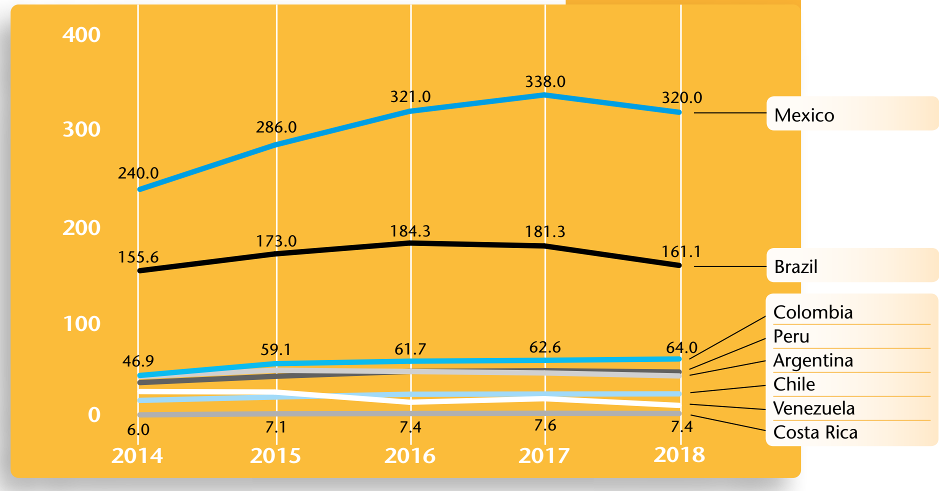
Sources: OIA (*)



Admissions in Latin America | 2014-2018

In millions.

Sources: OIA (*), Comscore



(*) INCAA, ANCINE, Chilean Min. Cult., Colombian Min. Cult., CCPC, IMCINE, Peruvian Min. Cult., CNAC.

	Dominican Republic	Ecuador	Mexico	Peru	Venezuela
Population 2018 e (million)	10.3	17.0	124.7	32.2	31.8
GDP per capita 2018 e (USD)	7 733.3	5 855.9	10 020.8	6 892.2	6 528.5
Gross box office 2018 (M USD)	24.6	80.9	848.4	169.0	1.7
Admissions 2018 (million)	6.5	17.9	320.0	50.5	15.8
Average ticket price 2018 (USD)	3.8	4.5	2.7	3.3	0.1
Average admissions per capita 2018	0.6	1.1	2.6	1.6	0.5
Screens 2018	201	324	7 024	634	424
Digital screens 2018 e	201	235	7 024	634	404
Digital 3D screens 2018 e	40	142	2 518	~	125
National market shares 2018	21.0%	0.6%	9.0%	13.4%	5.9%

Overview

Aggregated data for the ten Latin American markets covered in this report show a 6.1% decline in cumulative cinema attendance for 2018 to 717.4 million admissions, following three years of consecutive growth. The downturn can be ascribed to a decrease in admissions in the two biggest Latin American markets, Brazil (-11.1%) and Mexico (-5.3%), but also to a slump in Venezuela (-31%). Conversely, the volume of Latin American film released in 2018 grew to a total of 700 films, up 9% on 2017 and 34% compared with 2014, driven by a hike in Mexico (+27 films), Argentina (+18) and Brazil (+11). The overall number of screens for the region increased by 4.4% to a total of 14 191 in 2018, showing 23.3% growth over the last five years.

Mexico

In 2018, cinema attendance decreased by 5.3% to 320 million tickets sold, bucking the upward trend of the three previous years. Once again, Hollywood blockbusters dominated the box office, with the 10 highest-grossing titles, all of them US films, capturing about 37% of total admissions. The national market share went down from 9% to 7% in 2018; the most successful local title in terms of admissions was the comedy *Ya veremos*, selling 4.1 million tickets. The number of domestic films produced rose to 186 titles (ten more than in 2017), an increase also reflected in the number of local features released (115, up from 88 in 2017). The theatrical infrastructure, fully digital since 2017, added 391 new screens in 2018.

Brazil

2018 saw Brazilian cinema attendance decrease by 11.1% to 161.1 million admissions, with GBO following suit down to BRL 2.4 billion (USD 666 million). National market share increased from 9.6% to 15.1%, driven by the exceptional success of local blockbuster *Nada a perder (Nothing to Lose)*, ranking second in the box office chart with a total of 12.2 million tickets sold and accounting alone for about 50% of admissions to local films. Local film production has been on the rise since 2014, and a total of 171 national films received a theatrical release in 2018 (11 more titles than in 2017). Brazil unveiled 136 new screens in 2018, making a total number of 3 356. With only 16 screens per million inhabitants, one of the lowest screen densities in Latin America, the country's theatrical infrastructure still presents scope for development. In April 2019, amid political tensions, the national public funding agency ANCINE announced the suspension of all its support programs, following a government investigation over accounting procedures.

Argentina

Admissions in Argentina declined for the third year in a row to 46.4 million in 2018, down 6.3% on the previous year. In turn, GBO revenues increased by 13.2% to ARS 5.5 billion (USD 210 million), due to a high inflation rate in 2018. The share of admissions captured by national titles slightly increased to 14.7%, with crime drama *El Ángel* being the only local film in the top 10, taking 1.4 million admissions (corresponding to 20% of admissions to local films).

Production volume continued growing at a sustained pace, with the number of national film released rising to 238 titles in 2018. In 2018 ARS 1.06 trillion (USD 40.5 million) were allocated by the National Institute of Cinema and Audiovisual Arts (INCAA) in different forms of direct support to the audiovisual industry, the highest figure in the last eight years.

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

Top 10 films by admissions in Argentina | 2018

	Original title	Country of origin	Director	Admissions
1	Incredibles 2	US	Brad Bird	3 601 798
2	Coco	US	Lee Unkrich, Adrian Molina	3 203 429
3	Avengers: Infinity War	US	Anthony Russo, Joe Russo	2 915 842
4	Hotel Transylvania 3: Summer Vacation	US	Genndy Tartakovsky	2 571 868
5	Jurassic World: Fallen Kingdom	US	J. A. Bayona	2 363 567
6	Bohemian Rhapsody	GB INC/US	Bryan Singer	1 449 526
7	El Ángel (The Angel)	AR/ES	Luis Ortega	1 364 153
8	Jumanji: Welcome to the Jungle	US	Jake Kasdan	1 338 926
9	The Nun	US	Corin Hardy	1 173 659
10	Deadpool 2	US	David Leitch	1 038 272

Sources: OIA, INCAA

Top 10 films by admissions in Brazil | 2018

	Original title	Country of origin	Director	Admissions
1	Avengers: Infinity War	US	Anthony Russo, Joe Russo	14 501 280
2	Nada a Perder (Nothing to Lose)	BR	Alexandre Avancini	12 184 373
3	Incredibles 2	US	Brad Bird	9 809 291
4	Black Panther	US	Ryan Coogler	7 438 252
5	Aquaman	US	James Wan	5 584 309
6	Hotel Transylvania 3: Summer Vacation	US	Genndy Tartakovsky	5 375 364
7	The Nun	US	Corin Hardy	5 293 026
8	Jurassic World: Fallen Kingdom	US	J. A. Bayona	5 258 742
9	Jumanji: Welcome to the Jungle	US	Jake Kasdan	4 772 758
10	Venom	US/CN	Ruben Fleischer	4 605 459

Sources: OIA, ANCINE

Top 10 films by admissions in Chile | 2018

	Original title	Country of origin	Director	Admissions
1	Avengers: Infinity War	US	Anthony Russo, Joe Russo	2 338 642
2	Incredibles 2	US	Brad Bird	1 832 336
3	Jurassic World: Fallen Kingdom	US	J.A. Bayona	1 467 761
4	Hotel Transylvania 3: Summer Vacation	US	Genndy Tartakovsky	1 335 777
5	Coco	US	Lee Unkrich, Adrian Molina	1 221 012
6	Deadpool 2	US	David Leitch	1 113 689
7	Bohemian Rhapsody	GB INC/US	Bryan Singer	1 058 626
8	The Nun	US	Corin Hardy	1 047 618
9	Black Panther	US	Ryan Coogler	882 785
10	Ferdinand	US	Carlos Saldanha	756 194

Source: Comscore

Top 10 films by admissions in Colombia | 2018

	Original title	Country of origin	Director	Admissions
1	Avengers: Infinity War	US	Anthony Russo, Joe Russo	4 375 070
2	Incredibles 2	US	Brad Bird	3 838 628
3	Jumanji: Welcome to the Jungle	US	Jake Kasdan	2 568 000
4	The Nun	US	Corin Hardy	2 477 489
5	Jurassic World: Fallen Kingdom	US	J. A. Bayona	2 355 807
6	Black Panther	US	Ryan Coogler	2 225 683
7	Hotel Transylvania 3: Summer Vacation	US	Genndy Tartakovsky	2 025 633
8	Venom	US/CN	Ruben Fleischer	1 814 719
9	Deadpool 2	US	David Leitch	1 701 728
10	The Meg	US/CN	Jon Turteltaub	1 571 694

Sources: OIA, Colombian Ministry of Culture

Top 10 films by admissions in Ecuador | 2018

	Original title	Country of origin	Director	Admissions
1	Avengers: Infinity War	US	Anthony Russo, Joe Russo	1 359 828
2	Coco	US	Lee Unkrich, Adrian Molina	1 166 849
3	The Nun	US	Corin Hardy	705 861
4	Incredibles 2	US	Brad Bird	702 103
5	Black Panther	US	Ryan Coogler	650 291
6	Jurassic World: Fallen Kingdom	US	J. A. Bayona	608 520
7	Hotel Transylvania 3: Summer Vacation	US	Genndy Tartakovsky	560 193
8	Venom	US/CN	Ruben Fleischer	486 167
9	Ralph Breaks the Internet	US	Rich Moore, Phil Johnston	457 778
10	Deadpool 2	US	David Leitch	438 840

Sources: OIA, ICCA

Top 10 films by admissions in Mexico | 2018

	Original title	Country of origin	Director	Admissions
1	Avengers: Infinity War	US	Anthony Russo, Joe Russo	21 530 855
2	Incredibles 2	US	Brad Bird	15 249 092
3	Jurassic World: Fallen Kingdom	US	J. A. Bayona	13 768 259
4	Overboard	US	Rob Greenberg	11 520 860
5	Hotel Transylvania 3: Summer Vacation	US	Genndy Tartakovsky	11 007 606
6	Black Panther	US	Ryan Coogler	10 371 914
7	Venom	US/CN	Ruben Fleischer	8 911 408
8	Aquaman	US	James Wan	8 796 948
9	The Nun	US	Corin Hardy	8 421 026
10	Deadpool 2	US	David Leitch	8 115 994

Sources: OIA, IMCINE

Top 10 films by admissions in Peru | 2018

	Original title	Country of origin	Director	Admissions
1	Avengers: Infinity War	US	Anthony Russo, Joe Russo	3 138 943
2	¡Asu Mare! 3	PE	Jorge Ulloa	2 007 379
3	Jurassic World: Fallen Kingdom	US	J. A. Bayona	1 802 151
4	Incredibles 2	US	Brad Bird	1 776 909
5	Hotel Transylvania 3: Summer Vacation	US	Genndy Tartakovsky	1 719 543
6	Jumanji: Welcome to the Jungle	US	Jake Kasdan	1 544 171
7	Venom	US/CN	Ruben Fleischer	1 397 814
8	Black Panther	US	Ryan Coogler	1 366 927
9	The Nun	US	Corin Hardy	1 326 577
10	The Meg	US/CN	Jon Turteltaub	1 220 075

Sources: OIA, Peruvian Ministry of Culture

Top 10 films by admissions in Venezuela | 2018

	Original title	Country of origin	Director	Admissions
1	Avengers: Infinity War	US	Anthony Russo, Joe Russo	1 655 346
2	Incredibles 2	US	Brad Bird	1 391 712
3	Coco	US	Lee Unkrich, Adrian Molina	1 067 809
4	Jumanji: Welcome to the Jungle	US	Jake Kasdan	1 031 124
5	Hotel Transylvania 3: Summer Vacation	US	Genndy Tartakovsky	940 115
6	Black Panther	US	Ryan Coogler	730 617
7	Papita 2da Base	VE	Luis Carlos Hueck	708 593
8	Jurassic World: Fallen Kingdom	US	J. A. Bayona	569 988
9	Fifty Shades Freed	US	James Foley	413 284
10	The Nun	US	Corin Hardy	386 978

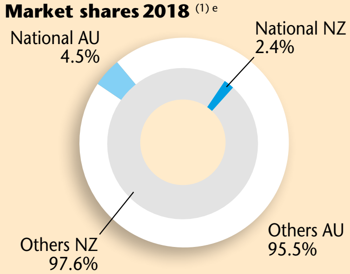
Sources: OIA, CNAC

Australia and New Zealand

	Australia	New Zealand
Population 2018 e (million)	25.1	4.9
GDP per capita 2018 e (USD)	58 940.7	44 069.3
Gross box office 2018 (M USD)	930.7	140.8
Admissions 2018 (million)	89.8	16.7
Average ticket price 2018 (USD)	10.36	8.4
Average admissions per capita 2018	3.6	3.4
Screens 2018	2 278	449
Digital screens 2018 e	2 100	449
Digital 3D screens 2018	971	184

(1) By GBO

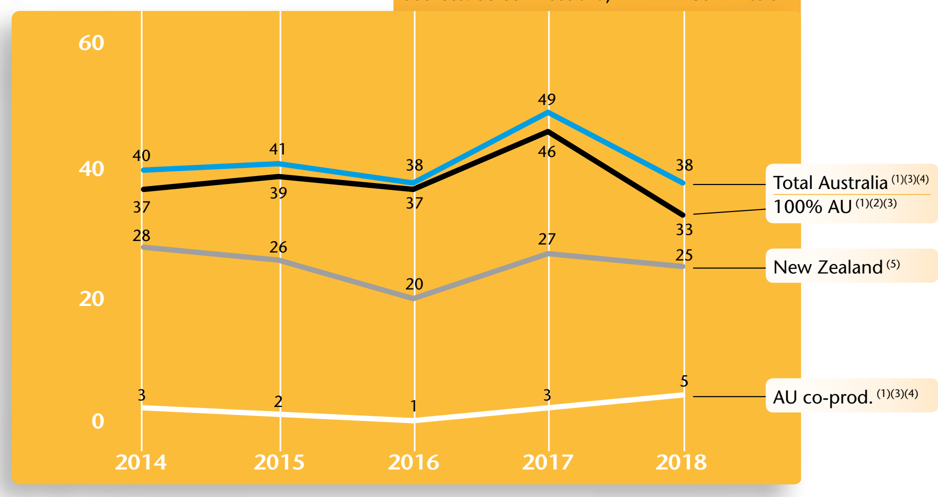
Market shares 2018 (1) e



Number of Australian and New Zealand feature films produced | 2014-2018

In units.

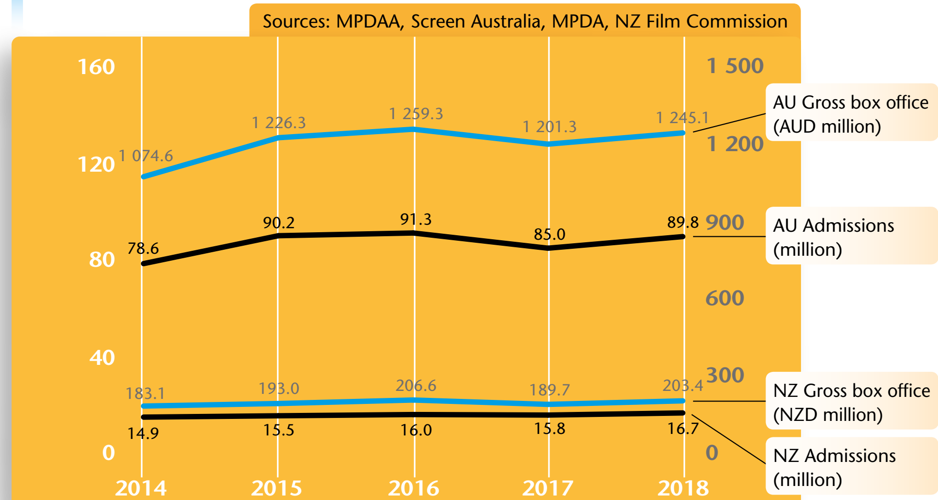
Sources: Screen Australia, NZ Film Commission



(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 New Zealand 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 | 2014-2018

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



Top 10 films by admissions in Australia | 2018 e

Estimated admissions based on average ticket price of AUD 13.9.

	Original title	Country of origin	Director	Distributor	Admissions e
1	Avengers: Infinity War	US	Anthony & Joe Russo	Walt Disney	4 463 789
2	Incredibles 2	US	Brad Bird	Walt Disney	3 302 213
3	Bohemian Rhapsody (1)	GB INC/US	Bryan Singer	20th Century Fox	3 059 785
4	Black Panther	US	Ryan Coogler	Walt Disney	2 943 791
5	Deadpool 2	US	David Leitch	20th Century Fox	2 600 915
6	Jurassic World: Fallen Kingdom	US	J.A. Bayona	Universal	2 563 904
7	Jumanji: Welcome to the Jungle	US	Jake Kasdan	Sony Pictures	2 375 381
8	A Star Is Born (1)	US	Bradley Cooper	Warner Bros.	2 368 437
9	The Greatest Showman	US	Michael Gracey	20th Century Fox	1 990 055
10	Peter Rabbit	US /AU	Will Gluck	Sony Pictures	1 930 066

(1) Still grossing in 2019.

Source: MPDAA

Top 10 films by admissions in New Zealand | 2018 e

Estimated admissions based on average ticket price of NZD 12.2.

	Original title	Country of origin	Director	Distributor	Admissions e
1	Avengers: Infinity War	US	Anthony & Joe Russo	Walt Disney	849 476
2	Incredibles 2	US	Brad Bird	Walt Disney	636 486
3	Black Panther	US	Ryan Coogler	Walt Disney	595 280
4	Jumanji: Welcome to the Jungle (1)	US	Jake Kasdan	Sony	558 150
5	Mamma Mia! Here We Go Again	US/GB/JP	Ol Parker	Universal	508 958
6	Bohemian Rhapsody	GB INC/US	Bryan Singer	20th Century Fox	501 920
7	A Star Is Born	US	Bradley Cooper	Warher Bros.	444 889
8	Jurassic World: Fallen Kingdom	US	J.A. Bayona	Universal	418 165
9	Deadpool 2	US	David Leitch	20th Century Fox	409 919
10	The Greatest Showman (1)	US	Michael Gracey	20th Century Fox	382 987

(1) Films released in late 2017. Admissions refer to lifetime box office.

Source: MPDA

Distribution and exhibition

After dropping in 2017, Australian cinema attendances bounced back in 2018, growing by 5.6% to 89.8 million tickets sold. GBO increased by 3.6%, to AUD 1.25 billion (USD 931 million). New Zealand's box office also went up in 2018, with admissions increasing 5.6% to 16.7 million and GBO going up 7.3% to NZD 203.4 million (USD 141 million), marking the second best year in terms of revenues after 2016.

In both markets, the uplift was driven by the success of Hollywood hits, headed by the box-office winner *Avengers: Infinity War*. The national market share marginally increased in both territories, to reach 4.5% in Australia and 2.4% in New Zealand. In Australia the highest-grossing local titles were the US co-production *Peter Rabbit* and the comedy *Ladies in Black*, while in New Zealand *The Breaker Upperer* was the top domestic production in terms of box office.

Production and funding

Although in 2018 Australian production volume declined to 38 films (11 films less than in 2017), overall production spend increased by 11.8% compared to 2017 to AUD 321 million (USD 240 million), up 28.9% on the five-year average. Co-production expenditure reached a record high of AUD 143 million (USD 107 million), driven by three Chinese and two European co-productions. In a bid to attract investments and boost the local industry, Australia has nearly doubled its shooting incentive schemes for foreign productions, increasing production rebates from 16.5% to 30% on qualifying production expenditure starting from the year 2019/2020 and extending incentives to streaming platforms.

In New Zealand 25 feature films were produced in 2018, compared to 27 films the previous year. The total film production and post-production spend fell by 39.4% to NZD 295 million (USD 204 million). The New Zealand Film Commission launched initiatives aimed at supporting the Maori film industry and introduced a feature film fund for projects with at least two women in key creative roles. In 2018 the country also initiated a review of the national Copyright Act.

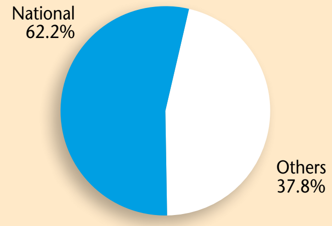
Sources: Screen Australia, MPDAA, MPDA, NZ Film Commission, Stats NZ, *Variety*, *Hollywood Reporter*, OBS

People's Republic of China

Population 2018 e	1 399 million
GDP per capita 2018 e	9 377 USD
Gross box office 2018 e	60.98 bn CNY (9.24 bn USD)
Admissions 2018 e	1.72 billion
Average ticket price 2018 e	35.5 CNY (5.4 USD)
Average admissions per capita 2018 e	1.2
Screens 2017 | 2018 e	50 776 | 60 079
Digital screens 2017 | 2018 e	47 097 | 55 623 (1)
Digital 3D screens 2017 | 2018 e	(2) 32 943 | 49 000 (1)

(1) As per end of June 2018. (2) 2016. (3) By GBO.

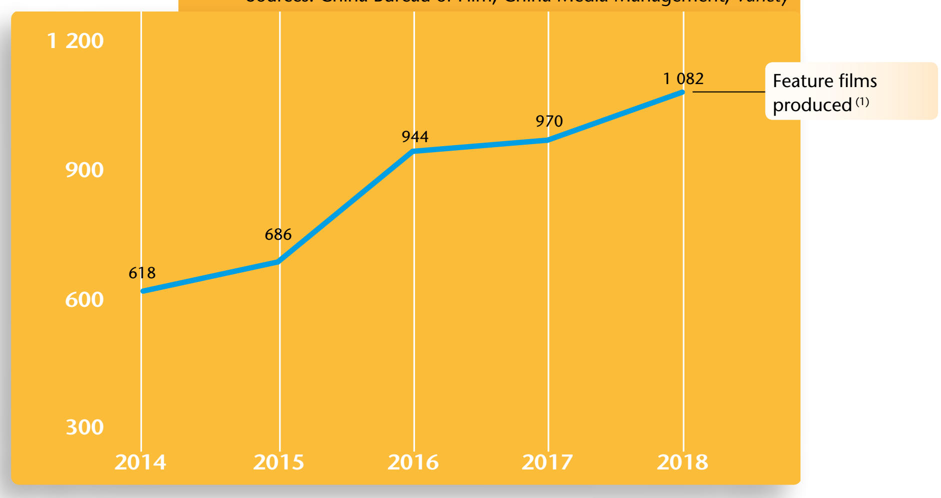
Market shares 2018 (3)



Number of feature films produced in China | 2014-2018 e

In units.

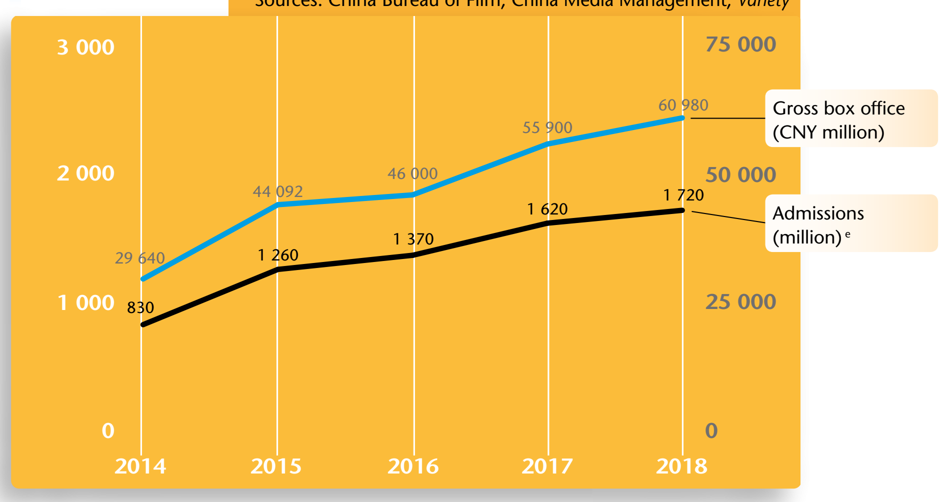
Sources: China Bureau of Film, China Media Management, *Variety*



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

Admissions and gross box office in China | 2014-2018 e

Sources: China Bureau of Film, China Media Management, *Variety*



Top 20 films by admissions in China | 2018

	English Title	Country of origin	Director	Admissions
1	Operation Red Sea	CN/MA/HK	Dante Lam	91 830 774
2	Dying to Survive	CN	Muye Wen	88 242 511
3	Detective Chinatown 2	CN	Sicheng Chen	86 470 362
4	Hello Mr. Billionaire	CN	Fei Yan, Da-Mo Peng	72 207 712
5	Avengers: Infinity War	US	Anthony Russo, Joe Russo	61 912 779
6	Monster Hunt 2	CN	Raman Hui	57 448 786
7	Aquaman	US	James Wan	52 530 874
8	Venom	US/CN	Ruben Fleischer	52 036 028
9	Jurassic World: Fallen Kingdom	US	J.A. Bayona	47 132 372
10	Us and Them	CN	Rene Liu	39 753 349
11	The Island	CN	Bo Huang	38 760 801
12	Ready Player One	US	Steven Spielberg	37 751 073
13	Project Gutenberg	CN/HK	Felix Chong	35 207 991
14	The Ex-File 3: Return of the Exes	CN	Yusheng Tian	33 920 755
15	Mission: Impossible - Fallout	US/CN/FR/NO	Christopher McQuarrie	33 527 178
16	Rampage	US	Brad Peyton	28 587 808
17	The Meg	US/CN	Jon Turteltaub	27 239 344
18	How Long Will I Love You	CN	Su Lun	26 879 341
19	Secret Superstar	IN	Advait Chandan	24 123 307
20	Forever Young	CN	Fangfang Li	23 687 531

Source: Comscore

Distribution and exhibition

2018 saw China confirming its position as the world's largest cinema market by number of admissions for the third year in a row. Cinema attendance increased by 6.2% on the previous year to 1.72 billion tickets sold, more than twice as many as in 2014. Chinese box office revenues increased by 9.1% in 2018 to CNY 60.98 billion (USD 9.24 billion), slowing down compared to the 21.5% growth rate registered in 2017. However, it must be noted that official Chinese box office reports for 2017 and 2018 include service fees charged by online ticketing companies, which may exaggerate the actual GBO growth.

Domestic productions captured 62.2% of total box office receipts, up from 53.8% in the previous year, with six Chinese features among the 10 top-grossing films. The action war film *Operation Red Sea* topped the chart with 91.8 million admissions, followed by the comedy-drama *Dying to Survive* (88.2 million) and *Detective Chinatown 2* (86.5 million). The top-grossing US film was the latest installment of the Avengers franchise: *Avengers: Infinity War*, coming in fifth place with 61.9 million admissions.

The country's theatrical infrastructure continued to grow at a steady pace, with 9 303 new screens unveiled in 2018, up 18.3% on 2017, for a total of 60 079 screens nationwide.

Production and funding

Production volume in China increased to 1 082 features in 2018 (112 more than in the previous year, marking a 75.1% jump compared to 2014), although only a limited number of these films received a theatrical release.

As part of a broader governmental restructuring, in 2018 China dissolved the country media regulator (SAPPRFT), setting up a new national Bureau of Film, under the direct jurisdiction of the Publicity Department. While the move is expected to further tighten governmental control over the film industry, the transition resulted in a slowdown of the censorship clearance process for many imported productions. The creation of an ethics committee for the Chinese film industry has been announced in response to a series of scandals and tax-evasion allegations involving high-profile personalities.

Negotiations between US and China over film import quotas and revenue-sharing for US films, initiated in 2017, are now on hold, amid political tensions between the two countries and the overhaul of the Chinese regulatory structure. In turn, China has loosened restrictions for mainland-Hong Kong co-productions.

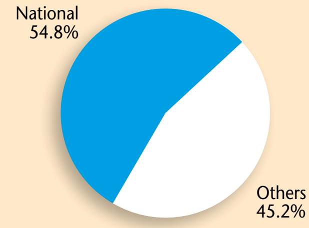
Sources: China Bureau of Film, *Variety, Screen International,* IHS Markit, Comscore

Japan

Population 2018 e	126.4 million
GDP per capita 2018 e	40 063 USD
Gross box office 2018	222.5 bn JPY (2.02 bn USD)
Admissions 2018	169.2 million
Average ticket price 2018	1 315 JPY (11.9 USD)
Average admissions per capita 2018	1.3
Screens 2017 | 2018	3 525 | 3 561
Digital screens 2017 | 2018	3 453 | 3 494
Digital 3D screens 2017 | 2018	1 214 | 1 232

(1) By GBO

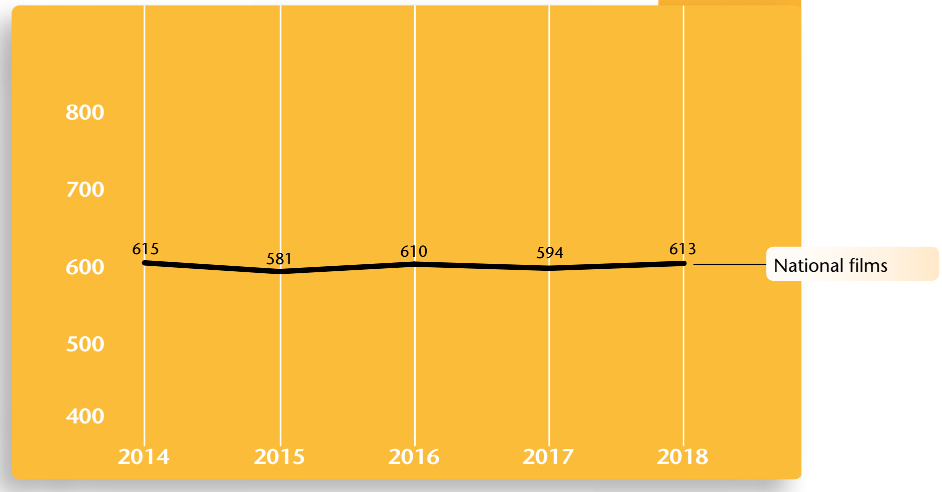
Market shares 2018 e (1)



Number of Japanese feature films released | 2014-2018

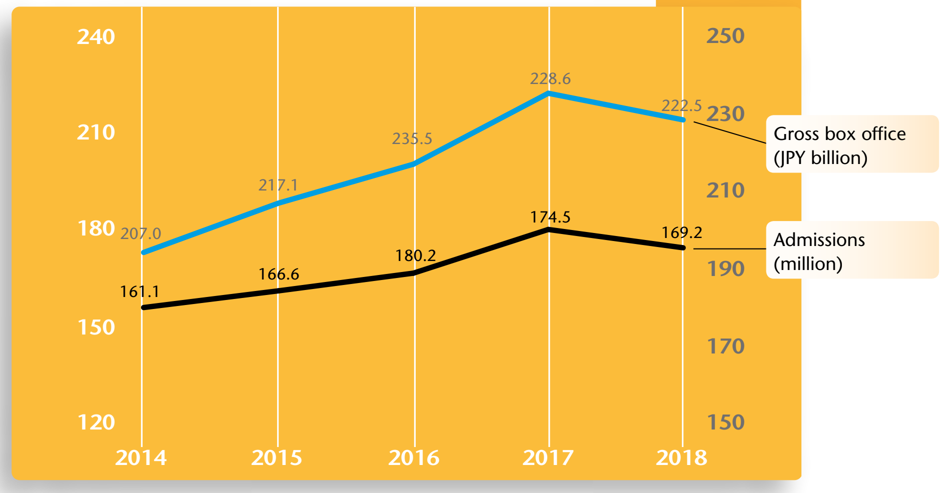
In units.

Source: EIREN



Admissions and gross box office in Japan | 2014-2018

Source: EIREN



Top 20 films by admissions in Japan | 2018 [e]

Estimated admissions based on average ticket price of JPY 1 315.

	English Title	Country of origin	Director	Distributor	Admissions
1	Bohemian Rhapsody	GB INC/US	Bryan Singer	20th Century Fox	7 954 373
2	Code Blue	JP	Masaki Nishiura	Toho	7 072 243
3	Detective Conan: Zero the Enforcer	JP	Yuzuru Tachikawa	Toho	6 980 989
4	Jurassic World: Fallen Kingdom	US	J.A. Bayona	Toho/Towa	6 136 882
5	Star Wars: The Last Jedi	US	Rian Johnson	Walt Disney	5 711 027
6	Doraemon The Movie: Nobita's…	JP	S. Ryoo, K. Imai	Toho	4 083 650
7	The Greatest Showman	US	Michael Gracey	20th Century Fox	3 969 582
8	Coco	US	L. Unkrich, A. Molina	Walt Disney	3 802 281
9	Incredibles 2	US	Brad Bird	Walt Disney	3 726 236
10	Mission: Impossible – Fallout	US/CN/FR/NO	C. McQuarrie	Towa Pictures	3 589 354
11	Shoplifters	JP	Hirokazu Koreeda	Gaga	3 460 076
12	Avengers: Infinity War	US	Anthony & Joe Russo	Walt Disney	2 844 106
13	Gintama 2: Rules Are Made to Be…	JP	Yûichi Fukuda	Warner Bros.	2 813 688
14	The Boss Baby	US	Tom McGrath	Toho/Towa	2 615 970
15	Destiny: The Tale of Kamakura	JP	Takashi Yamazak	Toho	2 441 065
16	One Cut of the Dead	JP	Shin'ichirô Ueda	Asmic/Enbu	2 372 624
17	Pokémon the Movie: The Power of Us	JP	Tetsuo Yajima	Toho	2 349 810
18	Killing for the Prosecution	JP	Masato Harada	Toho	2 250 951
19	Mirai	JP	Mamoru Hosoda	Toho	2 190 114
20	The 8-Year Engagement	JP	Takahisa Zeze	Shochiku	2 144 487

Sources: EIREN, OBS

Distribution and exhibition

Japan registered a 3% dip in cinema attendance in 2018. Admissions declined to 169.2 million from 174.5 million in 2017, still the third best result since 2010. Similarly, GBO dropped by 2.7% on the previous year to JPY 222.5 billion (USD 2.02 billion). Once again local content dominated the box office in 2018, as Japanese films made up 31 of the 54 titles crossing the 1 JPY million benchmark, compared to 23 foreign titles, mainly Hollywood blockbusters. The domestic market share remained stable, with local productions taking 54.8% of the GBO.

Bohemian Rhapsody topped the charts, racking up almost eight million admissions, boosted by a number of special karaoke sing-along screenings. Other top ranking imports include *Jurassic World: Fallen Kingdom* (6.1 million) and *Star Wars: The Last Jedi*, followed by the musical drama *The Greatest Showman* (4.0 million). The domestic hit *Code Blue*, a spin-off of a TV drama on a medical helicopter team, ranked second place, with 7.1 million admissions. Among the highest-grossing domestic films were the new installments of long-running anime franchises (*Detective Conan* and *Doraemon*) as well as the 2018 Palme-d'Or-winning drama *Shoplifters*.

The 20 top-grossing titles accounted for 46.4% of GBO, showing a higher level of concentration than in 2017 (42.9%). The country's theatrical infrastructure, by now almost fully digitised (98%), underwent a marginal expansion, reaching 3 561 screens in 2018, 1% up from 3 525 in 2017.

Production and funding

The total number of film releases grew marginally to 1 192 films in 2018, five more than in the previous year. Notably, the number of Japanese first releases rose to 613 films, marking a 3.2% increase on 2017. Animation remains a pivotal part of the Japanese film sector. According to the Association of Japanese Animation (AJA), the country's animation industry reached a total value of over JPY 2.15 trillion (USD 19.5 billion) in 2017, showing an 8% increase on 2016, this growth mainly driven by an increase in exports (+29.6%) and streaming revenues (13%). However, only six animation features generated more than 1 JPY million, breaking down as four local animations and Disney's *Coco* and *Incredibles 2*.

In an attempt to tackle the rampant levels of online piracy of manga and anime content, the government announced emergency measures such as restricting the access to websites that provide links for the illegal download of content under copyright as well as a comprehensive reform to Japanese copyright law.

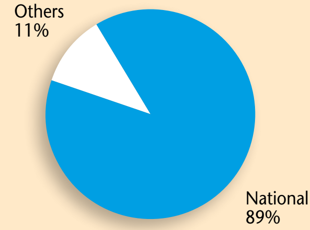
Sources: EIREN, AJA, *Variety*, *The Hollywood Reporter*

India

Population 2018 e	1 334.2 million
GDP per capita 2018 e	1 989.3 USD
Gross box office 2018 e	102.1 bn INR (1.5 bn USD)
Admissions 2018 e	2.02 billion
Average ticket price 2018 e	50.5 INR (0.7 USD)
Average admissions per capita 2018 e	1.5
Screens 2017 | 2018 e	11 209 | 11 280
Digital screens 2017 e | 2018 e (1)	9 530 | 9 601
3D screens 2017 | 2018 e	(2) 1 183 | ~

(1) Includes E-Cinema screens (2) 2016

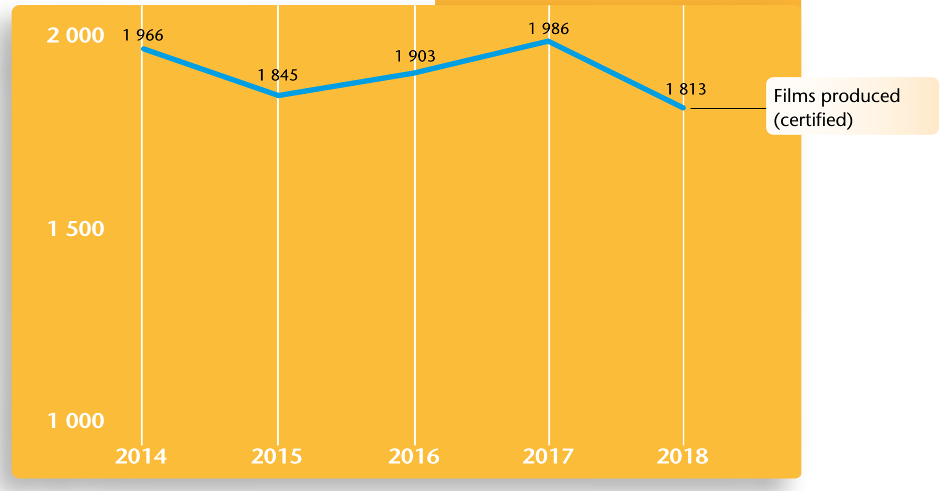
Market shares 2018



Number of Indian feature films certified (1) | 2014-2018

In units.

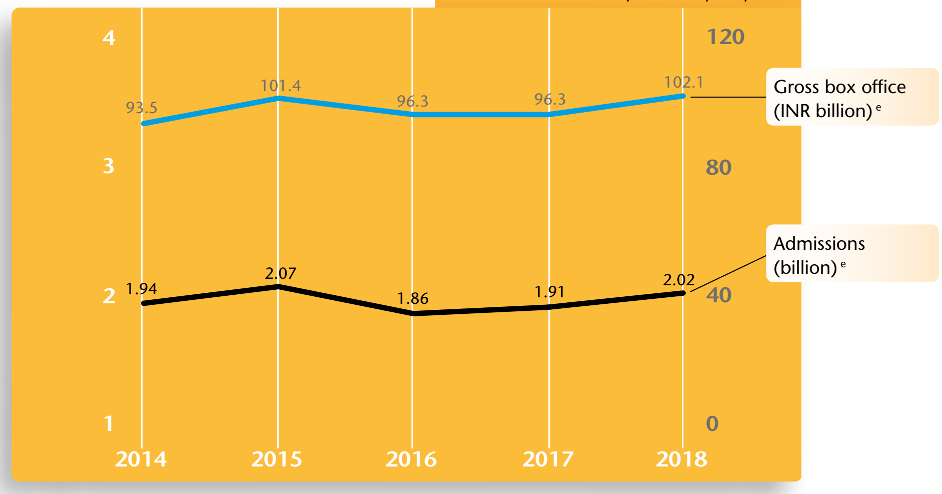
Source: Central Board of Film Certification



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

Admissions and gross box office in India | 2014-2018 e

Sources: FICCI-KPMG, FICCI-EY, IHS, OBS



Top 10 Bollywood films by gross box office in India | 2018

GBO calculated using an average exchange rate of 1 USD = 68.38 INR.

	Original title	Country of origin	Director	Gross box office (in USD)
1	Sanju	IN	Rajkumar Hirani	50 003 516
2	Padmaavat	IN	Sanjay Leela Bhansali	43 963 000
3	Simmba	IN	Rohit Shetty	35 202 640
4	2.0 (1)	IN	S. Shankar	27 550 147
5	Race 3	IN	Remo D'Souza	24 765 823
6	Baaghi 2	IN	Ahmed Khan	24 179 650
7	Thugs of Hindostan	IN	Vijay Krishna Acharya	21 291 281
8	Badhaai Ho	IN	Amit Ravindernath Sharma	20 047 128
9	Stree	IN	Amar Kaushik	18 934 864
10	Raazi	IN	Meghna Gulzar	18 049 742

(1) Version in Hindi.

Source: Koimoi.com

Top 10 US films by gross box office in India | 2018

	Original title	Country of origin	Director	Gross box office (in USD)
1	Avengers: Infinity War	US	Anthony Russo, Joe Russo	40 413 123
2	Black Panther	US	Ryan Coogler	10 783 029
3	Jumanji: Welcome to the Jungle	US	Jake Kasdan	8 010 811
4	Ant-Man and the Wasp	US	Peyton Reed	6 402 391
5	Venom	US/CN	Ruben Fleischer	5 925 020
6	Rampage	US	Brad Peyton	5 253 320
7	Insidious: The Last Key	US/CA	Adam Robitel	2 417 897
8	Pacific Rim Uprising	US/GB/JP/CN	Steven S. DeKnight	2 039 814
9	Skyscraper	US	Rawson Marshall Thurber	1 998 901
10	The Meg	US/CN	Jon Turteltaub	1 464 606

Source: Comscore

Distribution and exhibition

Theatrical revenues increased by 6.0% in 2018, with GBO crossing INR 102.1 million (USD 1.5 billion). Similarly, admissions grew to an estimated 2.0 billion, up from 1.9 billion in 2017. The increase was led both by the upturn of the Hindi-language segment (Bollywood) and the good box office performance of Hollywood productions.

Domestic films accounted for 89% of the box office revenues. In particular, Bollywood films reached a record high in 2018, generating approximately 42.1% of total box office takings, in spite of representing only 13.4% of the films released. As usual, the Hindi theatrical market was highly concentrated, with the top 50 films taking about 98% of the Bollywood box office receipts. The biographical blockbuster *Sanju* topped the Bollywood charts, grossing more than USD 50.0 million, followed by epic period drama *Padmaavat* (USD 44.0 million) and action film *Simmba* (USD 35.2 million). Indian films in other regional languages (including Tamil, Telegu and Gujarati) comprised about 81% of the titles on release and accounted for 46.9% of the box office receipts. US films, led by *Avengers: Infinity War*, which became the highest grossing Hollywood film of all time in India, took 11% of the GBO while comprising only 5.6% of the films on release.

There was a marginal growth in the total number of screens in 2018, with the expansion of multiplexes off-setting the rapid decline in the number of single screens. Screens from multiplexes contributed about 55% of the domestic box office receipts in 2018, representing only 29% of total screens. Low screen penetration still represents a key challenge for the Indian exhibition sector, and extensive development of the theatrical infrastructure is especially needed in smaller urban centres.

Production and funding

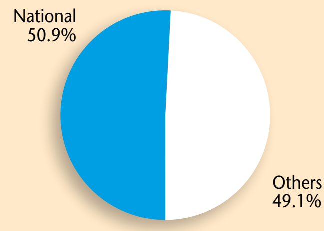
The number of domestic feature films certified for release declined by 8.7% in 2018 to 1 813, marking a five-year low. India and China have recently been in talks over a revenue-sharing agreement for film content, as China has become the largest international market for Indian film content in terms of box office receipts, with 10 Indian titles released in China generating a total of USD 272.3 million in 2018.

Sources: CBFC, FICCI, Ernst & Young (EY), IHS Markit, OBS

South Korea

Population 2018 e	51.7 million
GDP per capita 2018 e	30 912.2 USD
Gross box office 2018	1 814.0 bn KRW (1.71 bn USD)
Admissions 2018	216.4 million
Average ticket price 2018	8 383 KRW (7.6 USD)
Average admissions per capita 2018	4.2
Screens 2017 | 2018	2 766 | 2 937
Digital screens 2017 | 2018	2 575 | ~
Digital 3D screens 2017 | 2018	~ | ~

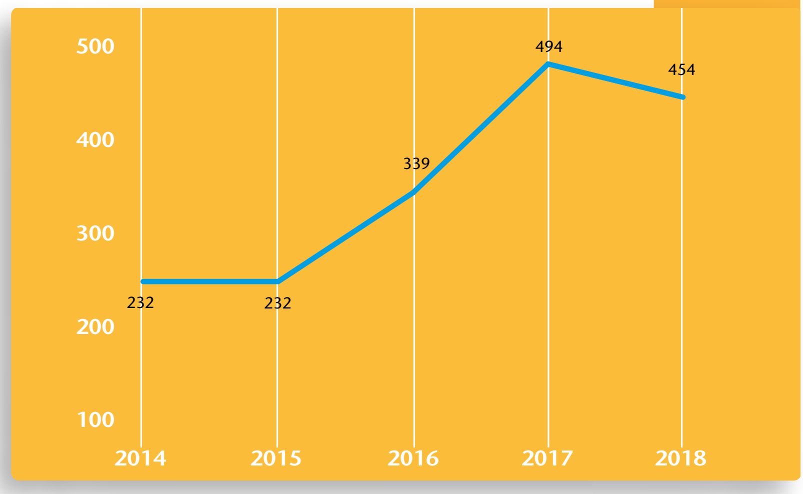
Market shares 2018 e



Number of Korean feature films released | 2014-2018

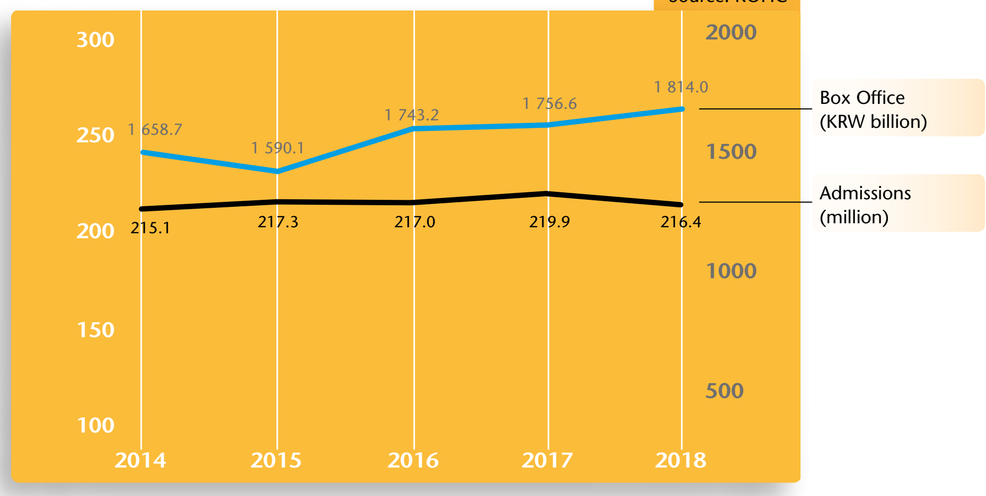
In units.

Source: KOFIC



Admissions and gross box office in South Korea | 2014-2018

Source: KOFIC



Top 20 films by admissions in South Korea | 2018

	English title	Country of origin	Director	Distributor	Admissions
1	Along with the Gods: The Last 49 Days	KR	Yong-hwa Kim	Lotte Entertain.	12 274 996
2	Avengers: Infinity War	US	Anthony & Joe Russo	Walt Disney	11 212 710
3	Bohemian Rhapsody	GB INC/US	Bryan Singer	20th Century Fox	9 224 587
4	Mission: Impossible - Fallout	US/CN/FR/NO	C. McQuarrie	Paramount	6 584 915
5	Along with the Gods: The Two Worlds	KR	Yong-hwa Kim	Lotte Entertain.	5 872 007
6	Jurassic World: Fallen Kingdom	US	J.A. Bayona	UIP	5 661 128
7	Ant-Man and the Wasp	US	Peyton Reed	Walt Disney	5 448 134
8	The Great Battle	KR	Kwang-shik Kim	Contents Panda	5 440 186
9	Black Panther	US	Ryan Coogle	Walt Disney	5 399 227
10	Intimate Strangers	KR	J.Q. Lee	Lotte Entertain.	5 293 435
11	1987: When the Day Comes	KR	Joon-hwan Jang	CJ Entertainment	5 290 310
12	Believer	KR	Hae-Young Lee	Contents Panda	5 063 684
13	The Spy Gone North	KR	Jong-bin Yoon	CJ Entertainment	4 974 520
14	Venom	US/CN	Ruben Fleischer	Sony Pictures	3 888 096
15	Dark Figure of Crime	KR	Tae-Gyoon Kim	Showbox	3 789 321
16	Deadpool 2	US	David Leitch	20th Century Fox	3 784 602
17	Default	KR	Kook-Hee Choi	CJ Entertainment	3 747 954
18	Coco	US	L. Unkrich, A. Molina	Walt Disney	3 510 017
19	Acquaman	US	James Wan	Warner Bros.	3 491 860
20	Keys to the Heart	KR	Sung-Hyun Choi	CJ Entertainment	3 419 339

Source: KOFIC

Distribution and exhibition

South Korea, which has one of the highest cinema attendance rates per capita worldwide, registered a new box office record in 2018 as GBO grew by 3.3% on the previous year to KRW 1 814.0 billion (USD 1.71 billion). In spite of the growth in revenues, admissions dropped by 1.6%, slipping from 219.9 million to 216.4 million tickets.

Domestic productions took a market share of 50.9% in 2018, slightly down from 51.8% in 2017. Only four out of the top 10 titles by admissions were South Korean films, down from eight in 2017. The domestic action-fantasy *Along with the Gods: The Last 49 Days* was the only film to exceed 10 million admissions in 2018, topping the charts with 12.3 million tickets sold. The first episode of the same franchise (*Along with the Gods: The Two Worlds*), ranked fifth with 5.9 million admissions, followed by historical action movie *The Great Battle* (5.4 million admissions). In turn, five Hollywood productions earned a place among the top 10, including the latest release of the superhero Avengers saga (ranking second place, with 11.2 million admissions), followed by *Bohemian Rhapsody* (9.2 million) and *Mission Impossible - Fallout* (6.6 million). Admissions to Korean independent and arthouse films (113 releases) slumped in 2018, decreasing by 47.9% to 1.1 million admissions, corresponding to 0.5% of total admissions.

2018 saw a change in leadership in the distribution landscape, with Lotte becoming the top distributor capturing a market share of 17.1% of total admissions, ahead of Disney (13.9%) and CJ Entertainment (13.3%), which had led the market in past years.

Production and funding

After reaching a record high in 2017, South Korean production volume dropped to 454 films released in 2018, 40 less than in the previous year, bucking a long established upward trend. The decline affected the overall number of film releases in the country which fell to 1 646 from 1 765 in 2017.

In recent years, South Korea's fiscal incentive system, providing a cash rebate of up 25% on qualified spend, has successfully attracted a series of high-profile foreign productions to shoot in the country.

The Korean Film Council (KOFIC) appointed a new chairman in 2018, after the former director resigned over a series of political and economic scandals.

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

Other Asia

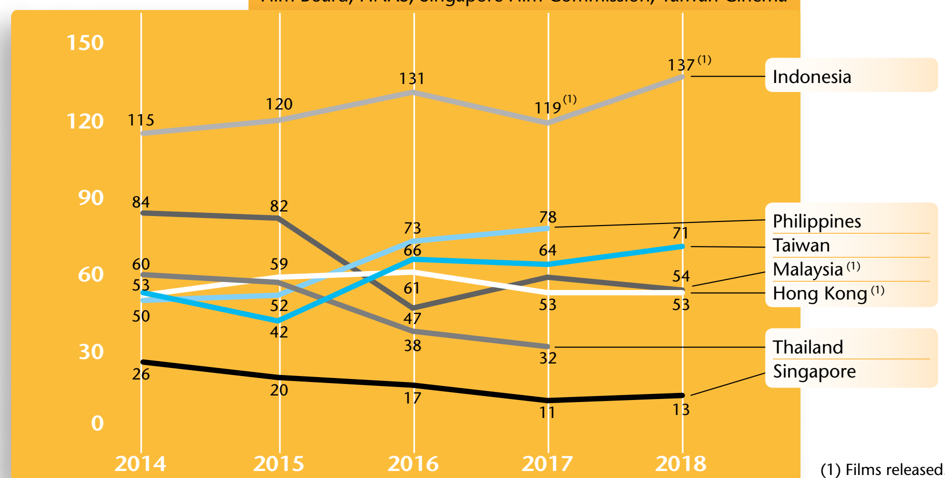
	Hong Kong	Indonesia	Malaysia	Philippines	Singapore	Taiwan	Thailand
Population 2018 e (million)	7.5	265.3	32.5	108.4	5.7	23.6	69.2
GDP per capita 2018 e (USD)	46 077	4 116	10 490	3 301	55 231	24 889	6 745
Gross box office 2018 e (M USD)	249.7	235.0 (2)	251.7	218.0 (1)	138.0	314.0 (1)	164.2 (3)
Admissions 2018 e (million)	25.2	89.51 (2)	77.3	85.01 (1)	19.6	34.5 (1)	32.80 (2)
Average ticket price 2018 e (USD)	9.9	2.6	3.3	2.6 (1)	7.0	9.1 (1)	4.6 (3)
Average admissions per capita 2018 e	3.4	0.3 (2)	2.4	0.8 (1)	3.4	1.5 (1)	0.5 (2)
Screens 2018 e	230 (2)	1 685	1 094	920 (1)	276	776 (2)	1154 (2)
Digital screens 2018 e	230 (2)	1 685	1 029 (2)	920 (1)	244 (2)	776 (2)	1154 (2)
3D screens 2018 e	204 (2)	825 (2)	310 (2)	164 (2)	92 (2)	468 (2)	412 (2)
National market shares 2018 e	13.0%	38.1% (2)	16.4%	~	1.7%	17.5% (4)	~

(1) 2017 (2) 2016 (3) 2015 (4) 2014

Number of feature films produced in selected Asian countries | 2014-2018

In units.

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

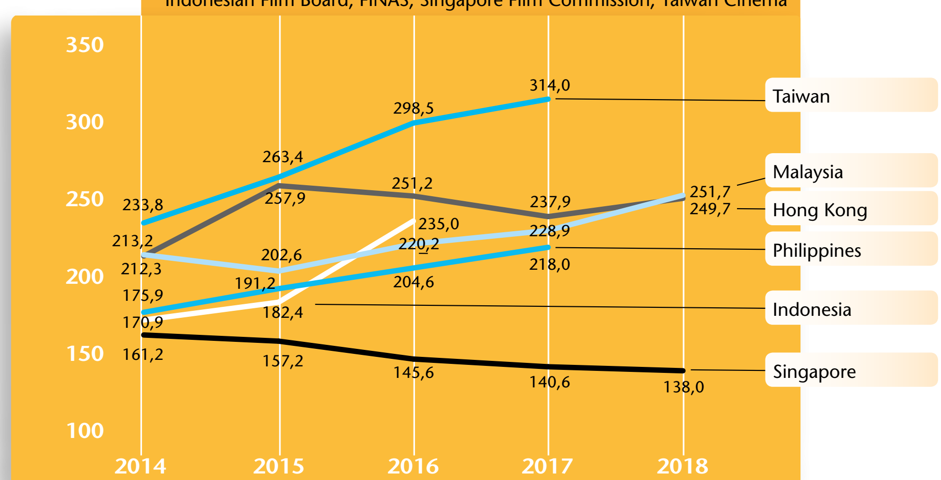


(1) Films released.

Gross box office in selected Asian countries | 2014-2018 e

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

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



Top 10 films by admissions in Hong Kong | 2018

	Original title	Country of origin	Director	Distributor	Admissions
1	Jurassic World: Fallen Kingdom	US	Juan Antonio Bayona	Universal	1 075 443
2	Incredibles 2	US	Brad Bird	Walt Disney	1 014 723
3	Avengers: Infinity War	US	Joe & Anthony Russo	Walt Disney	932 664
4	Along With The Gods: The Two Worlds	KR	Kim Yong-hwa	Edko	742 298
5	Deadpool 2	US	David Leitch	20th Century Fox	707 402
6	Mission: Impossible - Fallout	US/CN/FR/NO	C. McQuarrie	Paramount	687 112
7	Ant-Man And The Wasp	US	Peyton Reed	Walt Disney	670 087
8	Agent Mr. Chan	HK	Jeff Cheung	China 3D	598 989
9	Black Panther	US	Ryan Coogler	Walt Disney	595 911
10	Ready Player One	US	Steven Spielberg	Warner Bros.	554 187

Source: Comscore

Top 10 films by gross box office in Singapore | 2018

	Original title	Country of origin	Director	Distributor	Admissions
1	Avengers: Infinity War	US	Joe & Anthony Russo	Walt Disney	1 398 959
2	Jurassic World: Fallen Kingdom	US	J.A. Bayona	Universal	899 742
3	Black Panther	US	Ryan Coogler	Walt Disney	876 988
4	Aquaman	US	James Wan	Warner Bros.	773 244
5	Crazy Rich Asians	US	Jon M. Chu	Warner Bros.	664 656
6	Mission: Impossible - Fallout	US/CN/FR/NO	C. McQuarrie	Paramount	643 645
7	Incredibles 2	US	Brad Bird	Walt Disney	633 045
8	Venom	US/CN	Ruben Fleischer	Sony Pictures	560 659
9	Ant-Man And The Wasp	US	Peyton Reed	Walt Disney	517 378
10	Deadpool 2	US	David Leitch	20th Century Fox	473 623

Source: Comscore

Distribution and exhibition

Data on 2018 cinema attendance have not yet become available for several Asian markets, which does not allow the analysis of aggregate figures. Looking at individual countries, 2018 saw GBO increase in Hong Kong (up 5.8% to HKD 2.0 billion, USD 250 million) and Malaysia (up 5.7% to MYR 1.04 billion, USD 252 million). In turn, revenues in Singapore dropped to SGD 186.1 million (USD 138 million), down 4.1% on 2017, despite a slight increase in cinema attendance in 2018 (up 1.0% to 19.6 million admissions).

In both Hong Kong and Singapore, Hollywood franchise titles dominated the box office charts, topped respectively by *Jurassic World: Fallen Kingdom and Avengers: Infinity War*. In Hong Kong, the share captured by domestic productions dropped a fraction in 2018 to 13%, with comedy *Agent Chan* the only local title among the 10 top-grossing films for the year. In Singapore, the national market share dropped from 4.3% to 1.7%, with no national title in the top ten list. By contrast, three local films, headed by the horror movie *Munafik 2*, topped the box office charts in Malayisia, accounting for 61% of the receipts generated by national titles and taking the domestic share from 5.9% to 16.4%.

Indonesia further extended its theatrical infrastructure by unveiling 273 new screens in 2018, up 19.3% on 2017 to total of 1 685.

Production and funding

In 2018, production volume increased in Indonesia (+18 films), Singapore (+2 films) and Taiwan (+7), while it declined in Malaysia (-5) and remained stable in Hong Kong.

Several markets introduced measures aimed at attracting foreign investments: Thailand inked a deal with China to set up a co-production fund for content catering to Asian audiences while Taiwan launched an international co-production film investment scheme. In 2019, the Chinese mainland reduced restrictions on co-productions with Hong Kong, removing requirements on content as well as limits in the number of Hong Kong cast and crew. Honk Kong also announced an injection of HKD 1 billion (USD 128 million) into its Film Development Fund.

Sources: IHS Markit, Hong Kong Box Office Ltd, FINAS, Singapore Film Commission/IMDA, Indonesian Film Board, *Variety*, Comscore, OBS

Africa

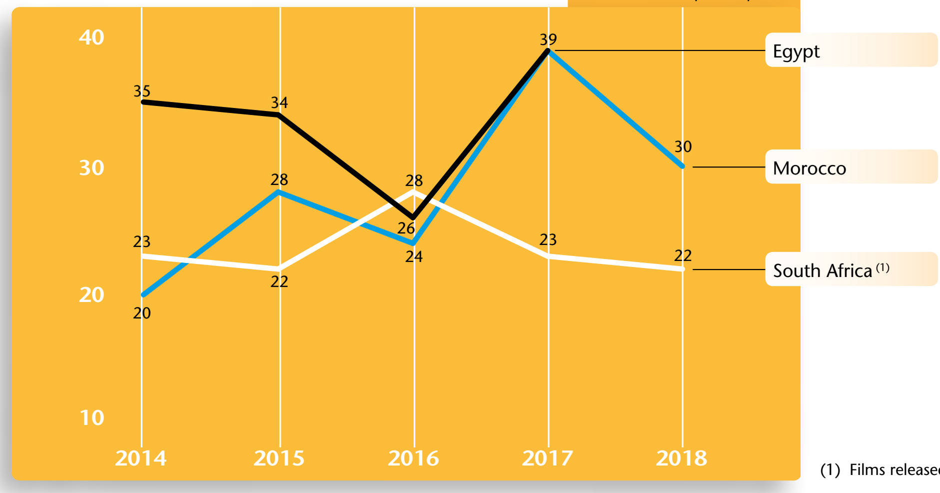
	Egypt	Morocco	South Africa
Population 2018 e (million)	94.4	35.2	57.4
GDP per capita 2018 e (USD)	3 685 (1)	3 368	6 292
Gross box office 2018 e (in M USD)	25.7	7.6	99.0
Admissions 2018 e (million)	6.7	1.6	19.6
Admissions per capita 2018 e	0.1	0.04	1.7
Average ticket price 2018 e (in USD)	3.9	4.9	5.0
Screens 2018 e	416 (2)	65	765
Digital screens 2018 e	166 (2)	60	765
National market shares 2018 e	~	32.5% (3)	3.9% (3)

(1) 2016 (2) 2015 (3) By GBO

Number of feature films produced in selected African countries | 2014-2018

In units.

Sources: CCM, NFVF, IHS

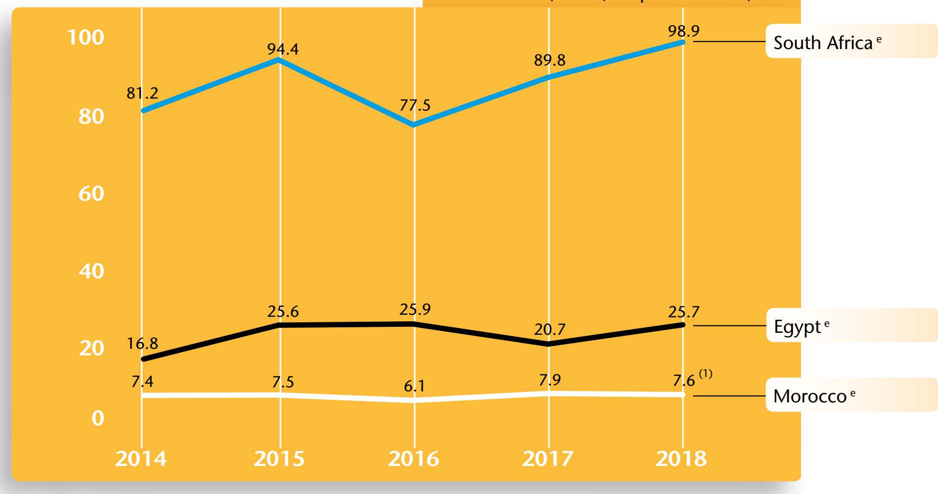


(1) Films released.

Gross box office in selected African countries | 2014-2018

In USD million.

Sources: CCM, NFVF, Empire Cinemas, IHS



(1) Includes box office from open-air screenings.

Top 10 films by gross box office in South Africa | 2018

	Original title	Country of origin	Director	Gross Box Office (in USD)
1	Black Panther	US	Ryan Coogler	8 160 967
2	Avengers: Infinity War	US	Anthony Russo, Joe Russo	5 554 699
3	Aquaman	US	James Wan	4 141 520
4	Incredibles 2	US	Brad Bird	4 010 956
5	Bohemian Rhapsody	GB INC/US	Bryan Singer	3 128 736
6	Mamma Mia! Here We Go Again	US/GB/JP	Ol Parker	2 580 596
7	Fifty Shades Freed	US	James Foley	2 528 899
8	Jurassic World: Fallen Kingdom	US	J. A. Bayona	2 457 026
9	Deadpool 2	US	David Leitch	2 417 941
10	Tyler Perry's Acrimony	US	Tyler Perry	2 108 570

Source: NFVF

Top 10 films by admissions in Morocco | 2018

	Original title	Country of origin	Director	Admissions
1	Lahnech	MA	Driss Mrini	203 977
2	Korsa	MA	Abdellah Ferkous	77 369
3	Razzia	MA/FR/BE	Nabil Ayouch	50 893
4	Mission: Impossible - Fallout	US/CN/FR/NO	Christopher McQuarrie	41 600
5	Deadpool 2	US	David Leitch	32 165
6	Taxi 5	FR	Franck Gastambide	31 449
7	Avengers: Infinity War	US	Joe Russo, Anthony Russo	30 155
8	Lhajjates	MA	Mohamed Achaour	29 171
9	Flatliners	US/CA	Niels Arden Oplev	29 016
10	Equalizer 2	US	Antoine Fuqua	28 042

Source: Centre Cinématographique Marocain (CCM)

South Africa

South African GBO climbed by 9.2% in 2018 registering a new record high at ZAR 1.3 billion (USD 99 million). The hike in revenues resulted from the exceptional box office performance of superhero megahit *Black Panther* which topped the South African chart in 2018. In line with the previous year, domestic productions captured 3.9% of box office receipts; the comedy *Frank & Fearless* was the highest grossing local title for the year. Overall, 22 South African films were released (one less than in 2017).

Morocco and Egypt

Moroccan cinema attendance dropped to 1.6 million admissions in 2018, down 6.7% on the previous year. The share of domestic films rose from 28.5% to 32.5% in 2018, boosted by the success of the comedy *Lahnech* which topped the charts for two years in a row. After booming in 2017, production volume declined 2018, with 30 films shot, compared to 39 for the previous year. With a total of 65 screens, the country's theatrical infrastructure remains under-equipped in spite of a marginal increase in 2018.

Egypt's admissions went up 10.5% to 6.7 million in 2018 as GBO reached EGP 459.3 million (USD 26 million).

Nigeria

Nigerian box office revenues were on the rise in 2018, setting a new record high at an estimated USD 13.9 million, up 25% on the previous year. In turn, the market share for domestic productions declined from almost 40% to an estimated 20%.

Nigeria's film industry, known as 'Nollywood', reportedly produces around 2 000 films a year, which would make it second to Bollywood only in terms of production volume. However, given the insufficient number of screens (less than 150 servicing a population of 19.3 million in 2018), only a small part of local productions receive a theatrical release. Recently, new hopes have been placed in theatrical expansion as 12 new cinemas were opened in 2018, bringing the national total to circa 40 cinemas. 2018 also saw the creation of the Cinema Exhibitors' Association of Nigeria, a body aimed at improving the availability and the transparency of box office data.

Sources: CCM, NFVF, *Variety*, IHS Markit, PwC, Ster-Kinekor, OBS

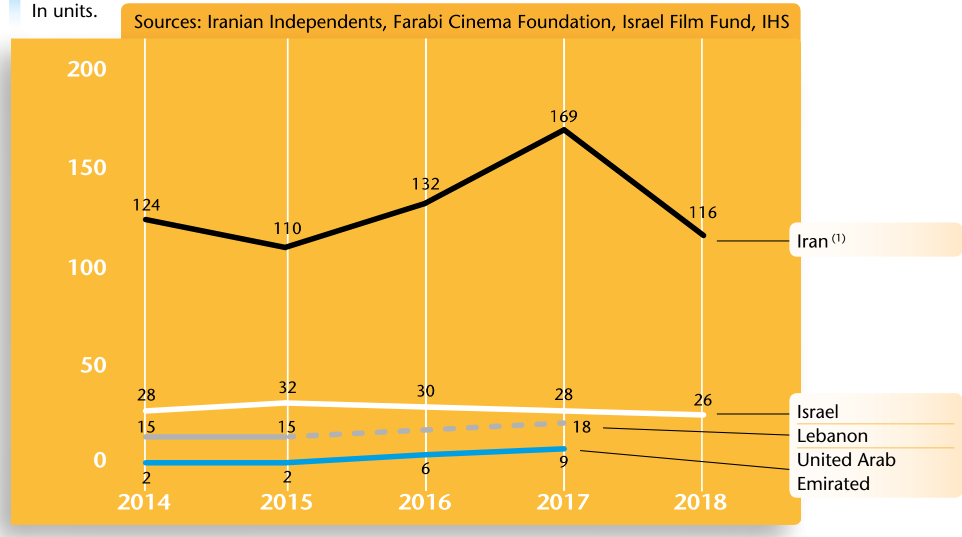
Middle East

	Iran	Israel	Kuwait	Lebanon	Qatar	Saudi Arabia	United Arab Emirates
Population 2018 e (million)	82.4	8.9	4.5	4.6	2.8	33.0	10.4
GDP per capita 2018 e (USD)	4 837.7	40 762.4	28 199.2	12 081.5	65 158.6	21 453.1	38 436.1
Gross box office 2018 e (in M USD)	60.9	156.0	56.7	32.6	39.5	7.9	250.3
Admissions 2018 e (million)	28.1	14.0	4.8	3.5	3.0	0.5	20.5
Admissions per capita 2018 e	0.3	1.6	1.1	0.8	1.1	0.0	2.0
Average ticket price 2018 e (USD)	2.2	11.1	11.74	9.43	13.34	16.23	12.24
Screens 2018 e	504	430	73 (1)	125 (2)	51 (2)	~	460 (3)
Digital screens 2018 e	504	430	~	~	~	~	460 (3)
National market shares 2018 e	92.0%	12.0%	~	23.7%	~	~	~

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

Number of films produced in selected Middle East countries | 2014-2018 e

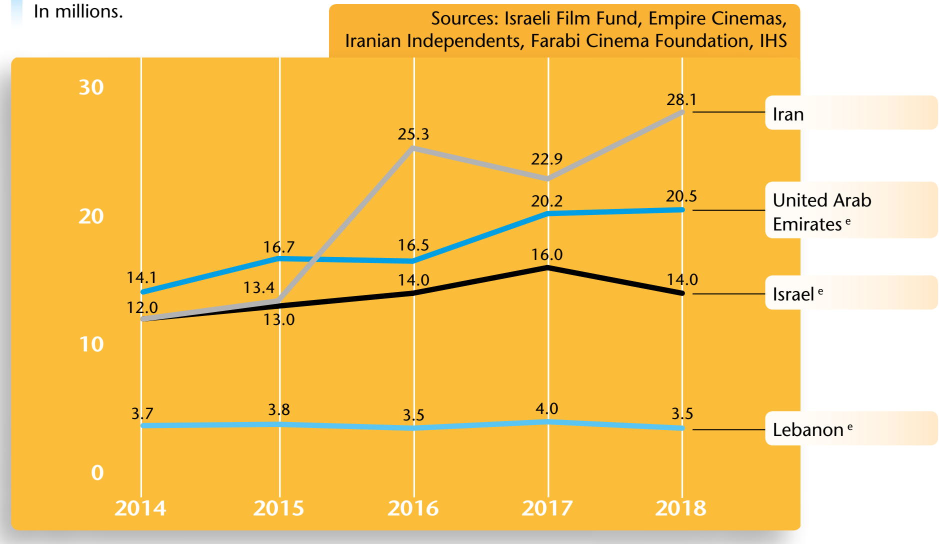
In units.



(1) According to the Farabi Cinema Foundation 97 films were produced in Iran in 2014, 84 films in 2015.

Admissions in selected Middle Eastern countries | 2014-2018 e

In millions.



Top 10 films by admissions in the United Arab Emirates | 2018

	Original title	Country of origin	Director	Distributor	Admissions
1	Avengers: Infinity War	US	Anthony Russo, Joe Russo	Walt Disney	733 281
2	Mission: Impossible - Fallout	US/CN/FR/NO	Christopher McQuarrie	Paramount	571 096
3	Jurassic World: Fallen Kingdom	US	J. A. Bayona	Universal Pictures	542 088
4	Black Panther	US	Ryan Coogler	Walt Disney	494 716
5	Aquaman	US	James Wan	Warner Bros.	423 926
6	The Meg	US/CN	Jon Turteltaub	Warner Bros.	420 093
7	Rampage	US	Brad Peyton	Warner Bros.	387 363
8	Incredibles 2	US	Brad Bird	Walt Disney	378 238
9	Venom	US/CN	Ruben Fleischer	Columbia	368 738
10	Padmaavat	IN	Sanjay Leela Bhansali	Paramount	357 503

Source: Empire Cinemas

Top 10 films by admissions in Saudi Arabia | 2018

	Original title	Country of origin	Director	Distributor	Admissions
1	Mission: Impossible - Fallout	US/CN/FR/NO	Christopher McQuarrie	Paramount	37 094
2	The Meg	US/CN	Jon Turteltaub	Warner Bros.	35 930
3	Avengers: Infinity War	US	Anthony Russo, Joe Russo	Walt Disney	28 269
4	Venom	US/CN	Ruben Fleischer	Columbia	27 483
5	Jurassic World: Fallen Kingdom	US	J. A. Bayona	Universal Pictures	26 041
6	Incredibles 2	US	Brad Bird	Walt Disney	24 815
7	Ant-Man And The Wasp	US	Peyton Reed	Walt Disney	21 470
8	Ocean's Eight	US	Gary Ross	Warner Bros.	19 904
9	Aquaman	US	James Wan	Warner Bros.	19 677
10	Skyscraper	US	Rawson Marshall Thurber	Universal Pictures	19 421

Source: Empire Cinemas

United Arab Emirates

In 2018 UAE cinema attendance hit a new record high at 20.5 million admissions. GBO followed suit rising by +2.4% on 2017 to UAD 919.2 million (USD 250 million). While domestic production volumes grew slowly (from 2 films produced in 2014 to 9 in 2017) film incentives made UAE an attractive shooting location for foreign productions. From 2019 onwards the DIFF (Dubai International Film Festival), the leading film festival in the region, will adopt a new format, taking place once every two years instead of annually.

Israel

Israeli GBO dropped from ILS 640 to 560 million (USD 156 million) in 2018, with admissions falling by 12.5% to 14 million tickets. In turn, the share captured by domestic productions increased to 12% while the number of national film produced slightly decreased from 28 to 26. In 2018 proposed legislation reinforcing governmental control over film funding sparked much controversy, as it would allow withholding subsidies from film projects considered critical to the Israeli State.

Iran

Iranian cinema attendance rose by 22.7% in 2018 to 28.1 million admissions, with GBO growing by 35.4% to IRR 2.5 trillion (USD 61 million). Once again, domestic titles dominated the box office, taking 92% of revenues. Local comedy *Millipede* was the highest-grossing title for 2018, taking a record-breaking IRR 350 billion (USD 8.7 million). According to Iranian Independents the number of domestic films produced fell from 169 to 116 in 2018, but only 61 of these films received a theatrical release in the same year.

Saudi Arabia

After lifting its ban on cinemas, Saudi Arabia re-opened its first theatre in 35 years in April 2018. Half a million tickets were sold during the year generating a GBO of SAR 29.5 million (USD 7.9 million). *Mission: Impossible - Fallout* led the box office charts, taking 37 094 admissions. In the Gulf's most populated market, the comeback of cinema is expected to drive rapid expansion, as the government announced investments of USD 35 billion in multiplexes by 2020 to reach the goal of 2 500 screens over the next five years.

Sources: IHS Markit, Empire Cinemas, Iranian Independents, Israel film Fund, *Variety*, *Screen International*, *The Guardian*, OBS

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FOCUS 2019 was prepared by the European Audiovisual Observatory. We would like to thank the following sources:

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Centre national de l'audiovisuel (CNA)	**LU**	www.cna.public.lu
National Film Centre of Latvia (NFC)	**LV**	www.nfc.lv
Centre Cinématographique Marocain (CCM)	**MA**	www.ccm.ma/
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Macedonian Film Agency	**MK**	www.filmfund.gov.mk
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The Hollywood Reporter		www.hollywoodreporter.com
Variety		www.variety.com
Observatório Iberoamericano Audiovisual (OIA)		www.oia-caci.org
LUMIERE Database		www.lumiere.obs.coe.int
International Monetary Fund		www.imf.org
UNESCO		www.unesco.org


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EUROPEAN AUDIOVISUAL OBSERVATORY CONFERENCE

FILM FINANCING –

European strategies to boost cultural diversity

This conference will look at how today's European films are financed. Who are the new financial players? How does public policy channel money into film funds and financing mechanisms? How is the structure of film financing in Europe changing?

9.30 – 11.30, Saturday 18 May, 2019

Olympia Cinema 5, rue de la Pompe, Cannes

Attendance free

Market, festival or press accreditation plus printed invitation necessary to attend. Come and pick up your invitation from our stand:

Stand: H3, Riviera Hall, Ground floor (in front of the Marina Club)
Marché du film Palais des Festivals

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