MARCHÉ DU FILM
FESTIVAL DE CANNES
ONLINE

FOCUS

2020

World Film Market Trends / Tendances du Marché mondial du film

FOCUS

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

focus 2020

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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 existed as a publication for well over two decades now and I am very proud of our long term relationship with the European Audiovisual Observatory. In these difficult and changing times for the whole of the film industry, the Marché du Film is continuing to evolve, creating its first online edition in June 2020, and FOCUS remains more than ever an essential reference guide for professional attendees. Not only does it help grasp the changing practices of the film industry, but it also provides specific information on production and distribution around the world, as well as current information on the impact caused by Covid-19. Special thanks to Susanne Nikoltchev and her team, with whom we have worked to provide this invaluable insight into the world of film market trends.

Jérôme Paillard

Executive Director
Marché du Film

FOCUS existe en tant que publication depuis plus de deux décennies déjà et je suis très fier de notre si longue collaboration avec l'Observatoire européen de l'audiovisuel. En ces temps difficiles et nouveaux pour toute l'industrie cinématographique, le Marché du Film continue d'évoluer en créant sa première édition en ligne en juin 2020, et FOCUS reste plus que jamais un guide de référence essentiel pour les professionnels qui y participent. Non seulement il permet de comprendre les nouvelles pratiques de l'industrie cinématographique, mais il fournit également des informations spécifiques sur la production et la distribution à travers le monde, ainsi que des informations actuelles sur l'impact du Covid-19. Nous remercions tout particulièrement Susanne Nikoltchev et son équipe, avec qui nous avons travaillé pour fournir cet éclairage précieux sur les tendances du marché du film.

Jérôme Paillard

Directeur Délégué
Marché du Film

"It was the best of times, it was the worst of times" … This year's *FOCUS* must surely *tell A Tale of Two Cinemas*. We look back at 2019 which, globally speaking, was an extremely positive year for the international cinema industry. Some countries even broke previous attendance records in 2019. And this report documents the country-by-country successes of last year. Then came the pandemic with its catastrophic effect on global film production and distribution. We've tried to document the effects of COVID-19 where data was available but at the time of writing, we cannot yet paint a complete picture of this "worst of times". A fuller analysis will be made by the European Audiovisual Observatory in the coming months. In the meantime an entire industry will rebuild itself within the rules of the 'new normal'. And we'll be there for you to report on its renaissance.

Susanne Nikoltchev

Executive Director
European Audiovisual Observatory

« C'était le meilleur des temps, c'était le pire des temps » … Le *FOCUS* de cette année raconte sans aucun doute *Le Conte de deux cinémas*. Mais revenons sur l'année 2019 qui, globalement, a été une année extrêmement positive pour l'industrie cinématographique internationale. Certains pays ont même battu leurs précédents records de fréquentation en 2019. Ce rapport détaille les succès de l'année dernière, pays par pays. Puis est survenue la pandémie et ses effets catastrophiques sur la production et la distribution des œuvres cinématographiques mondiales. Nous avons essayé de documenter les effets du COVID-19 lorsque des données étaient disponibles, mais à l'heure où nous écrivons ces lignes, nous ne pouvons pas encore dresser un tableau exhaustif du « pire des temps ». Une analyse plus complète sera faite par l'Observatoire européen de l'audiovisuel dans les prochains mois. Dans l'intervalle, toute une industrie va se reconstruire dans les règles de la « nouvelle normalité ». Et nous serons là pour vous rendre compte de sa renaissance.

Susanne Nikoltchev

Directrice exécutive
Observatoire européen de l'audiovisuel

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Covid-19: cascading effects pushing independent film production and distribution towards a prolonged crisis?

This edition of FOCUS comes in troubled times for the film industry. As of June 2020, cinemas have just initiated a reopening process or are preparing for it under heavy constraints, one of the many reasons why assessing the impact of the COVID-19 crisis on the film industry is premature. Still, some early hypotheses can be explored. The Observatory believes that, as far as audiovisual content is concerned, European theatrical film production and distribution are likely to be the sectors proportionally hit hardest and most profoundly by the crisis. The immediate impact is direct and short-term because all theatrical film distribution as well as film and TV production having come to a sudden stop threatening the existence of thousands of businesses as well as causing mass unemployment among film professionals. The more indirect and mid-term consequences can be seen in the cascading effects of the current loss of box office revenues due to cinema closures putting further pressure on film financing as well as in the accelerated shift towards TV content instead of film.

Revenue impacts of the crisis on the film industry

While it is too early to assess the financial impact of the COVID-19 crisis along the value chain of the European film industries, one can venture some educated guesses. Cinema admissions, on the one hand, and TV advertising on the other are likely to be the segments most affected, at least in the short term. Pay-services are probably more resilient to the crisis but may see revenues shift from Pay-TV to Subscription Video-On-Demand (SVOD) providers which stand to benefit from the lockdown as well as social distancing measures.

Evidently, the theatrical sector - exhibitors and distributors - has been hit hardest and in the most abrupt manner due to cinema closures in practically all European markets from mid-March onwards. According to figures collected for selected EU markets by the International Union of Cinemas (UNIC) box office figures from January to May 2020 have declined on average by over 50% compared to the previous year and it remains to be seen to what extent audiences will come back to cinemas in the remaining months of the year. It seems reasonable to expect that social distancing, the lack of consumer confidence and strain on disposable income may adversely impact ticket sales in the months and years to come and it may take a long time for box office takings to climb back to levels achieved in 2019.

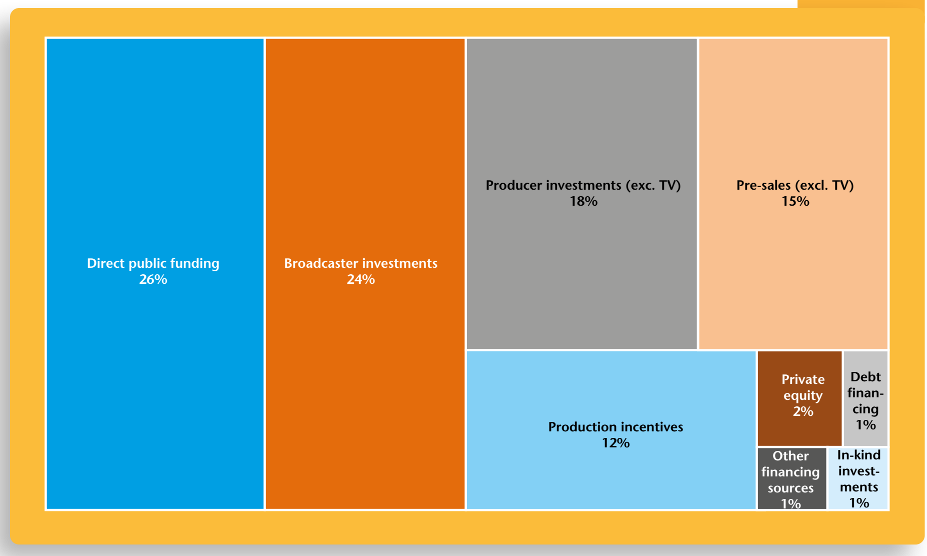
Advertising expenditure is correlated to the general economic climate. The 2008 crisis has shown that a recession of the gross domestic product causes a decrease in advertising expenditure which is proportionally double in size. The boost of TV audiences is therefore unlikely to produce more TV advertising revenues – and, anyway, early figures seem to indicate that TV audiences rapidly come back to their pre COVID-19 levels once the lockdown is over. It remains to be seen whether the COVID-19 crisis will translate into a loss of advertising market share for broadcasters to the benefit of Internet with the corresponding revenues consequently being lost for the audiovisual sector, as the bulk of advertising goes to Google and Facebook which – in contrast to broadcasters – are not (at least not yet) investing in films or audiovisual content, in particular high-end series.

Linear pay-television is likely to have shown some resilience during the confinement: consumers are often bound by one-year-contracts; pay-services are often bundled with Internet access services. However, pay-TV providers have had to discount their services as sport competitions were suspended. SVOD revenues were already growing fast before the crisis, and the growth

Breakdown of cumulative financing volume by financing source | 2017

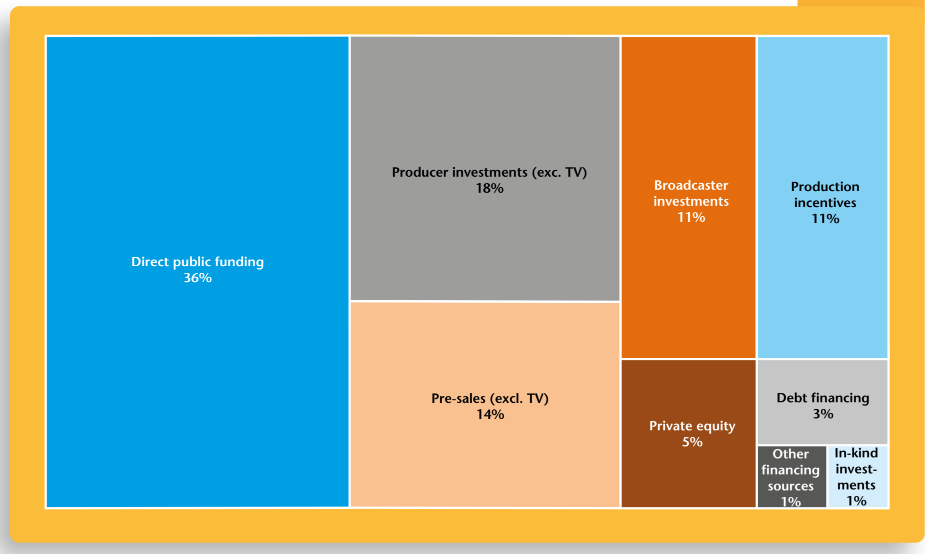
Sample analysis based on **576 European fiction films** released in 2017 with a cumulative investment volume of EUR 1.85 billon.

Source: OBS



Sample analysis based on **391 European fiction films (excl. French films)** released in 2017 with a cumulative investment volume of EUR 883 million.

Source: OBS



may even accelerate as many new consumers have made use of trial subscriptions during the lockdown. The ability to offer content at comparatively lower prices might also play into the hands of SVOD providers as economies could slide into a recession with severe economic and social implications affecting disposable income. SVOD / TVOD services also benefitted from the fact that some US studios as well as other distributors used the cinema lockdown to experiment with direct to VOD releases. This raised questions about the US studios' intentions to bypass the theatrical window in a more systematic way, even in a post-COVID-19 world.

Just like the theatrical exhibition and distribution sector, the European production sector came to a complete standstill in Europe in March, with production set to restart under strict security measures in many countries from late May onwards. The production halt is expected to have a severe economic and social impact on the European film industry which is dominated by thousands of small and medium sized enterprises and millions of freelancers which may not be able to absorb the immediate financial impact and risk bankruptcy. The current lag in productions is furthermore expected to cause a lack of work for the post-production sector in a couple of months. The COVID-19 crisis might also result in increasing production costs e.g. due to security measures at a time when financing is under pressure. Further down the road, a lack of content, particularly for streaming services and broadcasters, could lead not only to a production boom when filming resumes but also accelerate the shift from film to TV productions, particularly high-end series.

Mid-term impacts on film financing

In Europe all segments of the audiovisual sector contribute directly or indirectly to film financing, creating a complicated film financing ecosystem. A systematic review of how each of them will be affected and how each will cope with the crisis will therefore be needed to better understand the potential long-term effects of the COVID-19 crisis on European film productions.

The analysis of European film financing plans by the European Audiovisual Observatory (1) shows that direct public funding, broadcasters' investments and pre-sales (including distributors' minimum guarantees) are the most important financing sources cumulatively accounting for about 65% of film financing.

The financing mix of course varies between countries, with, in particular, a specific situation for France: on the one hand, a higher share of broadcasters' investments and, on the other, a lower share of direct public funding. Another specificity of France is the high proportion of taxes and levies in the funding of its public support system. (2)

Given that public funding and pre-sales to broadcasters as well as to sales agents or distributors are closely linked to actual or expected box office results, all three major financing sources could come under significant pressure in the months and years to come as theatrical revenues will plummet this year and may even in the mid-term not reach pre COVID-19 levels. The funding of Public Service Broadcasters and of film funds could shrink due to lower income from taxes and levies as well as due to austerity measures addressing post-COVID economic crises, pre-sales could be valued at lower prices and broadcasters, particularly public broadcasters would not only have less money earmarked for production investment, but might furthermore increasingly shift their production focus further towards "audiovisual content". In this scenario, the traditional main financiers of European theatrical film production would leave a financing gap.

Could SVOD revenues offset the losses from other financing sources? According to the above-mentioned research on film financing, SVOD services play – from a big picture point of view – a limited role in the financing of films. Figures are from 2017 and have certainly evolved. But, whereas SVOD is a significant new source of financing and revenues for a limited number of films, rough estimates suggest that it is unlikely that the total investments in films from SVOD

(1) Fiction film financing in Europe: A sample analysis of films released in 2017
(2) Public financing for film and television content - The state of soft money in Europe

services could offset a long-lasting decrease in broadcaster investments and box-office revenues. Should the COVID-19 crisis translate into an accelerated switch from traditional pay-TV players to SVOD platforms, the corresponding revenues could in principle still benefit the production of films, provided that the leading platforms actually do invest in film production. However, even in this scenario the investment capacities of the pay-service sector may be lower than they used to be, as SVOD subscriptions are less expensive than pay-TV services and cumulative consumer expenditure on pay-services (Pay-TV and SVOD) is likely to decrease. Furthermore, there is no indication that SVOD services would follow the same pattern as broadcasters regarding the balancing of their investments between film and TV content; nor indeed that SVOD investments in films would be spread over many films rather than concentrated on a limited number of film projects.

These developments could have severe mid to long-term effects on the European film production sector as financing theatrical films will become even more difficult, likely confronting producers with the need to cut budgets (thus lowering the competitiveness of European films due to lower production values), to invest more (i.e. to increase the risk) as pre-financing will decrease at a time when box-office revenues needed to recoup their investments will not have returned to their pre-crisis levels.

The COVID-19 crisis could hence accelerate and amplify trends already at work in the film industry: increasing difficulty to finance films due to pressure on advertising revenues and stagnating resources of film funds; pre-sales mostly available for high-budget films; box-office revenues concentrated around a limited number of films. At the heart of this potential development lies the increasing fragility of cinemas, and in particular art-house establishments, caused by the COVID-19 crisis. As regards audiovisual content, films are therefore likely to be particularly affected: directly, because cinemas are among the most impacted segments; indirectly, because audiovisual services that could be reinforced by the crisis may indeed focus more on TV content than on films. As a consequence, theatrical film production levels would be forced to drop putting independent film production and cultural diversity at risk.

These threats and the need for public support targeting the film and audiovisual sectors have been rapidly identified and governments, film funds and the EU have been quick in setting up short term general support measures ranging from solidarity funds or short-term unemployment schemes as well as sector specific support measures, ranging from emergency funding, advancing support payments and relaxing requirements and deadlines. At the time of writing over 650 COVID-19 sector related support measures have been tracked by the Observatory across Europe. [3] In addition several countries have already set up industry-wide task forces to define strategies to support the European film industries and its cultural diversity in the mid- to long term.

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(3) https://www.obs.coe.int/en/web/observatoire/covid-19-audiovisual-sector-measures

Top 10 markets worldwide by gross box office | 2015-2019 [e]

In USD billion. Converted at average annual exchange rates. Ranked by 2019 values.

Sources: OBS, MPA, Comscore, Omdia, National data sources

Rank	Market	2015	2016	2017	2018	2019	Annual growth rate 5 years	Annual growth rate 1 year
1	US & Canada	11.14	11.37	11.12	11.88	11.38	0.5%	-4.3%
2	China	6.81	6.60	8.27	9.24	9.30	8.1%	0.7%
3	Japan	1.80	2.17	2.04	2.02	2.40	7.4%	18.9%
4	South Korea	1.37	1.50	1.55	1.65	1.64	4.6%	-0.5%
5	France	1.48	1.54	1.56	1.58	1.62	2.3%	2.7%
6	United Kingdom	1.90	1.66	1.65	1.71	1.60	-4.3%	-6.7%
7	India	1.60	1.49	1.48	1.50	1.60	0.0%	6.7%
8	Germany	1.29	1.13	1.19	1.06	1.15	-2.9%	7.9%
9	Mexico	0.84	0.79	0.85	0.85	0.97	3.5%	14.2%
10	Russian Federation	1.15	0.73	0.91	0.81	0.86	-7.1%	5.3%
World total [e]		39.1	39.3	40.9	41.8	42.2	1.9%	1.0%
Growth rate - World		7.4%	0.5%	4.1%	2.2%	1.0%	1.9%	1.0%
Growth rate - Top 10		14.2%	-1.4%	5.7%	5.4%	0.7%	2.6%	0.7%
Growth rate - Top 10 without China		8.0%	-0.9%	-0.1%	3.1%	0.6%	0.7%	0.6%

Top 10 markets worldwide by admissions | 2015-2019 [e]

In million. Ranked by 2019 admissions.

Sources: OBS, Omdia, National data sources

Rank	Market	2015	2016	2017	2018	2019	Annual growth rate [e] 5 years	Annual growth rate [e] 1 year
1	China	1 260	1 370	1 620	1 720	1 727	8.2%	0.4%
2	India [e]	2 073	1 860	1 429	1 463	1 561	-6.8%	6.7%
3	US & Canada	1 321	1 315	1 240	1 304	1 242	-1.5%	-4.8%
4	Mexico	286	321	338	320	342	4.6%	6.9%
5	South Korea	217	217	220	216	227	1.1%	4.8%
6	Russian Federation	174	193	212	200	219	6.0%	9.5%
7	France	205	213	209	201	213	0.9%	5.9%
8	Japan	167	180	174	169	195	4.0%	15.2%
9	Brazil	173	184	181	163	176	0.5%	8.2%
10	United Kingdom	172	168	171	177	176	0.6%	-0.5%
World total [e]		7 498	7 560	7 347	7 482	7 644	0.5%	2.2%
Growth rate - World [e]		12.4%	0.8%	-2.8%	1.8%	2.2%	0.5%	2.2%
Growth rate - Top 10 [e]		13.1%	-0.4%	-3.8%	2.4%	2.4%	0.1%	2.4%
Growth rate - Top 10 [e] without China		5.9%	-2.8%	-10.3%	1.0%	3.2%	-2.4%	3.2%

Top 10 markets worldwide by number of screens | 2015-2019 e

In units. Ranked by 2019 values.

Sources: OBS, MPA, Omdia

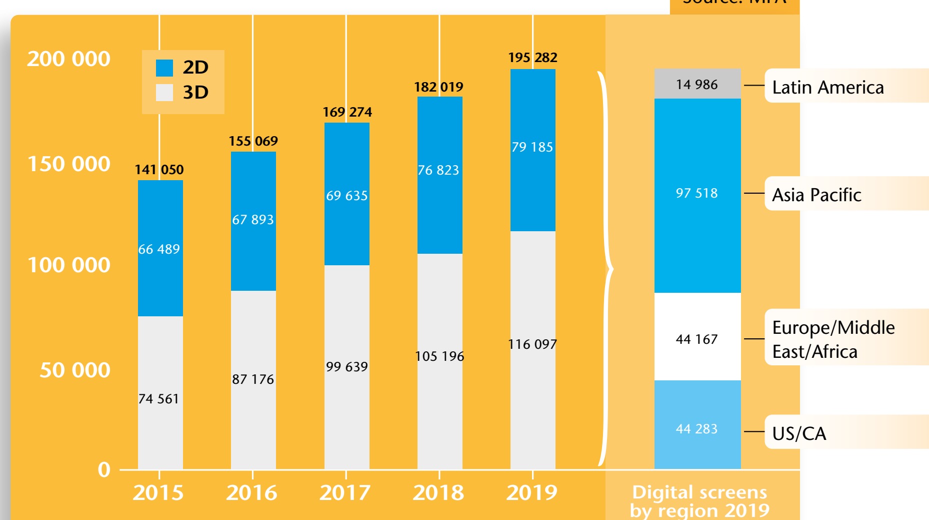
Rank	Market	2015	2016	2017	2018	2019	Annual growth rate e 5 years	Annual growth rate e 1 year
1	China	31 627	41 179	50 776	60 079	69 787	21.9%	16.2%
2	US & Canada	43 661	43 531	43 500	43 459	44 283	0.4%	1.9%
3	India (1)	9 500	9 481	9 530	9 601	9 527	0.1%	-0.8%
4	Mexico	5 977	6 225	6 633	7 024	7 493	5.8%	6.7%
5	France	5 741	5 842	5 913	5 983	6 114	1.6%	2.2%
6	Russia	3 994	4 376	4 805	5 341	5 597	8.8%	4.8%
7	Italy	5 053	5 104	5 315	5 205	5 385	1.6%	3.5%
8	Germany	4 692	4 739	4 803	4 849	4 961	1.4%	2.3%
9	UK	4 046	4 150	4 264	4 340	4 395	2.1%	1.3%
10	Spain	3 588	3 554	3 618	3 589	3 695	0.7%	3.0%
World total e		152 142	163 928	171 755	186 859	200 954	7.1%	7.5%
Growth rate - World e		7.0%	7.7%	4.8%	8.8%	7.5%	7.1%	7.5%
Growth rate - Top 10 e		5.8%	8.7%	8.6%	7.4%	7.9%	8.1%	7.9%
Growth rate - Top 10 e (without China and India)		1.4%	1.0%	1.7%	1.2%	2.7%	1.6%	2.7%

(1) Restated series. Refers to digital and e-cinema screens.

Worldwide number of digital and 3D screens | 2015-2019 e

In units.

Source: MPA



Top 10 markets worldwide by feature film production (1) | 2015-2019 e

In units. Ranked by 2019 values.

Sources: OBS, Omdia, National data sources

Rank	Market	2015	2016	2017	2018	2019	Annual growth rate 5 years	Annual growth rate 1 year
1	India (2)	1 845	1 903	1 986	1 813	2 446	7.3%	34.9%
2	China (3)	686	944	970	1 082	1 037	10.9%	-4.2%
3	US (4)	732	788	812	808	814	2.7%	0.7%
4	Japan (5)	581	610	594	613	689	4.4%	12.4%
5	South Korea (5)	232	339	494	454	502	21.3%	10.6%
6	Italy	185	224	235	273	325	15.1%	19.0%
7	France	300	283	300	300	301	0.1%	0.3%
8	Germany (5)	236	256	247	247	265	2.9%	7.3%
9	Argentina	185	200	220	238	265	9.4%	11.3%
10	Spain (2)	254	254	279	264	263	0.9%	-0.4%
	World total e	*7 648*	*7 893*	*8 026*	*7 895*	*8 652*	*3.1%*	*9.6%*
	Growth rate - World e	*2.6%*	*3.2%*	*1.7%*	*-1.6%*	*9.6%*	*3.1%*	*9.6%*
	Growth rate - Top 10 e	*0.1%*	*10.8%*	*5.8%*	*-0.7%*	*13.4%*	*7.2%*	*13.4%*
	Growth rate - Top 10 e *(without China and India)*	*2.3%*	*9.2%*	*7.7%*	*0.5%*	*7.1%*	*6.1%*	*7.1%*

(1) Country data include minority co-productions.

(2) Films certified.

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

(4) Includes films that were made for or by an online video service; does not include student films, documentaries, films created for straight-to-DVD or Blu-ray release.

(5) Feature films released.

Top 20 films by gross box office worldwide | 2019

In USD million. GBO for 2019 only. Does not include carryovers.

	Original title	Country of origin	Studio	North American box office	International box office	Global box office
1	Avengers: Endgame	US	Walt Disney	858.37	1 939.56	2 797.93
2	The Lion King	US/GB	Walt Disney	543.64	1 113.42	1 657.06
3	Frozen 2 (1)	US	Walt Disney	430.14	815.60	1 245.74
4	Spider-Man: Far From Home	US	Sony Pictures	390.53	741.46	1 131.99
5	Captain Marvel	US	Walt Disney	426.83	702.88	1 129.71
6	Toy Story 4	US	Walt Disney	434.04	640.07	1 074.11
7	Joker (1)	US	Warner Bros.	333.77	732.48	1 066.25
8	Aladdin	US	Walt Disney	355.56	695.46	1 051.02
9	Star Wars: Episode IX - The Rise of… (1)	US	Walt Disney	390.71	396.30	787.01
10	Fast & Furious Presents: Hobbs & Shaw	US/JP	Universal	173.96	586.62	760.58
11	Ne Zha (1)(2)	CN	Coco Cartoon	3.70	724.18	727.88
12	The Wandering Earth (2)	CN	CFGC	4.96	684.17	689.13
13	How to Train Your Dragon: The Hidden…	US/JP	Universal	160.80	361.25	522.05
14	Jumanji: The Next Level (1)	US	Sony Pictures	192.09	321.18	513.28
15	Maleficent: Mistress of Evil (1)	US/GB/CA	Walt Disney	113.29	377.91	491.20
16	It Chapter Two	US/CA	Warner Bros.	211.59	261.36	472.95
17	The Secret Life of Pets 2	US/FR/JP	Universal	157.95	275.64	433.59
18	Pokémon Detective Pikachu	US/JP	Warner Bros.	144.11	288.90	433.01
19	My People, My Country (1)(2)	CN	Bona Film/Alibaba	2.36	412.74	415.10
20	The Captain (1)(2)	CN	Bona Film/Alibaba	0.71	404.34	405.05

(1) Still grossing in 2020.

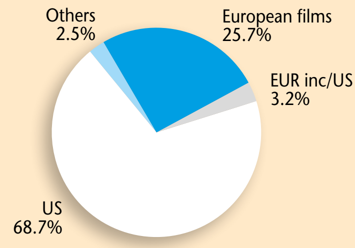
(2) Unofficial cumulated BO.

Sources: *Variety*, Comscore, OBS

European Union

Population 2019 [e]	513.5 million
GDP per capita 2019 [e]	38 294 USD
Gross box office 2019 [e]	7.13 bn EUR (7.98 bn USD)
Admissions 2019 [e]	1.0 billion
Average ticket price 2019 [e]	7.1 EUR (7.9 USD)
Average admissions per capita 2019 [e]	2.0
Screens 2018 I 2019	33 255 I 33 956
Digital screens 2018 I 2019	31 268 I 31 717
Digital 3D screens 2018 I 2019	14 580 I 14 592

Market shares 2019 [e]



EU admissions topped 1 billion in 2019

The European Audiovisual Observatory estimates that in 2019 cinema attendance in the 28 European Union Member States jumped by 5.3% to over one billion tickets sold. This is 51 million admissions more than in 2018 and the best result registered in the EU since 2004. Gross box office earnings also bounced back after falling below EUR 7 billion in 2018 growing by 5.2% to EUR 7.13 billion (USD 7.89 billion).The surge in EU admissions was almost entirely driven by the comparatively strong performance of US blockbusters as admissions to European films and European films produced in Europe with incoming US investment (EUR inc) actually declined. The estimated market share for US films therefore increased from 62.6% to 68.7%, the highest level observed since 2013, while the market share for European films in the EU decreased from 29.2% to 25.7%, the lowest level since 2005.

A very strong 2019 will be followed by a catastrophic 2020 which will see admissions plummeting as cinemas were closed all across Europe in March due to the COVID-19 pandemic. Some countries started to reopen cinemas by the end of May while they remain closed in many markets until at least mid-June. According to figures collected for selected EU markets by UNIC box office figures from January to May 2020 declined on average between 50% and 60% compared to the previous year and it remains to be seen to which extent audiences will come back to cinemas in the remaining months of the year.

EU production reached record high

EU film production volume continued its long-standing growth trend as the estimated number of theatrical feature films produced in the EU increased from 1 807 to 1 881 films, breaking down into an estimated 1 135 fiction films (60%) and 746 feature documentaries (40%). The increase in production activity continued to be driven by a growing number of international co-productions and feature documentaries.

It is expected that the film production industry could be the market segment to be hit hardest the COVID-19 crisis. In the short term production activity came to a complete standstill due to the lock-down measures taken all over Europe from March onwards. In the mid-term film production stands to suffer from cascading effects of lost box office revenues further aggravating film financing. In order to mitigate the impacts of the crisis, European film agencies and governments across Europe have been implementing a variety of support measures, ranging from emergency funding, advancing support payments to relaxing requirements and deadlines.

Source: European Audiovisual Observatory (OBS)

Please note that all 2019 figures for the EU are provisional estimates. “Inc” refers to films produced in a “host” country with US studio 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.

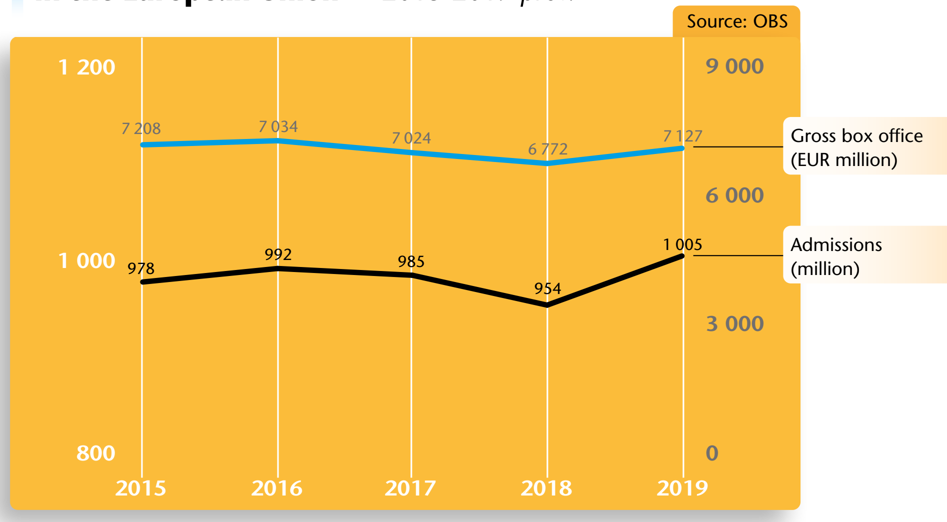
EUROPA CINEMAS

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, 685 cities, 1 134 cinemas and 2 761 screens.

UNIC

Information on the impacts of the COVID-19 crisis on the European exhibition sector have been tracked by UNIC, i.e. the Union Internationale des Cinémas/International Union of Cinemas is the European grouping of cinema trade associations and key operators, covering 38 territories across the region.

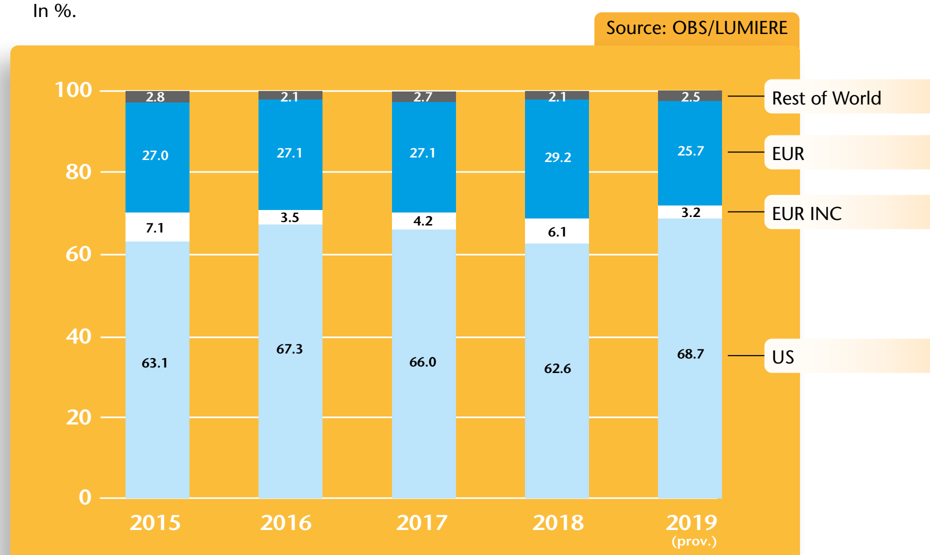
Admissions and gross box office in the European Union [1] | 2015-2019 *prov.*



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

Breakdown of European Union admissions by nationality of films | 2015-2019 [e]

In %.



Note: 'Inc' refers to films produced in Europe with US studio investments.

Number of feature films produced in the European Union | 2015-2019 *prov.*

In units.

Country		2015	2016	2017	2018	*prov.* 2019	Sources
Austria	100% national fiction	15	13	9	12	14	Austrian Film Institute
	maj. co-prod. fiction	1	3	6	5	1	Austrian Film Institute
	min. co-prod. fiction	7	7	9	9	3	Austrian Film Institute
	Feature documentaries	17	23	20	25	26	Austrian Film Institute
Belgium (1)	100% national fiction	14	16	14	14	9	CFWB / VAF
	maj. co-prod. fiction	16	21	22	13	19	CFWB / VAF
	min. co-prod. fiction	34	28	38	31	28	CFWB / VAF
	Feature documentaries	9	17	15	17	14	CFWB / VAF
Bulgaria	100% national fiction	10	18	10	5	9	National Film Center
	maj. co-prod. fiction	2	6	4	1	2	National Film Center
	min. co-prod. fiction	5	7	5	5	1	National Film Center
	Feature documentaries	8	11	4	10	12	National Film Center
Cyprus (2) e	100 % national fiction	1	3	2	2	1	OBS/MOECSY
	maj. co-prod. Fiction	0	0	0	2	0	OBS/MOECSY
	min. co-prod. Fiction	0	0	0	0	1	OBS/MOECSY
	Feature documentaries	1	0	1	0	0	OBS/MOECSY
Croatia	100% national fiction	5	6	6	10	6	Croatian Audiovisual Centre
	maj. co-prod. fiction	4	4	2	4	6	Croatian Audiovisual Centre
	min. co-prod. fiction	5	6	9	8	15	Croatian Audiovisual Centre
	Feature documentaries	1	1	16	14	13	Croatian Audiovisual Centre
Czech Rep.	100% national fiction	20	24	16	23	21	Czech FIlm Fund
	maj. co-prod. fiction	7	17	8	13	16	Czech FIlm Fund
	min. co-prod. fiction	9	7	5	11	12	Czech FIlm Fund
	Feature documentaries	20	31	25	30	39	Czech FIlm Fund
Denmark (2)	100% national fiction	14	15	13	13	11	Danish Film Institute
	maj. co-prod. fiction	9	8	8	9	8	Danish Film Institute
	min. co-prod. fiction	8	8	9	10	9	Danish Film Institute
	Feature documentaries	40	31	24	26	28	Danish Film Institute
Estonia (2)	100% national fiction	1	7	3	6	9	Estonian Film Institute
	maj. co-prod. fiction	3	2	4	1	3	Estonian Film Institute
	min. co-prod. fiction	2	3	5	3	2	Estonian Film Institute
	Feature documentaries	19	8	7	11	13	Estonian Film Institute
Finland (3)	100% national fiction	14	16	20	18	17	Finnish Film Foundation
	maj. co-prod. fiction	5	3	2	0	2	Finnish Film Foundation
	min. co-prod. fiction	2	5	2	7	4	Finnish Film Foundation
	Feature documentaries	24	22	18	24	23	Finnish Film Foundation
France	100% national fiction	126	125	147	140	138	CNC
	maj. co-prod. fiction	66	55	38	48	46	CNC
	min. co-prod. fiction	61	59	72	56	52	CNC
	Feature documentaries	47	44	43	56	65	CNC
Germany (2)	100% national fiction	76	82	80	78	96	SPIO
	maj. co-prod. fiction	24	41	27	35	38	SPIO
	min. co-prod. fiction	45	43	34	40	23	SPIO
	Feature documentaries	91	90	106	94	108	SPIO
Greece (2) e	100% national fiction	14	6	11	9	12	GFC / OBS
	maj. co-prod. fiction	1	5	3	2	5	GFC / OBS
	min. co-prod. fiction	7	10	6	3	4	GFC / OBS
	Feature documentaries	8	6	6	6	9	GFC / OBS
Hungary	100% national fiction	13	15	12	15	-	National Film Office (NMHH)
	maj. co-prod. fiction	2	3	2	2	-	National Film Office (NMHH)
	min. co-prod. fiction	3	1	2	1	-	National Film Office (NMHH)
	Feature documentaries	3	1	3	0	-	National Film Office (NMHH)
Ireland	100% national fiction	4	6	2	3	6	Screen Ireland
	maj. co-prod. fiction	7	10	12	11	4	Screen Ireland
	min. co-prod. fiction	6	4	6	6	6	Screen Ireland
	Feature documentaries	15	9	7	14	10	Screen Ireland
Italy	100% national fiction	126	142	153	147	160	MiBACT
	maj. co-prod. fiction	22	23	18	23	32	MiBACT
	min. co-prod. fiction	5	7	5	10	11	MiBACT
	Feature documentaries	31	50	61	91	122	MiBACT

Continued

Number of feature films produced in the European Union | 2015-2019 *prov.*

In units.

Country		2015	2016	2017	2018	*prov.* 2019	Sources
Latvia (2)	100% national fiction	1	2	3	6	10	National Film Centre of Latvia
	maj. co-prod. fiction	2	2	2	3	2	National Film Centre of Latvia
	min. co-prod. fiction	0	3	1	1	5	National Film Centre of Latvia
	Feature documentaries	14	13	15	17	20	National Film Centre of Latvia
Lithuania (2)	100% national fiction	6	8	6	9	10	Lithuanian Film Centre
	maj. co-prod. fiction	2	4	4	2	4	Lithuanian Film Centre
	min. co-prod. fiction	0	1	0	3	2	Lithuanian Film Centre
	Feature documentaries	9	13	11	23	9	Lithuanian Film Centre
Luxembourg e	100% national fiction	3	1	1	0	1	OBS / LFF
	maj. co-prod. fiction	5	0	3	3	4	OBS / LFF
	min. co-prod. fiction	10	16	7	8	22	OBS / LFF
	Feature documentaries	2	3	2	3	5	OBS / LFF
Malta e	Total	1	3	2	4	1	IMDB / OBS
The Netherlands	100% national fiction	24	19	19	23	26	NFF
	maj. co-prod. fiction	19	10	10	11	16	NFF
	min. co-prod. fiction	20	21	25	21	15	NFF
	Feature documentaries	19	31	32	31	40	NFF
Poland	100% national fiction	28	39	36	25	-	Polish Film Institute
	maj. co-prod. fiction	4	1	6	4	-	Polish Film Institute
	min. co-prod. fiction	3	6	17	5	-	Polish Film Institute
	Feature documentaries	14	8	16	8	-	Polish Film Institute
Portugal	100% national fiction	6	5	12	13	12	ICA
	maj. co-prod. fiction	9	8	0	8	4	ICA
	min. co-prod. fiction	2	4	8	2	6	ICA
	Feature documentaries	14	10	18	20	15	ICA
Romania	100% national fiction	27	27	22	32	38	CNC
	maj. co-prod. fiction	8	7	6	10	3	CNC
	min. co-prod. fiction	1	7	2	1	2	CNC
	Feature documentaries	7	8	11	7	11	CNC
Slovakia	100% national fiction	5	2	4	1	8	Slovak Film Institute
	maj. co-prod. fiction	5	4	5	6	7	Slovak Film Institute
	min. co-prod. fiction	5	8	12	12	13	Slovak Film Institute
	Feature documentaries	10	12	6	14	16	Slovak Film Institute
Slovenia (2)	100% national fiction	9	4	5	2	6	Slovenian Film Center
	maj. co-prod. fiction	1	4	6	4	5	Slovenian Film Center
	min. co-prod. fiction	5	4	1	3	8	Slovenian Film Center
	Feature documentaries	4	8	9	12	12	Slovenian Film Center
Spain	100% national fiction	69	98	117	95	85	ICAA
	maj. co-prod. fiction	58	23	19	26	22	ICAA
	min. co-prod. fiction	16	13	18	12	21	ICAA
	Feature documentaries	111	120	125	131	135	ICAA
Sweden (2)	100% national fiction	21	16	18	22	20	SFI
	maj. co-prod. fiction	7	6	7	9	9	SFI
	min. co-prod. fiction	4	7	13	0	14	SFI
	Feature documentaries	18	25	30	20	25	SFI
United Kingdom (4)	100% national fiction	157	175	165	130	73	BFI
	maj. co-prod. fiction	15	7	8	5	6	BFI
	min. co-prod. fiction	15	17	9	14	15	BFI
	Feature documentaries	120	82	89	51	23	BFI
	Inward features (5)	54	58	73	57	70	BFI
Total fiction films EU 28 (6) e		***1 114***	***1 169***	***1 140***	***1 117***	***1 135***	OBS
Total feature documentaries EU 28 (6) e		***599***	***608***	***635***	***690***	***746***	OBS
Total feature films EU 28 (6) e		***1 713***	***1 777***	***1 775***	***1 807***	***1 881***	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 2019 is partly 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 | 2015-2019 *prov.*

In millions. Provisional data.

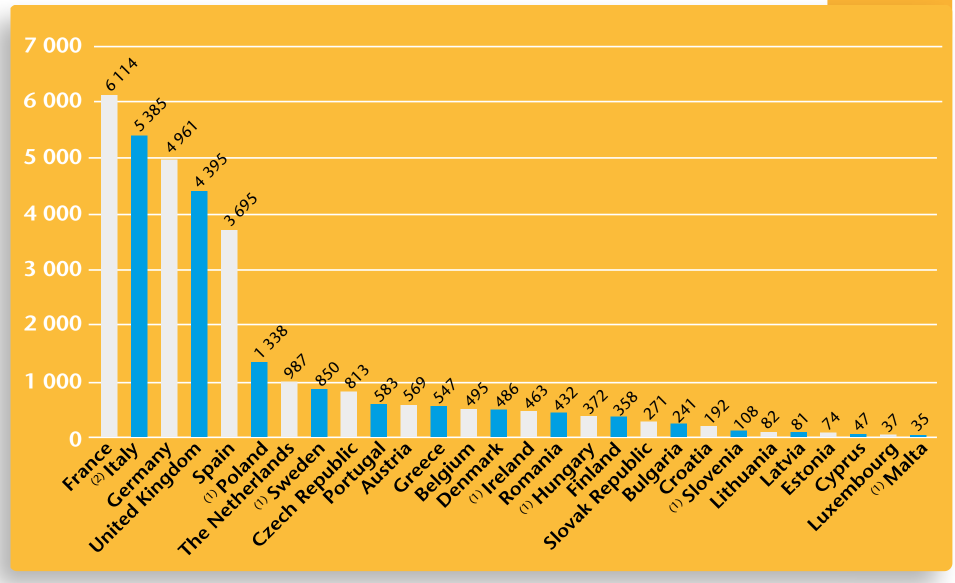
ISO	Country	2015	2016	2017	2018	*prov.* 2019	*2019/18*	Sources
AT	**Austria** [e]	15.9	15.1	14.6	12.9	13.7	***5.8%***	Austrian Film Institute
BE	**Belgium** [e]	21.1	19.4	19.6	18.8	19.5	***3.8%***	VAF / CFWB / Cinedata
BG	**Bulgaria**	5.3	5.5	5.6	4.9	5.0	***2.4%***	National Film Center (NFC)
CY	**Cyprus** [e]	0.7	0.7	0.7	0.8	0.8	***11.7%***	Dept. of Cultural Service (MOECSY)
CZ	**Czech Republic**	13.0	15.6	15.2	16.3	18.3	***12.1%***	Czech Film Fund
DE	**Germany**	139.2	121.1	122.3	105.4	118.6	***12.6%***	FFA
DK	**Denmark**	13.8	13.0	11.9	12.5	13.2	***6.0%***	Statistics Denmark / Danish Film Institute
EE	**Estonia**	3.1	3.3	3.5	3.6	3.7	***1.5%***	Estonian Film Institute
ES	**Spain** [e]	96.1	101.8	99.8	98.9	104.9	***6.1%***	ICAA
FI	**Finland** [e]	8.7	8.7	8.8	8.1	8.4	***3.8%***	Finnish Film Foundation
FR	**France**	205.4	213.2	209.4	201.2	213.0	***5.9%***	CNC
GB	**United Kingdom**	171.9	168.3	170.6	177.0	176.1	***-0.5%***	BFI / DCM
GR	**Greece** [e]	9.8	10.0	10.1	9.4	9.6	***2.1%***	Greek Film Center
HR	**Croatia**	3.9	4.3	4.5	4.6	4.9	***6.6%***	Croatian Audiovisual Centre
HU	**Hungary** [e]	13.0	14.6	14.9	15.5	–	–	National Film Office
IE	**Ireland** [e]	15.2	15.8	16.7	15.8	15.1	***-4.2%***	Screen Ireland
IT	**Italy** [e]	106.7	113.8	99.6	91.7	104.4	***13.9%***	SIAE / Cinetel / ANICA
LT	**Lithuania**	3.3	3.7	4.1	4.3	4.2	***-2.9%***	Lithuanian Film Centre
LU	**Luxembourg** [e]	1.3	1.1	1.2	1.1	1.1	***8.6%***	CNA
LV	**Latvia**	2.4	2.5	2.5	2.5	2.7	***7.9%***	National Film Centre of Latvia
MT	**Malta**	0.7	0.7	0.8	0.8	–	–	National Statistics Office Malta
NL	**Netherlands**	33.0	34.2	36.0	35.7	38.0	***6.5%***	NFF / MaccsBox - NVB & NVF
PL	**Poland**	44.7	52.1	56.6	59.7	60.6	***1.5%***	Polish Film Institute
PT	**Portugal**	14.6	14.9	15.6	14.8	15.5	***5.0%***	Instituto do Cinema e do Audiovisual
RO	**Romania**	11.2	13.0	13.9	13.3	13.1	***-1.6%***	Centrul National al Cinematografiei
SE	**Sweden**	17.0	17.8	16.9	16.4	15.9	***-2.8%***	Swedish Film Institute
SI	**Slovenia**	2.1	2.3	2.4	2.5	2.4	***-4.9%***	Slovenian Film Centre
SK	**Slovak Republic**	4.6	5.7	6.7	6.0	6.5	***9.5%***	Slovak Film Institute / UFD
	EU 28 - Total [e]	***978***	***992***	***985***	***954***	***1 005***	***5.3%***	European Audiovisual Observatory

Source: OBS

Number of screens in the EU by country
December 2019 e

In units.

Source: OBS

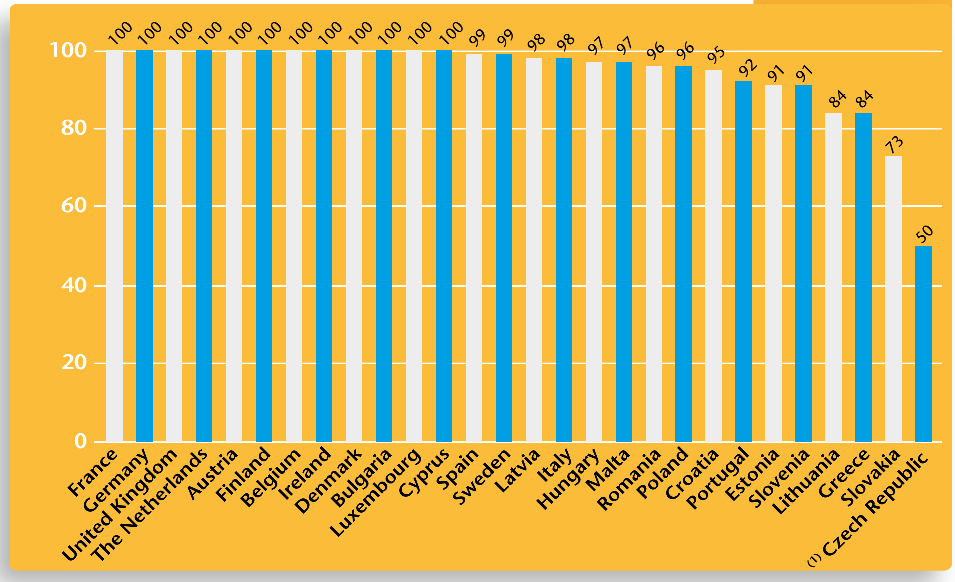


(1) Estimated as of December 2018. (2) Including screens with screenings on less than 60 days.

Digital screen penetration in the EU by country
December 2019 e

In %.

Source: MEDIA Salles



(1) Czech screen base includes non-permanent screens (open-air, part-time, itinerant screens) which represent an important part of the local cinema landscape. Digital screen penetration among permanent cinemas is above 90%.

The tables below offer provisional rankings based on the analysis of partially fragmentary data for 23 EU member states (excl. among others Poland and Hungary) representing 89% of all admissions in the EU.

Top 25 films by admissions in the European Union | 2019 *prov.*

	Original title	Country of origin	Director	*prov.* Admissions
1	The Lion King	US/GB	Jon Favreau	48 674 126
2	Avengers: Endgame	US	Anthony Russo, Joe Russo	41 037 910
3	Joker	US	Todd Phillips	34 644 144
4	Frozen 2	US	Chris Buck, Jennifer Lee	31 644 426
5	Toy Story 4	US	Josh Cooley	22 451 398
6	Star Wars: Episode IX - The Rise of Skywalker	US	J.J. Abrams	22 145 204
7	Aladdin	US	Guy Ritchie	20 194 060
8	Captain Marvel	US	Anna Boden, Ryan Fleck	18 106 274
9	Spider-Man: Far from Home	US	Jon Watts	17 744 592
10	Once Upon a Time... in Hollywood	US/CN/GB	Quentin Tarantino	14 897 988
11	How to Train Your Dragon: The Hidden World	US/JP	Dean DeBlois	14 828 172
12	The Secret Life of Pets 2	US/FR/JP	Chris Renaud, J. del Val	13 879 303
13	Dumbo	US/GB/AU/CA	Tim Burton	12 971 056
14	Fast & Furious Presents: Hobbs & Shaw	US/JP	David Leitch	12 667 189
15	Jumanji: The Next Level	US	Jake Kasdan	12 610 461
16	Maleficent: Mistress of Evil	US/GB/CA	Joachim Rønning	12 037 512
17	It Chapter Two	US/CA	Andy Muschietti	11 198 719
18	Green Book (1)	US/CN	Peter Farrelly	10 765 619
19	Qu'est-ce qu'on a encore fait au bon Dieu? (2)	FR	Philippe de Chauveron	9 289 517
20	Pokémon Detective Pikachu	US/JP	Rob Letterman	8 771 594
21	Ralph Breaks the Internet (3)	US	Phil Johnston, Rich Moore	8 534 332
22	Bohemian Rhapsodyn (4)	GB INC/US	Bryan Singer	7 993 022
23	Downton Abbey	GB/US	Michael Engler	7 897 935
24	Alita: Battle Angel	US/CA/JP	Robert Rodriguez	6 710 571
25	Abominable	US/CN/JP	Jill Culton, Todd Wilderman	6 619 513

(1) 227 464 admissions in the EU in 2018.
(2) 4 535 admissions in the EU in 2018.
(3) 4 423 255 admissions in the EU in 2018.
(4) 26 891 839 admissions in the EU in 2018.

Source: OBS/LUMIERE

Top 25 European films (including EUR inc) by admissions in the European Union | 2019 *prov.*

	Original title	Country of origin	Director	*prov.* Admissions
1	Qu'est-ce qu'on a encore fait au bon Dieu? (1)	FR	Philippe de Chauveron	9 289 517
2	Bohemian Rhapsody (2)	GB INC/US	Bryan Singer	7 993 022
3	Downton Abbey	GB/US	Michael Engler	7 897 935
4	Rocketman	GB INC/US	Dexter Fletcher	6 464 821
5	The Favourite (3)	GB INC/US/IE	Yorgos Lanthimos	5 186 255
6	Yesterday	GB/US/RU/JP	Danny Boyle	5 102 595
7	Das perfekte Geheimnis	DE	Bora Dagtekin	5 100 778
8	Mia et le lion blanc (4)	FR/DE/ZA	Gilles de Maistre	3 917 941
9	A Shaun the Sheep Movie: Farmageddon	GB/US/FR	Will Becher, Richard Phelan	3 531 230
10	The Queen's Corgi	BE/US	V. Kesteloot, Ben Stassen	3 455 329
11	Dolor y gloria (Pain and Glory)	ES/FR	Pedro Almodóvar	3 232 763
12	Der Junge muss an die frische Luft (All…)	DE	Caroline Link	3 107 758
13	Nous finirons ensemble (Little White Lies 2)	FR/BE	Guillaume Canet	3 028 452
14	Mary Queen of Scots	GB INC/US	Josie Rourke	2 550 082
15	Padre no hay más que uno (Father There…)	ES	Santiago Segura	2 387 973
16	Hors normes (The Specials)	FR/BE	O. Nakache, Eric Toledano	2 314 606
17	Cold Pursuit	GB/US/FR/CN/NO/CA	Hans Petter Moland	2 216 644
18	Stan & Ollie	GB/CA/US	Jon S. Baird	2 211 015
19	Il primo Natale (Once Upon A Time…)	IT	Ficarra, Picone	2 073 499
20	J'accuse (AN Officer And A Spy)	FR/IT	Roman Polanski	2 006 916
21	Au nom de la terre (In The Name Of The…)	FR/BE	Edouard Bergeon	1 996 417
22	Lo dejo cuando quiera (I Can Quit Quit…)	ES	Carlos Therón	1 839 605
23	La vie scolaire (School Life)	FR	M. Idir, Grand Corps Malade	1 826 080
24	Mientras dure la guerra (While At War)	ES/AR	Alejandro Amenábar	1 806 816
25	Les misérables	FR	Ladj Ly	1 780 627

(1) 4 535 admissions in the EU in 2018.
(2) 4 423 255 admissions in the EU in 2018.
(3) 3 724 admissions in the EU in 2018.
(4) 22 527 admissions in the EU in 2018.

Source: OBS/LUMIERE

Top 25 EU films by admissions in the Europa Cinemas Network (1) | 2019 e

	Original title	Country of origin (2)	Director	prov. Admissions
1	Dolor y Gloria (Pain and Glory)	ES/FR	Pedro Almodóvar	1 347 179
2	The Favourite	GB INC/US/IE	Yorgos Lanthimos	1 325 215
3	Downton Abbey	GB/US	Michael Engler	714 509
4	Qu'est-ce qu'on a encore fait au Bon Dieu ?	FR	Philippe de Chauveron	540 854
5	Yesterday	GB/US/RU/JP	Danny Boyle	532 346
6	Rocketman	GB INC/US	Dexter Fletcher	507 352
7	Der Junge muss an die frische Luft	DE	Caroline Link	487 266
8	Sorry We Missed You	GB/FR/BE	KenLoach	447 871
9	Portrait de la jeune fille en feu	FR	Céline Sciamma	427 413
10	J'accuse (An Officer and a Spy)	FR/IT	Roman Polanski	423 326
11	Il traditore (The Traitor)	IT/FR/DE/BE	Marco Bellocchio	379 506
12	Systemsprenger (System Crasher)	DE	Nora Fingscheidt	373 996
13	The White Crow	GB	Ralph Fiennes	365 346
14	Grâce à Dieu (By the Grace of God)	FR/BE	François Ozon	360 252
15	Les Invisibles (Invisibles)	FR	Louis-Julien Petit	330 193
16	La belle époque	FR/BE	Nicolas Bedos	303 574
17	Doubles Vies (Non-Fiction)	FR	Olivier Assayas	302 265
18	Zimna wojna (Cold War)	PL/FR/GB	Pawel Pawlikowski	282 147
19	Hors Normes (The Specials)	FR/BE	Eric Toledano, Olivier Nakache	273 819
20	Werk ohne Autor (Never Look Away)	DE/IT	Florian Henckel von Donnersmarck	268 290
21	The Wife	GB/SE/US	Björn Runge	259 895
22	A Shaun the Sheep Movie: Farmageddon	GB/US/FR	Will Becher, Richard Phelan	252 822
23	Martin Eden	IT/FR/DE	Pietro Marcello	251 027
24	Mientras Dure la Guerra (While at War)	ES/AR	Alejandro Amenábar	245 029
25	Das perfekte Geheimnis	DE	Bora Dagtekin	235 543

(1) Data based on Europa Cinemas members in 34 MEDIA countries, 685 cities, 1 134 cinemas, 2 761 screens.
(2) Country of origin and production year as allocated in LUMIERE database.

Sources: Europa Cinemas, OBS

Top 25 European films (including EUR inc) by admissions in the US & Canada | 2019 e

Admissions estimated based on average ticket price of USD 9.16.

	Original title	Country of origin	Director	Distributor	Admissions e
1	Downton Abbey	GB/US	Michael Engler	Focus/Focus Features	10 573 567
2	Rocketman	GB INC/US	Dexter Fletcher	Paramount Pictures	10 520 541
3	Yesterday	GB/US/RU/JP	Danny Boyle	Universal Pictures	3 837 418
4	Cold Pursuit	GB/US/FR/CN/…	H. Petter Moland	Lionsgate	3 508 610
5	Bohemian Rhapsody	GB INC/US	Bryan Singer	20th Century Fox	2 732 153
6	Judy	GB/US/FR	Rupert Goold	Roadside Attractions	2 622 605
7	Fighting with My Family	GB INC/US	Stephen Merchant	MGM-Dimension	2 506 395
8	47 Meters Down: Uncaged	GB/US	Johannes Roberts	Entert. Studios Motion Pict.	2 430 229
9	Cats	GB INC/US	Tom Hooper	Universal Pictures	2 411 674
10	The Favourite	GB INC/US/IE	Yorgos Lanthimos	Fox Searchlight	1 839 469
11	The Kid Who Would Be King	GB INC/US	Joe Cornish	20th Century Fox	1 833 055
12	They Shall Not Grow Old	GB/NZ	Peter Jackson	Warner Bros.	1 337 671
13	Blinded by the Light	GB/US	Gurinder Chadha	Warner Bros.	1 299 252
14	Greta	IE/US	Neil Jordan	Focus/Focus Features	1 151 125
15	Anna	FR/US	Luc Besson	Lionsgate	932 690
16	The Mustang	FR/BE	L. Clermont-T.	Focus/Focus Features	845 392
17	Stan & Ollie	GB/CA/US	Jon S. Baird	Sony Pictures	582 624
18	Mary Queen of Scots	GB INC/US	Josie Rourke	Focus/Focus Features	581 141
19	Zimna wojna (Cold War)	PL/FR/GB	Pawel Pawlikowski	Amazon Studios	566 646
20	Dolor y gloria (Pain and Glory)	ES/FR	Pedro Almodóvar	Sony Pictures	480 207
21	Maiden	GB	Alex Holmes	Sony Pictures	345 603
22	Everybody Knows	ES/FR/IT	Asghar Farhadi	Focus/Focus Features	292 336
23	Fantastic Beasts: The Crimes…	GB INC/US	David Yates	Warner Bros.	234 424
24	Official Secrets	GB/US	Gavin Hood	IFC Films	217 328
25	The White Crow	GB INC/US/RS	Ralph Fiennes	Sony Pictures	199 648

Note: A total of 192 European films (including 15 EUR inc films) were identified among the top 600 films on release in the US and Canada in 2019, generating cumulative admissions of 61.2 million (4.9% market share).

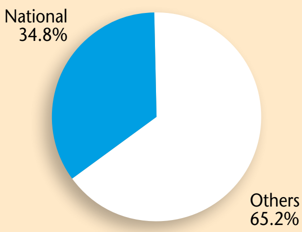
Sources: Comscore, OBS/LUMIERE

France

Population 2019 e	67.0 million
GDP per capita 2019 e	41 761 USD
Gross box office 2019 e	1.45 bn EUR (1.62 bn USD)
Admissions 2019 e	213.0 million
Average ticket price 2019 e	6.8 EUR (7.6 USD)
Average admissions per capita 2019 e	3.2
Screens 2018 I 2019 (1)	5 983 I 6 114
Digital screens 2018 I 2019 (2)	5 981 I 6 045
Digital 3D screens 2018 I 2019 (2)	3 030 I 3 030

(1) Source: CNC (2) MEDIA Salles

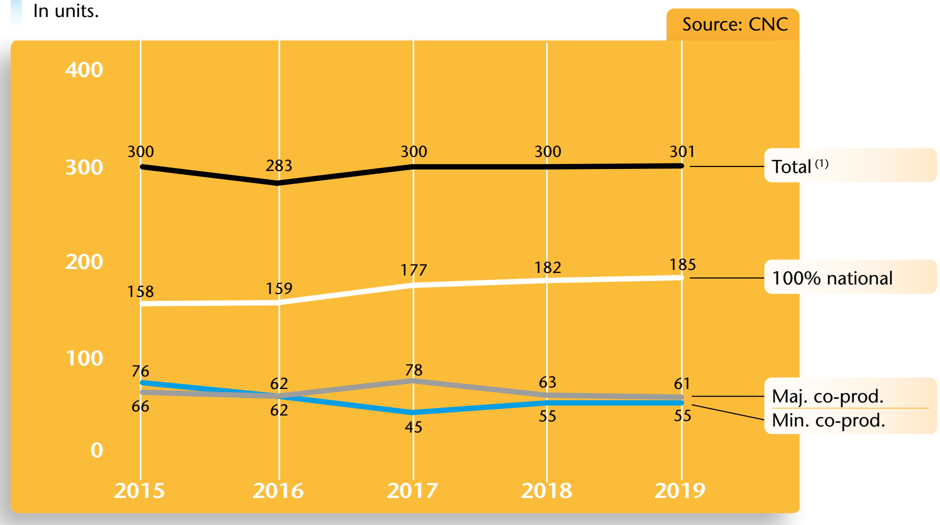
Market shares 2019 e



Number of French feature films produced I 2015-2019

In units.

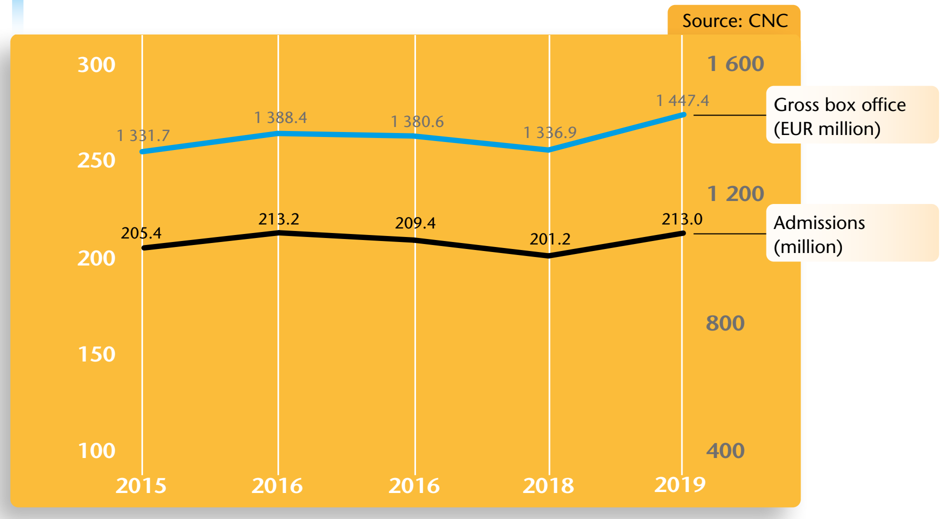
Source: CNC



(1) Officially recognised films.

Admissions and gross box office in France I 2015-2019

Source: CNC



Top 20 films by admissions in France | 2019 (1)

	Original title	Country of origin	Director	Distributor	Admissions e
1	The Lion King	US/GB	Jon Favreau	Walt Disney Studios	10 019 173
2	Avengers: Endgame	US	Anthony & Joe Russo	Walt Disney Studios	6 942 331
3	Qu'est-ce qu'on a encore fait au…	FR	P. de Chauveron	UGC Distribution	6 714 809
4	Frozen 2	US	C. Buck, Jennifer Lee	Walt Disney Studios	6 642 628
5	Joker	US	Todd Phillips	Warner Bros.	5 567 242
6	Toy Story 4	US	Josh Cooley	Walt Disney Studios	4 599 944
7	Star Wars: Episode IX - The Rise…	US	J.J. Abrams	Walt Disney Studios	4 291 215
8	How to Train Your Dragon: The…	US/JP	Dean DeBlois	Universal Pict. Intl FR	3 389 854
9	Captain Marvel	US	A. Boden, R. Fleck	Walt Disney Studios	3 374 614
10	Spider-Man: Far from Home	US	Jon Watts	Sony Pict. Releasing	3 215 835
11	Nous finirons ensemble (Little…	FR/BE	Guillaume Canet	Pathé Distribution	2 800 004
12	Maleficent: Mistress of Evil	US	Joachim Rønning	Walt Disney Studios	2 719 523
13	Once Upon a Time... in Hollywood	US/CN/GB	Quentin Tarantino	Sony Pict. Releasing	2 647 748
14	Aladdin	US	Guy Ritchie	Walt Disney Studios	2 510 813
15	Fast & Furious Presents: Hobbs…	US/JP	David Leitch	Universal Pict. Intl FR	2 451 750
16	Jumanji: The Next Level	US	Jake Kasdan	Sony Pict. Releasing	2 413 896
17	Dumbo	US/GB/AU/CA	Tim Burton	Walt Disney Studios	2 397 405
18	Ralph Breaks the Internet	US	Johnston, Moore	Walt Disney Studios	2 315 786
19	The Secret Life of Pets 2	US/FR/JP	C. Renaud, J. del Val	Universal Pict. Intl FR	2 309 328
20	Green Book	US	Peter Farrelly	Metropolitan Filmexport	2 090 550

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

Source: *Le Film Français*

Distribution and exhibition

2019 saw French cinema attendance reach its third highest level since 1966 as admissions increased by 5.9% to 213.0 million tickets sold. This marks the sixth consecutive year of admissions exceeding 200 million. As the average ticket price increased from EUR 6.64 to EUR 6.79, GBO jumped by 8.3% to EUR 1.45 billion, the highest level in history. Box office growth was driven entirely by a 32.3% surge in admissions to US films which reached their highest level since 1957 and captured 55.2% of the market, while French market share dropped from 39.5% to 34.8%, with *Qu'est-ce qu'on a encore fait au bon Dieu?* and *Nous finirons ensemble* being the only two French led productions to feature in the top 20 ranking in 2019.

In response to the COVID-19 crisis, French cinemas were ordered to close on March 14. Consequently, GBO takings from January to May 31 were estimated to have plunged by 59% compared to the same period in 2019. Mitigating the grave impact of venue closures, virtual cinema initiatives were created e.g. by La Toile, a French VOD platform, and La Vingt-Cinquième Heure, which provides a geolocated platform allowing access to screenings to people living within 40 km radius from participating cinemas. Without calling into question the French media chronology, emergency regulation allows an exceptional four-month reduction in the theatrical release time for VOD pay-per-view basis or for a DVD release of films during the closing of cinemas. French cinemas will be allowed to reopen from June 22 onwards.

Production and funding

With 301 feature films approved by the country's national funding body, the CNC, in 2019 French film production continued to remain stable at record levels. In 2019 the average production cost of French initiative films amounted to EUR 3.8 million, compared to EUR 4.0 million in 2018 and EUR 5.5 million in 2016. Total investment in film production in France continued to decrease by 0.8% to EUR 1.12 billon in 2019, EUR 903 million of which was invested in French initiative films. These are the second lowest levels registered in the past decade and will most likely drop to a record low in 2020 due to the current standstill of production activity in France due to COVID-19.

In response to the crisis, the French government and the CNC introduced a variety of support measures, including additional supports and emergency funds, cash flow measures through mobilization of funds in advance, flexibilization of rules and payment obligations and additional loan guarantees. In April, Audiens (the social protection group for the cultural sector) and Netflix launched an emergency aid fund for intermittent artists and technicians in the audiovisual and film industries.

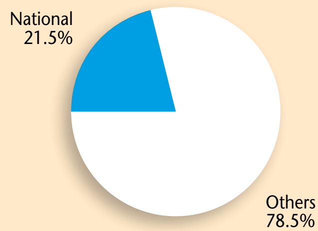
Sources: CNC, *Le Film Français*, UNIC, OBS

Germany

Population 2019 e	83.0 million
GDP per capita 2019 e	46 564 USD
Gross box office 2019 e	1.02 bn EUR (1.15 bn USD)
Admissions 2019 e	118.6 million
Average ticket price 2019 e	8.6 EUR (10.1 USD)
Average admissions per capita 2019 e	1.4
Screens 2018 I 2019 (1)	4 849 I 4 961
Digital screens 2018 I 2019 (2)	4 848 I 4 961
Digital 3D screens 2018 I 2019 (2)	2 220 I 2 246

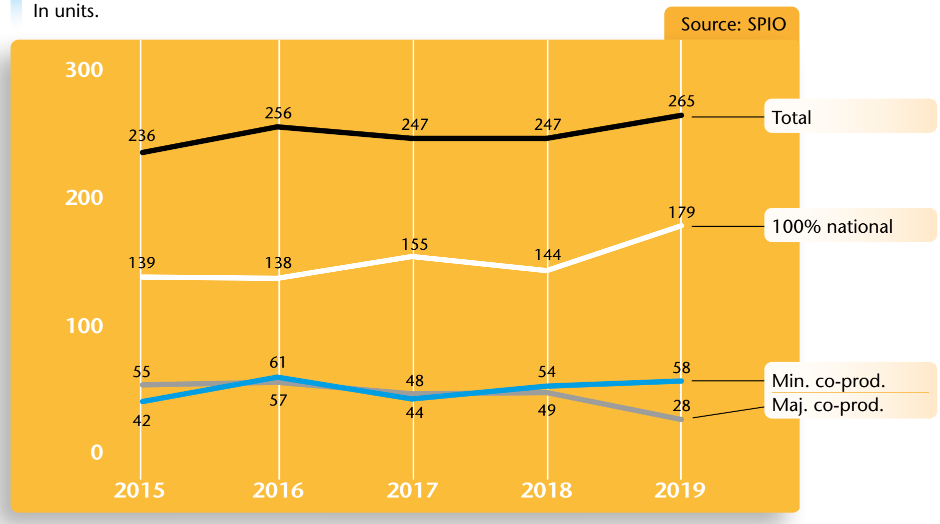
(1) Source: FFA (2) Source: MEDIA Salles

Market shares 2019 e



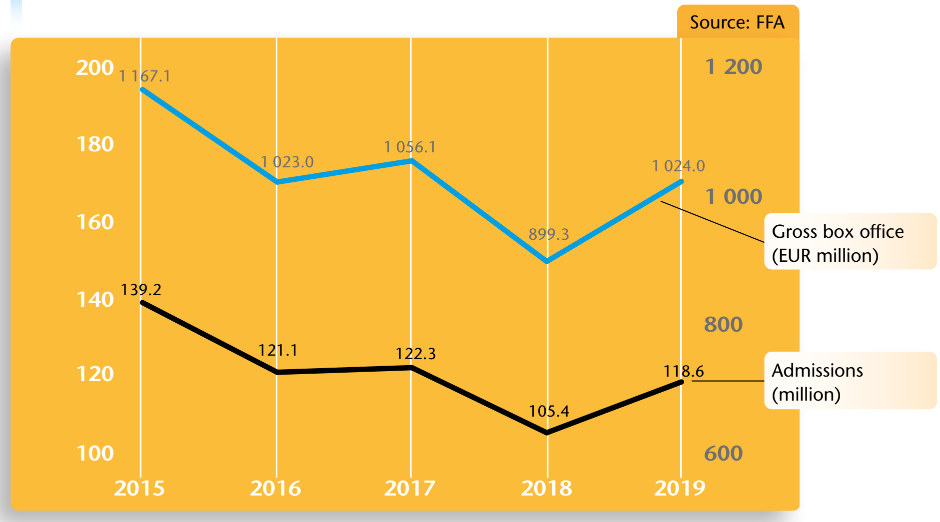
Number of German feature films produced (1) I 2015-2019

In units.



(1) Films on first release.

Admissions and gross box office in Germany I 2015-2019



Top 20 films by admissions in Germany | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	Frozen 2	US	C. Buck, J. Lee	Walt Disney Studios	5 685 373
2	The Lion King	US/GB	Jon Favreau	Walt Disney Studios	5 565 333
3	Avengers: Endgame	US	Anthony & Joe Russo	Walt Disney Studios	5 130 521
4	Das perfekte Geheimnis	DE	Bora Dagtekin	Constantin Film	4 623 306
5	Joker	US	Todd Phillips	Warner Bros.	4 064 979
6	Star Wars: Episode IX - The Rise of…	US	J.J. Abrams	Walt Disney Studios	3 773 947
7	Der Junge muss an die frische Luft…	DE	Caroline Link	Warner Bros.	3 064 823
8	The Secret Life of Pets 2	US/FR/JP	C. Renaud, J. del Val	UIP	2 483 924
9	How to Train Your Dragon: The…	US/JP	Dean DeBlois	UIP	2 266 365
10	Captain Marvel	US	A. Boden, R.Fleck	Walt Disney Studios	2 079 966
11	Aladdin	US	Guy Ritchie	Walt Disney Studios	1 984 792
12	It Chapter Two	US/CA	Andy Muschietti	Warner Bros.	1 897 731
13	Once Upon a Time... in Hollywood	US/CN	Quentin Tarantino	Sony Pict. Releasing	1 859 819
14	Bohemian Rhapsody	GB INC/US	Bryan Singer	20th Century Fox	1 795 362
15	Spider-Man: Far from Home	US	Jon Watts	Sony Pict. Releasing	1 771 749
16	Fast & Furious Presents: Hobbs &…	US/JP	David Leitch	UIP	1 722 051
17	Green Book	US/CN	Peter Farrelly	Entertain. One - eOne	1 592 593
18	Jumanji: The Next Level	US	Jake Kasdan	Sony Pict. Releasing	1 508 876
19	Pokémon Detective Pikachu	US/JP	Rob Letterman	Warner Bros.	1 428 687
20	Ralph Breaks the Internet	US	P. Johnston, R. Moore	Walt Disney Studios	1 354 973

Source: FFA

Distribution and exhibition

After an exceptionally bad year in 2018, German cinema attendance recovered to a certain extent in 2019 with admissions climbing back up from 105.4 million to 118.6 million. This still represents, however, the second lowest result since the German reunification in 1990. GBO takings also bounced back to EUR 1.02 billion, up 13.9% from 2018, as the average ticket price went back up to EUR 8.63. After declining for two years in a row, the number of first releases increased from 576 to 606 film releases. Despite two local films - *Das perfekte Geheimnis* and *Der Junge muss an die frische Luft* - featuring in the top 10 ranking, the market share of German films declined slightly from 23.5% to 21.5%. In contrast to 2018, when no single film managed to do so, five films sold more than four million tickets in 2019.

2020 will certainly not provide any further recovery to the German theatrical sector as cinemas were closed in response to the COVID-19 crisis between March 14 and 18, depending on the decision of federal State ("Land") authorities. As a result, GBO takings from January to May 24 were estimated to have plummeted by 47% compared to the same period in 2019. As of 5 June, 14 out of 16 German States have announced reopening dates for local cinemas ranging from 15 May to 30 June. This represents approximately 60% of the total screen count. German cinema chains and associations have expressed their concerns regarding these staggered reopening dates and have asked for a more coherent approach.

Production and funding

In 2019 German feature film production increased from 247 to 265 national feature film releases, including minority co-productions. The increase stems primarily from an increased number of 100% national productions which increased from 144 to 179.

Just like the rest of Europe, German film production activity came to a standstill in the second half of March due to the COVID-19 crisis. In order to mitigate the effects of the crisis on the German film and cinema industry, the federal government, the federal States and film funds have launched numerous measures including, for example, the establishment of a specific emergency fund of EUR 15 million, financed by the FFA, regional funds and the Ministry for Culture and Media to cover coronavirus-related additional costs, up to 30% of initial production costs, up to 50% for distribution and 30% for physical video. Like in other European markets funding conditions and media chronology stipulations are being applied in a more flexible manner and levy obligations have been suspended for a limited period.

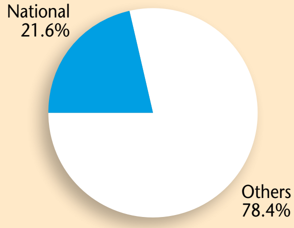
Sources: FFA, SPIO, BKM, UNIC, OBS

Italy

Population 2019 e	60.4 million
GDP per capita 2019 e	32 947 USD
Gross box office 2019 e	667.9 M EUR (748 M USD)
Admissions 2019 e	104.4 million
Average ticket price 2019 e	6.4 EUR (7.2 USD)
Average admissions per capita 2019 e	1.7
Screens 2018 I 2019 (1)	5 205 I 5 385
Digital screens 2018 I 2019 (2)	3 766 I 3 795
Digital 3D screens 2018 I 2019 (2)	1 390 I 1 400

(1) Source: SIAE. But only 3 880 screens with at least 60 days of activity in 2019.
(2) Source: MEDIA Salles (counting only screens with at least 60 days of activity).

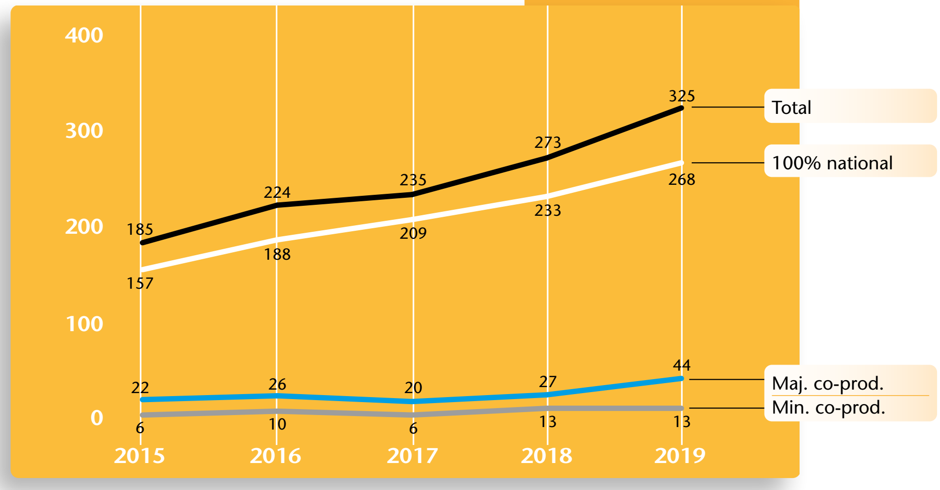
Market shares 2019 e



Number of Italian feature films produced I 2015-2019

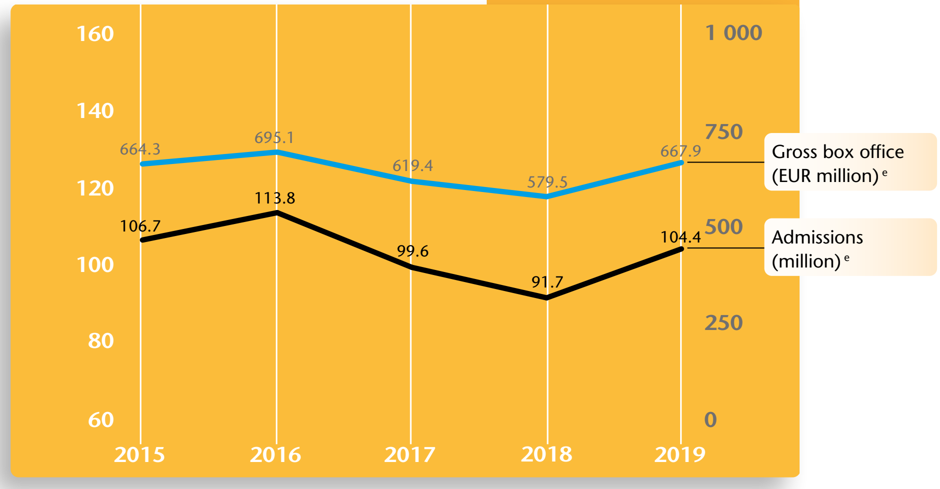
In units.

Source: DG Cinema - MiBACT



Admissions and gross box office in Italy I 2015-2019 e

Source: SIAE, ANICA, Cinetel, OBS



Top 20 films by admissions in Italy | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	The Lion King	US/GB	Jon Favreau	Walt Disney	5 692 214
2	Joker	US	Todd Phillips	Warner Bros.	4 193 477
3	Avengers: Endgame	US	Anthony & Joe Russo	Walt Disney	4 098 421
4	Frozen 2	US	C. Buck, Jennifer Lee	Walt Disney	2 813 176
5	Aladdin	US	Guy Ritchie	Walt Disney	2 411 864
6	Il primo Natale (Once Upon A Time in…	IT	Ficarra, Picone	Medusa Film	2 073 499
7	Dumbo	US/GB/AU/CA	Tim Burton	Walt Disney	2 004 882
8	Maleficent: Mistress of Evil	US/GB/CA	Joachim Rønning	Walt Disney	1 872 529
9	Spider-Man: Far from Home	US	Jon Watts	Warner Bros.	1 768 876
10	Once Upon a Time... in Hollywood	US/CN	Quentin Tarantino	Warner Bros.	1 716 656
11	Ralph Breaks the Internet	US	P. Johnston, R. Moore	Walt Disney	1 684 484
12	Pinocchio	IT/FR/GB	Matteo Garrone	01 Distribution	1 654 179
13	Green Book	US/CN	Peter Farrelly	Eagle Pictures	1 631 687
14	Captain Marvel	US	A. Boden, Ryan Fleck	Walt Disney	1 556 091
15	Aquaman	US	James Wan	Warner Bros.	1 537 777
16	Star Wars: Episode IX - The Rise of…	US	J.J. Abrams	Walt Disney	1 501 941
17	It Chapter Two	US/CA	Andy Muschietti	Warner Bros.	1 339 106
18	10 giorni senza mamma (When Mom…	IT	Alessandro Genovesi	Medusa Film	1 193 681
19	Bohemian Rhapsody	GB INC/US	Bryan Singer	20th Cent. Fox	1 152 712
20	How to Train Your Dragon: The Hidden…	US/JP	Dean DeBlois	Universal	1 126 183

Source: Cinetel

Distribution and exhibition

2019 saw Italian box office recovering from its 2018 low of 91.7 million admissions (the lowest level in ticket sales since 1995) jumping by 13.9% to 104.4 million tickets sold. Gross box office takings even increased by 15.3% to an estimated EUR 668 million as the average ticket prices increased slightly to EUR 6.40. The increase in the Italian box office, was primarily driven by the comparatively strong performance of US blockbusters, whose market share rose from 60.0% to 64.3% in 2019. Admissions to Italian films increased as well but at a much slower rate which caused market share for national films to decrease from 23.0% to 21.6%. Led by *Il primo Natale*, a total of four Italian films generated more than 1 million admissions in 2019 with three of them featuring among the top 20 films.

Italy was the first European country to become a COVID-19 hotspot and was the first European country to close its cinemas with almost half the country´s screens being closed as early as of 23 February due to regional bans and a nationwide closure on 8 March. GBO takings from January to May 31 were estimated to have plummeted by 51% compared to the same period in 2019. As in Germany or Spain, the decision on the reopening of cinemas is taken at regional level with opening dates planned from June 15 onwards.

Production and funding

Italian feature film production continued to grow to a new record high of 325 films produced in 2019. However, the COVID-19 crisis will most likely put an end to this growth trend as the production and exhibition sector are among the industry sectors hit hardest by the crisis.

In order to alleviate some of the effects the Italian government put in place a EUR 130 million emergency fund for the cinema, audiovisual and live entertainment sectors to support professionals and businesses. Following the approval of the “Relaunch” Law Decree on 13 May, this amount was increased to EUR 245 million, which could potentially be increased by an additional EUR 50 million by the end of the year. The DG Cinema is accelerating the payments of ordinary funded aid resulting from the Cinema Law, including tax credit measures of EUR 100 million to facilitate investments in new and renovated cinemas, EUR 10 million for art-house cinemas. Other measures include the relaxation of requirements and deadlines, the suspension of tax obligations and a revision of the rule on media chronology.

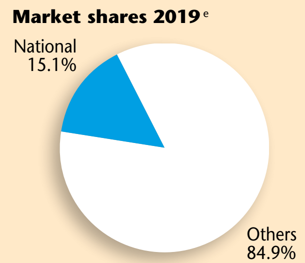
Sources: DG Cinema-MiBACT, SIAE, ANICA, Cinetel, UNIC, OBS

Spain

Population 2019 [e]	46.9 million
GDP per capita 2019 [e]	29 961 USD
Gross box office 2019 [e]	614.7 M EUR (688.2 M USD)
Admissions 2019 [e]	104.9 million
Average ticket price 2019 [e]	5.9 EUR (6.6 USD)
Average admissions per capita 2019 [e]	2.2
Screens 2018 I 2019 (1)	3 589 I 3 695
Digital screens 2018 I 2019 (2)	3 546 I 3 575
Digital 3D screens 2018 I 2019 (2)	1 120 I 1 100

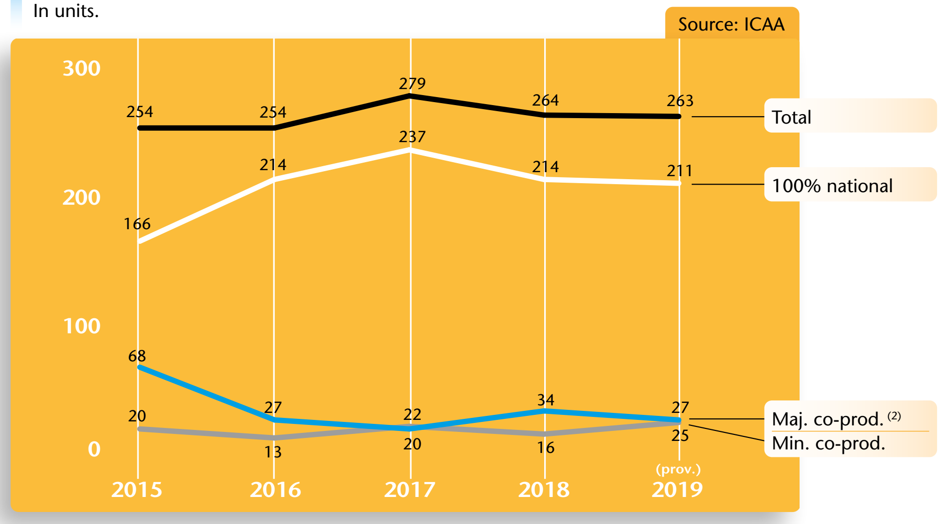
(1) Source: ICAA (2) Source: MEDIA Salles

Market shares 2019 [e]



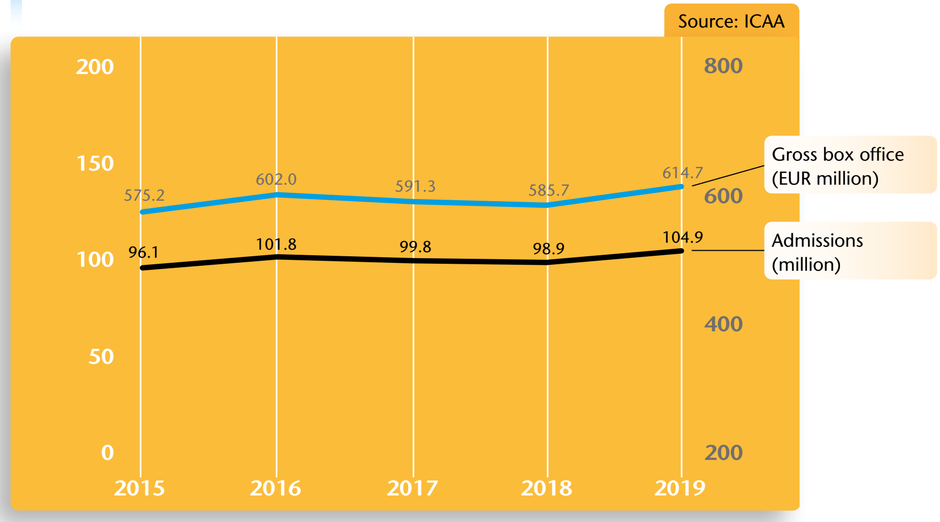
Number of Spanish feature films produced (1) | 2015-2019

In units.



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

Admissions and gross box office in Spain | 2015-2019 *prov.*



Top 20 films by admissions in Spain | 2019 *prov.*

	Original title	Country of origin	Director	Distributor	Admissions
1	The Lion King	US/GB	Jon Favreau	Walt Disney	5 910 725
2	Joker	US	Todd Phillips	Warner Bros.	4 867 369
3	Avengers: Endgame	US	Anthony & Joe Russo	Walt Disney	4 550 437
4	Aladdin	US	Guy Ritchie	Walt Disney	4 417 768
5	Toy Story 4	US	Josh Cooley	Walt Disney	3 877 805
6	Frozen 2	US	C. Buck, Jennifer Lee	Walt Disney	2 848 655
7	Dumbo	US/GB/AU/CA	Tim Burton	Walt Disney	2 430 177
8	Padre no hay más que uno (Father…	ES	Santiago Segura	Sony Pictures	2 387 973
9	Spider-Man: Far from Home	US	Jon Watts	Sony Pictures	2 249 013
10	Captain Marvel	US	A. Boden, Ryan Fleck	Walt Disney	2 158 590
11	Maleficent: Mistress of Evil	US/GB/CA	Joachim Rønning	Walt Disney	2 087 047
12	Star Wars: Episode IX - The Rise of…	US	J.J. Abrams	Walt Disney	2 080 002
13	The Secret Life of Pets 2	US/FR/JP	C. Renaud, J. del Val	UPI	2 003 834
14	Once Upon a Time... in Hollywood	US/CN/GB	Quentin Tarantino	Sony Pictures	1 911 986
15	Lo dejo cuando quiera (I Can Quit…	ES	Carlos Therón	Sony Pictures	1 838 819
16	Mientras dure la guerra (While At War)	ES/AR	Alejandro Amenábar	Walt Disney	1 802 647
17	Si yo fuera rico (If I Were A Rich Man)	ES	Á. Fernández Armero	Paramount	1 709 288
18	Green Book	US/CN	Peter Farrelly	Aurum Prod.	1 558 403
19	How to Train Your Dragon: The Hidden…	US/JP	Dean DeBlois	UPI	1 538 718
20	Fast & Furious Presents: Hobbs & Shaw	US/JP	David Leitch	UPI	1 481 486

Sources: ICAA, Comscore

Distribution and exhibition

Spanish cinema attendance reached its highest level since 2009, growing by 6.1% to 104.9 million admissions. Seen in a wider context, 2019 hence sustained a longer-term recovery of the Spanish box office which had reached a record low of 76.9 million admissions in 2013. GBO takings increased by 5.0% to EUR 615 million, as the average ticket price decreased slightly to EUR 5.86. The increase in Spanish box office was largely due to the extraordinary performance of Disney titles which represented seven out of the top 10 titles in 2019. In contrast, admissions to Spanish films declined by almost 9% and caused national market share to drop from 17.6% to 15.1%, the lowest value since 2013. Four local titles, including three remakes of foreign comedies: *Padre no hay más que uno, Lo dejo cuando quiera, Mientras dure la guerra, Si yo fuera rico*, sold more than 1 million tickets and made it into the top 20, while several award winning Spanish films including Pedro Almodóvar's *Dolor y gloria*, Oliver Laxe's *O que arde* or *La trinchera infinita* failed to attract comparable audiences.

As elsewhere in Europe, Spain will see a major drop in admissions in 2020 as cinemas had to close in response to the COVID-19 crisis on March 14. GBO takings from January to May 31 were estimated to have plummeted by 57% compared to the same period in 2019. As in Germany, the decision on the reopening of cinemas is taken at regional level with opening dates foreseen between May 25 and June 8.

Production and funding

Spanish film production activity remained stable with a total of 263 films certified by ICAA, the country's national public funding body, in 2019. As in other parts of Europe, film production came to a halt in March 2020 but has become possible under strict conditions in certain provinces from May 11 onwards while still not being allowed in other regions.

Among other non-sector specific measures, the Spanish government approved in early May EUR 76.4 million specifically aimed at supporting the cultural sector. Of this sum, EUR 13.2 million will be allocated to cinema operators. The support is redistributed by the ICAA, which also increased flexibility in funding obligations and increased the production incentive by 5% upping the maximum amount from EUR 3 to EUR 10 million. Additionally, a new support scheme was launched by Netflix, Acción Cultural Española, la Academia de Cine and ICAA aimed at helping artistic and/or technical workers due to the cessation of audiovisual production and CREA-SGR increased its loan guarantees by EUR 20 million.

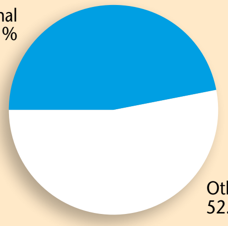
Sources: ICAA, UNIC, *Screen International*, OBS

United Kingdom

Population 2019 e	66.6 million
GDP per capita 2019 e	41 030 USD
Gross box office 2019 e	1.25 bn GBP (1.60 bn USD)
Admissions 2019 e	176.1 million
Average ticket price 2019 e	7.1 GBP (9.1 USD)
Average admissions per capita 2019 e	2.6
Screens 2018 (1) I 2019 (2)	4 340 I 4 395
Digital screens 2018 (1) I 2019 (2)	4 340 I 4 395
Digital 3D screens 2018 I 2019 (2)	2 090 I 2 063

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

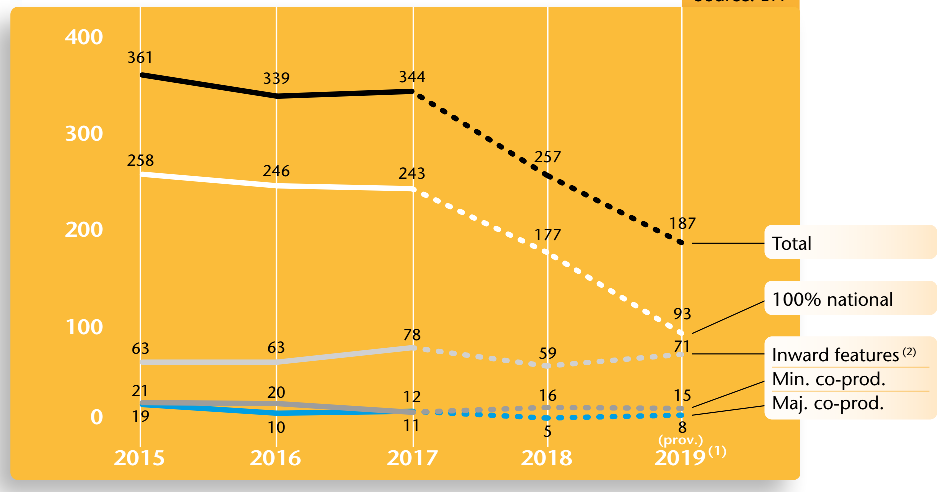
Market shares 2019 e



Number of films produced in the United Kingdom I 2015-2019 *prov.* (1)

In units.

Source: BFI

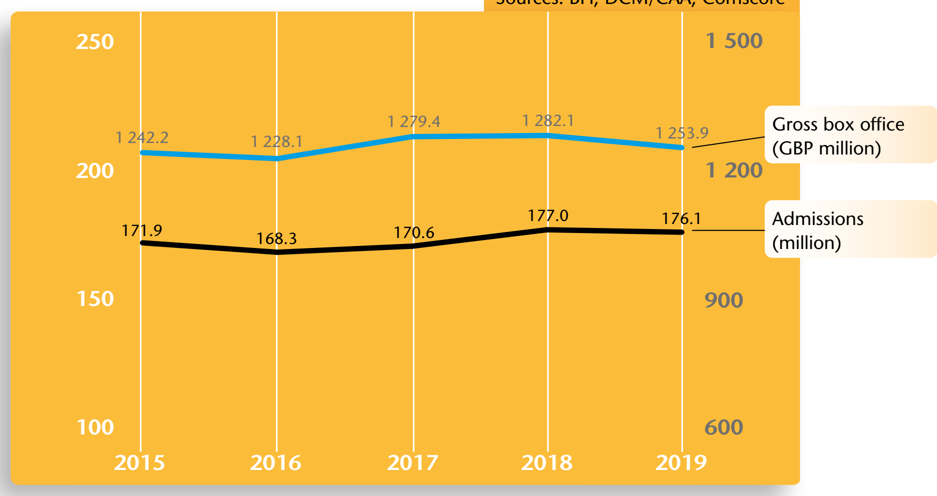


(1) The apparent decline of film productions in 2019 is partially linked linked to a time lag in identifying film productions with budgets below GBP 500 000.

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

Admissions and gross box office in the United Kingdom I 2015-2019

Sources: BFI, DCM/CAA, Comscore



Top 20 films by admissions in the United Kingdom & Ireland | 2019 e

Estimated admissions based on average ticket price of GBP 7.11.

	Original title	Country of origin	Director	Distributor	Admissions e
1	Avengers: Endgame	US	Anthony & Joe Russo	Walt Disney	12 250 383
2	The Lion King	US/GB	Jon Favreau	Walt Disney	10 490 921
3	Toy Story 4	US	Josh Cooley	Walt Disney	9 142 377
4	Joker	US	Todd Phillips	Warner Bros.	8 002 052
5	Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney	6 694 731
6	Star Wars: Episode IX - The Rise of…	US	J.J. Abrams	Walt Disney	6 475 943
7	Captain Marvel	US	Anna Boden, Ryan Fleck	Walt Disney	5 449 478
8	Aladdin	US	Guy Ritchie	Walt Disney	5 139 112
9	Spider-Man: Far from Home	US	Jon Watts	Sony Pictures	5 116 572
10	Downton Abbey	GB/US	Michael Engler	Universal Pictures	3 891 355
11	Jumanji: The Next Level	US	Jake Kasdan	Sony Pictures	3 506 708
12	Dumbo	US/GB/AU/CA	Tim Burton	Walt Disney	3 472 585
13	Rocketman	GB INC/US	Dexter Fletcher	Paramount	3 226 442
14	Once Upon a Time... in Hollywood	US/CN/GB	Quentin Tarantino	Sony Pictures	2 941 069
15	Fast & Furious Presents: Hobbs &…	US/JP	David Leitch	Universal Pictures	2 825 295
16	How to Train Your Dragon: The…	US/JP	Dean DeBlois	Universal Pictures	2 738 741
17	The Secret Life of Pets 2	US/FR/JP	C. Renaud, J. del Val	Universal Pictures	2 710 065
18	It Chapter Two	US/CA	Andy Muschietti	Warner Bros.	2 613 056
19	The Lego Movie 2: The Second Part	US/DK/NO/AU	Mike Mitchell	Warner Bros.	2 588 539
20	Last Christmas	GB/US	Paul Feig	Universal Pictures	2 472 215

Source: BFI, Comscore

Distribution and exhibition

Following a record year in 2018, UK cinema admissions dropped only marginally by 0.5% to 176 million tickets sold in 2019, the second highest level of admissions since 1970. GBO takings, however, decreased by 2.2% to GBP 1.25 billion in 2019, as the average ticket price continued to decrease from GBP 7.24 to GBP 7.12. The market share of UK qualifying films increased slightly from 33.1% to 33.3%. At the same time the market share of independent UK films was also up from 11.7% to 13.0% leading to a cumulative market share of UK films of 47.1%. This is the highest national market share since records began in 2001.

Good fortunes changed rapidly in 2020 with the Covid-19 crisis causing audiences to stay away from cinemas even before venues closed on March 20. As a result, GBO takings from January to May 31 were estimated to have plunged by 51% compared to the same period in 2019. At the time of writing a possible re-opening of cinemas as of July 4 is envisaged for cinemas in England with dates for Scotland, Wales and Northern Ireland yet to be announced.

Production and funding

According to BFI interim figures, the number of UK film productions continued to decline with a total of 187 UK feature films – including inward investment films – starting principal photography in 2019, compared to 361 in 2015. In contrast, UK film production spend climbed to GBP 1.95 billion, 6% up on 2018 and the second highest level on record. However, 91% of this spend is linked to only 21 US studio productions and another 51 independent inward investment films, while the 193 domestic films and 23 co-productions accounted only for 7% and 2% respectively. Q1 pre-shutdown figures show inward investments continued to boom (up 40%) while domestic film production continued to fall dramatically by 72% compared to Q1 2019.

By the end of March film and TV production had come to a complete shutdown but production is expected to reboot after the end of the lockdown following specific codes of practice developed by the BFI led industry-wide Screen Sector Task Force, which is drawing up the UK´s recovery plan for the screen sector. Alongside the UK government´s Covid-related fiscal support measures, the BFI has ring-fenced GBP 4.6 million to support exhibitors, freelancers and producers through several funds and adjusted the criteria of existing schemes to address short term key issues such as cash flow. The BFI also contributes to The Film and TV Emergency Relief Fund financed largely by donations from the industry.

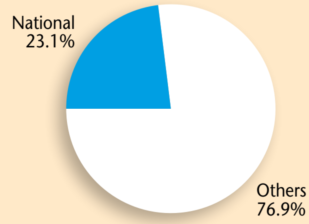
Sources: British Film Institute (BFI), DCM, *Screen International*, Comscore, OBS

Russian Federation

Population 2019[e]	146.7 million
GDP per capita 2019[e]	11 163 USD
Gross box office 2019[e]	55.47 bn RUB (857 M USD)
Admissions 2019[e]	219.4 million
Average ticket price 2019[e]	252.8 RUB (3.9 USD)
Average admissions per capita 2019[e]	1.5
Screens 2018 | 2019[(1)]	5 341 | 5 597
Digital screens 2018 | 2019[(2)]	5 239 | 5 574
Digital 3D screens 2018 | 2019[(2)]	3 963 | 4 094

(1) Source: Russian Cinema Fund Analytics (2) Source: MEDIA Salles

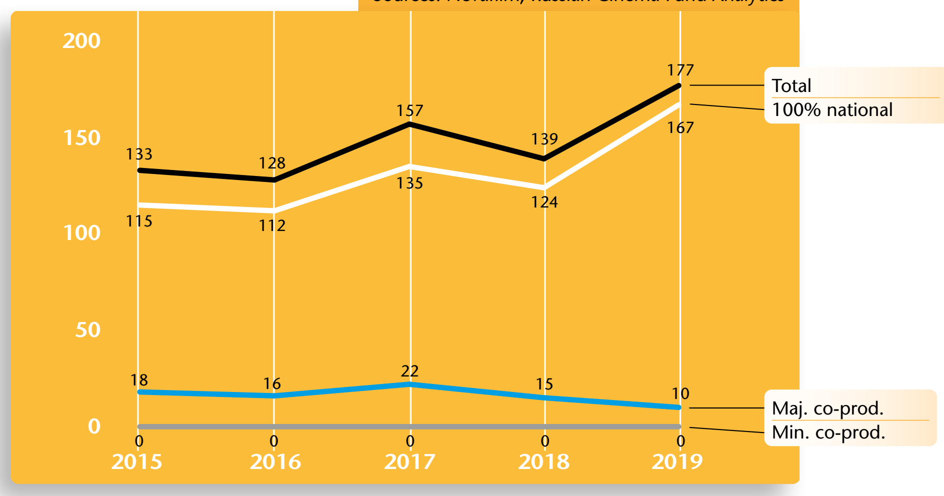
Market shares 2019[e]



Number of Russian feature films produced | 2015-2019

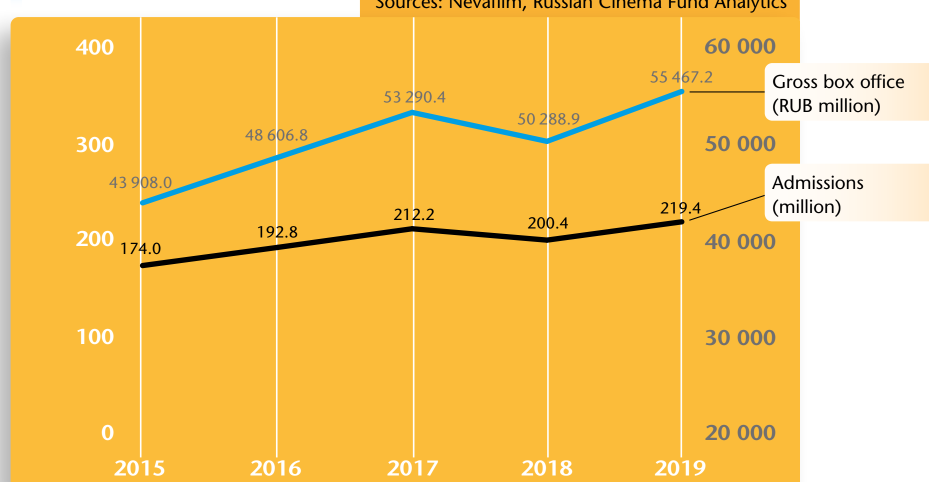
In units.

Sources: Nevafilm, Russian Cinema Fund Analytics



Admissions and gross box office in Russia[(1)] | 2015-2019

Sources: Nevafilm, Russian Cinema Fund Analytics



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

Top 20 films by admissions in the Russian Federation (1) | 2019

	Original title	Country of origin	Director	Distributor	Admissions e
1	The Lion King	US/GB	Jon Favreau	Walt Disney/Sony	10 860 775
2	T-34	RU	Aleksey Sidorov	Central Partnership	8 771 342
3	Avengers: Endgame	US	Anthony & Joe Russo	Walt Disney/Sony	8 703 669
4	Maleficent: Mistress of Evil	US/GB/CA	Joachim Rønning	Walt Disney/Sony	7 623 545
5	How to Train Your Dragon: The…	US/JP	Dean DeBlois	UPI	7 239 717
6	The Secret Life of Pets 2	US/FR/JP	C. Renaud, J. del Val	UPI	6 889 634
7	Frozen 2	US	C. Buck, J. Lee	Walt Disney/Sony	6 858 063
8	Joker	US	Todd Phillips	Caro Premier	6 814 944
9	Aladdin	US	Guy Ritchie	Walt Disney/Sony	4 914 327
10	Spider-Man: Far from Home	US	Jon Watts	Walt Disney/Sony	4 764 060
11	It Chapter Two	US/CA	Andy Muschietti	Caro Premier	4 238 901
12	Captain Marvel	US	A. Boden, R. Fleck	Walt Disney/Sony	4 085 705
13	Fast & Furious Presents: Hobbs &…	US/JP	David Leitch	UPI	4 024 701
14	Once Upon a Time... in Hollywood	US/CN	Quentin Tarantino	Walt Disney/Sony	3 872 005
15	Politseyskiy s Rublyovki…	RU	Ilya Kulikov	Caroprokat	3 634 056
16	The Addams Family	US/CA	G. Tiernan, C. Vernon	UPI	3 353 321
17	Abominable	US/CN/JP	J. Culton, T. Wilderman	UPI	3 155 278
18	Jumanji: The Next Level	US	Jake Kasdan	Walt Disney/Sony	3 007 123
19	Politseyskiy s Rublyovki… 2	RU	Ilya Kulikov	Central Partnership	2 998 172
20	Alita: Battle Angel	US/CA/JP	Robert Rodriguez	20 Cent. Fox - CIS	2 612 167

Source: Russian Cinema Fund Analytics

Distribution and exhibition

Russian box office bounced back in 2019 after the FIFA World Cup related dip in 2018. Cinema attendance jumped by 9.5% to a record 219 million, confirming Russia´s position as Europe's largest market in terms of admissions for the third consecutive year. GBO increased by 10.3% to RUB 55.5 billion. This is the highest box office result measured in local currency in Russia's recent history. Measured in US dollars however, GBO continues to be well below the levels observed between 2010 and 2014. As in other European markets box office growth was driven primarily by the strong performance of US blockbusters. After growing for several years, market share for Russian films declined from a record 28.9% to 23.1% in 2019, still the third highest level in recent years. A total of three Russian films featured among the top 20 in 2019, compared to five films in 2018: War action film *T-34* (8.8 million) followed by the latest instalments of two local comedy franchises *Christmas Trees. Final* (3.6 million) and *Policeman VIP* (3.0 million)

The COVID-19 crisis reached Russia slightly later than other European countries and Russian cinemas were the last ones to close following an official Government decree on 25 March. Mid-July was announced as a potential date for reopening cinemas. As elsewhere in Europe, several drive-in cinemas have been opened in the meantime. GBO takings from January to May 24 were estimated to have dropped by 34% compared to the same period in 2019.

Production and funding

Russian film production levels – including regional films – grew to a new record high, increasing from 139 in 2018 to 177 feature film releases in 2019. This is the 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. In addition, Russian tycoon Roman Abramovich's private film fund Kinoprime became operational in 2019, boasting a budget of USD 100 million for the period 2019 to 2021. The Fund supports both mainstream and arthouse Russian titles as well as international and English-language projects with a Russian flavour.

At the time of writing the Russian Cinema Fund has extended application deadlines for several of its support schemes but in contrast to most other European markets, no sector specific support measures could be identified. The film industry was however listed as one of the economic sectors most affected by the COVID-19 crisis in a government resolution.

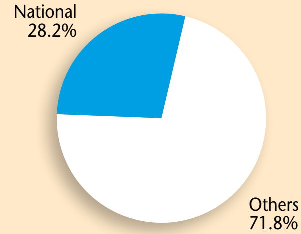
Sources: Russian Cinema Fund Analytics, UNIC, *Screen International*, OBS

Poland

Population 2019 e	38.0 million
GDP per capita 2019 e	14 902 USD
Gross box office 2019 e	1.1 bn PLN (298.1 M USD)
Admissions 2019 e	60.6 million
Average ticket price 2019 e	18.9 PLN (4.9 USD)
Average admissions per capita 2019 e	1.6
Screens 2018 I 2019 (1)	1 338 I 1 360
Digital screens 2018 I 2019 (2)	1 270 I 1 300
Digital 3D screens 2018 I 2019 (2)	720 I 720
National films produced 2018 I 2019	42 I >40

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

Market shares 2019 e



Top 10 films by admissions in Poland I 2019

	Original title	Country of origin	Director	Distributor	Admissions (in million)
1	The Lion King	US/GB	Jon Favreau	Walt Disney	2.52
2	Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney	2.46
3	Miszmasz czyli Kogel Mogel 3	PL	Kordian Piwowarski	Next Film	2.39
4	Joker	US	Todd Phillips	Warner Bros.	1.96
5	Polityka	PL	Patryk Vega	Kino Swiat	1.89
6	Avengers: Endgame	US	Anthony Russo, Joe Russo	Walt Disney	1.88
7	The Secret Life of Pets 2	US/FR/JP	Chris Renaud, J. del Val	UIP	1.45
8	Planeta Singli 3	PL	Sam Akina, Michal Chacinski	Kino Swiat	1.44
9	Boze Ciało (Corpus Christi)	PL/FR	Jan Komasa	Kino Swiat	1.40
10	How to Train Your Dragon: The Hidden World	US/JP	Dean DeBlois	UIP	1.27

Sources: FILMNEWEUROPE, Box Office Mojo, OBS

Distribution and exhibition

2019 was another strong year for the Polish film industry. Cinema attendance continued to grow for the sixth year in a row and reached a record high of 60.6 million admissions, up 1.5% from 2018. This is the highest level since 1989. GBO takings surpassed the PLN 1 billion barrier for the third consecutive year, increasing by 1.8% to PLN 1.14 billion (USD 298 million) as the average ticket price remained stable at PLN 18.9 (USD 4.9). In contrast to 2018 when the surge in cinema attendance was driven by national films, it was the strong performance of US titles which nudged Polish box office to its new record high. While not matching 2018 record levels Polish films continued to perform well. Led by comedy sequel *Miszmasz czyli Kogel Mogel 3* and political drama *Polityka* a total of four Polish films featured among the top 10 films and national market share reached 28.2% in 2019, the second highest level since 2011.

In response to the COVID-19 crisis, the Polish government decided to close all cinemas from 12 March onwards with a potential reopening of venues planned for June 6.

Production and funding

While no reliable production figures could be identified for Poland in 2019, it is assumed that the level of production remained comparable to the level observed in 2018 when 42 films were produced. Film production was set to resume on 18 May as Poland relaxes its lockdown measures in response to the COVID-19 crisis.

Film production in Poland is publicly supported by the Polish Film Institute (PISF) as well as a network of 12 regional funds. In an effort to increase production activity in the country, Poland introduced a 30% cash rebate at the start of 2019 and supported 26 projects with about USD 13 million in its first year. Mitigating the effects of the COVID-19 pandemic, the PISF established a crisis team to develop support measures for the film industry which include changes in operational programs to support financial liquidity, grants for filmmakers and artists, changes in the Cinematography Act and the Act on financial support for audiovisual production and bank loans available for cinemas.

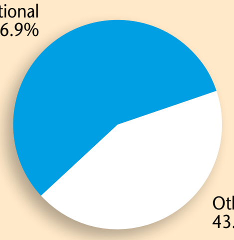
Sources: Polish Film Institute (PISF), UNIC, *Cineuropa, Screen International,* OBS

Turkey

Population 2019 e	82.0 million
GDP per capita 2019 e	8 958 USD
Gross box office 2019 e	976.9 M TRY (172.2 M USD)
Admissions 2019 e	59.4 million
Average ticket price 2019 e	16.4 TRY (2.9 USD)
Average admissions per capita 2019 e	0.7
Screens 2018 | 2019 (1) e	2 877 | 1 360
Digital screens 2018 | 2019 (2) e	2 692 | 2 720
Digital 3D screens 2018 | 2019 (2) e	704 | 712
National films released 2018 | 2019	180 | 155

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

Market shares 2019 e



Top 10 films by admissions in Turkey | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	Yedinci Kogustaki Mucize	TR	Mehmet Ada Öztekin	CJ Entertainment	5 310 542
2	Recep Ivedik 6	TR	Togan Gökbakar	CJ Entertainment	3 974 999
3	Organize Isler: Sazan Sarmali	TR	Yilmaz Erdogan	CJ Entertainment	3 537 774
4	Avengers: Endgame	US	Anthony Russo, Joe Russo	UIP	2 482 083
5	Kral Sakir Korsanlar Diyari	TR	H.C. Dizdaroglu, B. Tokay	CJ Entertainment	2 107 663
6	Joker	US	Todd Phillips	Warner Bros.	1 841 861
7	Cep Herkülü: Naim Süleymanoglu	TR	Ozer Feyzioglu	CGV Mars Dagitim	1 735 443
8	Mucize 2: Ask	TR	Mahsun Kirmizigül	CGV Mars Dagitim	1 663 858
9	Fast & Furious Presents: Hobbs & Shaw	US/JP	David Leitch	UIP	1 446 549
10	Frozen 2	US	Chris Buck, Jennifer Lee	UIP	1 282 331

Source: Ministry of Culture / DG Sinema

Distribution and exhibition

In contrast to most other European markets Turkey suffered a significant decline in box office results in 2019. Cinema attendance fell by 15.6% from 70.4 million to 59.4 million, the second lowest level since 2013. As a result of a 29% surge in the average ticket price, which was only partly driven by the inflation rate (~ 15%), GBO revenues nevertheless increased by 9% to reach a new record high of TRY 977 million. However, measured in US dollars GBO continued to decline by 7% to USD 172 million due to the double-digit devaluation of the Turkish lira throughout 2019. The decline can be explained by a combination of factors including the difficult economic and political situation in the country, the strong increase in ticket prices and a 24% decline in admissions to national films which was not compensated for by an exceptionally strong performance of US blockbusters as seen in other European markets. National market share dropped from a record high of 63.4% to 56.9%, still the highest national market share of any European market.

While the Turkish government did not impose a strict lockdown in response to the COVID-19 pandemic, cinemas – except for drive-ins – were ordered to close as of 17 March and will remain closed at least until mid-June. Nevertheless, Turkish box office seems to have been less affected by the lockdown than other European countries, with GBO takings between January and May 2020 estimated to have dropped by 'only' 27%.

Production and funding

A total of 155 Turkish films were released in 2019, 25 less than in 2018, when a record high of 180 films productions were registered. A new cinema law became effective in mid-2019. Besides establishing boards to evaluate the support applications, the new law prohibits the sale of cinema tickets in combination with popcorn or other merchandise and limits the duration of commercials before and during breaks at screenings.

While indicating the provision of support, the Turkish government had not formally announced any specific support measures by the end of May. An industry support initiative of the IKSV, the Cinema and Television Union and Netflix, which contributed TRY 4 million, provides some emergency relief to film professionals affected by the crisis.

Sources: Ministry of Culture / DG Sinema, Antrakt – Deniz Yavuz, UNIC, OBS

Other Western Europe

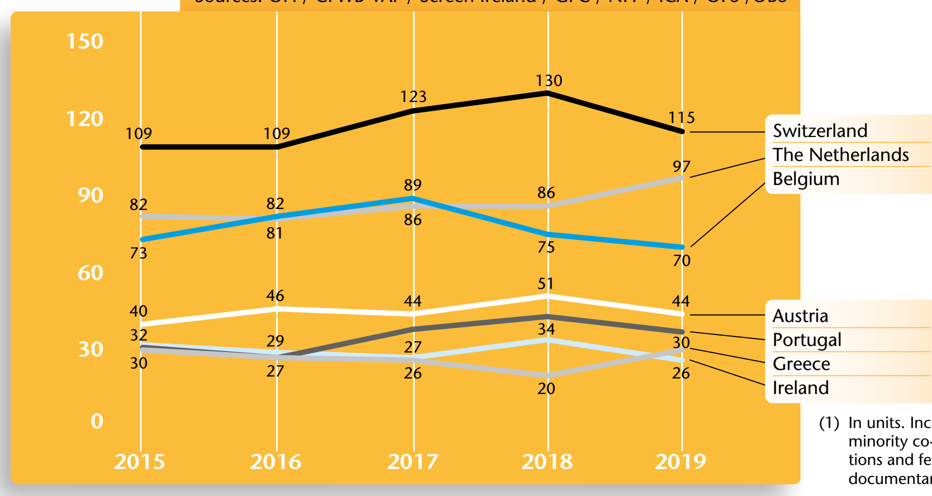
	Austria	Belgium	Greece	Ireland	Netherlands	Portugal	Switzerland
Population 2019 e (million)	8.9	11.5	10.7	4.9	17.3	10.3	8.5
GDP per capita 2019 e (USD)	50 023	45 176	19 974	31 431	52 368	23 031	83 717
Gross box office 2019 (M USD)	145.0	191.4	68.2	134.0	389.1	93.0	194.6
Admissions 2019 (million)	13.7	19.5	9.6	15.1	38.0	15.5	12.5
Average ticket price 2019 (USD)	10.6	9.8	7.1	8.9	10.2	6.0	15.6
Average admissions per capita 2019	1.5	1.7	0.9	3.1	2.2	1.5	1.5
Screens 2019 e (1)	577 (3)	495	547	463 (3)	987	583	605
Digital screens 2019 (2)	576	503	460	543	985	527	596
Digital 3D screens 2019 (2)	347	180	160	267	530	254	313
National market shares 2019 e	3.1%	8.0%	5.3%	1.7%	11.7%	4.5%	6.7%

(1) National data source (2) Source: MEDIA Salles (3) 2018

Number of feature films produced by selected Western European countries (1) | 2015-2019

In units.

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

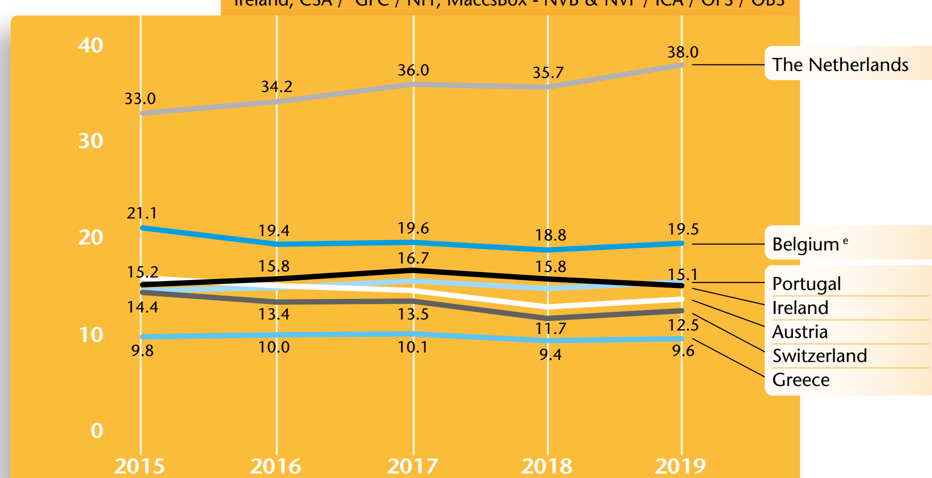


(1) In units. Including minority co-productions and feature documentaries.

Admissions in selected Western European countries | 2015-2019

In millions.

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



Top 10 films by admissions in the Netherlands | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	The Lion King	US/GB	Jon Favreau	Walt Disney	3 077 586
2	Avengers: Endgame	US	Anthony Russo, Joe Russo	Walt Disney	1 205 410
3	Joker	US	Todd Phillips	Warner Bros.	1 157 159
4	Bohemian Rhapsody	GB INC/US	Bryan Singer	Warner Bros.	1 081 210
5	Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney	1 032 327
6	Aladdin	US	Guy Ritchie	Walt Disney	982 308
7	The Secret Life of Pets 2	US/FR/JP	C. Renaud, J. del Val	UPI	701 634
8	Once Upon a Time... in Hollywood	US/CN/GB	Quentin Tarantino	UPI	643 659
9	The Queen's Corgi	BE/US	V. Kesteloot, Ben Stassen	Independent Films	636 851
10	Spider-Man: Far from Home	US	Jon Watts	UPI	632 307

Sources: MaccsBox - NVB & NVF

Top 10 films by admissions in Belgium | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	The Lion King	US/GB	Jon Favreau	Walt Disney	1 329 504
2	Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney	766 549
3	Joker	US	Todd Phillips	Warner Bros.	726 721
4	Avengers: Endgame	US	Anthony Russo, Joe Russo	Walt Disney	669 718
5	Aladdin	US	Guy Ritchie	Walt Disney	471 890
6	Toy Story 4	US	Josh Cooley	Walt Disney	405 909
7	Dumbo	US/GB/AU/CA	Tim Burton	Walt Disney	377 678
8	Star Wars: Episode IX - The Rise…	US	J.J. Abrams	Walt Disney	368 366
9	Fast & Furious Presents: Hobbs…	US/JP	David Leitch	Sony Pictures	334 357
10	F.C. De Kampioenen 4: Viva Boma!	BE	Jan Verheyen	Indep. Films Dist.	330 978

Sources: CFWB, VAF, Cinedata

Top 10 films by admissions in Portugal | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	The Lion King	US/GB	Jon Favreau	NOS Luso. Audio.	1 280 743
2	Joker	US	Todd Phillips	NOS Luso. Audio.	900 934
3	Avengers: Endgame	US	Anthony Russo, Joe Russo	NOS Luso. Audio.	670 586
4	Frozen 2	US	Chris Buck, Jennifer Lee	NOS Luso. Audio.	580 166
5	Toy Story 4	US	Josh Cooley	NOS Luso. Audio.	400 186
6	Spider-Man: Far from Home	US	Jon Watts	Big Picture 2 Films	334 695
7	Dumbo	US/GB/AU/CA	Tim Burton	NOS Luso. Audio.	295 718
8	Aladdin	US	Guy Ritchie	NOS Luso. Audio.	293 769
9	Captain Marvel	US	Anna Boden, Ryan Fleck	NOS Luso. Audio.	288 002
10	Once Upon a Time... in Hollywood	US/CN/GB	Quentin Tarantino	Big Picture 2 Films	281 411

Source: ICA

Top 10 films by admissions in Austria | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	The Lion King	US/GB	Jon Favreau	Walt Disney	839 703
2	Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney	623 666
3	Avengers: Endgame	US	Anthony Russo, Joe Russo	Walt Disney	611 635
4	Joker	US	Todd Phillips	Warner Bros.	543 312
5	Das perfekte Geheimnis	DE	Bora Dagtekin	Constantin Film	461 126
6	Star Wars: Episode IX - The Rise…	US	J.J. Abrams	Walt Disney	339 362
7	The Secret Life of Pets 2	US/FR/JP	C. Renaud, J. del Val	Universal Pictures	307 995
8	Captain Marvel	US	Anna Boden, Ryan Fleck	Walt Disney	283 588
9	How to Train Your Dragon: The…	US/JP	Dean DeBlois	Universal Pictures	262 280
10	Aladdin	US	Guy Ritchie	Walt Disney	259 352

Sources: Austrian Film Institute (OFI) / Comscore

Nordic countries

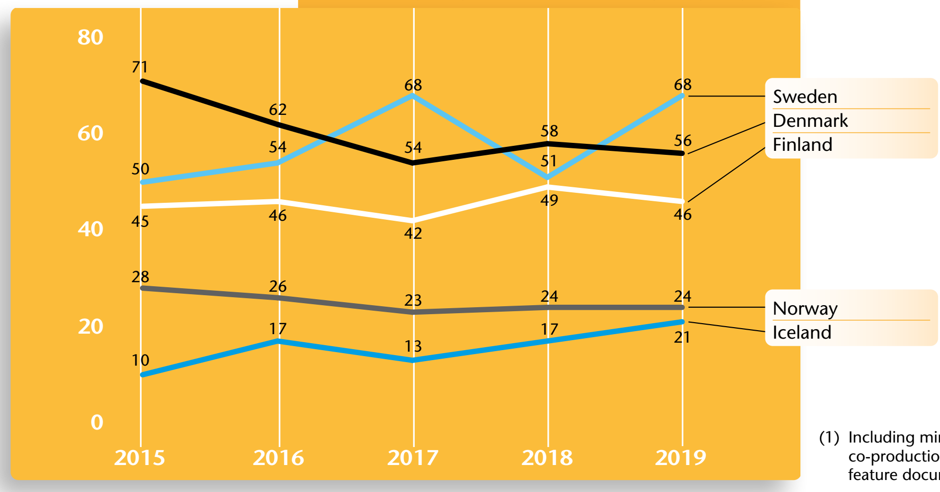
	Denmark	Finland	Iceland	Norway	Sweden
Population 2019 e (million)	5.8	5.5	0.4	5.3	10.2
GDP per capita 2019 e (USD)	59 795	48 869	67 037	77 975	51 242
Gross box office 2019 (M USD)	178.0	107.3	12.9	147.2	203.5
Admissions 2019 (million)	13.2	8.4	1.3	11.3	15.9
Average ticket price 2019 (USD)	13.4	12.8	10.2	13.0	12.8
Average admissions per capita 2019	2.3	1.5	3.5	2.1	1.6
Screens 2019 e (1)	486	358	43	483	850 (3)
Digital screens 2019 (2)	478	350	43	484	843
Digital 3D screens 2019 (2)	265	230	30	294	485
National market shares 2019 e	27.4%	16.9%	3.7%	18.4%	13.2%

(1) National data source (2) Source: MEDIA Salles (3) 2018

Number of feature films produced by Nordic countries (1) | 2015-2019

In units.

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

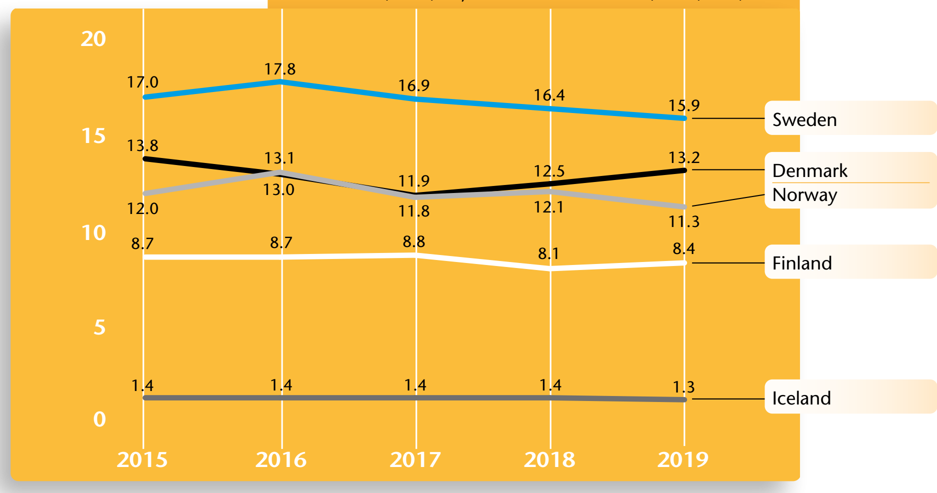


(1) Including minority co-productions and feature documentaries.

Admissions in Nordic countries | 2015-2019

In millions.

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



Top 10 films by admissions in Sweden | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	The Lion King	US/GB	Jon Favreau	Walt Disney	1 120 321
2	Avengers: Endgame	US	Anthony Russo, Joe Russo	Walt Disney	769 817
3	Joker	US	Todd Phillips	Svensk Filmindustri	654 878
4	Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney	573 184
5	Star Wars: Episode IX - The Rise of…	US	J.J. Abrams	Walt Disney	550 603
6	Ralph Breaks the Internet	US	Phil Johnston, Rich Moore	Walt Disney	357 588
7	Aladdin	US	Guy Ritchie	Walt Disney	357 141
8	How to Train Your Dragon: The…	US/JP	Dean DeBlois	UIP/Universal	355 932
9	Once Upon a Time... in Hollywood	US/CN	Quentin Tarantino	Svensk Filmindustri	332 245
10	Captain Marvel	US	Anna Boden, Ryan Fleck	Walt Disney	328 390

Source: OBS/LUMIERE, Comscore

Top 10 films by admissions in Denmark | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	Ternet ninja (Cleckered Ninja)	DK	Christoffersen, Matthesen	Nordisk Film Distr.	621 463
2	Avengers: Endgame	US	Anthony Russo, Joe Russo	Walt Disney	574 248
3	Joker	US	Todd Phillips	SF Studios	515 660
4	The Lion King	US/GB	Jon Favreau	Walt Disney	512 231
5	Jagtsæson (Hunting Season)	DK	Tilde Harkamp	Nordisk Film Distr.	473 622
6	Ser du månen, Daniel (Daniel)	DK/NO/SE	N. Oplev, A. Berthelsen	Nordisk Film Distr.	472 559
7	Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney	417 597
8	Green Book	US/CN	Peter Farrelly	Nordisk Film Distr.	415 339
9	A Star Is Born	US	Bradley Cooper	SF Studios	371 893
10	Dronningen (Queen Of Hearts)	DK/SE	May el-Toukhy	Nordisk Film Distr.	333 486

Source: Danmark Statistics / DFI

Top 10 films by admissions in Norway | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	The Lion King	US/GB	Jon Favreau	Walt Disney	618 184
2	Avengers: Endgame	US	Anthony Russo, Joe Russo	Walt Disney	520 151
3	Joker	US	Todd Phillips	SF Norway	446 829
4	Snekker Andersen og den vesle…	NO	Andrea Eckerbom	Nordisk Film Distr.	415 436
5	Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney	387 770
6	Star Wars: Episode IX - The Rise of…	US	J.J. Abrams	Walt Disney	295 959
7	Once Upon a Time... in Hollywood	US/CN/GB	Quentin Tarantino	SF Norway	270 517
8	Askeladden - I Soria Moria slott	NO	Mikkel Brænne Sandemose	Nordisk Film Distr.	257 992
9	Kaptein Sabeltann og den magiske…	NO	M. Aune, R. Sivertsen	Nordisk Film Distr.	250 141
10	Ralph Breaks the Internet	US	Phil Johnston, Rich Moore	Walt Disney	249 151

Source: Film og Kino

Top 10 films by admissions in Finland | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	Joker	US	Todd Phillips	SF Film Finland	402 892
2	Avengers: Endgame	US	Anthony Russo, Joe Russo	Walt Disney	342 893
3	The Lion King	US/GB	Jon Favreau	Walt Disney	333 239
4	Star Wars: Episode IX - The Rise of…	US	J.J. Abrams	Walt Disney	293 849
5	Risto Räppääjä ja pullistelija	FI	Markus Lehmusruusu	Nordisk Film… (1)	288 305
6	Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney	256 032
7	Downton Abbey	GB/US	Michael Engler	Finnkino	229 721
8	The Secret Life of Pets 2	US/FR/JP	C. Renaud, J. del Val	Finnkino	226 488
9	Once Upon a Time... in Hollywood	US/CN/GB	Quentin Tarantino	SF Film Finland	216 938
10	Aladdin	US	Guy Ritchie	Walt Disney	201 350

(1) Nordisk Film Theatrical Distribution

Source: Finnish Film Foundation

Baltics and Central Europe

	Czech Republic	Estonia	Hungary (3)	Latvia	Lithuania	Slovenia	Slovakia
Population 2019 e (million)	10.6	1.3	9.8	1.9	2.8	2.1	5.5
GDP per capita 2019 e (USD)	23 214	23 524	17 463	18 172	19 267	26 170	19 548
Gross box office 2019 (M USD)	114.2	24.4	78.3	16.8	25.2	14.1	41.7
Admissions 2019 (million)	18.3	3.7	15.5	2.7	4.2	2.4	6.5
Average ticket price 2019 (USD)	6.2	6.6	5.1	6.2	6.1	5.8	6.4
Average admissions per capita 2019	1.7	2.8	1.6	1.4	1.5	1.2	1.2
Screens 2019 e (1)	813	74	372	81	82	0	271
Digital screens 2019 (2)	533	89	332	74	62	97	197
Digital 3D screens 2019 (2)	300	44	194	37	30	44	101
Films produced 2019	88	27	18	37	25	31	44
National market shares 2019 e	26.5%	23.0%	6.9%	20.2%	19.2%	6.6%	16.5%

(1) National data source (2) Source: MEDIA Salles (3) 2018 data

Top 10 films by admissions in the Czech Republic | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	Zeny v behu (Women On The Run)	CZ	Martin Horský	CinemArt	1 543 842
2	Avengers: Endgame	US	Anthony & Joe Russo	Falcon	935 915
3	Bohemian Rhapsody	GB INC/US	Bryan Singer	CinemArt	758 076
4	Frozen 2	US	Chris Buck, Jennifer Lee	Falcon	749 784
5	How to Train Your Dragon: The…	US/JP	Dean DeBlois	CinemArt	636 162
6	Joker	US	Todd Phillips	Vertical Entertainment	514 642
7	Poslední aristokratka	CZ/SK	Jirí Vejdelek	Falcon	468 416
8	Once Upon a Time... in Hollywood	US/CN/GB	Quentin Tarantino	Falcon	441 941
9	The Lion King	US/GB	Jon Favreau	Falcon	437 361
10	Spider-Man: Far from Home	US	Jon Watts	Falcon	421 922

Source: Czech Film Fund / Unie Filmovvych Distributoru

Top 10 films by admissions in Slovakia | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	Avengers: Endgame	US	Anthony & Joe Russo	Saturn Entertainment	278 301
2	Trhlina	SK	Peter Bebjak	Continental Film	262 588
3	How to Train Your Dragon: The…	US/JP	Dean DeBlois	CinemaArt	252 102
4	Frozen 2	US	Chris Buck, Jennifer Lee	Saturn Entertainment	238 428
5	Stastny novy rok	SK/CZ	Jakub Kroner	Continental Film	201 858
6	The Lion King	US/GB	Jon Favreau	Saturn Entertainment	195 934
7	Joker	US	Todd Phillips	Continental Film	189 926
8	The Secret Life of Pets 2	US/FR/JP	C. Renaud, J. del Val	CinemaArt	179 081
9	Spider-Man: Far from Home	US	Jon Watts	Itafilm	135 267
10	Zeny v behu (Women On The Run)	CZ	Martin Horský	CinemaArt	131 727

Source: Slovak Film Institute / UFD

Top 10 films by admissions in Lithuania | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	Pats Sau Milijonierius (Fake Millionaire)	LT	Tadas Vidmantas	Stambus planas	204 860
2	Joker	US	Todd Phillips	ACME/Warner Bros.	155 986
3	The Lion King	US/GB	Jon Favreau	Theatrical Film… (1)	154 363
4	How to Train Your Dragon: The…	US/JP	Dean DeBlois	NCG Distr./Universal	134 218
5	Ir visi ju vyrai (And All Their Men)	LT	Donatas Ulvydas	Acme	121 123
6	The Secret Life of Pets 2	US/FR/JP	C. Renaud, J. del Val	NCG Distr./Universal	111 307
7	Frozen 2	US	Chris Buck, Jennifer Lee	Theatrical Film… (1)	99 784
8	Avengers: Endgame	US	Anthony & Joe Russo	Theatrical Film… (1)	92 523
9	Pasmerkti. Kauno Romanas	LT	Ramunas Rudokas	Singing Fish	88 763
10	Once Upon a Time... in Hollywood	US/CN/GB	Quentin Tarantino	ACME/Sony	76 044

(1) Theatrical Film Distribution/WDSMPI

Source: Lithuanian Film Centre

South-Eastern Europe

	BA (3)	Bulgaria	Croatia	Cyprus	Georgia	MK (4)	Romania
Population 2019 e (million)	3.8	7.0	4.1	0.9	0.6	2.1	19.4
GDP per capita 2019 e (USD)	5 742	9 518	13 958	27 720	8 704	5 500	12 483
Gross box office 2019 (M USD)	4.0	28.3	24.0	7.6	1.3	1.7	63.2
Admissions 2019 (million)	1.3	5.0	4.9	0.8	0.3	0.5	13.1
Average ticket price 2019 (USD)	3.1	5.6	4.9	9.0	4.3	3.4	4.8
Average admissions per capita 2019	0.3	0.7	1.2	1.0	0.5	0.2	0.7
Screens 2019 e (1)	34	241	192	47	18	~	432
Digital screens 2019 (2)	32	255	182	40	12	~	414
Digital 3D screens 2019 (2)	~	170	103	14	9	~	230
Films produced 2019	10	24	40	2	7	18	54
National market shares 2019 e	0.2%	9.0%	5.5%	12.6%	0.4%	~	6.2%

(1) National data source (2) Source: MEDIA Salles (3) Bosnia-Herzegovina (4) North Macedonia

Top 10 films by admissions in Romania | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	Avengers: Endgame	US	Anthony & Joe Russo	Forum Film	612 309
2	Frozen 2	US	Chris Buck, Jennifer Lee	Forum Film	579 606
3	Joker	US	Todd Phillips	Vertical Ent.	523 099
4	Fast & Furious Presents: Hobbs & Shaw	US/JP	David Leitch	Ro-Image 2000	430 596
5	The Lion King	US/GB	Jon Favreau	Forum Film	391 839
6	Jumanji: The Next Level	US	Jake Kasdan	Intercomfilm	328 143
7	Aquaman	US	James Wan	Vertical Ent.	323 747
8	Captain Marvel	US	Anna Boden, Ryan Fleck	Forum Film	299 719
9	Maleficent: Mistress of Evil	US/GB/CA	Joachim Rønning	Forum Film	298 759
10	Oh, Ramona!	RO	Cristina Jacob	Jacob Bros	256 115

Source: Centrul National al Cinematografiei

Top 10 films by admissions in Bulgaria | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	The Lion King	US/GB	Jon Favreau	Forum Film	292 149
2	Avengers: Endgame	US	Anthony & Joe Russo	Forum Film	218 863
3	Frozen 2	US	Chris Buck, Jennifer Lee	Forum Film	208 976
4	Fast & Furious Presents: Hobbs & Shaw	US/JP	David Leitch	Forum Film	177 823
5	Star Wars: Episode IX - The Rise of…	US	J.J. Abrams	Forum Film	173 233
6	Aladdin	US	Guy Ritchie	Forum Film	158 921
7	Maleficent: Mistress of Evil	US/GB/CA	Joachim Rønning	Forum Film	142 248
8	How to Train Your Dragon: The…	US/JP	Dean DeBlois	Forum Film	132 936
9	Joker	US	Todd Phillips	Aleksandra	129 976
10	Aquaman	US	James Wan	Aleksandra	107 249

Source: Bulgarian National Film Center

Top 10 films by admissions in Croatia | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	The Lion King	US/GB	Jon Favreau	2iFilm	259 427
2	Joker	US	Todd Phillips	Blitz Film & … (1)	236 587
3	Frozen 2	US	Chris Buck, Jennifer Lee	2iFil	197 900
4	Avengers: Endgame	US	Anthony & Joe Russo	2iFil	192 233
5	Once Upon a Time... in Hollywood	US/CN/GB	Quentin Tarantino	CF	121 229
6	Last Christmas	US/GB	Paul Feig	Editus	115 438
7	How to Train Your Dragon: The…	US/JP	Dean DeBlois	Editus	110 725
8	Spider-Man: Far from Home	US	Jon Watts	CF	100 841
9	Star Wars: Episode IX - The Rise of…	US	J.J. Abrams	2iFilm	99 208
10	Hustlers	US	Lorene Scafaria	Duplicato	88 961

(1) Blitz Film & Video Distribution

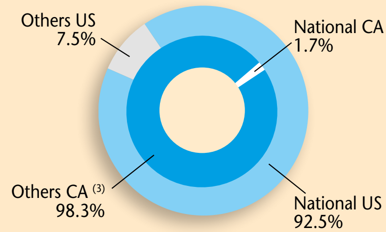
Source: HAVCR (Croatian Audiovisual Centre)

North America

	North America	US	Canada
Population 2019 e (million)	366.8	329.3	37.5
GDP per capita 2019 e (USD)	63 182	65 112	46 213
Gross box office 2019 e (M USD) (1)	11 375.5	10 337.1	1 014.0
Admissions 2019 e (million) (1)	1 241.9	1 128.5	110.7
Average ticket price 2019 e (USD) (2)	9.16	9.16	9.16
Average admissions per capita 2019 e	3.4	3.4	3.0
Screens 2019 e	44 283	41 172	3 111
Digital screens 2019 e	43 681	40 570	3 111
Digital 3D screens 2019 e	16 586	15 136	1 450

(1) North American figures might differ slightly from US and Canada combined as different sources were used: MPA for North America, Comscore for US and Canada. (2) Arithmetic mean.

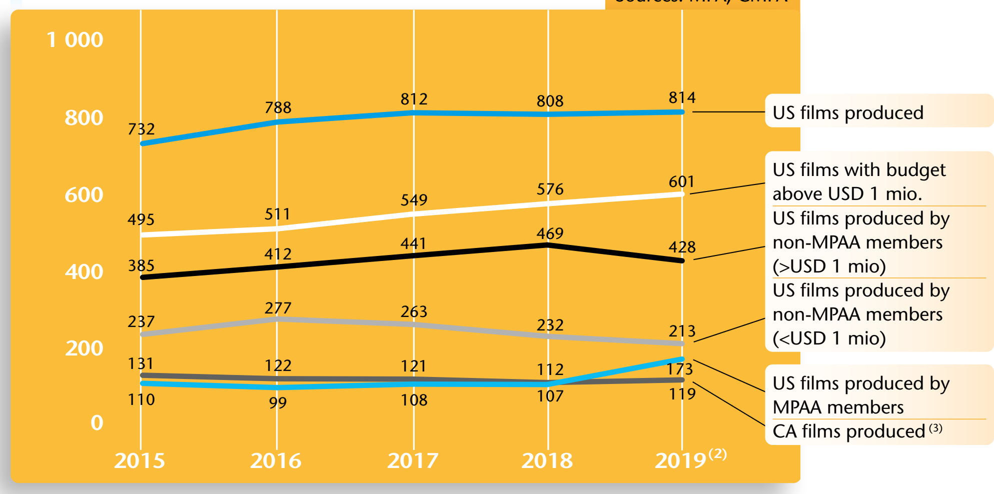
Market shares 2019 e



Number of US (1) and Canadian feature films produced | 2015-2019

In units

Sources: MPA, CMPA



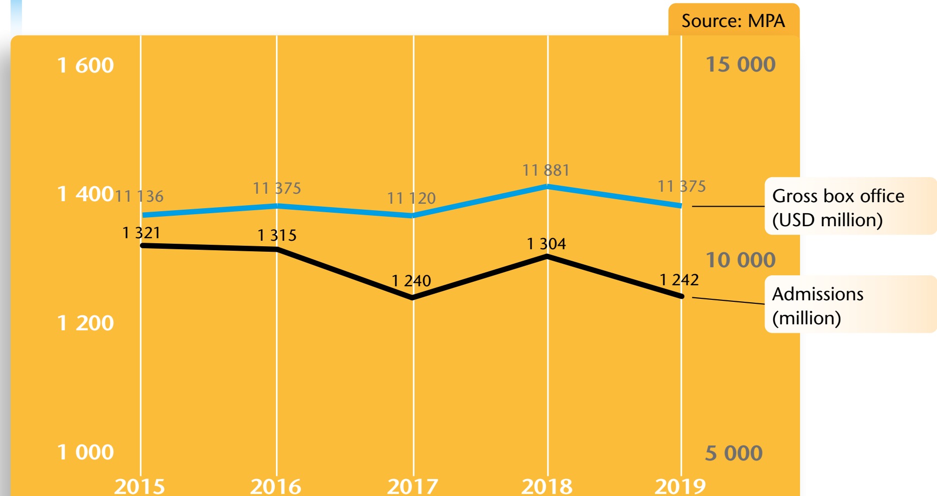
(1) English-language films (including co-productions). The counts include films that were made for or by an online video service, but do not include student films, documentaries, films created for straight-to-DVD or Blue-ray release.

(2) US data are provisional as of February 2020. Figures for 2019 include Netflix, past years include MPA member studios at that time.

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

Admissions and gross box office in the US & Canada | 2015-2019

Source: MPA



Top 20 films by admissions in North America | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	Avengers: Endgame	US	Anthony Russo, Joe Russo	Walt Disney	93 708 843
2	The Lion King	US/GB	Jon Favreau	Walt Disney	59 349 131
3	Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney	47 880 498
4	Toy Story 4	US	Josh Cooley	Walt Disney	47 384 062
5	Captain Marvel	US	Ryan Fleck, Anna Boden	Walt Disney	46 597 144
6	Star Wars: Episode IX - The Rise of…	US	J.J. Abrams	Walt Disney	45 530 288
7	Spider-Man: Far from Home	US	Jon Watts	Sony Pictures	42 634 507
8	Aladdin	US	Guy Ritchie	Walt Disney	38 816 508
9	Joker	US	Todd Phillips	Warner Bros.	36 447 267
10	It Chapter Two	US/CA	Andy Muschietti	Warner Bros.	23 099 697
11	Jumanji: The Next Level	US	Jake Kasdan	Sony Pictures	22 893 712
12	Us	US/CN/JP	Jordan Peele	Universal	19 114 038
13	Fast & Furious Presents: Hobbs & Shaw	US/JP	David Leitch	Universal	18 990 932
14	John Wick: Chapter 3 - Parabellum	US	Chad Stahelski	Lionsgate	18 669 834
15	How to Train Your Dragon: The Hidden…	US/JP	Dean DeBlois	Universal	17 554 531
16	The Secret Life of Pets 2	US/FR/JP	Chris Renaud, J. del Val	Universal	17 243 384
17	Pokémon Detective Pikachu	US/JP	Rob Letterman	Warner Bros.	15 732 025
18	Once Upon a Time... in Hollywood	US/CN/GB	Quentin Tarantino	Sony Pictures	15 402 012
19	Shazam!	US/CA	David Sandberg	Warner Bros.	15 324 417
20	Knives Out	US	Rian Johnson	Lionsgate	13 231 773

Sources: OBS/LUMIERE, Comscore

Distribution and exhibition

After reaching a record high in 2018, the North American GBO declined by 4.3% to USD 11.4 billion in 2019, still the second highest level on record. In contrast, admissions dropped by 4.8% to 1.24 billion, the second lowest level since 1995. Marvel's *Avengers: Endgame* topped the box office charts with 93.7 million tickets sold, becoming the second-highest grossing film of all time in the region, ahead of Disney´s remake of *The Lion King* (59.3 million) and *Frozen 2* (47.9 million). In Canada, the Québécois comedy film *Menteur* topped the list of domestic productions with 672 137 admissions, followed by the French-language drama *Il pleuvait des oiseaux*.

Most North American cinemas – except for drive-in venues – closed their doors from mid-March 2020 due to the COVID-19 outbreak. No reliable box office figures are available as the US majors stopped reporting box office figures during the shutdown. However, Omdia estimated that the North American GBO plummeted by 25.4% in Q1, compared to the previous year. Upcoming theatrical releases were cancelled or postponed while an anticipated online digital release was chosen for selected titles. While a number of US states have already allowed cinemas to reopen in May under certain conditions, the majority of cinema chains are not expected to resume operations before the summer. In Canada, several provinces authorised the reopening of drive-in cinemas in May while dates for brick and mortar theatres are yet to be announced at the time of writing.

Production and funding

In 2019, a total of 814 films with a budget of over USD 1 million were produced in the US, up from 808 in 2018. The increase was led by productions by MPA members (173 films in 2019 compared to 107 the previous year) while the number of productions by non-MPA members dwindled from 701 to 641 films. In Canada, 119 feature films were produced during the fiscal year 2018-2019, up from 112 in 2017-2018, accounting for a total production investment of CAD 337 million (USD 254.0 million), +24.8% on the previous year.

In response to the COVID-19 crisis, the US government passed a stimulus package legislation that, while not specific to the film and audiovisual sector, provides support measures for exhibitors and film professionals. In Canada, the government set up an emergency support fund to mitigate the financial impact of the pandemic on screen-based industries while streaming giant Netflix launched a relief fund to support production workers.

Sources: MPA, CMPA, Telefilm Canada, *Variety*, *Screen International*, *The Hollywood Reporter*, Omdia, Comscore, OBS

Latin America

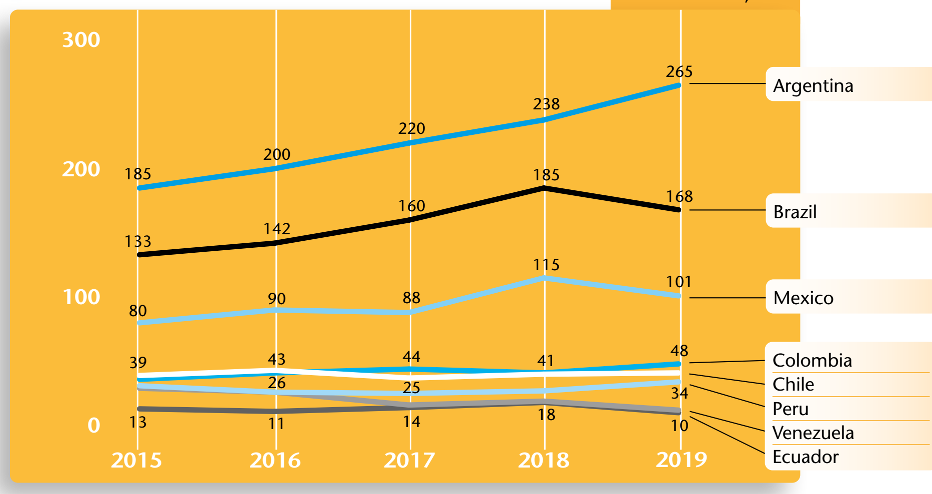
	Argentina	Brazil	Chile	Colombia	Costa Rica
Population 2019 e (million)	45.1	210.0	19.1	50.4	5.1
GDP per capita 2019 (USD)	9 888	8 797	15 399	6 508	12 015
Gross box office 2019 e (M USD)	181.3	708.6	139.7	197.7	42.3
Admissions 2019 (million)	48.7	176.4	29.2	73.1	8.3
Average ticket price 2019 (USD)	3.7	4.0	4.8	2.7	5.1
Average admissions per capita 2019 e	1.1	0.8	1.5	1.5	1.6
Screens 2019	1 001	3 509	518	1 227	170 (1)
Digital screens 2019 e	1 001	3 509	518	1 227	155 (1)
Digital 3D screens 2019 e	574	1833	-	473	9 (1)
National market shares 2019	8.4%	11.8%	1.0% e	3.5%	1.7% e

(1) 2018

Number of national feature films released in Latin America | 2015-2019

In units.

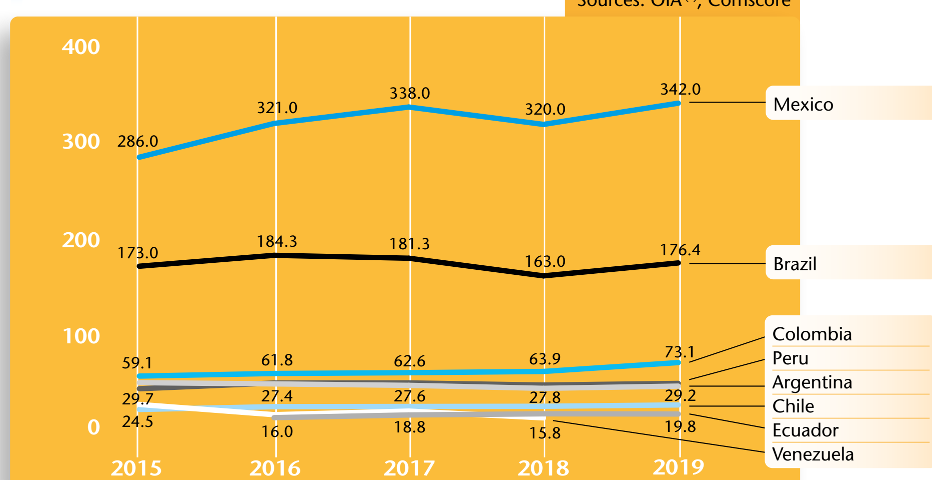
Sources: OIA (*), OBS



Admissions in Latin America | 2015-2019

In millions.

Sources: OIA (*), Comscore



(*) INCAA, ANCINE, CNCA, Colombian Ministry of Culture, ICCA, IMCINE, Peruvian Ministry of Culture, CNAC.

	Dominican Republic	Ecuador	Mexico	Peru	Venezuela
Population 2019 e (million)	10.4	17.3	125.9	32.5	27.5
GDP per capita 2019 e (USD)	8 629	6 249	10 118	7 047	2 548
Gross box office 2019 (M USD)	24.6 (1)	94.4	969.1	172.5	1.7 (1)
Admissions 2019 (million)	6.5 (1)	17.9	342.0	51.5	15.8 (1)
Average ticket price 2019 (USD)	3.8 (1)	5.3	2.8	3.3	0.1 (1)
Average admissions per capita 2019	0.6 (1)	1.0	2.7	1.6	0.5 (1)
Screens 2019	207	324	7 493	678	430
Digital screens 2019 e	207	235	7 493	678	404 (1)
Digital 3D screens 2019 e	40 (1)	142	2 616	-	125 (1)
National market shares 2019	21.0% (1)	0.6%	10.0%	4.4%	5.9% (1)

Mexico

In 2019 theatrical revenues hit an all-time record increasing by 14.5% to MXN 18.8 billion (USD 969.1 million), as attendance rose by 6.9% to reach 342.0 million admissions. Once again US hits took the top 10 slots of the box office chart, topped by *Toy Story 4* (25.0 million admissions). Local productions captured 10% of admissions, led by the comedy *No Manches Frida 2* (6.7 million tickets sold).

The number of Mexican films produced reached a new record high in 2019 to 216, 30 more than in 2018 while the number of domestic releases fell from 115 to 101 films. During the coronavirus outbreak in 2020 Mexico was one of the last territories in the region to close cinemas on March 24. In early June cinema operators published a safety protocol for a partial reopening as the lockdown was eased, as theatres were allowed to reopen in selected areas.

Brazil

GBO takings reached a record level of BRL 2.8 billion (USD 708.6 million), up 13.5% year-on-year while attendance grew by 8.0% to 176.4 million admissions. The upturn was mainly driven by the performance of several US hits, led by box-office winner *Avengers: Endgame* (19.7 million admissions). Brazilian productions captured a market share of 11.8%, down from 15.1% in 2019. Biopic *Nada a perder 2* was the only local film to break into the top 10 list for 2019, taking 6.2 million admissions.

Despite Brazil's representation at major film festivals in recent years, a standstill in film funding from the national film agency (ANCINE) sparked disquiet among local producers, as support programmes for new productions were suspended in 2019. As estimated by Omdia, the COVID-19 crisis in 2020 has resulted in a 13.1% drop in box office revenues in Q1 compared to 2019. With cinemas shut down by March 20 due to the pandemic, operators have launched drive-in movie theatres in a bid to mitigate their losses. In order to support companies impacted by the lockdown, ANCINE has announced plans for an emergency line of credit while the São Paulo Film Commission unveiled Brazil's first rebate scheme to be launched as soon as the pandemic wanes.

Argentina

After declining for three years in a row, cinema-going rebounded in 2019 to 48.7 million admissions (+4.8% year-on-year), while GBO revenues rose by 54.6% to ARS 8.5 billion (USD 181.3 million) due to high inflation rates. National productions generated 8.4% of all admissions in 2019, down from 14.7% in 2018. The highest-grossing domestic title for the year was the comedy *La Odisea de los Giles*, racking up 1.8 million admissions, the only local production among the 10 top films. The number of national films released reached a record high of 265 titles in 2019, 27 more than the previous year.

Given Argentina's precarious economy, the spread of coronavirus in 2020 took a heavy toll on the country's film industry. With all cinemas shut down since mid-March, national films scheduled for theatrical release will be allowed to open on-online on the VOD platform run by the national film agency (INCAA).

Sources: Observatorio Iberoamericano del Audiovisual (OIA), *Screen International, Variety,* Omdia, OBS

Top 10 films by admissions in Argentina | 2019

	Original title	Country of origin	Director	Admissions
1	Toy Story 4	US	Josh Cooley	6 698 596
2	Avengers: Endgame	US	Joe Russo, Anthony Russo	3 933 784
3	The Lion King	US/GB	John Favreau	3 673 204
4	Joker	US	Todd Phillips	2 992 006
5	La Odisea de los Giles	AR/ES	Sebastián Borenstein	1 832 420
6	Ralph Breaks the Internet	US	Phil Johnston, Rich Moore	1 607 537
7	Captain Marvel	US	Ryan Fleck, Anna Boden	1 383 188
8	Aladdin	US	Phil Johnston, Rich Moore	1 367 085
9	The Secret Life of Pets 2	US/FR/JP	Chris Renaud	1 329 926
10	Spider-Man: Far From Home	US	Jon Watts	1 301 429

Sources: OIA, INCAA

Top 10 films by admissions in Brazil | 2019

	Original title	Country of origin	Director	Admissions
1	Avengers: Endgame	US	Joe Russo, Anthony Russo	19 656 467
2	The Lion King	US/GB	John Favreau	16 242 804
3	Joker	US	Todd Phillips	9 746 101
4	Captain Marvel	US	Ryan Fleck, Anna Boden	8 991 777
5	Toy Story 4	US	Josh Cooley	7 955 544
6	Spider-Man: Far From Home	US	Jon Watts	6 555 353
7	Nada a Perder 2	BR	Alexandre Avancini	6 189 465
8	Maleficient: Mistress of Evil	US/GB/CA	Joachim Rønning	5 786 301
9	Aladdin	US	Guy Ritchie	4 788 803
10	Ralph Breaks the Internet	US	Phil Johnston, Rich Moore	4 399 733

Sources: OIA, ANCINE

Top 10 films by admissions in Chile | 2019

	Original title	Country of origin	Director	Admissions
1	Toy Story 4	US	Josh Cooley	3 180 115
2	Avengers: Endgame	US	Anthony Russo, Joe Russo	3 079 897
3	The Lionk King	US/GB	Jon Favreau	2 326 040
4	Joker	US	Todd Phillips	1 572 748
5	Captain Marvel	US	Ryan Fleck, Anna Boden	1 369 372
6	Spider-Man: Far From Home	US	Jon Watts	1 069 739
7	How to Train your Dragon: The Hidden World	US/JP	Dean DeBlois	1 050 390
8	IT Chapter Two	US/CA	Andy Muschietti	864 076
9	Frozen 2	US	Jennifer Lee, Chris Buck	838 650
10	Aladdin	US	Guy Ritchie	815 191

Sources: OBS/LUMIERE, Comscore

Top 10 films by admissions in Colombia | 2019

	Original title	Country of origin	Director	Admissions
1	Avengers: Endgame	US	Anthony Russo, Joe Russo	5 624 282
2	Toy Story 4	US	Josh Cooley	5 151 052
3	The Lionk King	US/GB	Jon Favreau	4 658 502
4	Joker	US	Todd Phillips	3 217 476
5	Captain Marvel	US	Ryan Fleck, Anna Boden	3 049 086
6	Maleficient: Mistress of Evil	US/GB/CA	Joachim Rønning	2 678 232
7	Aquaman	US	James Wan	2 596 546
8	Aladdin	US	Guy Ritchie	2 483 651
9	Frozen 2	US	Jennifer Lee, Chris Buck	2 326 134
10	Spider-Man: Far From Home	US	Jon Watts	1 897 593

Sources: OIA, Colombian Ministry of Culture

Top 10 films by admissions in Costa Rica | 2019

	Original title	Country of origin	Director	Admissions
1	Avengers: Endgame	US	Anthony Russo, Joe Russo	833 436
2	Toy Story 4	US	Josh Cooley	669 532
3	The Lion King	US/GB	Jon Favreau	627 019
4	Joker	US	Todd Phillips	479 650
5	Captain Marvel	US	Ryan Fleck, Anna Boden	403 423
6	Frozen 2	US	Jennifer Lee, Chris Buck	392 905
7	Spider-Man: Far From Home	US	Jon Watts	325 811
8	Maleficent: Mistress Of Evil	US/GB/CA	Joachim Rønning	323 251
9	Aladdin	US	Guy Ritchie	312 846
10	Dumbo	US/GB/AU/CA	Tim Burton	236 880

Sources: OBS/LUMIERE, Comscore

Top 10 films by admissions in Ecuador | 2019

	Original title	Country of origin	Director	Admissions
1	Avengers: Endgame	US	Anthony Russo, Joe Russo	1 855 086
2	The Lion King	US/GB	Jon Favreau	1 175 354
3	Toy Story 4	US	Josh Cooley	1 116 546
4	Captain Marvel	US	Ryan Fleck, Anna Boden	928 618
5	Joker	US	Todd Phillips	795 507
6	Maleficient: Mistress of Evil	US/GB/CA	Joachim Rønning	703 354
7	Aladdin	US	Guy Ritchie	687 031
8	Spider-Man: Far From Home	US	Jon Watts	631 118
9	Frozen 2	US	Jennifer Lee, Chris Buck	671 773
10	IT Chapter Two	US/CA	Andrés Muschietti	535 969

Sources: OIA, ICCA

Top 10 films by admissions in Mexico | 2019

	Original title	Country of origin	Director	Admissions
1	Toy Story 4	US	Josh Cooley	25 200 514
2	Avengers: Endgame	US	Anthony Russo, Joe Russo	24 861 935
3	The Lion King	US/GB	Jon Favreau	18 040 704
4	Joker	US	Todd Phillips	15 062 128
5	Aladdín	US	Guy Ritchie	11 686 177
6	Captain Marvel	US	Ryan Fleck, Anna Boden	11 513 470
7	Spider-Man: Far from Home	US	Jon Watts	10 809 951
8	Frozen 2	US	Chris Buck, Jennifer Lee	9 925 227
9	Maleficent: Mistress of Evil	US/GB/CA	Joachim Rønning	9 368 428
10	How to Train your Dragon: The Hidden World	US/JP	Dean DeBlois	8 046 402

Sources: OIA, IMCINE

Top 10 films by admissions in Peru | 2019

	Original title	Country of origin	Director	Admissions
1	Avengers: Endgame	US	Anthony Russo, Joe Russo	3 860 992
2	The Lion King	US/GB	Jon Favreau	3 447 359
3	Toy Story 4	US	Josh Cooley	2 788 896
4	Joker	US	Todd Phillips	2 384 783
5	Captain Marvel	US	Ryan Fleck, Anna Boden,	1 984 499
6	Aladdin	US	Guy Ritchie	1 954 030
7	Maleficent: Mistress Of Evil	US/GB/CA	Joachim Rønning	1 934 874
8	Jumanji: The Next Level	US	Jake Kasdan	1 580 218
9	Spider-Man: Far From Home	US	Jon Watts	1 533 610
10	Dumbo	US/GB/AU/CA	Tim Burton	1 353 575

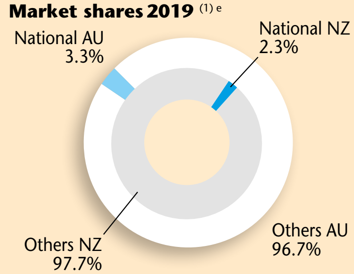
Sources: OIA, Peruvian Ministry of Culture

Australia and New Zealand

	Australia	New Zealand
Population 2019 e (million)	25.6	5.0
GDP per capita 2019 e (USD)	53 825	40 634
Gross box office 2019 (M USD)	854.4	134.6
Admissions 2019 (million)	84.7	16.1
Average ticket price 2019 (USD)	10.1	8.4
Average admissions per capita 2019	3.3	3.2
Screens 2019	2 310	458
Digital screens 2019 e	2 131	458
Digital 3D screens 2019	988	186

(1) By GBO

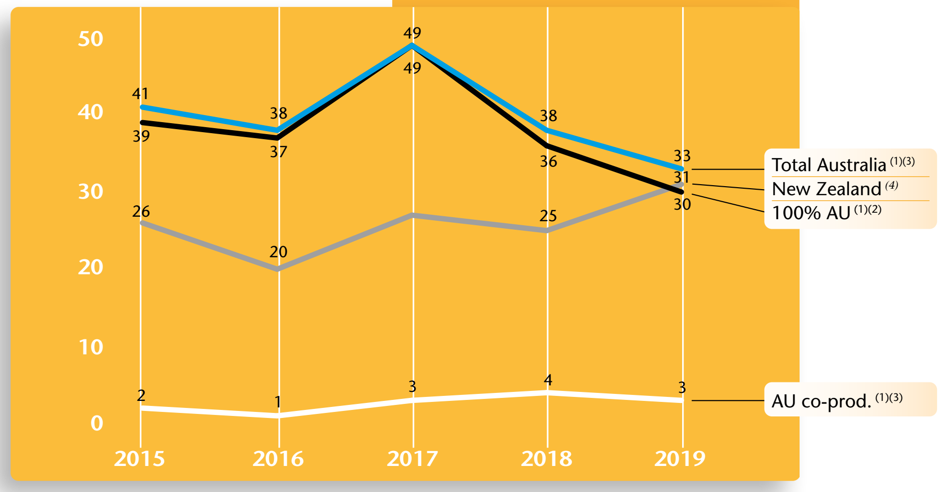
Market shares 2019 (1) e



Number of Australian and New Zealand feature films produced | 2015-2019

In units.

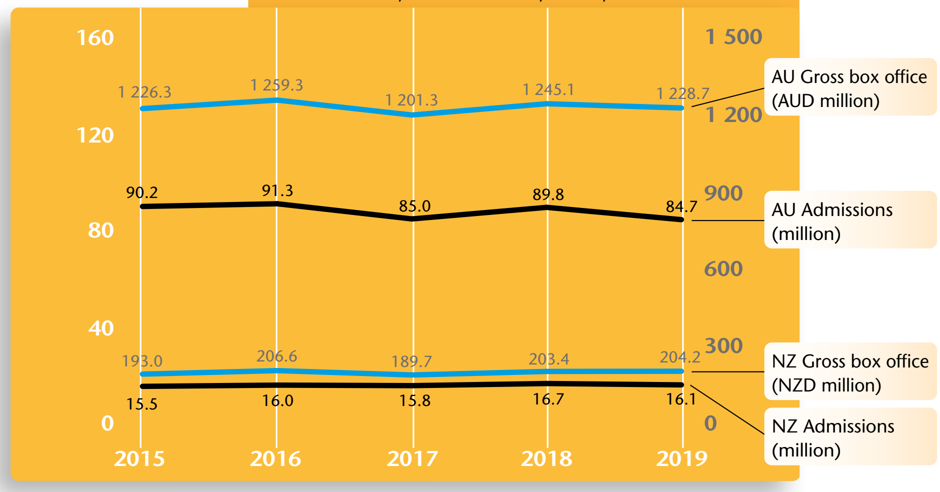
Sources: Screen Australia, NZ Film Commission



(1) Restated series. Films with budgets below AUD 0.5 million are only included if they had a theatrical release or major festival screening. Refers to fiscal year ending that year.
(2) Includes films under Australian creative control that were 100% foreign financed.
(3) Does not include unofficial co-productions.
(4) 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; includes official co-productions included.

Admissions and gross box office in Australia and New Zealand | 2015-2019

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



Top 10 films by admissions in Australia | 2019 e

Estimated admissions based on average ticket price of AUD 14.5.

	Original title	Country of origin	Director	Distributor	Admissions e
1	Avengers: Endgame	US	Anthony & Joe Russo	Walt Disney	5 801 859
2	The Lion King (1)	US/GB	Jon Favreau	Walt Disney	4 414 982
3	Captain Marvel	US	Ryan Fleck, Anna Boden	Walt Disney	2 869 745
4	Toy Story 4	US	Josh Cooley	Walt Disney	2 869 147
5	Joker (1)	US	Todd Phillips	Roadshow	2 794 848
6	Spider-Man: Far from Home	US	Jon Watts	Sony Pictures	2 572 731
7	Aladdin	US	Guy Ritchie	Walt Disney	2 431 120
8	Star Wars: Episode IX - The Rise of... (1)	US	J.J. Abrams	Walt Disney	2 344 836
9	Frozen 2 (1)	US	Chris Buck, Jennifer Lee	Walt Disney	2 244 589
10	Aquaman	US	James Wan	Warner Bros.	1 708 010

(1) Still grossing in 2020.

Source: MPDAA

Top 10 films by admissions in New Zealand | 2019 e

Estimated admissions based on average ticket price of NZD 12.7.

	Original title	Country of origin	Director	Distributor	Admissions e
1	Avengers: Endgame	US	Anthony & Joe Russo	Walt Disney	1 142 808
2	The Lion King	US/GB	Jon Favreau	Walt Disney	1 026 549
3	Captain Marvel	US	Ryan Fleck, Anna Boden	Walt Disney	504 304
4	Aquaman	US	James Wan	Warner Bros.	482 864
5	Spider-Man: Far from Home	US	Jon Watts	Sony Pictures	452 122
6	Toy Story 4	US	Josh Cooley	Walt Disney	428 552
7	Joker	US	Todd Phillips	Walt Disney	386 712
8	Frozen 2 (1)	US	Chris Buck, Jennifer Lee	Roadshow	385 415
9	Rocketman	GB INC/US	Dexter Fletcher	Paramount	385 094
10	Aladdin	US	Guy Ritchie	Walt Disney	384 850

(1) Still grossing in 2020.

Source: MPDA

Distribution and exhibition

Australian cinema attendance fell by 5.7% to 84.7 million admissions in 2019, while the GBO only decreased by 1.3% to AUD 1.23 billion (USD 854.4 million). In New Zealand, admissions declined by 3.4% to 16.1 million, while GBO takings registered a marginal uplift (+0.4%) to NZD 204.2 million (USD 134.6 million), which is the second highest level after 2016. In Australia the market share for local productions slightly decreased to 3.3% of the GBO, while in New Zealand it remained comparatively stable at 2.3%. Disney's *Avengers: Endgame* topped the box office chart in both markets. In Australia the highest grossing domestic film was the sports drama *Ride Like a Girl* while in New Zealand *Daffodils* was the top local title in terms of revenues.

In March 2020, cinemas shut down in both territories due to the COVID-19 outbreak. Omdia estimates that in Australia the crisis resulted in a decline of 7.6% in box office revenues in Q1 compared to 2019. In some Australian states cinemas have reopened in June while in New Zealand they were given the greenlight from mid-May whilst applying anti-infection measures. However, the viability for reopening is challenged by the postponement of many blockbusters as well by restrictions in the number of viewers allowed indoors.

Production and funding

In Australia production volume declined to 33 films in 2019 (5 less than in 2018), while the overall production spend increased by 15% to a total of AUD 299 million (USD 209 million). In New Zealand 31 films were produced in 2019 versus 25 in 2018. The country will soon inaugurate a new film production complex to further boost its popularity as a shooting location for large-scale coproductions.

After production came to a sudden halt due to the pandemic, Australia and New Zealand launched funding programmes to support the industry and issued guidelines to safely resume operations. As New Zealand largely succeeded in stopping the spread of the virus, some local films have resumed shooting in early June, with US production *Avatar 2* set out to restart imminently.

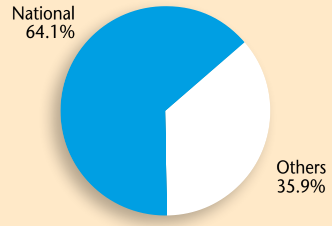
Sources: Screen Australia, MPDAA, MPDA, NZ Film Commission, Stats NZ, *Variety, The Hollywood Reporter,* Omdia, OBS

People's Republic of China

Population 2019 e	1 400.2 million
GDP per capita 2019 e	10 099 USD
Gross box office 2019 e	64.27 bn CNY (9.30 bn USD)
Admissions 2019 e	1.73 billion
Average ticket price 2019 e	37.2 CNY (5.4 USD)
Average admissions per capita 2019 e	1.2
Screens 2018 I 2019 e	60 079 I 69 787
Digital screens 2018 I 2019 e	60 079 I 69 787
Digital 3D screens 2018 I 2019 e	(1) 49 170 I ~

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

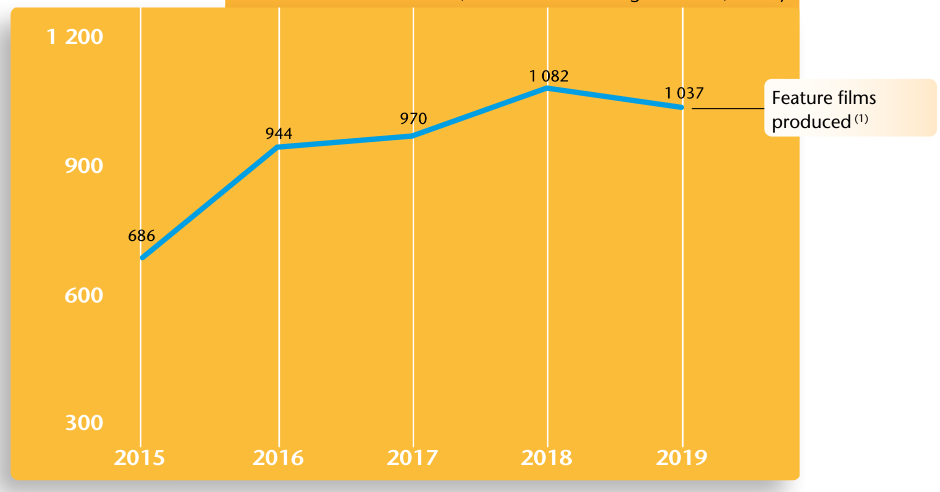
Market shares 2019 (2)



Number of feature films produced in China I 2015-2019 e

In units.

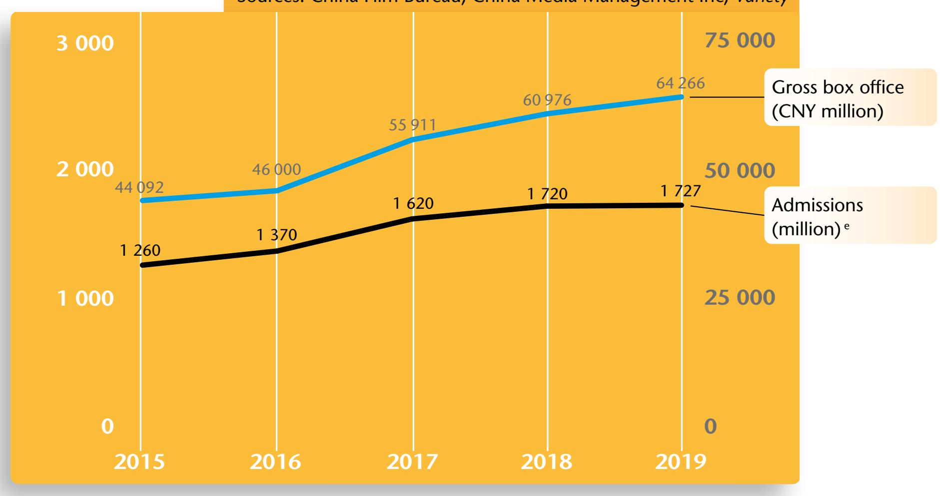
Sources: China Film Bureau, China Media Management Inc, *Variety*



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

Admissions and gross box office in China I 2015-2019 e

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



Top 20 films by admissions in China | 2019

	English Title	Country of origin	Director	Admissions
1	Ne Zha	CN	Yu Yang	137 794 925
2	The Wandering Earth	CN	Frant Gwo	103 301 157
3	Avengers: Endgame	US	Anthony Russo, Joe Russo	86 296 740
4	My People, My Country	CN	Kaige Chen, Hao Ning, … (1)	78 110 749
5	The Captain	CN	Andrew Lau	77 059 234
6	Feng kuang de wai xing ren (Crazy Alien)	CN	Hao Ning	51 783 513
7	The Bravest	CN	Tony Chan	47 282 870
8	Better Days	CN	Derek Tsang	43 435 705
9	Pegasus	CN	Han Han	40 694 235
10	Fast & Furious Presents: Hobbs & Shaw	US	David Leitch	39 684 295
11	Spider-Man: Far from Home	US	Jon Watts	38 791 331
12	The White Storm 2: Drug Lords	HK/CN	Herman Yau	35 974 977
13	Bumblebee	US/CN	Travis Knight	31 510 992
14	Bi bei shang geng bei shang de gu shi	TW	Gavin Lin	30 792 466
15	The Climbers	CN	Daniel Lee	29 447 814
16	Captain Marvel	US	Ryan Fleck, Anna Boden	27 609 640
17	Godzilla: King of the Monsters	US/JP/CA/MX	Michael Dougherty	26 294 882
18	Sheep Without a Shepherd	CN	Sam Quah	26 085 749
19	Looking Up	CN	Chao Deng, Baimei Yu	25 598 449
20	Ip Man 4: The Finale	HK/CN	Wilson Yip	23 627 993

(1) Kaige Chen, Hao Ning, Yibai Zhang, Zheng Xu, Hu Guan, Muye Wen, Xiaolu Xue.

Source: OBS/LUMIERE, Comscore

Distribution and exhibition

In 2019 Chinese theatrical takings hit a new all-time record, reaching CNY 64.3 billion (USD 9.3 billion) up 5.4% on 2018, as attendance increased by 0.4% to 1.73 billion admissions. Domestic productions accounted for 64.1% of box office receipts, up from 62.2% in 2018, driven by the successful performance of several Chinese blockbusters, representing 8 out of the 10 top-earning films. Animated feature *Ne Zha* topped the 2019 chart with 137.8 million tickets sold, followed by domestic sci-fi film *The Wandering Earth* (103.3 million). *Avengers: Endgame*, the highest-grossing US title for the year, came in third place with 86.3 million admissions.

In 2020, China was the first country to close cinemas in late January due to the COVID-19 outbreak, leading to a full shutdown on February 3. In March, a small number of sites reopened, only to close again a few days later amid concerns of a second wave of infection. On May 8, Chinese authorities published guidelines allowing cinemas to reopen, operating at reduced capacity and following a strict prevention protocol. However, despite the formal greenlight, the majority of screens remain closed at the time of writing. Closure has had a devastating impact on theatrical revenues, determining an estimated slump of 88.0% of GBO receipts in Q1 versus the same period in 2019. In turn, quarantine measures resulted in a boom of the home entertainment sector, with a handful of films skipping theatrical release and turning directly to streaming platforms.

Production and funding

A total of 1 037 films were produced in China in 2019, down from 1 082 titles in 2018. Sustained by a growing consumer demand, the local animation industry has undergone rapid development in recent years, and 51 animated features were produced in 2019. Amid rampant political tensions linked to the trade issues between China and the United States, talks over film quotas and revenue-sharing for Hollywood studios got stuck after two years of negotiations.

With the COVID-19 crisis, Chinese film and audiovisual productions came to a halt in January. The shutdown took a heavy toll on the local film and TV industry, with more than 5 000 companies disbanded by April. Film shoots gradually resumed at the end of March, under strict health guidelines. In order to support the film industry, local authorities have announced a series of support measures, including subsidies and tax incentives.

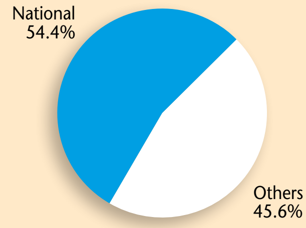
Sources: China Bureau of Film, *Variety*, *The Hollywood Reporter*, Omdia, OBS, Comscore

Japan

Population 2019 e	126.2 million
GDP per capita 2019 e	40 847 USD
Gross box office 2019	261.2 bn JPY (2.4 bn USD)
Admissions 2019	194.9 million
Average ticket price 2019	1 340 JPY (12.3 USD)
Average admissions per capita 2019	1.5
Screens 2018 I 2019	3 561 I 3 583
Digital screens 2018 I 2019	3 494 I 3 518
Digital 3D screens 2018 I 2019	1 232 I 1 230

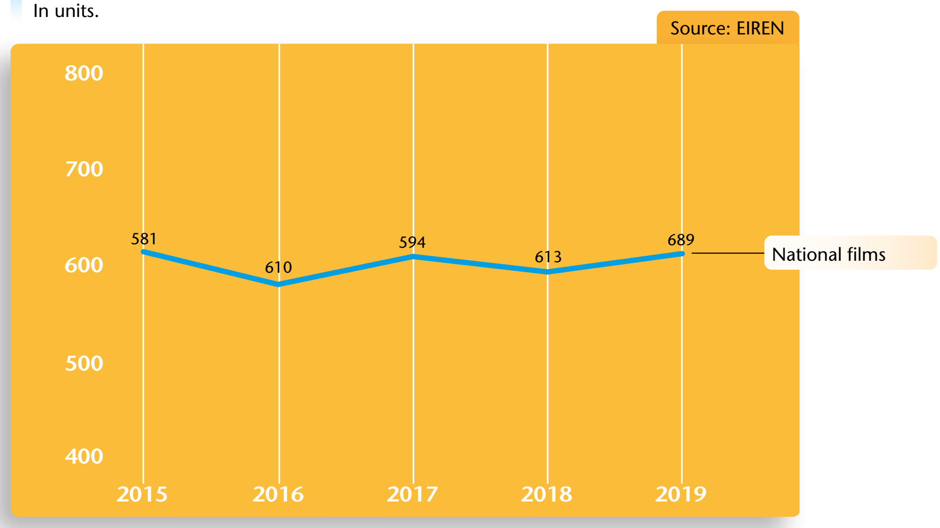
(1) By GBO

Market shares 2019 e (1)

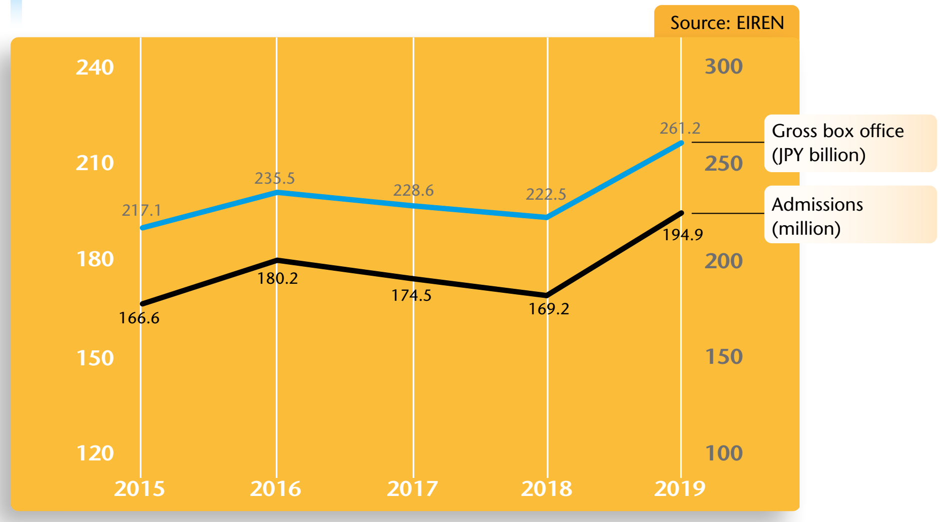


Number of Japanese feature films released I 2015-2019

In units.



Admissions and gross box office in Japan I 2015-2019



Top 20 films by admissions in Japan | 2019 e

Estimated admissions based on average ticket price of JPY 1 340.

	English Title	Country of origin	Director	Distributor	Admissions
1	Weathering With You	JP	Makoto Shinkai	Toho	10 492 513
2	Frozen II	US	Chris Buck, Jennifer Lee	Walt Disney	9 544 754
3	Aladdin	US	Guy Ritchie	Walt Disney	9 074 606
4	Toy Story 4	US	Josh Cooley	Walt Disney	7 529 833
5	Detective Conan: The Fist of Blue Sapphire	JP	Tomoka Nagaoka	Toho	6 992 521
6	The Lion King	US/GB	Jon Favreau	Walt Disney	4 977 601
7	Fantastic Beasts: The Crimes of Grindelwald	GB INC/US	David Yates	Warner Bros.	4 902 974
8	Avengers: Endgame	US	Anthony & Joe Russo	Walt Disney	4 567 154
9	Kingdom	JP	Shinsuke Sato	Toho/Sony	4 276 110
10	One Piece : Stampede	JP	Takashi Otsuka	Toei	4 141 782
11	Doraemon: Nobita's Chronicle of the…	JP	S. Yakuwa, J.-beom Lee	Toho	3 746 260
12	Joker	US	Todd Phillips	Warner Bros.	3 746 260
13	Masquerade Hotel	JP	Masayuki Suzuk	Toho	3 462 679
14	Dragonball Super - Broly	JP	Tatsuya Nagamine	Toei	2 985 068
15	Ralph Breaks the Internet	US	Rich Moore, P. Johnston	Walt Disney	2 880 590
16	Fly me to the Saitama	JP	Hideki Takeuchi	Toei	2 805 964
17	Hit Me Anyone One More Time	JP	Koki Mitani	Toho	2 716 412
18	Spider-Man: Far From Home	US	Jon Watts	Sony	2 283 577
19	Fast & Furious Presents: Hobbs & Shaw	US/JP	David Leitch	Towa	2 283 577
20	Pokémon Detective Pikachu	US/JP	Rob Letterman	Toho	2 246 263

Sources: EIREN, OBS

Distribution and exhibition

2019 marked a new record high for the Japanese box office as theatrical revenues surged by 17.4% to JPY 261.2 billion (USD 2.4 billion). Similarly, cinema attendance went up 15.2% on 2018 to 194.9 million tickets sold, the highest level since 1971. The hike in cinema-going was the result the strong performance of several titles, four of which individually grossed more than JPY 10 billion (USD 91.8 million). The national market share remained stable, as local features took 54.4% of box office revenues. Among the ten highest-earning films in 2019, six were animated features, led by the domestic title *Weathering With You* ranking first with 10.5 million admissions. Other domestic hits included the latest instalments of the *Detective Conan* and *Doraemon* animation franchises as well as the live-action film *Kingdom*. Disney took the box office by storm with three titles in the top 5 slots: *Frozen 2* (9.5 million admissions), *Aladdin* (9.1 million) and *Toy Story 4* (7.5 million).

As the COVID-19 crisis emerged in 2020, the country's exhibition circuit stopped in mid-April, a setback particularly threatening for small arthouse cinemas. Fears over the epidemic had taken a toll on cinema attendance even before the shutdown, resulting in an estimated decline of 36.7% in box office receipts in Q1, compared to 2019. In selected areas, theatres began to resume operations in May, implementing safety and social distancing measures. The chains that have reopened are showing old releases and classics, as new titles have been pushed back to avoid poor box office returns.

Production and funding

The number of national film releases jumped to a record high in 2019, to a total of 689 titles, compared to 613 in 2018. According to the Association of Japanese Animation (AJA), the local animation industry increased for the ninth consecutive year in 2018 to a total value of JPY 2.18 trillion (USD 20 billion), driven by continued growth in overseas sales. For the first time in 2019, Japan launched a pilot production incentive scheme, offering a rebate of up to 20% of qualifying spend to foreign film and TV productions shooting in the country.

In 2020, while the government unveiled support measures for small and medium-sized companies hit by the pandemic, no specific plans for the film industry were announced so far. Meanwhile, national film celebrities have launched crowdfunding initiatives to support exhibitors, while tech giant Sony set up a USD 100 million relief fund to support workers affected by the pandemic, including an envelope aimed at those employed in the entertainment industry.

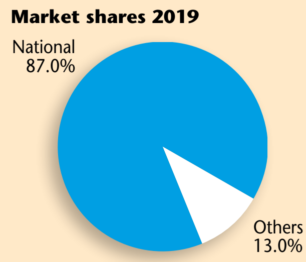
Sources: EIREN, AJA, *Variety, The Hollywood Reporter,* Omdia

India

Population 2019 e	1 351.8 million
GDP per capita 2019 e	2 172 USD
Gross box office 2019 e	115.2 bn INR (1.6 bn USD)
Admissions 2019 e	1.56 billion
Average ticket price 2019 e	70.1 INR (1.0 USD)
Average admissions per capita 2019 e	1.2
Screens 2018 I 2019 e	~ I ~
Digital screens 2018 e I 2019 e (1)	9 601 I 9 527
3D screens 2018 I 2019 e	1 183 (2) I ~

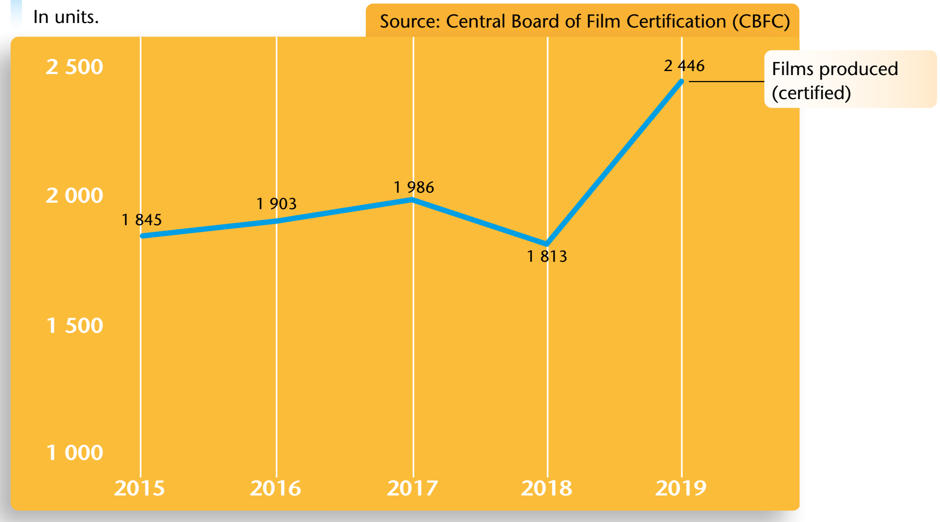
(1) Includes e-cinema screens. (2) 2016

Market shares 2019



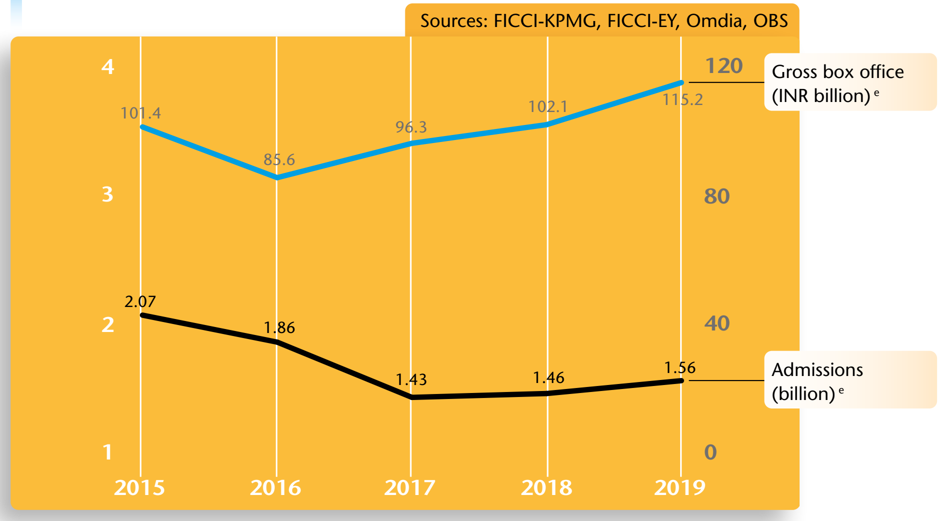
Number of Indian feature films certified (1) I 2015-2019

In units.



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

Admissions and gross box office in India I 2015-2019 (1)



(1) Restated data series.

Top 10 Bollywood films by gross box office in India | 2019

GBO calculated using an average exchange rate of 1 USD = INR 70.43.

	Original title	Country of origin	Director	Gross box office (in USD)
1	War	IN	Siddharth Anand	45 283 730
2	Kabir Singh	IN	Sandeep Reddy Vanga	39 621 840
3	Uri - The Surgical Strike	IN	Aditya Dhar	34 754 551
4	Bharat	IN	Ali Abbas Zafar	29 813 213
5	Housefull 4	IN	Sajid Samji, Farhad Samji	29 334 743
6	Good Newwz	IN	Raj Mehta	28 642 671
7	Mission Mangal	IN	Jagan Shakti	28 503 118
8	Total Dhamaal	IN	Indra Kumar	21 972 577
9	Kesari	IN	Anurag Singh	21 787 455
10	Chhichhore	IN	Nitesh Tiwari	21 411 515

Source: Koimoi.com

Top 10 US films by gross box office in India | 2019

	Original title	Country of origin	Director	Gross box office (in USD)
1	Avengers: Endgame	US	Anthony Russo, Joe Russo	44 215 200
2	The Lion King	US/GB	Jon Favreau	21 910 633
3	Spider-Man: Far From Home	US	Jon Watts	13 052 876
4	Fast & Furious Presents: Hobbs & Shaw	US/JP	David Leitch	12 098 623
5	Joker	US	Todd Phillips	11 739 167
6	Captain Marvel	US	Ryan Fleck, Anna Boden	11 613 255
7	Jumanji: The Next Level	US	Jake Kasdan	9 155 378
8	Aladdin	US	Guy Ritchie	7 021 113
9	Annabelle Comes Home	US	Gary Dauberman	4 566 994
10	Godzilla: King Of The Monsters	US/JP/CN/MX	Michael Dougherty	3 857 637

Source: Comscore

Distribution and exhibition

2019 saw Indian theatrical revenues increase by 12.8% on the previous year to INR 115.2 billion (USD 1.6 billion), due to the success of several Hindi-language productions (Bollywood) and US blockbusters. Once again national productions dominated the box office in 2019 with an 87% market share. Hindi titles registered the highest revenues on record generating 43% of total box office receipts, despite representing only 14% of films released. The top 10 Hindi films accounted for 52% of the Hindi box office, led by the action thriller *War* (USD 45.3 million). Indian films in other regional languages accounted for 44% of box office takings, compared to 13% for US and international titles. Superhero movie *Avengers: Endgame* became the highest grossing Hollywood title of all time in India taking USD 44.2 million at the box office.

As cinemas were shut nationwide in Mid-March 2020 due to the pandemic, many titles scheduled to open were postponed. This resulted in a reported decline of 29.1% in box office revenues for Q1, compared to the same period in 2019. As infection fears persist, there is still no indication of a reopening date for theatres. In a move that sparked debate, some producers bypassed the theatrical window securing direct to streaming deals for major movies.

Production and funding

According to the Central Board of Film Certification the number of national feature films certified for release peaked at 2 446 films in 2019, up from 1813 in 2018. In 2019, India announced plans for production incentives aimed to boost international co-productions and attract foreign film shoots. However, details of the implementation of these schemes have not been unveiled yet.

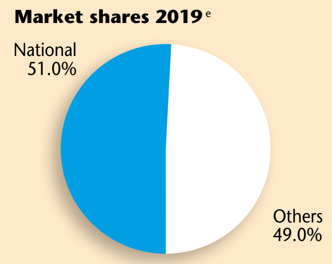
In 2020, all productions came to a halt as the country was ordered into lockdown. While there is no clear picture as to when filming will start again nationwide, Hindi-language productions (Bollywood) will resume operations in June. Film bodies have issued a series of guidelines covering both production and exhibition activities, including social distancing and sanitisation measures as well as provisions for online ticketing.

Sources: CBFC, FICCI, Ernst & Young (EY), *Variety, Screen International, The Hollywood Reporter, The Financial Times, The Financial Express*, OBS

South Korea

Population 2019 e	51.8 million
GDP per capita 2019 e	31 431 USD
Gross box office 2019	1 914.0 bn KRW (1.6 bn USD)
Admissions 2019	226.7 million
Average ticket price 2019	8 442.9 KRW (7.2 USD)
Average admissions per capita 2019	4.2
Screens 2018 I 2019	2 937 I 3 079
Digital screens 2018 I 2019	~ I ~
Digital 3D screens 2018 I 2019	~ I ~

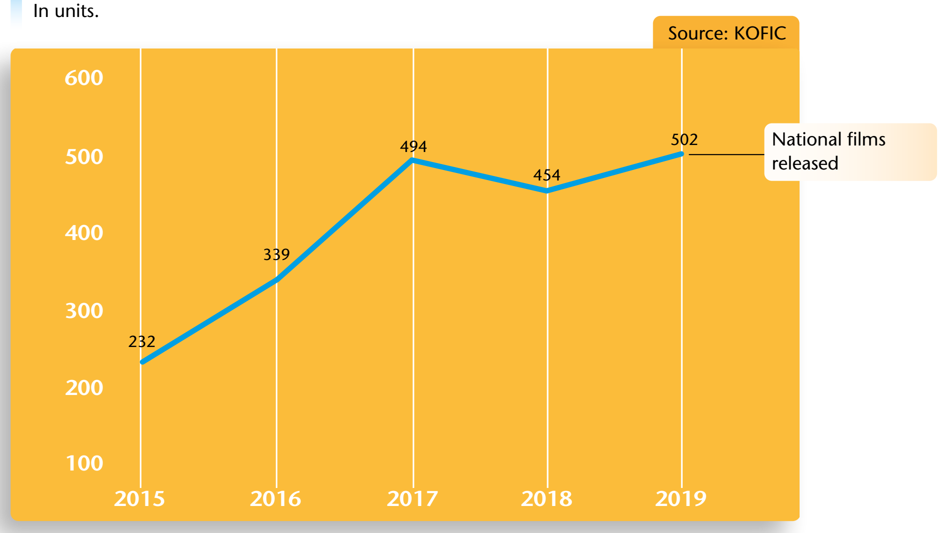
Market shares 2019 e



Number of Korean feature films released I 2015-2019

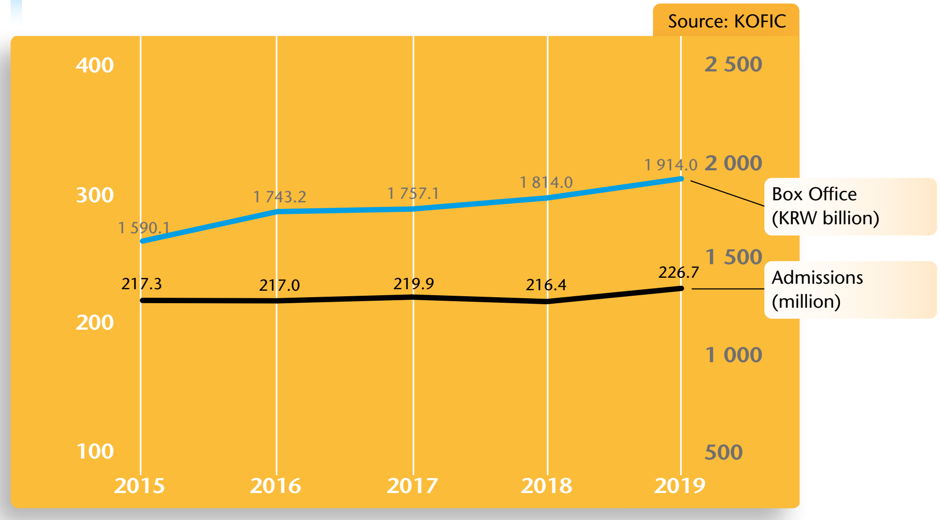
In units.

Source: KOFIC



Admissions and gross box office in South Korea I 2015-2019

Source: KOFIC



Top 20 films by admissions in South Korea | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	Extreme Job	KR	Byeong-heon Lee	CJ Entertainment	16 265 618
2	Avengers: Endgame	US	Anthony Russo, Joe Russo	Walt Disney	13 934 592
3	Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney	13 369 079
4	Aladdin	US	Guy Ritchie	Walt Disney	12 552 283
5	Parasite	KR	Bong Joon Ho	CJ Entertainment	10 085 275
6	Exit	KR	Sang Geun Lee	CJ Entertainment	9 426 011
7	Spider-Man: Far from Home	US	Jon Watts	Walt Disney	8 021 145
8	Ashfall	KR	B.-seo Kim, H.-jun Lee	CJ Entertainment	6 290 773
9	Captain Marvel	US	Ryan Fleck, Anna Boden	Walt Disney	5 802 810
10	Joker	US	Todd Phillips	Warner Bros.	5 247 874
11	The Battle: Roar to Victory	KR	Shin-yeon Won	Showbox/Big... (1)	4 787 538
12	The Lion King	US/GB	Jon Favreau	Walt Disney	4 743 264
13	Bad Guys: Reign of Chaos	KR	Yong-ho Son	CJ Entertainment	4 573 902
14	Kim Ji-Young: Born 1982	KR	Kim Do-Young	Lotte Entertainment	3 678 156
15	Fast & Furious Presents: Hobbs & Shaw	US/JP	David Leitch	Universal	3 657 536
16	Toy Story 4	US	Josh Cooley	Walt Disney	3 400 034
17	Money	KR	Noo-ri Park	Showbox	3 389 125
18	The Gangster, the Cop, the Devil	KR	Won-Tae Lee	K-Movie	3 364 712
19	Crazy Romance	KR	Kim Han-Kyul	Contents Panda	2 924 563
20	MAL·MO·E: The Secret Mission	KR	Yu-na Eom	Lotte Entertainment	2 812 877

(1) Showbox/Big Stone/W-Pictures.

Source: KOFIC

Distribution and exhibition

South Korean cinema attendance hit an all-time record in 2019, as admissions increased by 4.8% on the previous year to 226.7 million tickets sold. Box office takings also soared to KRW 1 914.0 billion (USD 1.64 billion), up 5.5% on 2018. The box office chart was dominated by a mix of US and local big-budget films, with top 10 titles accounting for 44.6% of total admissions. Five films passed the 10 million admissions benchmark, led by the domestic comedy *Extreme Job* (16.3 million admissions) which became the second most viewed national film of all time. Other successful Korean films included the 2019 Palme d'Or recipient *Parasite*, ranking fifth with 10.1 million ticket sold, and the action comedy *Exit* (9.4 million). Disney took the lion's share at the box office, with five titles among the top 10 films, led by superhero hit *Avengers: Endgame* (13.9 million admissions). Domestic productions captured a market share of 51.0%, in line with previous years.

While the closing of cinemas was not ordered nationwide, many exhibitors decided to shut down during the COVID-19 crisis, as attendance started to taper off as early as January. According to the Korean Film Council (KOFIC), admissions only totalled 1.83 million in March 2020, compared to 14.7 million in March 2019. Omdia estimates that the box office revenues plunged by 53.1% in Q1 compared to the same period in 2019. Cinemas slowly started to reopen at the end of April, putting in place social distancing measures and contactless operations. After pushing back many releases, distributors are now hoping for a return to normal for the summer.

Production and funding

Production volume increased in 2019 to an unprecedented total of 502 local films released during the year, 48 more than in 2018. South Korea announced a new development strategy for the film industry, including the launch of a fund for small and mid-sized production companies and the extension of tax credits. The country also set out to establish a joint organisation to foster ties with film agencies in the Southeast Asian region.

In response to the COVID-19 outbreak, the government unveiled measures to support the film industry, including subsidies for marketing costs of cancelled releases, financial aid for productions halted during the pandemic and the exemption for multiplexes from contributing to the film development fund. In a bid to draw audiences back into cinemas, KOFIC has also announced the distribution of 1.3 million discount coupons for the purchase of film tickets.

Sources: KOFIC, *Variety, Screen International, The Hollywood Reporter*, Omdia, OBS

Other Asia

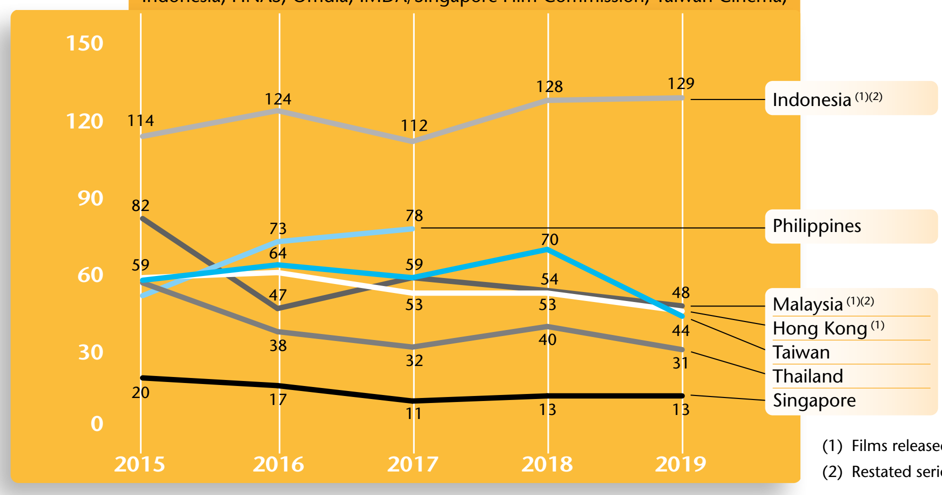
	Hong Kong	Indonesia	Malaysia	Philippines	Singapore	Taiwan	Thailand
Population 2019 e (million)	7.6	267.0	32.8	108.3	5.7	23.6	67.9
GDP per capita 2019 e (USD)	49 334	4 164	11 137	3 294	63 987	24 828	7 792
Gross box office 2019 e (M USD)	245.4	326.4	260.7	218.0 (2)	128.6	261.0	176.6 (1)
Admissions 2019 e (million)	24.4	111.4	77.8	85.01 (2)	18.5	34.8	38.5 (1)
Average ticket price 2019 e (USD)	10.1	2.9	3.4	2.6 (2)	7.0	7.5	4.6 (1)
Average admissions per capita 2019 e	3.2	0.4	2.4	0.8 (2)	3.3	1.5	0.6 (1)
Screens 2019 e	323	2 110	1 134	1 069	297	972	1 321
Digital screens 2019 e	323	2 110	1 134	1 069	297	972	1 321
3D screens 2019 e	245 (1)	1 253	299 (1)	171 (1)	97 (1)	454 (1)	430 (1)
National market shares 2019 e	13.2%	46.6%	14.9%	~	1.4% (3)	6.7%	~

(1) 2018 (2) 2017 (3) By GBO

Number of feature films produced in selected Asian countries | 2015-2019

In units.

Sources: Hong Kong Box Office, Pusbangfilm, Indonesian Film Board, Film Indonesia, FINAS, Omdia, IMDA/Singapore Film Commission, Taiwan Cinema,

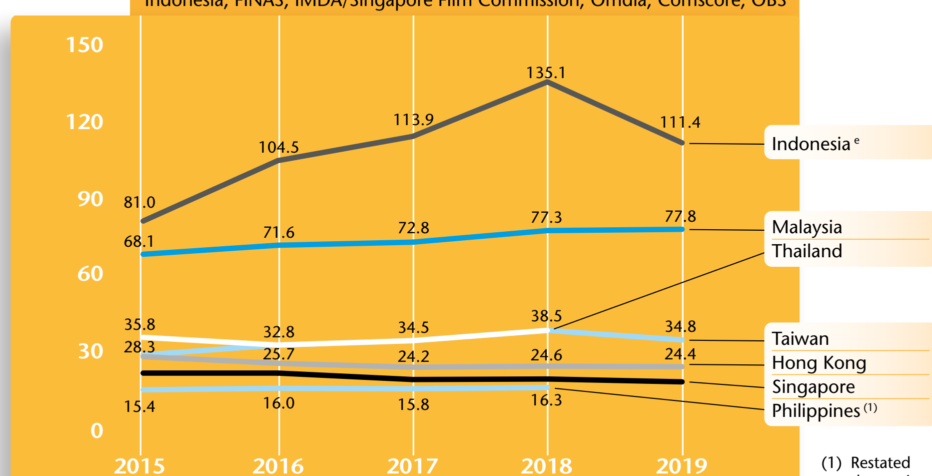


(1) Films released.
(2) Restated series.

Admissions in selected Asian countries | 2015-2019 e

In million.

Sources: Hong Kong Box Office, Pusbangfilm, Indonesian Film Board, Film Indonesia, FINAS, IMDA/Singapore Film Commission, Omdia, Comscore, OBS



(1) Restated data series.

Top 10 films by admissions in Hong Kong | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	Avengers: Endgame	US	Anthony Russo, Joe Russo	Walt Disney	1 688 326
2	Toy Story 4	US	Josh Cooley	Walt Disney	1 121 479
3	Spider-Man: Far from Home	US	Jon Watts	Sony Pictures	960 828
4	Joker	US	Todd Phillips	Warner Bros.	873 274
5	Aladdin	US	Guy Ritchie	Walt Disney	861 404
6	Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney	831 959
7	Alita: Battle Angel	US/CA/JP	Robert Rodriguez	20th Century Fox	539 582
8	The Lion King	US/GB	Jon Favreau	Walt Disney	528 655
9	Captain Marvel	US	Ryan Fleck, Anna Boden	Walt Disney	489 629
10	Fast & Furious Presents: Hobbs & Shaw	US/JP	David Leitch	Universal	466 159

Sources: OBS/LUMIERE, Comscore

Top 10 films by gross box office in Singapore | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	Avengers: Endgame	US	Anthony Russo, Joe Russo	Walt Disney	1 598 251
2	Captain Marvel	US	Ryan Fleck, Anna Boden	Walt Disney	938 578
3	Jumanji: The Next Level	US	Jake Kasdan	Sony Pictures	888 152
4	Spider-Man: Far from Home	US	Jon Watts	Sony Pictures	866 866
5	Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney	769 197
6	Ip Man 4: The Finale	HK/CN	Wilson Yip	Shaw	694 464
7	Joker	US	Todd Phillips	Warner Bros.	579 264
8	Aladdin	US	Guy Ritchie	Walt Disney	562 311
9	Fast & Furious Presents: Hobbs & Shaw	US/JP	David Leitch	Universal	498 273
10	The Lion King	US/GB	Jon Favreau	Walt Disney	476 184

Sources: OBS/LUMIERE, Comscore

Distribution and exhibition

Based on available data for 2019, cinema attendance declined in several Asian markets, including Hong Kong (-1.0% to 24.4 million admissions), Indonesia (-17.5% to 111.4 million admissions), Singapore (-5.6% to 18.4 million admissions) and Taiwan (-9.6% to 34.8 million). In contrast, admissions slightly increased in Malaysia to 77.8 million tickets sold. In Hong Kong and Singapore, US films dominated the box office chart, topped by superhero hit *Avengers: Endgame*. In both markets, no domestic production ranked among the 10 top-grossing films. In turn, in Malaysia a number of national titles made the top 10 list, including the computer-animated films *Ejen Ali: The Movie, BoBoiBOy Movie 2* and *Upin & Ipin: The Lone Gibbon Kris*.

As the 2020 coronavirus outbreak ravaged the exhibition sector in the region, the majority of cinemas shut down in March across all territories. Following the easing of the lockdown restrictions, individual countries have gradually authorised the reopening of cinemas in selected areas from May onwards, operating at reduced capacity and following strict preventive measures.

Production and funding

Production volume decreased year-on-year in several Asian markets: Hong Kong (-7 films), Malaysia (-6 films), Taiwan (-26 films) and Thailand (-9 films). In turn, the number of films produced remained stable in Singapore. Malaysia announced a new support scheme to help local directors shoot multiple linguistic versions of a film, in a bid to increase their attractiveness to foreign audiences. In 2019, Singapore launched a grant programme to boost coproductions with Southeast Asia, providing up to SGD 250 000 (USD 183 000) in funding.

As film productions were halted due to the COVID-19 pandemic, several countries issued stimulus packages to cushion the impact of the crisis on the sector. Among others, Hong Kong launched a subsidy for cinema screens while Singapore and Thailand established a relief fund to support local freelancers.

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

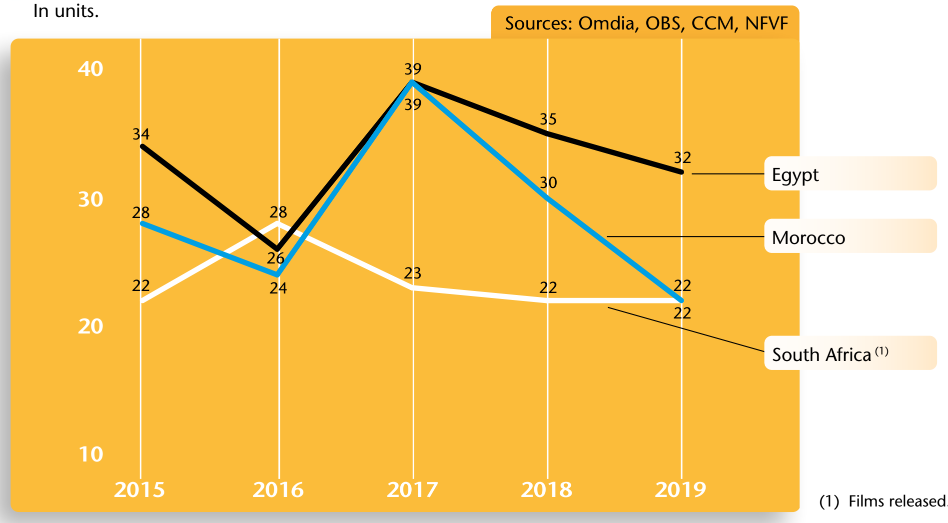
Africa

	Egypt	Morocco	South Africa
Population 2019 e (million)	99.2	35.6	58.8
GDP per capita 2019 e (USD)	3 047	3 345	6 100
Gross box office 2019 e (in M USD)	29.2	9.7	92.2
Admissions 2019 e (million)	6.1	1.9	18.5
Admissions per capita 2019 e	0.1	0.1	0.3
Average ticket price 2019 e (in USD)	4.8	5.1	5.0
Screens 2019 e	289	77	776
Digital screens 2019 e	289	72	776
National market shares 2019 e	~	26.0%	5.0% (1)

(1) By GBO

Number of feature films produced in selected African countries | 2015-2019

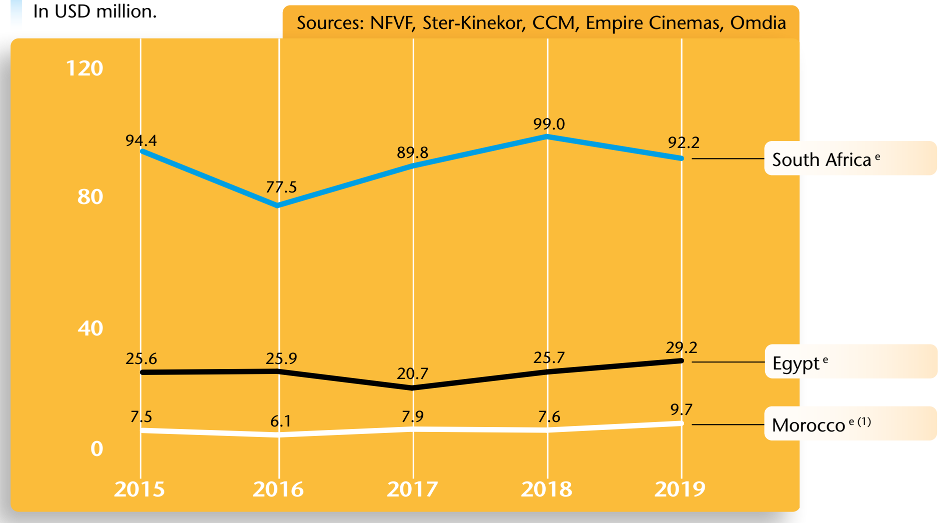
In units.



(1) Films released.

Gross box office in selected African countries | 2015-2019

In USD million.



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

Top 10 films by gross box office in South Africa | 2019

	Original title	Country of origin	Director	Gross Box Office (in USD)
1	The Lion King	US/GB	Jon Favreau	8 374 787
2	Avengers: Endgame	US	Anthony Russo, Joe Russo	7 221 749
3	Jumanji: The Next Level	US	Jake Kasdan	4 910 319
4	Frozen 2	US	Chris Buck, Jennifer Lee	3 880 654
5	Captain Marvel	US	Ryan Fleck, Anna Boden	3 418 379
6	Aladdin	US	Guy Ritchie	3 011 787
7	Fast & Furious Presents: Hobbs & Shaw	US/JP	David Leitch	3 011 787
8	Spider-Man: Far from Home	US	Jon Watts	2 444 156
9	John Wick: Chapter 3 - Parabellum	US	Chad Stahelski	1 987 634
10	How to Train Your Dragon: The Hidden World	US/JP	Dean DeBlois	1 861 621

Source: NFVF

Top 10 films by admissions in Morocco | 2019

	Original title	Country of origin	Director	Admissions
1	Messaoud, Saida et Saadane	MA	Brahim Chkiri	169 947
2	Joker	US	Todd Phillips	161 477
3	The Lion King	US/GB	Jon Favreau	107 468
4	Aladdin	US	Guy Ritchie	70 781
5	Avengers: Endgame	US	Anthony Russo, Joe Russo	66 975
6	Taxi Bied	MA	Moncef Malzi	56 637
7	Fast & Furious Presents: Hobbs & Shaw	US/JP	David Leitch	52 084
8	Cambodia	MA	Mohammed Taha Ben Slimane	47 011
9	Ils sont grands et ne peuvent quitter le nid familial	MA	Nourddine Douguena	41 361
10	Frozen 2	US	Chris Buck, Jennifer Lee	40 947

Source: Centre Cinématographique Marocain (CCM)

South Africa

After the 2018 record high, South African GBO declined by 6.0% in 2019 to ZAR 1.2 billion (USD 92.2 million), of which 5.0% was generated by national productions. A total of 22 domestic titles were released in 2019, the same number as in 2018. The COVID-19 pandemic in 2020 severely impacted the local film industry, with production and exhibition coming to a halt at the end of March. In order to alleviate the impact of the crisis, the country established a dedicated relief programme. While no date for the reopening of cinemas has been announced, film and TV productions were allowed to resume as of May 4 under strict safety measures.

Egypt

Cinema attendance in Egypt decreased by 9.0% to 6.1 million admissions while GBO takings went up 6.6% to EGP 489.7 (USD 29.2 million) as the average ticket prices increased due to high inflation rates. A total of 32 domestic films were produced in 2019, compared to 35 in 2018. In recent years, budget cuts have heavily impacted the local film industry, already stifled by state restrictions and censorship. In 2020 Egypt closed all its cinema screens in March to contain the spread of the coronavirus. It is still is unclear if cinemas will reopen before the country's peak cinema season, running from June through to mid-August.

Morocco

Total admissions soared by 20.6% to 1.9 million in 2019, the highest level since 2012. Similarly, GBO revenues rocketed by 27.1% to a total MAD 93.0 million (USD 9.7 million). Domestic titles captured 26.0% of GBO receipts, led by the comedy *Messaoud, Saida et Saadane*. Overall, 22 local films were produced, 8 less than 2018. Morocco is a popular destination for foreign productions, due to its filmmaking infrastructure and a 20% cash rebate introduced in 2018. The Kingdom unveiled 12 screens in 2019 to a total of 77 screens, remaining under-equipped for a population of 35.6 million inhabitants. The spread of the COVID-19 caused a drop in movie-going even before theatres were closed in mid-March 2020. In response to the shutdown, the Moroccan Centre for Cinematography (CCM) made available a selection of national films to be watched for free online during the Ramadan.

Sources: CCM, NFVF, Ster-Kinekor, *Variety,* Omdia, OBS

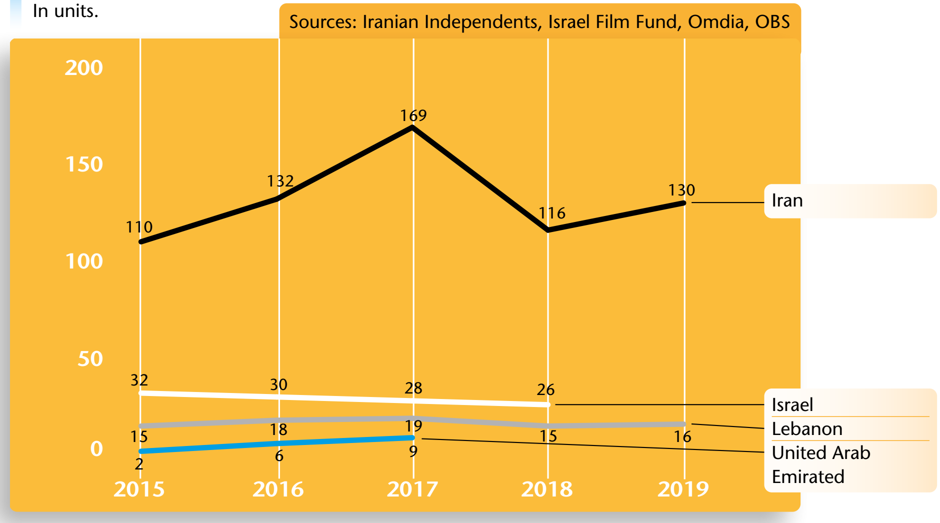
Middle East

	Iran	Israel	Kuwait	Lebanon	Qatar	Saudi Arabia	United Arab Emirates
Population 2019 e (million)	83.3	9.1	4.7	6.1	2.8	34.1	34.1
GDP per capita 2019 e (USD)	5 506	42 823	29 267	9 655	69 688	22 865	22 865
Gross box office 2019 e (in M USD)	71.4	156.0 (1)	69.4	25.6	43.3	112.1	247.4
Admissions 2019 e (million)	26.0	14.0 (1)	5.9	2.7	3.1	6.5	20.3
Admissions per capita 2019 e	0.3	1.6 (1)	1.2	0.4	1.1	0.2	0.6
Average ticket price 2019 e (USD)	2.7	11.1 (1)	11.8	9.4	13.7	17.2	12.2
Screens 2019 e	609	464	115	154	139	129	618
Digital screens 2019 e	609	464	115	154	139	129	618
National market shares 2019 e	94.4%	12.0% (1)	~	20.2%	~	~	~

(1) 2018

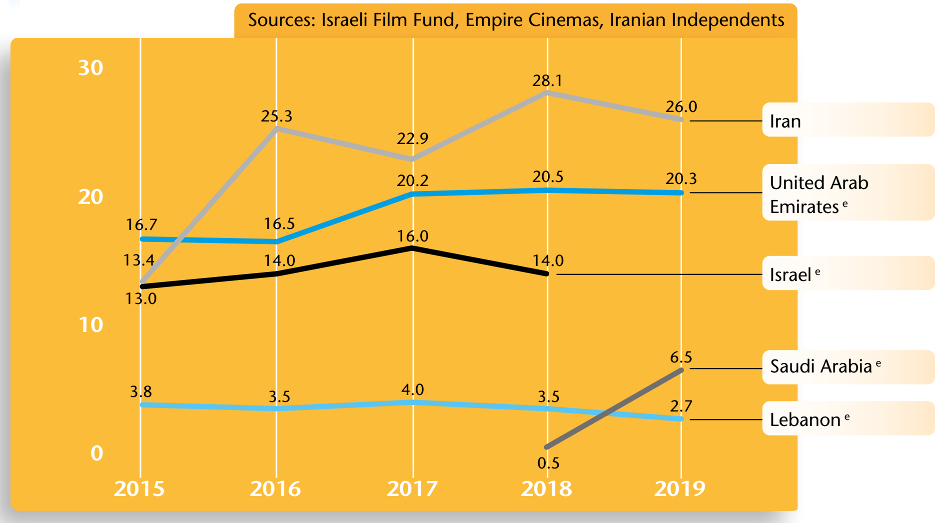
Number of films produced in selected Middle East countries | 2015-2019 e

In units.



Admissions in selected Middle Eastern countries | 2015-2019 e

In millions.



Top 10 films by admissions in the United Arab Emirates | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	Avengers: Endgame	US	Anthony Russo, Joe Russo	Walt Disney	938 196
2	Aladdin	US	Guy Ritchie	Walt Disney	790 422
3	The Lion King	US/GB	Jon Favreau	Walt Disney	709 069
4	Fast & Furious Presents: Hobbs & Shaw	US/JP	David Leitch	Universal Pictures	626 393
5	Joker	US	Todd Phillips	Warner Bros.	560 164
6	Spider-Man: Far from Home	US	Jon Watts	Columbia	486 499
7	Jumanji: The Next Level	US	Jake Kasdan	Columbia	458 121
8	Captain Marvel	US	Ryan Fleck, Anna Boden	Walt Disney	425 535
9	Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney	468 861
10	Maleficent: Mistress of Evil	US/GB/CA	Joachim Rønning	Walt Disney	382 390

Source: Empire Cinemas

Top 10 films by admissions in Saudi Arabia | 2019

	Original title	Country of origin	Director	Distributor	Admissions
1	Joker	US	Todd Phillips	Warner Bros.	532 614
2	Fast & Furious Presents: Hobbs & Shaw	US/JP	David Leitch	Universal Pictures	269 349
3	The Lion King	US/GB	Jon Favreau	Walt Disney	247 847
4	Jumanji: The Next Level	US	Jake Kasdan	Columbia	215 916
5	Aladdin	US	Guy Ritchie	Walt Disney	231 760
6	Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney	199 482
7	Maleficent: Mistress of Evil	US/GB/CA	Joachim Rønning	Walt Disney	193 409
8	Avengers: Endgame	US	Anthony Russo, Joe Russo	Walt Disney	174 848
9	Spider-Man: Far from Home	US	Jon Watts	Columbia	165 204
10	Toy Story 4	US	Josh Cooley	Walt Disney	184 587

Source: Empire Cinemas

Iran

Iranian cinema attendance fell by 7.6% to 26 million admissions in 2019 while GBO takings grew by 21% to IRR 3 trillion (USD 71.4 million). Local films dominated the box office, generating 94.4% of revenues. The domestic comedy *Motreb (The Singer)* topped the charts taking a total of IRR 385 billion (USD 9.5 million) and becoming the highest-grossing film of all time in Iran. The number of national productions grew from 116 to 130 films in 2019, of which 58 were released in the same year. Economic sanctions took a toll on the national film industry, leading to a downturn in funding and international sales. In 2020, as the coronavirus pandemic hit Iran, all cinema activities came to a halt in March. With all regular cinemas closed, a drive-in movie theatre has opened for the first time since their ban in 1979.

United Arab Emirates

After a record-breaking 2018, UAE cinema attendance marginally declined in 2019 to 20.3 million admissions (-0.6%), as box office takings dropped slightly by 1.1% to UAD 908.7 million (USD 247.4 million). In 2020, all cinemas in UAE were shut down in mid-March following the coronavirus outbreak. However, as the country started to ease lockdown restrictions, multiplexes in Dubai began to reopen at the end of May, operating at reduced capacity with sanitary measures in place.

Saudi Arabia

After the ban on movie theatres was lifted in April 2018, admissions in Saudi Arabia soared to 6.5 million in 2019, up from 0.5 million in 2018. The country's theatrical infrastructure is growing rapidly, counting 129 screens at the beginning of 2020, with an estimated potential to grow up to 2 600 by 2030. The Kingdom has announced a series of initiatives to foster the local film industry, including plans to establish a national film archive and a film festival. However, the first edition of the Red Sea International Film Festival, scheduled for March 2020, was postponed due to the COVID-19 pandemic. In response to the pandemic, the non-profit foundation organising the festival announced the creation of a relief fund of Saudi filmmakers. Saudi Arabia, one of the first territories to close all cinemas in early March, has announced that theatres will be allowed to reopen from June 21.

Sources: Empire Cinemas, Iranian Independents, *Variety, Screen International, The Hollywood Reporter,* Associated Press, Omdia, OBS

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FOCUS 2020 was prepared by the European Audiovisual Observatory. We would like to thank the following sources:

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Slovenski Filmski Center (SFC)	SI	www.film-center.si
Slovak Film Institute (SKFI)	SK	www.sfu.sk
Antrakt	TR	www.antraktsinema.com
DG Sinema	TR	www.sinema.gov.tr
Taiwan Cinema	TW	www.taiwancinema.com
MPA	US	www.motionpictures.org
International Movie Database (IMDb)	US	www.imdb.com
Dirección del Cine y Audiovisual Nacional (ICAU)	UY	icau.mec.gub.uy
Centro Nacional Autónomo de Cinematografía (CNAC)	VE	www.cnac.gob.ve
Ster-Kinekor Entertainment	ZA	www.sterkinekor.com
National Film and Video Fund (NFVF)		www.nfvf.co.za
Comscore		www.comscore.com
Omdia		www.omdia.com
The Financial Times		www.ft.com
Associated Press		apnews.com
International Monetary Fund		www.imf.org
LUMIERE Database		www.lumiere.obs.coe.int
Observatório Iberoamericano do Audiovisual (OIA)		www.oia-caci.org
Screen International		www.screendaily.com
The Hollywood Reporter		www.hollywoodreporter.com
UNESCO		www.unesco.org
Variety		www.variety.com