



MARCHÉ DU FILM
FESTIVAL DE CANNES

2021

Marché du Film

focus

WORLD FILM MARKET TRENDS
TENDANCES DU MARCHÉ MONDIAL DU FILM



focus 2021

World Film Market Trends

Tendances du marché mondial du film



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



MARCHÉ DU FILM
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Lay-out: Acom* Media (Paris)

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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 changing times for the whole of the film industry, the Marché du Film is continuing to evolve, very happy to be back in Cannes finally whilst also continuing an online edition; 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

The unusual release date for the *FOCUS* 2021 testifies to the firm grip of COVID-19 on the film industry as well as to its continuing struggle towards recovery. We could already sense and share some of the pandemic's unprecedented effects in last year's edition. These effects have taken on a much clearer shape since then. In particular, the figures for film exhibition are gruesome despite the close to 1 200 industry support measures that the Observatory tracked in a 12 months project, and in doing so sought to provide the audiovisual industry with useful information on the different support initiatives implemented in the 41 Observatory member states, as well as at EU and international level. These measures were specific to the audiovisual sector and to the cultural and creative industries. One does not need a crystal ball to predict that the industry needs more help to get back on its feet. As cinemas reopen all over Europe, we can only look to and hope for a brighter future for this industry and its professionals.

Susanne Nikoltchev

Executive Director
European Audiovisual Observatory

FOCUS existe en tant que publication depuis plus de deux décennies déjà et je suis très fier de notre longue collaboration avec l'Observatoire européen de l'audiovisuel. En ces temps nouveaux pour toute l'industrie cinématographique, le Marché du Film est très heureux d'être enfin de retour à Cannes et poursuit son évolution en proposant à nouveau une édition en ligne. Quant au *FOCUS*, il 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

La date inhabituelle de parution du *FOCUS* 2021 témoigne de l'emprise de la COVID-19 sur l'industrie cinématographique ainsi que de la lutte pour le redressement menée sans relâche par celle-ci. Dans l'édition de l'année dernière, nous avons déjà perçu et fait part de certains effets inédits de la pandémie. Ces effets ont pris une forme beaucoup plus claire depuis lors. Ainsi, les chiffres concernant l'exploitation des films sont catastrophiques malgré les quelques 1 200 mesures de soutien au secteur que l'Observatoire a recensées dans le cadre d'un projet de 12 mois. Ce faisant, il a cherché à fournir au secteur audiovisuel des informations utiles sur les différentes initiatives de soutien mises en œuvre dans les 41 États membres de l'Observatoire, ainsi qu'au niveau européen et international. Ces mesures étaient spécifiques au secteur audiovisuel et aux industries culturelles et créatives. Il n'est pas nécessaire d'avoir une boule de cristal pour prédire que le secteur a besoin d'une aide supplémentaire pour se remettre sur pied. Alors que les cinémas rouvrent leurs portes dans toute l'Europe, nous ne pouvons que souhaiter et espérer un avenir meilleur pour cette industrie et ses professionnels.

Susanne Nikoltchev

Directrice exécutive
Observatoire européen de l'audiovisuel

focus 2021

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YEAR ONE UNDER COVID

This 2021 edition of the Focus provides a global overview of a film industry painfully impacted by the COVID-19 crisis. The collapse of cinema exhibition, the growth in the market share of European films, the relative resilience of film production, the continued investments in cinema screens and the contrasts between countries and regions are among the observations that our figures suggest.

Drop of 73% in admissions, with variations

Unfortunately, the figures are damning: the Observatory estimates that worldwide cinema admissions collapsed by 73% in 2020, to just over 2 billion compared to 7.5 billion in 2019. Some regions or countries have been less affected than others, firstly, in all probability, because of the different levels of sanitary measures that have been put in place, but perhaps also partly due to the capacity of each national industry to partially compensate for the relative lack of US films on offer. South America and India thus lost more than 80% of their cinema admissions, while the downslide was more limited in Japan (-46%) or Taiwan (-49%). In wider Europe (-68%), countries such as Denmark (-44%), Estonia (-51%), Finland (-54%), the Netherlands (-56%), Norway (-58%) and Russia (-60%) were more resilient.

European films partially compensated for the shortage of American blockbusters

The idea that North American blockbusters were absent from cinemas during the COVID-19 crisis must be nuanced. The list of the top 20 films by number of admissions worldwide indeed includes fewer US films in 2020 (11) than in 2019 (16). But the difference is not that significant when it comes to the Top 25 films with the highest number of admissions in Europe¹, which still includes 21 US films vs. 23 in 2019.

However, while the rankings are still topped by US films, these have been much less represented in European cinemas: their market share of

admissions in Europe² has indeed decreased from 68% in 2019 to 49% in 2020. The market share of European films has meanwhile increased from 26% to 40%. European films, because they were more present in cinemas and less exposed to competition from North American blockbusters, were therefore more resilient to the drop in attendance: while cinema admissions fell by 70%, attendance of European films dropped by 55%. Films from regions other than Europe or the United States saw their market share almost double in 2020, even if it remained modest at 4.9%.

The decline in the market share of US films was not a phenomenon unique to the European Union. Indeed certain countries outside of Europe have seen spectacular growth in the market share of their national films: Japan (+22 percentage points), China (+20pp), Russia (+25pp) or Turkey (+23pp).

Resilience of the number of films produced

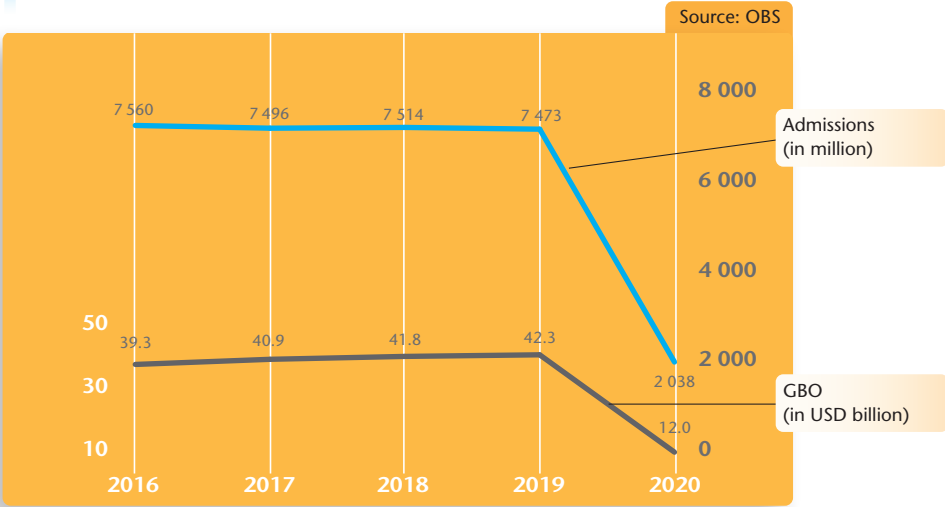
The number of films produced decreased by 25% in 2020, significantly less than the drop in cinema admissions, a sign that producers kept on investing and that, in certain regions, public support played a role in cushioning the impact of the crisis. Trends differ widely between countries also due to different methodologies in counting the number of films produced: in those markets where film production is measured as the number of films actually released, the closing of cinemas had a direct negative impact on this number whereas in markets where film production is measured in

1. European Union + United Kingdom

2. European Union + United Kingdom

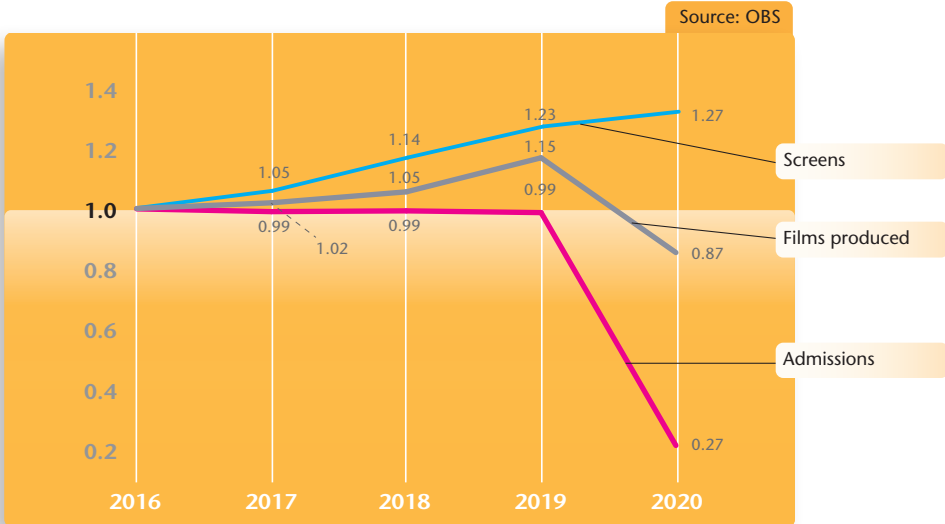
Introduction

Development of world admissions & GBO | 2016-2020^e



Indexed development of world screens, admissions & films produced | 2016-2020^e

In % of base year value. Base year = 2016



terms of films receiving public funding or being certified, the decline in production activity may only be seen in future years.

In particular, the crisis has taken a heavy toll on Latin America with a two-thirds drop in the number of films produced. In the United States (-45%), independent films with a budget of more than USD 1 million were particularly hard hit; China saw a production decline of -37%. Some countries such as Taiwan, South Korea, Canada and Israel, however, recorded much smaller drops in the number of films produced. In Europe (-28%), among the major producing countries, Spain and France held up better than Germany and Italy.

Continued investments in new screens

The crisis has not interrupted the long-standing trend of investments in new screens. Admittedly, growth was halved between 2019 and 2020, but it remained significant (+3.3%), and particularly strong in China, but also in Iran, Saudi Arabia, Estonia, Bosnia-Herzegovina and Ireland.

The number of digital screens also continued to grow, at a rate (+4%) slightly higher than the growth in the number of screens, which sug-

gests that the increase in the number of digital screens is rather a result of the creation of new screens than of the digitisation of existing screens; digitisation is indeed almost complete, except in some Asian countries.

What's next?

These first few analyses can only be provisional, firstly because the COVID-19 crisis continues to profoundly affect the film sector in 2021. It is also possible that some of the effects of this crisis will not be immediately apparent, such as the capacity of distributors, weakened by the drop in box office revenues, to contribute to the financing of future films. But a degree of optimism can be on the agenda as the reopening of cinemas seems to be creating a real appetite among cinema-goers.

Gilles Fontaine

Head of the Market Information Department

Martin Kanzler

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Top 10 markets worldwide by gross box office | 2016-2020^e

In USD billion. Converted at average annual exchange rates. Ranked by 2020 values.

Sources: OBS, MPA, Omdia, National data sources

Rank	Market	2016	2017	2018	2019	2020	Annual growth rate 1 year
1	China	6.60	8.27	9.24	9.30	2.96	-68.2%
2	US & Canada	11.37	11.12	11.88	11.38	2.22	-80.5%
3	Japan	2.17	2.04	2.02	2.40	1.34	-44.0%
4	France	1.54	1.56	1.58	1.62	0.49	-69.5%
5	South Korea	1.50	1.55	1.65	1.64	0.43	-73.6%
6	United Kingdom	1.66	1.65	1.71	1.60	0.39	-75.3%
7	Germany	1.13	1.19	1.06	1.15	0.36	-68.3%
8	India ⁽¹⁾	1.27	1.48	1.50	1.64	0.32	-80.3%
9	Russian Federation	0.73	0.91	0.81	0.86	0.32	-62.9%
10	Australia	0.91	0.92	0.93	0.85	0.28	-67.5%
World total^e		39.3	40.9	41.8	42.3	12.0	-71.6%
Growth rate - World		0.5%	4.1%	2.2%	1.2%	-71.6%	-71.6%
Growth rate - Top 10		-1.8%	6.3%	5.5%	0.2%	-71.9%	-71.9%
Growth rate - Top 10 without China		-1.4%	0.6%	3.2%	0.0%	-73.3%	-73.3%

(1) Restated series.

Top 10 markets worldwide by admissions⁽¹⁾ | 2016-2020^e

In million. Ranked by 2020 admissions.

Sources: OBS, Omdia, National data sources

Rank	Market	2016	2017	2018	2019	2020e	Annual growth rate ^e 1 year
1	China	1 370	1 620	1 720	1 727	548	-68.3%
2	India	1 860	1 660	1 560	1 460	390	-73.3%
3	US & Canada	1 315	1 240	1 304	1 242	237	-80.9%
4	Japan	180	174	169	195	106	-45.5%
5	Russian Federation	193	212	200	219	89	-59.5%
6	France	213	209	201	213	65	-69.4%
7	South Korea	217	220	216	227	60	-73.8%
8	Mexico	321	338	320	342	55	-83.9%
9	United Kingdom	168	171	177	176	44	-75.0%
10	Brazil	184	181	163	176	39	-77.7%
World total^e		7 560	7 496	7 514	7 473	2 038	-72.7%
Growth rate - World^e		0.8%	-0.8%	0.2%	-0.5%	-72.7%	-72.7%
Growth rate - Top 10^e		-0.4%	0.1%	0.1%	-0.9%	-72.7%	-72.7%
Growth rate - Top 10^e without China		-2.8%	-5.3%	-2.1%	-1.4%	-74.5%	-74.5%

(1) Restated series. Only includes available data.

Top 10 markets worldwide by number of screens ⁽¹⁾ | 2016-2020 ^e

In units. Ranked by 2020 values.

Sources: OBS, MPA, Omdia, National data sources, Media Salles

Rank	Market	2016	2017	2018	2019	2020	Annual growth rate ^e	
							5 years	1 year
1	China	41 179	50 776	60 079	69 787	75 581	16.4%	8.3%
2	US & Canada ⁽¹⁾	42 659	43 216	43 459	43 679	44 111	0.8%	1.0%
3	India ⁽²⁾	9 481	9 530	9 601	9 527	8 000	-4.2%	-16.0%
4	Mexico	6 225	6 633	7 024	7 493	7 494	4.7%	0.0%
5	France	5 842	5 913	5 983	6 114	6 127	1.2%	0.2%
6	Russian Fed.	4 376	4 805	5 341	5 597	5 337	5.1%	-4.6%
7	Italy	5 104	5 315	5 205	5 385	5 325	1.1%	-1.1%
8	Germany	4 739	4 803	4 849	4 961	4 926	1.0%	-0.7%
9	UK	4 150	4 264	4 340	4 480	~	2.0%	~
10	Spain	3 554	3 618	3 589	3 695	3 701	1.0%	0.2%
World total ^e		163 928	171 755	186 859	200 954	207 650	6.1%	3.3%
Growth rate - World ^e		7.7%	4.8%	8.8%	7.5%	3.3%	6.1%	3.3%
Growth rate - Top 10 ^e		8.0%	9.1%	7.6%	7.5%	2.8%	6.7%	2.7%
Growth rate - Top 10 ^e (without China and India)		-0.1%	2.5%	1.6%	1.9%	0.2%	1.6%	0.1%

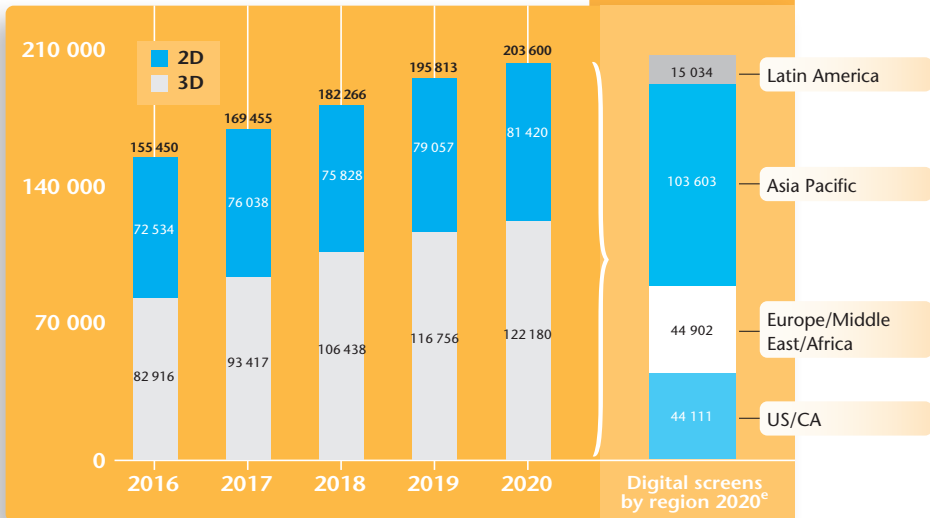
(1) Restated series.

(2) Refers to digital and e-cinema screens.

Worldwide number of digital and 3D screens | 2016-2020 ^e

In units.

Sources: MPA, Omdia



Top 10 markets worldwide by feature film production ⁽¹⁾ | 2016-2020 ^e

In units. Ranked by 2020 values.

Sources: OBS, Omdia, National data sources

Rank	Market	2016	2017	2018	2019	2020	Annual growth rate 5 years	1 year
1	India ⁽²⁾ ⁽³⁾	1903	1986	1813	2446	2396	5.9%	-2.0%
2	China ⁽⁴⁾	944	970	1082	1037	650	-8.9%	-37.3%
3	South Korea ⁽⁵⁾	339	494	454	502	615	16.1%	22.5%
4	Japan ⁽⁶⁾	610	594	613	689	506	-4.6%	-26.6%
5	USA ⁽⁷⁾	788	812	808	814	447	-13.2%	-45.1%
6	Italy	224	235	273	325	253	3.1%	-22.2%
7	France	283	300	300	301	239	-4.1%	-20.6%
8	Spain ⁽²⁾	254	241	266	263	215	-4.1%	-18.3%
9	Germany ⁽⁵⁾	256	247	247	265	152	-12.2%	-42.6%
10	UK ⁽⁷⁾	368	409	380	328	145	-20.8%	-55.8%
World total ^e		7 893	8 026	8 772	9 569	7 171	-2.4%	-25.1%
Growth rate - World ^e		3.2%	1.7%	9.3%	9.1%	-25.1%	-2.4%	-25.1%
Growth rate - Top 10 ^e		10.3%	5.3%	-0.8%	11.8%	-19.4%	-1.5%	-19.4%
Growth rate - Top 10 ^e (without China and India)		8.4%	6.7%	0.3%	4.4%	-26.2%	-4.7%	-26.2%

(1) Restated data series. Production data not available for all territories. Country data include minority co-productions.

(2) Films certified. Excluding experimental films.

(3) Figures do not reflect the impact on COVID-19 as they are based on fiscal year ending in March 2020.

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

(5) Feature films released.

(6) 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

Blue-ray release.

(7) The apparent decline of film productions in 2020 is partially linked to a time lag in identifying film productions with budgets below GBP 500 000. Includes inward feature co-productions but not inward features involving only VFX work in the UK.

Top 20 films by gross box office worldwide | 2020

In USD million. GBO for 2020 only. Does not include carryovers.

Original title	Country of origin	Studio	North American box office	International box office	Global box office
1 Ba Bai (The Eight Hundred)	CN	Huayi Brothers/... ⁽¹⁾	0.4	461.0	461.39
2 Demon Slayer: Mugen Train	JP	Aniplex/Shueisha/... ⁽²⁾	47.7	405.1	452.77
3 Bad Boys for Life	US/MX	Columbia	206.3	220.2	426.51
4 My People. My Homeland	CN	CFGF/Alibaba		422.4	422.39
5 Tenet	US/GB	Warner Bros.	58.5	305.2	363.66
6 Sonic the Hedgehog	US/JP/CA	Paramount	149.0	170.7	319.72
7 Dolittle	US/CN/GB/JP	Universal	77.0	168.4	245.49
8 Legend of Deification	CN	Beijing Enlight Pictures	0.2	240.4	240.66
9 A Little Red Flower	CN	CFGF/Lian Ray		216.0	216.00
10 Birds of Prey: And the Fantabulous...	US	Warner Bros.	84.2	117.7	201.86
11 Shock Wave 2	HK/CN	Alibaba/Cinedigit/... ⁽³⁾		198.9	198.91
12 The Croods: A New Age	US	Dreamworks	58.4	112.4	170.76
13 Wonder Woman 1984	US	Warner Bros.	46.5	120.0	166.53
14 The Sacrifice	CN	CFGF		161.0	161.05
15 The Invisible Man	US/AU	Universal	70.4	72.7	143.15
16 Onward	US	Walt Disney	61.6	80.4	141.95
17 Soul	US	Walt Disney		136.9	136.92
18 Warm Hug	CN	Aimei/... ⁽⁴⁾		129.2	129.24
19 The Call of the Wild	US/CA	20th Century Fox	62.3	49	111.11
20 Caught in Time	CN	Emperor/Lian Ray		80.5	80.54

(1) Beijing Enlight/Alibaba

(3) Universe

Sources: Box Office Mojo / OBS

(2) Ufotable

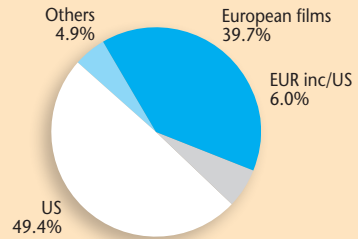
(4) Huayi Brothers/Alibaba

Europe 28⁽¹⁾

Population 2020 ^e	514.3 million
GDP per capita 2020 ^e	44 191 USD
Gross box office 2020 ^e	2.13 bn EUR (2.44 bn USD)
Admissions 2020 ^e	299.7 million
Average ticket price 2020 ^e	7.1 EUR (7.9 USD)
Average admissions per capita 2020 ^e	0.6
Screens 2019 2020	34 181 34 030

(1) In order to keep time series consistent, data are shown for Europe 28, i.e. the 27 EU Member States and the United Kingdom

Market shares 2020^e



Admissions in the EU and the UK plummet by 70% in 2020

Cinemas throughout most of Europe had to close in response to COVID restrictions in March 2020. While most theatres were allowed to reopen from mid-May / June onwards, they could only operate under strict restrictions including capacity limits and had to close again during the second wave in late autumn. On top of this most blockbuster films planned for release in 2020 rescheduled their theatrical release or – in some cases – were directly released on premium VOD. As a result, the theatrical market collapsed in 2020 with cinema attendance in the 27 Europe and the UK plummeting by 70.2% to an estimated 300 million tickets, down from over one billion admissions in 2019 (the highest level since 2004). Gross box office earnings dropped correspondingly from EUR 7.20 billion to EUR 2.13 billion (USD 2.4 billion), down by 70.4% from 2019. While admissions dropped sharply in every European country, there were differences in the magnitude of the box office catastrophe: the lowest year-on-year decrease was registered in Denmark (-44%) while admissions dropped by -79% in Cyprus.

While admissions to US films in the EU and the UK fell by an estimated 78%, admissions to European films dropped by “only” 55%. The market share of European films hence reached a record high of almost 40% of total admissions (compared to 26.3% in 2019), mostly driven by often exceptionally high market shares of national films in the respective markets. US market share on the other hand dropped from 68.2% to 49.4%, the lowest level registered in recent history.

Production levels in the EU and the UK down by 30%

Having reached a temporary standstill all over Europe due to the lockdown measures taken in March 2020, film production was taken up again in early summer following strict sanitary protocols. In contrast to theatrical exhibition film shoots were largely allowed to continue throughout the second wave in autumn and winter, often at levels equal to or even higher than before the pandemic. Film production volume in the EU and the UK consequently did not collapse in the same manner as box office did. The Observatory estimates that a total of 1 403 theatrical feature films were produced in the EU and the UK in 2020, down “only” 30% on the 2019 record level of 2 007 films. Trends differ widely between countries also due to different methodologies in counting productions: in those markets where film production is measured as films actually released, the closing of cinemas had a direct negative impact on film productions whereas in markets where film production is measured in terms of films receiving public funding or being certified, the decline in production activity may only be seen in the upcoming years. It also remains to be seen which effect the significant loss of box office revenues in 2020 and 2021 will have on the European film production sector in the mid-term.

In order to mitigate the impacts of the crisis, the European Commission, 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 2020 figures for Europe 28 (EU+GB) are provisional estimates. “Inc” refers to films produced in a “host” country with US studio incoming investment.



Information on the various support measures to mitigate the COVID-19 crisis have been tracked by the European Film Agency Directors association (EFAD), an international non-profit association, grouping national film agencies from 34 European countries.

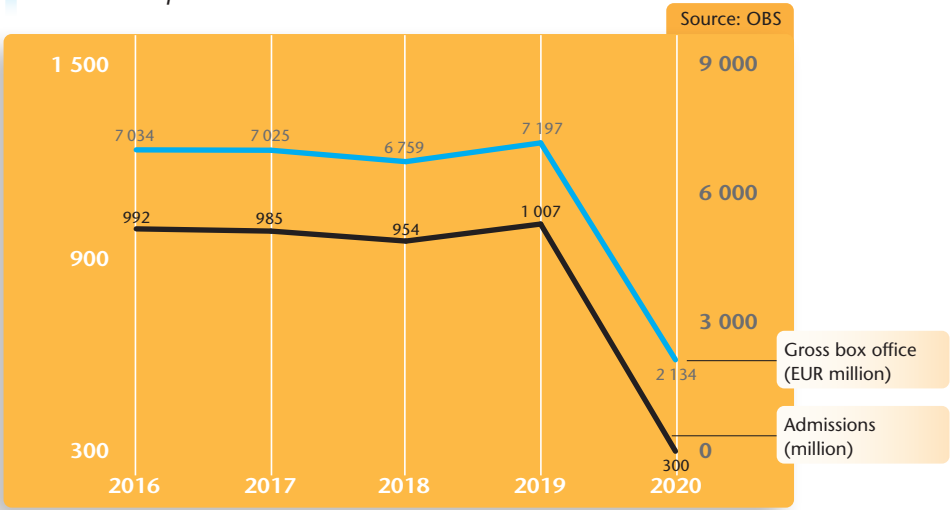


Complementary admissions data to top European films are provided by Europa Cinemas, the first international network of cinemas for the circulation of European films with members in 34 MEDIA countries, 692 cities, 1 143 cinemas, 2 764 screens.



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.

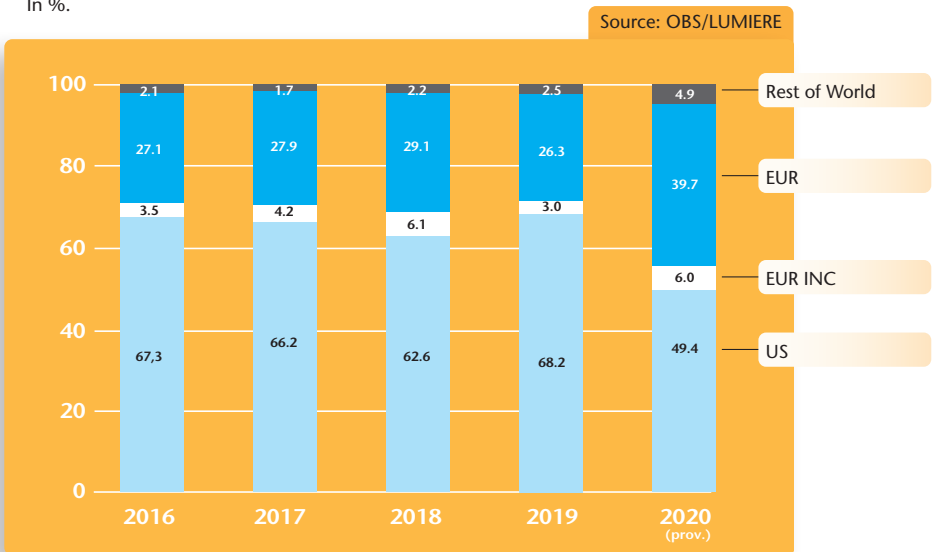
Admissions and GBO in the European Union & GB ⁽¹⁾ |
 2016-2020 *prov.*



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

Breakdown of EU & GB admissions by nationality films | 2016-2020 ^e

In %.



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

Number of feature films produced in the European Union & GB | 2016-2020 *prov.*

In units.

Country		2016	2017	2018	2019	prov. 2020	Sources
Austria	100% national fiction	13	9	12	14	4	Austrian Film Institute
	maj. co-prod. fiction	3	6	5	1	1	Austrian Film Institute
	min. co-prod. fiction	7	9	9	3	3	Austrian Film Institute
	Feature documentaries	23	20	25	26	16	Austrian Film Institute
Belgium ⁽¹⁾	100% national fiction	16	14	14	9	1	CFWB / VAF
	maj. co-prod. fiction	21	22	13	20	12	CFWB / VAF
	min. co-prod. fiction	28	38	31	28	0	CFWB / VAF
	Feature documentaries	17	15	17	14	6	CFWB / VAF
Bulgaria	100% national fiction	18	10	5	9	12	National Film Center
	maj. co-prod. fiction	6	4	1	2	2	National Film Center
	min. co-prod. fiction	7	5	5	1	4	National Film Center
	Feature documentaries	11	4	10	12	7	National Film Center
Cyprus ^{(2)e}	100 % national fiction	1	2	2	2	2	OBS / MOECSY
	maj. co-prod. Fiction	0	0	1	0	0	OBS / MOECSY
	min. co-prod. Fiction	0	0	0	0	1	OBS / MOECSY
	Feature documentaries	0	1	0	1	0	OBS / MOECSY
Croatia	100% national fiction	6	6	10	6	2	Croatian Audiovisual Centre
	maj. co-prod. fiction	4	2	4	6	1	Croatian Audiovisual Centre
	min. co-prod. fiction	6	9	8	15	3	Croatian Audiovisual Centre
	Feature documentaries	1	16	14	13	11	Croatian Audiovisual Centre
Czech Rep.	100% national fiction	24	16	23	21	16	State Cinematography Fund
	maj. co-prod. fiction	17	8	13	16	7	State Cinematography Fund
	min. co-prod. fiction	7	5	11	12	7	State Cinematography Fund
	Feature documentaries	31	25	30	39	30	State Cinematography Fund
Denmark ⁽²⁾	100% national fiction	15	13	13	11	14	Danish Film Institute
	maj. co-prod. fiction	8	8	9	8	6	Danish Film Institute
	min. co-prod. fiction	8	9	10	9	8	Danish Film Institute
	Feature documentaries	31	24	26	28	30	Danish Film Institute
Estonia ⁽²⁾	100% national fiction	7	3	6	9	5	Estonian Film Institute
	maj. co-prod. fiction	2	5	1	3	4	Estonian Film Institute
	min. co-prod. fiction	3	5	3	2	5	Estonian Film Institute
	Feature documentaries	8	7	11	12	9	Estonian Film Institute
Finland ⁽³⁾	100% national fiction	16	20	18	17	17	Finnish Film Foundation
	maj. co-prod. fiction	3	2	0	2	4	Finnish Film Foundation
	min. co-prod. fiction	5	2	7	4	4	Finnish Film Foundation
	Feature documentaries	22	18	24	23	21	Finnish Film Foundation
France	100% national fiction	125	147	140	138	115	CNC
	maj. co-prod. fiction	55	38	48	46	26	CNC
	min. co-prod. fiction	59	72	56	52	45	CNC
	Feature documentaries	44	43	56	65	53	CNC
Germany ⁽²⁾	100% national fiction	82	80	78	96	44	SPIO
	maj. co-prod. fiction	41	27	35	38	24	SPIO
	min. co-prod. fiction	43	34	40	23	23	SPIO
	Feature documentaries	90	106	94	108	61	SPIO
Greece ^{(2)e}	100% national fiction	27	9	9	12	6	GFC / OBS
	maj. co-prod. fiction	2	4	2	5	2	GFC / OBS
	min. co-prod. fiction	2	8	4	4	8	GFC / OBS
	Feature documentaries	21	15	10	9	2	GFC / OBS
Hungary	100% national fiction	15	12	15	11	13	National Film Office (NMHH)
	maj. co-prod. fiction	3	2	2	4	3	National Film Office (NMHH)
	min. co-prod. fiction	1	2	1	3	2	National Film Office (NMHH)
	Feature documentaries	1	3	0	1	3	National Film Office (NMHH)
Ireland	100% national fiction	6	2	3	6	5	Screen Ireland
	maj. co-prod. fiction	10	12	11	4	3	Screen Ireland
	min. co-prod. fiction	4	6	6	6	3	Screen Ireland
	Feature documentaries	9	7	14	10	7	Screen Ireland
Italy	100% national fiction	142	153	147	160	127	MiC
	maj. co-prod. fiction	23	18	23	32	25	MiC
	min. co-prod. fiction	7	5	10	11	11	MiC
	Feature documentaries	52	59	93	122	90	MiC

Continued

Number of feature films produced in the European Union & GB | 2016-2020 *prov.*

In units.

Country		2016	2017	2018	2019	<i>prov.</i> 2020	Sources
Latvia ⁽²⁾	100% national fiction	2	3	6	10	15	National Film Centre of Latvia
	maj. co-prod. fiction	2	2	3	2	2	National Film Centre of Latvia
	min. co-prod. fiction	3	1	1	5	2	National Film Centre of Latvia
	Feature documentaries	13	15	17	20	5	National Film Centre of Latvia
Lithuania ⁽²⁾	100% national fiction	8	6	9	10	8	Lithuanian Film Centre
	maj. co-prod. fiction	4	4	2	4	0	Lithuanian Film Centre
	min. co-prod. fiction	1	0	3	2	2	Lithuanian Film Centre
	Feature documentaries	2	1	9	9	2	Lithuanian Film Centre
Luxembourg ^e	100% national fiction	1	1	0	1	0	OBS / LFF
	maj. co-prod. fiction	0	3	3	4	3	OBS / LFF
	min. co-prod. fiction	16	7	8	22	25	OBS / LFF
	Feature documentaries	3	2	3	5	4	OBS / LFF
Malta ^e	Total	3	2	4	1	0	IMDB / OBS
The Netherlands	100% national fiction	19	19	23	26	25	NFF
	maj. co-prod. fiction	10	10	11	16	6	NFF
	min. co-prod. fiction	21	25	21	15	16	NFF
	Feature documentaries	31	32	31	40	19	NFF
Poland	100% national fiction	39	37	25	27	15	Polish Film Institute
	maj. co-prod. fiction	1	6	4	13	3	Polish Film Institute
	min. co-prod. fiction	6	15	5	14	1	Polish Film Institute
	Feature documentaries	8	14	8	39	5	Polish Film Institute
Portugal	100% national fiction	5	12	13	12	7	ICA
	maj. co-prod. fiction	8	0	8	4	2	ICA
	min. co-prod. fiction	4	8	2	6	3	ICA
	Feature documentaries	10	18	20	15	12	ICA
Romania	100% national fiction	27	22	32	38	23	CNC
	maj. co-prod. fiction	7	6	10	3	5	CNC
	min. co-prod. fiction	7	2	1	2	5	CNC
	Feature documentaries	8	11	7	11	8	CNC
Slovakia	100% national fiction	2	4	1	8	0	Slovak Film Institute
	maj. co-prod. fiction	4	5	6	7	4	Slovak Film Institute
	min. co-prod. fiction	8	12	12	13	7	Slovak Film Institute
	Feature documentaries	12	6	14	16	17	Slovak Film Institute
Slovenia ⁽²⁾	100% national fiction	4	5	2	6	0	Slovenian Film Center
	maj. co-prod. fiction	4	6	4	5	1	Slovenian Film Center
	min. co-prod. fiction	4	1	3	8	5	Slovenian Film Center
	Feature documentaries	8	9	12	12	7	Slovenian Film Center
Spain ⁽⁷⁾	100% national fiction	98	84	95	85	76	ICAA
	maj. co-prod. fiction	24	22	26	22	17	ICAA
	min. co-prod. fiction	13	15	14	21	9	ICAA
	Feature documentaries	119	120	131	135	113	ICAA
Sweden ⁽²⁾	100% national fiction	16	18	22	20	15	SFI
	maj. co-prod. fiction	6	7	9	9	6	SFI
	min. co-prod. fiction	7	13	0	14	5	SFI
	Feature documentaries	25	30	20	25	21	SFI
United Kingdom ⁽⁴⁾	100% national fiction	255	265	226	172	81	BFI
	maj. co-prod. fiction	10	13	6	12	9	BFI
	min. co-prod. fiction	20	11	20	16	9	BFI
	Feature documentaries	19	36	60	43	11	BFI
	Inward features ⁽⁵⁾	64	84	68	85	35	BFI
Total fiction films EU 27 & GB ^{(6) e}		1 269	1 216	1 213	1 225	879	OBS
Total feature docs. EU 27 & GB ^{(6) e}		558	584	689	782	525	OBS
Total feature films EU 27 & GB ^{(6) e}		1 827	1 800	1 902	2 007	1 403	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 decline of film productions in 2020 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 identifying GB productions. Excluding GB inward investment features.

(7) Excluding seven theatrical experimental feature films in 2020 and two in 2019.

Admissions in the European Union & GB | 2016-2020 *prov.*

In millions. Provisional data.

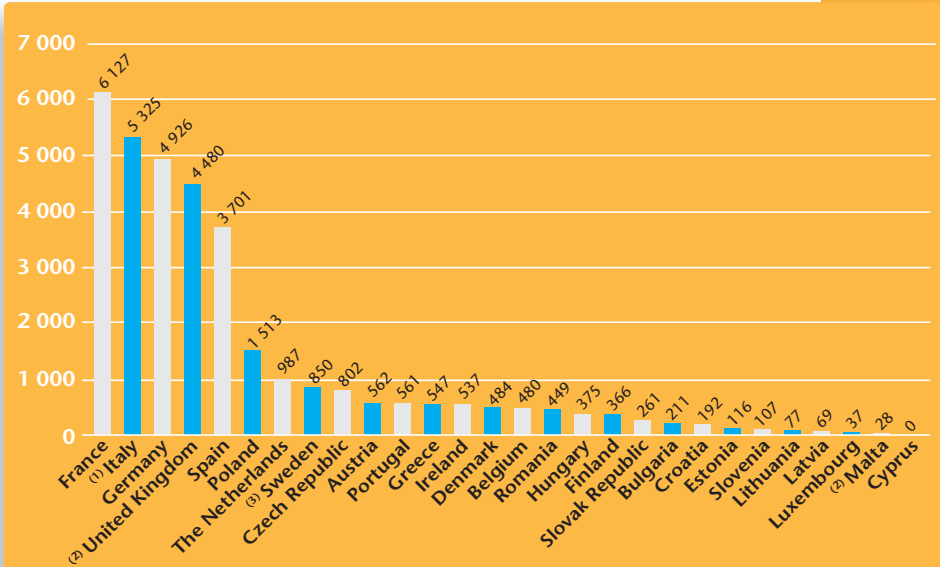
ISO	Country	2016	2017	2018	2019	prov. 2020	2020/19	Sources
AT	Austria ^e	15.1	14.6	12.9	13.7	3.9	-71.8%	Austrian Film Institute
BE	Belgium ^e	19.4	19.6	18.8	19.9	5.6	-72.0%	VAF / CFWB / Cinedata
BG	Bulgaria	5.5	5.6	4.9	5.0	1.3	-73.3%	National Film Center (NFC)
CY	Cyprus ^e	0.7	0.7	0.8	0.8	0.2	-79.4%	MOECSY
CZ	Czech Republic	15.6	15.2	16.3	18.3	6.4	-65.1%	Czech Film Fund
DE	Germany	121.1	122.3	105.4	118.6	38.1	-67.9%	FFA
DK	Denmark	13.0	11.9	12.5	12.8	7.2	-43.7%	Statistics Denmark / Danish Film Institute
EE	Estonia	3.3	3.5	3.6	3.7	1.8	-51.2%	Estonian Film Institute
ES	Spain ^e	101.8	99.8	98.9	104.9	27.0	-74.3%	ICAA
FI	Finland ^e	8.7	8.8	8.1	8.4	3.9	-53.9%	Finnish Film Foundation
FR	France	213.2	209.4	201.2	213.2	65.2	-69.4%	CNC
GB	United Kingdom	168.3	170.6	177.0	176.1	44.0	-75.0%	BFI / DCM
GR	Greece ^e	10.0	10.1	9.4	9.6	3.1	-67.3%	Greek Film Center
HR	Croatia	4.3	4.5	4.6	4.9	1.4	-71.7%	Croatian Audiovisual Centre
HU	Hungary ^e	14.6	15.1	15.5	15.2	4.3	-71.6%	National Film Office
IE	Ireland ^e	15.8	16.7	15.8	15.1	3.7	-75.4%	Screen Ireland
IT	Italy ^e	113.8	99.6	91.7	104.4	30.3	-71.0%	SIAE / Cinetel / ANICA
LT	Lithuania	3.7	4.1	4.3	4.2	1.5	-63.1%	Lithuanian Film Centre
LU	Luxembourg ^e	1.1	1.2	1.1	1.1	0.3	-69.8%	CNA
LV	Latvia	2.5	2.5	2.5	2.7	0.9	-67.0%	National Film Centre of Latvia
MT	Malta	0.7	0.8	0.8	0.7	0.2	-77.9%	National Statistics Office Malta
NL	Netherlands	34.2	36.0	35.7	38.0	16.8	-55.9%	NFF / MaccsBox - NVB & NVF
PL	Poland	52.1	56.6	59.7	60.6	17.1	-71.8%	Polish Film Institute
PT	Portugal	14.9	15.6	14.8	15.5	3.8	-75.7%	Instituto do Cinema e do Audiovisual
RO	Romania	13.0	13.9	13.3	14.3	3.3	-76.9%	Centrul National al Cinematografiei
SE	Sweden	17.8	16.9	16.4	15.9	5.7	-64.4%	Swedish Film Institute
SI	Slovenia	2.3	2.4	2.5	2.4	0.6	-76.2%	Slovenian Film Centre
SK	Slovak Republic	5.7	6.7	6.0	6.5	2.4	-63.8%	Slovak Film Institute / UFD
EU 27 & GB - Total ^e		992	985	954	1 007	300	-70.2%	European Audiovisual Observatory

Source: OBS

Number of screens in the EU & GB by country December 2020^e

In units.

Source: OBS



(1) Including screens with screenings on less than 60 days.

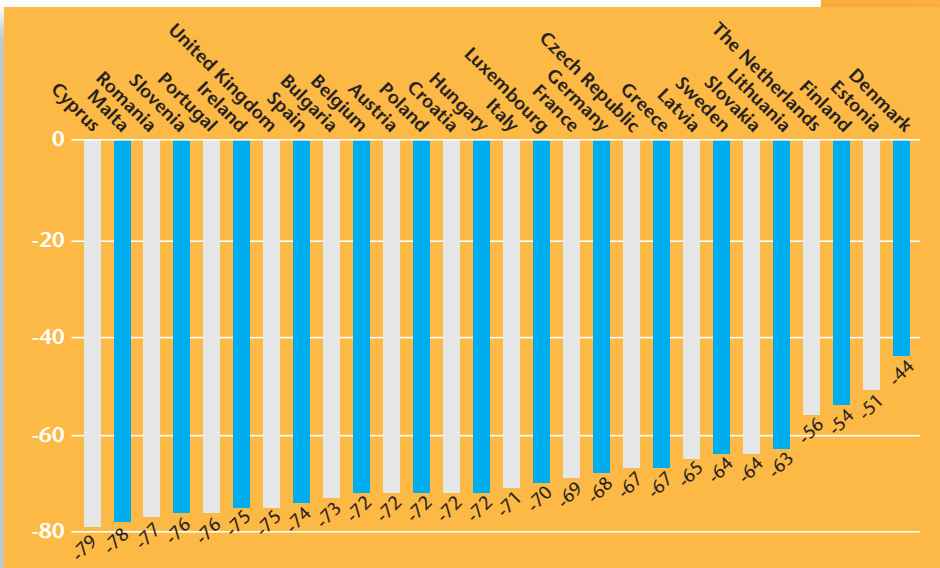
(2) Estimated as of December 2019.

(3) Estimated as of December 2018.

Percentage change of admissions in the EU & GB Between 2020 and 2019

In %.

Source: OBS



The tables below offer provisional rankings based on the analysis of partially fragmentary data for 26 EU member states and the UK representing 96% of all admissions in the EU and the UK.

Top 25 films by admissions in the European Union and GB | 2020 *prov.*

Original title	Country of origin	Director	Release markets	Admissions <i>prov.</i>
1 1917	GB INC/US	Sam Mendes	26	15 643 104
2 Tenet	US/GB	Christopher Nolan	26	11 577 608
3 Bad Boys for Life	US/MX	Adil El Arbi, Bilall Fallah	25	10 466 973
4 Sonic the Hedgehog	US/JP/CA	Jeff Fowler	25	9 204 960
5 Dolittle	US/CN/GB/JP	Stephen Gaghan	25	7 793 611
6 Star Wars: Ep. IX The Rise of ... ⁽¹⁾	US	J.J. Abrams	24	7 314 897
7 Tolo Tolo	IT	Checco Zalone	2	6 674 872
8 Jumanji: The Next Level ⁽²⁾	US	Jake Kasdan	24	6 400 841
9 Little Women ⁽³⁾	US	Greta Gerwig	24	5 839 574
10 Frozen 2 ⁽⁴⁾	US	Chris Buck, Jennifer Lee	24	5 621 559
11 Birds of Prey: And the Fantabulous ...	US	Cathy Yan	26	5 010 485
12 Gisaengchung (Parasite) ⁽⁵⁾	KR	Bong Joon Ho	23	4 634 580
13 The Gentlemen	US	Guy Ritchie	25	4 611 716
14 Onward	US	Dan Scanlon	26	4 244 362
15 After We Collided	US	Roger Kumble	25	4 193 005
16 Jojo Rabbit	US/NZ/CZ	Taika Waititi	24	3 916 435
17 Spies in Disguise ⁽⁶⁾	US	Nick Bruno, Troy Quane	26	3 359 412
18 The Call of the Wild	US/CA	Chris Sanders	26	3 160 914
19 The Invisible Man	US/AU	Leigh Whannell	25	3 155 543
20 Knives Out ⁽⁷⁾	US	Rian Johnson	24	2 799 302
21 Trolls World Tour	US	Walt Dohrn, David Smith	25	2 702 514
22 Scoob!	US	Tony Cervone	15	2 604 572
23 Greenland	US/GB	Ric Roman Waugh	23	2 096 944
24 Padre no hay más que uno ...	ES	Santiago Segura	1	1 859 491
25 Richard Jewell	US	Clint Eastwood	21	1 791 397

Compared admissions in Europe 28 in 2019: — (4) 34 705 226 — (5) 3 289 149 — (6) 1 553 178

(1) 24 005 966 — (2) 12 902 996 — (3) 1 159 901 — (7) 4 901 976

Source: OBS/LUMIERE

Top 25 European films (including EUR inc) by admissions in the European Union and GB | 2020 *prov.*

Original title	Country of origin	Director	Release markets	Admissions <i>prov.</i>
1 1917	GB INC/US	Sam Mendes	26	15 643 104
2 Tolo Tolo	IT	Checco Zalone	2	6 674 872
3 Padre no hay más que uno 2: ...	ES	Santiago Segura	1	1 859 491
4 365 dni (365 Days)	PL	B Bialowas, T Mandes	2	1 703 326
5 Ducobu 3	FR	Elie Semoun	3	1 595 597
6 Me contro Te - Il film: La vendetta ...	IT	Gianluca Leuzzi	1	1 548 994
7 Nightlife	DE	Simon Verhoeven	5	1 498 465
8 Pinocchio (1)	IT/FR/GB	Matteo Garrone	14	1 385 551
9 10 jours sans maman (10 Days Without...)	FR	Ludovic Bernard	7	1 306 867
10 Emma.	GB/US	Autumn de Wilde	21	1 306 646
11 Psy 3: W imie zasad (Dogs 3)	PL	Wladyslaw Pasikowski	4	1 266 403
12 Jak zostalem gangsterem. Historia ...	PL	Maciej Kawulski	3	1 175 102
13 Odio l'estate (I Hate Summer)	IT	Massimo Venier	2	1 161 569
14 30 jours max	FR	Tarek Boudali	4	1 157 651
15 Les blagues de Toto	FR/LU/BE	Pascal Bourdiaux	3	1 096 528
16 Bigfoot Family	BE/FR	J Degruson, Ben Stassen	11	1 049 533
17 Druk (Another Round)	DK/SE/NL	Thomas Vinterberg	7	1 041 791
18 Adú	ES	Salvador Calvo	1	1 035 322
19 Le prince oublié (The Lost Prince)	FR/BE	Michel Hazanavicius	12	992 840
20 Mayday	PL	Sam Akina	1	977 000
21 Gli anni più belli (The Best Years)	IT	Gabriele Muccino	6	953 858
22 Hammamet	IT	Gianni Amelio	2	901 137
23 De Gaulle	FR	Gabriel Le Bomin	5	896 301
24 Das perfekte Geheimnis	DE	Bora Dagtekin	6	895 803
25 Die Känguru-Chroniken (The Kangaroo...)	DE	Dani Levy	3	824 440

(1) 1 654 179 admissions in Europe 28 in 2019. (2) 5 100 778 admissions in Europe 28 in 2019.

Source: OBS/LUMIERE

Top 25 European films by admissions in the Europa Cinemas Network ⁽¹⁾ | 2020 ^e

Original title	Country of origin ⁽²⁾	Director	Admissions ^{prov.}
1 J'accuse (An Officer And Spy)	FR/IT	Roman Polanski	323 450
2 Un divan à Tunis (Arab Blues)	FR/TN	Manele Labidi	298 907
3 Sorry We Missed You	GB/ FR/BE	Ken Loach	277 069
4 Judy	GB/US/FR	Rupert Goold	266 807
5 Les Misérables	FR	Ladj Ly	258 694
6 Boze Ciało (Corpus Christi)	PL/FR	Jan Komasa	233 071
7 Tolo tolo	IT	Checco Zalone	202 724
8 La Vérité (The Truth)	FR/JP	Hirokazu Koreeda	199 928
9 Druk (Another Round)	DK/SE/NL	Thomas Vinterberg	197 530
10 Als Hitler das rosa Kaninchen stahl (When Hitler Stole...)	DE/CH	Caroline Link	195 312
11 Svina (Scumbag)	SK	R. Biermann, M. S.Cengel	194 326
12 Portrait de la jeune fille en feu (Portrait of a Lady on Fire)	FR	Céline Sciamma	180 412
13 Hors Normes (The Specials)	FR/BE	O. Nakache, E. Toledano	178 582
14 Antoinette dans les Cévennes (My Donkey, My Lover & I)	FR/BE	Caroline Vignal	167 442
15 Hammamet	IT	Gianni Amelio	164 270
16 La belle époque	FR/BE	Nicolas Bedos	157 214
17 A Hidden Life	DE/US/GB	Terrence Malick	142 066
18 Gli anni più belli (The Best Years)	IT	Gabriele Muccino	133 233
19 Effacer l'historique (Delete History)	FR/BE	B. Delépine, G. Kervern	130 254
20 Lindenberg! Mach dein Ding!	DE	Hermine Huntgeburth	130 085
21 La bonne épouse (How to Be a Good Wife)	FR/BE	Martin Provost	121 662
22 Été 85 (Summer of 85)	FR/BE	François Ozon	121 129
23 Die Känguru-Chroniken (The Kangaroo Chronicles)	DE	Dani Levy	120 904
24 De beentjes van Sint-Hildegard (The Marriage Escape)	NL	Johan Nijenhuis	120 114
25 La dea fortuna (The Goddess of Fortune)	IT	Ferzan Ozpetek	119 150

(1) Data based on Europa Cinemas members in 34 MEDIA countries, 692 cities, 1 143 cinemas, 2 764 screens.

Sources: Europa Cinemas, OBS

(2) Country of origin and production year as allocated in LUMIERE database.

Top 25 European films (including EUR inc) by admissions in the US & Canada | 2020 ^e

Admissions estimated based on average ticket price of USD 9.20.

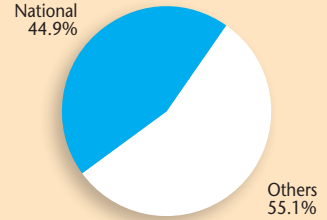
Original title	Country of origin	Director	Distributor	Admissions ^e
1 1917	GB INC/US	Sam Mendes	Universal Pictures	17 145 740
2 The Turning	GB/IE/IN/CA/US	Floria Sigismondi	Universal Pictures	1 681 823
3 Emma.	GB/US	A. de Wilde	Focus/Focus Features	1 092 974
4 The Rhythm Section	GB/ES/US	Reed Morano	Paramount-Dreamworks	591 084
5 Cats	GB INC/US	Tom Hooper	Universal Pictures	551 721
6 Monster Hunter	DE/US/JP/ZA/...	P. W.S. Anderson	Sony Pictures	545 479
7 Portrait de la jeune fille ...	FR	Céline Sciamma	Neon Rated	395 788
8 The Lodge	GB/CA/US	S Fiala, V Franz	Neon Rated	244 648
9 Harry Potter & the Philo...	GB INC/US	Chris Columbus	Warner Bros.	161 761
10 Promising Young Woman	GB/US	Emerald Fennell	Focus/Focus Features	131 324
11 Harry Potter & the Chamber...	GB INC/US	Chris Columbus	Warner Bros.	84 371
12 A Hidden Life	DE/US/GB	Terrence Malick	Fox Searchlight	78 019
13 Dolor y gloria (Pain and Glory)	ES/FR	Pedro Almodóvar	Sony Pictures	72 506
14 Harry Potter & the Prisoner...	GB INC/US	Alfonso Cuarón	Warner Bros.	63 151
15 Pinocchio	IT/FR/GB	Matteo Garrone	Roadside Attractions	53 135
16 Harry Potter and the Goblet...	GB INC/US	Mike Newell	Warner Bros.	51 288
17 The High Note	GB/US	Nisha Ganatra	Focus/Focus Features	48 100
18 Seberg	GB/US	B. Andrews	Amazon Studios	47 250
19 Greed	GB	M. Winterbottom	Sony Pictures	38 620
20 Les misérables	FR	Ladj Ly	Amazon Studios	35 890
21 Ordinary Love	GB	L Barros D\'Sa...	Bleecker Street	35 195
22 Harry Potter & the Deathly...	GB INC/US	David Yates	Warner Bros.	33 654
23 The Informer	GB	Andrea Di Stefano	Vertical Entertainment	32 659
24 Judy	GB/US/FR	Rupert Goold	Roadside Attractions	32 271
25 Il traditore (The Traitor)	IT/FR/DE/BR	Marco Bellochio	Sony Pictures	32 177

Note: A total of 126 European films (including 17 EUR inc films) were identified among the top 755 films on release in the US and Canada in 2020, generating cumulative admissions of 23.9 million (10.4% market share) Sources: Comscore, OBS/LUMIERE

France

Population 2020 ^e	67.3 million
GDP per capita 2020 ^e	39 907 USD
Gross box office 2020 ^e	432.6 M EUR (494.1 M USD)
Admissions 2020 ^e	65.1 million
Average ticket price 2020 ^e	6.6 EUR (7.6 USD)
Average admissions per capita 2020 ^e	1.2
Screens 2019 2020	6 114 6 127

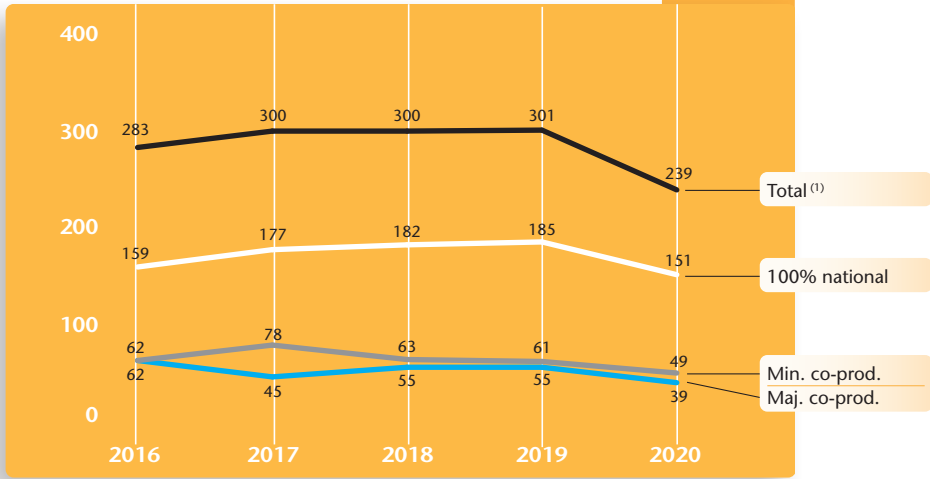
Market shares 2020^e



Number of French feature films produced | 2016-2020

In units.

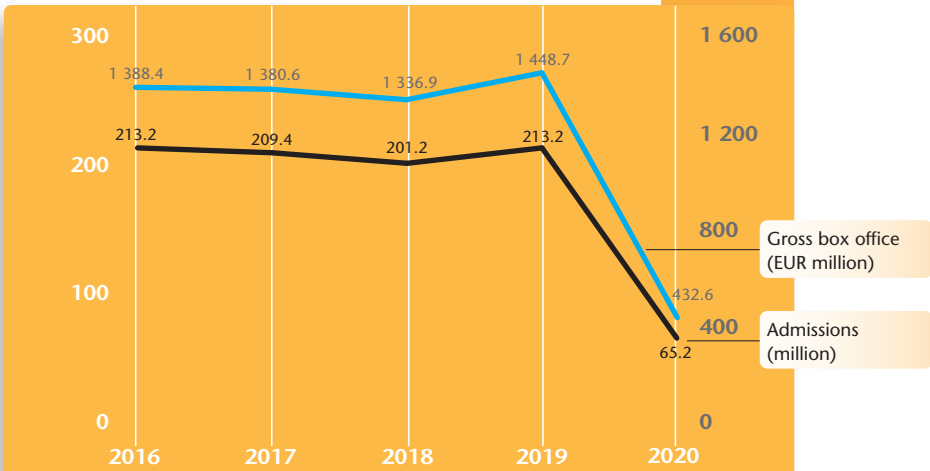
Source: CNC



(1) Officially recognised films.

Admissions and gross box office in France | 2016-2020

Source: CNC



Top 20 films by admissions in France | 2020 ⁽¹⁾

Original title	Country of origin	Director	Distributor	Admissions
1 Tenet	US/GB	Christopher Nolan	Warner Bros.	2 346 680
2 1917	GB INC/US	Sam Mendes	UPI	2 227 282
3 Sonic the Hedgehog	US/JP/CA	Jeff Fowler	Paramount Pictures	2 117 099
4 Bad Boys for Life	US/MX	Adil El Arbi, Bilall Fallah	Sony Pictures	1 726 217
5 Star Wars: Episode IX - The Rise of...	US	J.J. Abrams	Walt Disney Studios	1 692 028
6 Ducobu 3	FR	Elie Semoun	UGC Distribution	1 502 399
7 Dolittle	US/CN/GB/JP	Stephen Gaghan	UPI	1 322 643
8 The Call of the Wild	US/CA	Chris Sanders	Walt Disney Studios	1 271 304
9 10 jours sans maman (10 Days...)	FR	Ludovic Bernard	StudioCanal	1 184 054
10 30 jours max	FR	Tarek Boudali	StudioCanal	1 142 154
11 Les blagues de Toto	FR/LU/BE	Pascal Bourdiaux	SND Films	1 064 776
12 Birds of Prey: And the Fantabulous...	US	Cathy Yan	Warner Bros.	1 049 233
13 Trolls World Tour	US	D. Smith, W. Dohrn	UPI	1 013 227
14 Onward	US	Dan Scanlon	Walt Disney Studios	927 281
15 Le prince oublié (The Lost Prince)	FR/BE	Michel Hazanavicius	Pathé Distribution	919 912
16 De Gaulle	FR	Gabriel Le Bomin	SND Films	869 881
17 Jumanji: The Next Level	US	Jake Kasdan	Sony Pictures	843 769
18 Richard Jewell	US	Clint Eastwood	Warner Bros.	797 965
19 Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney Studios	789 173
20 Scoob!	US	Tony Cervone	Warner Bros.	783 522

Source: CNC

Distribution and exhibition

In response to the pandemic French cinemas were closed for 162 days throughout 2020. Cinemas were first ordered to close in mid-March 2020 and reopened by the end of June. Due to a second national lockdown cinemas had to close again in late October and were only allowed to reopen in mid-March 2021 with a 35% occupancy limit, which was raised to 65% on June 9 and is expected to be lifted completely from July onwards. Consequently – and more or less in line with the EU average – admissions collapsed by 69.4% in 2020 from 213 million in 2019 down to 65.2. Likewise, GBO fell from EUR 1.45 billion in 2019 to EUR 433 million, down by 70.1%.

The rescheduling of most US blockbusters helped French films to increase their traditionally strong market share even further, lifting it from 34.8% to 44.9%. Led by comedy sequel *Ducobu 3* selling 1.5 million tickets and ranking in sixth place, a total of six French productions featured among the top 20 films, compared to two in 2019. In contrast to some other European markets the French charts were however topped by five US films, led by *Tenet* (US) which sold over 2.3 million tickets and made France one of the few markets whose charts were topped by a film released after the first lockdown.

Production and funding

Just like elsewhere in Europe production levels dropped in France due to pandemic related shooting restrictions. In 2020 a total of 239 feature films were approved by the country's national funding body, the CNC, compared to a record 301 films in 2019. The mean production cost of French initiative films continued to decline and reached EUR 3.4 million, compared to EUR 3.8 million in 2019, EUR 4.0 million in 2018 and EUR 5.5 in 2016. Total investment in film production in France dropped from EUR 1.1 billion to EUR 784 million, EUR 644 million of which was invested in French initiative films.

In response to the crisis, the French government and the CNC introduced a variety of support measures, including additional forms of supports and emergency funds, cash flow measures through mobilization of funds in advance, flexibilization of rules and payment obligations and additional loan guarantees. In September the French government released its "Film and audiovisual sector plan" within the French Cultural Recovery Plan. The plan has a budget of EUR 165 million and will be implemented by the CNC and includes several support programmes across the industry. In addition, an exceptional fund of EUR 50 million is aimed at compensating cinema operators for the losses due to the drop in attendance during the various lockdowns.

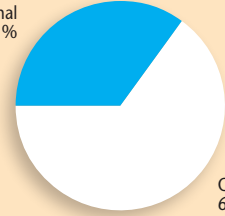
Sources: CNC, UNIC, EFAD, *Screen International*, OBS

Germany

Population 2020 ^e	83.2 million
GDP per capita 2020 ^e	45 733 USD
Gross box office 2020 ^e	318.0 M EUR (363.2 M USD)
Admissions 2020 ^e	38.1 million
Average ticket price 2020 ^e	8.3 EUR (9.5 USD)
Average admissions per capita 2020 ^e	0.5
Screens 2019 2020	4 961 4 926

Market shares 2020^e

National
35.1%

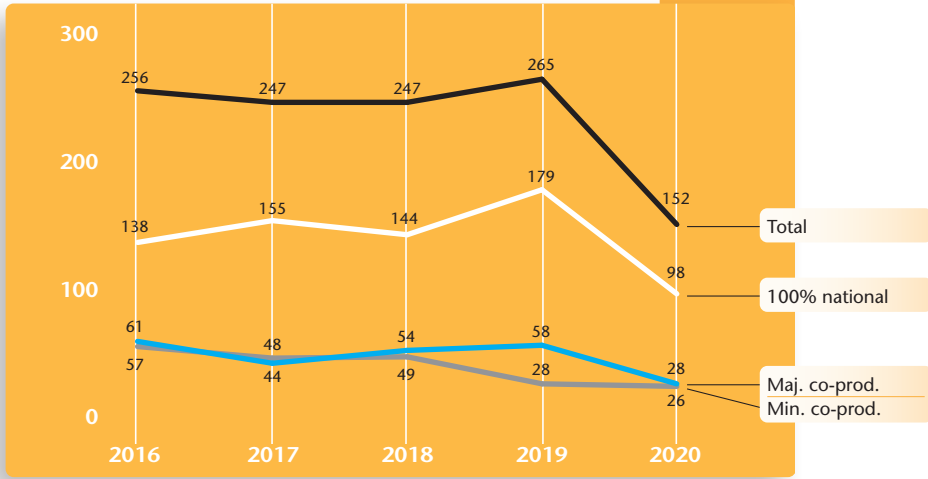


Others
64.9%

Number of German feature films produced⁽¹⁾ | 2016-2020

In units.

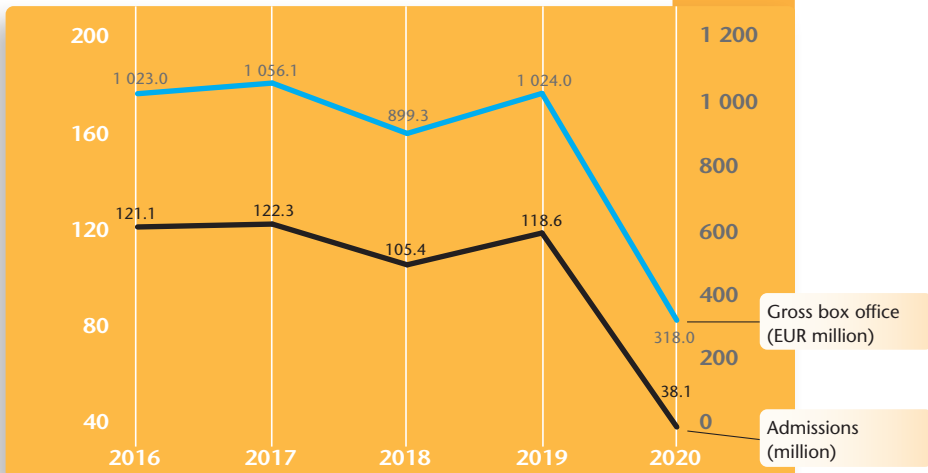
Source: SPIO



(1) Films on first release.

Admissions and gross box office in Germany | 2016-2020

Source: FFA



Top 20 films by admissions in Germany | 2020

Original title	Country of origin	Director	Distributor	Admissions
1 Bad Boys for Life	US/MX	Adil El Arbi, Bilall Fallah	Sony Pict. Releasing	1 820 035
2 Tenet	US/GB	Christopher Nolan	Warner Bros.	1 658 815
3 Star Wars: Episode IX - The Rise...	US	J.J. Abrams	Walt Disney Studios	1 463 825
4 Nightlife	DE	Simon Verhoeven	Warner Bros.	1 379 279
5 Sonic the Hedgehog	US/JP/CA	Jeff Fowler	Paramount	1 228 993
6 Knives Out	US	Rian Johnson	LEONINE Distribution	1 208 628
7 Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney Studios	1 096 103
8 Jumanji: The Next Level	US	Jake Kasdan	Sony Pict. Releasing	1 058 057
9 1917	GB INC/US	Sam Mendes	Universal Pictures	985 673
10 After We Collided	US	Roger Kumble	Constantin Film	936 397
11 Dolittle	US/CN/GB/JP	Stephen Gaghan	Universal Pictures	909 609
12 Die Känguru-Chroniken	DE	Dani Levy	X-Verleih	809 282
13 Jim Knopf und die Wilde 13	DE	Dennis Gansel	Warner Bros.	782 032
14 Als Hitler das rosa Kaninchen stahl	DE/CH	Caroline Link	Warner Bros.	725 919
15 Gisaengchung (Parasite)	KR	Bong Joon Ho	Koch Media	718 581
16 Das perfekte Geheimnis	DE	Bora Dagtekin	Constantin Film	691 427
17 Lindenberg! Mach dein Ding	DE	Hermine Huntgeburth	DCM Film Distrib.	685 685
18 Die Hochzeit (The Wedding)	DE	Til Schweiger	Warner Bros.	654 357
19 Enkel für Anfänger (Granny Nanny)	DE	Wolfgang Groos	StudioCanal	532 823
20 Little Women	US	Greta Gerwig	Sony Pict. Releasing	528 475

Source: FFA

Distribution and exhibition

Having recovered to a certain extent in 2019, the German film industry was hit hard by the COVID crisis in 2020. Cinemas had to close first in mid-March, reopened in July with strict sanitary safety measures which kept maximum capacities capped at 20 to 25% and finally had to close again in November. They did not open again until May/June 2021 depending on the respective German states regulations. As a result admissions plummeted by 68% from 118.6 million in 2019 to 38.1 million in 2020 while gross box office takings dropped by 69% from EUR 1.0 billion to EUR 318 million.

Only 339 films were theatrically released in 2020, compared to 606 film releases in 2019. Almost half of these films were German films as the release of many US productions was postponed. The absence of US blockbusters provided more opportunities for national films and led to a record national market share of 35.1%. Led by the comedy *Nightlife* (1.4 million admissions) a total of seven German films featured among the top 20 titles, compared to only two German films in 2019. Released in mid-January *Bad Boys for Life* (US) became the year's top ranking film in 2020 selling 1.8 million tickets.

The impacts of this dramatic loss in revenue in the theatrical sector will only be seen over the coming years, as in the short term the number of

cinema screens remained stable decreasing only marginally from 4 961 to 4 926 screens in 2020.

Production and funding

Just like the rest of Europe, German film production activity came to a temporary standstill in the second half of March due to the COVID-19 crisis. This impact is however not necessarily represented in production figures as in Germany film production is officially measured in terms of film releases. Intrinsically linked to the temporary closures of cinemas the number of German feature films dropped from 265 in 2019 to 152 feature film releases in 2020.

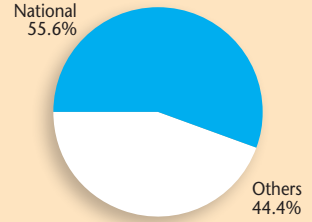
In order to mitigate the effects of the crisis the federal government, the federal States and film funds have launched numerous measures including the establishment of a special support programme for the cultural sector earmarking EUR 165 million for the film industry, of which EUR 75 million are reserved for cinema exhibition. 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, VAT on cinema tickets was reduced from 7% to 5% for the second half of 2020 and payments to collecting societies were deferred.

Sources: FFA, SPIO, BKM, UNIC, OBS

Italy

Population 2020 ^e	59.6 million
GDP per capita 2020 ^e	31 288 USD
Gross box office 2020 ^e	189.5 M EUR (216 M USD)
Admissions 2020 ^e	30.3 million
Average ticket price 2020 ^e	6.3 EUR (7.1 USD)
Average admissions per capita 2020 ^e	0.5
Screens 2019 2020 ⁽¹⁾	5 385 5 325

Market shares 2020^e

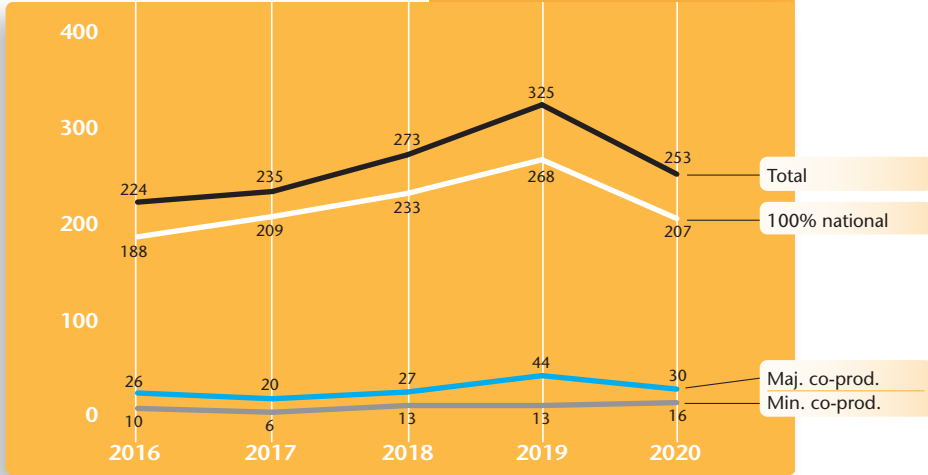


(1) Source: SIAE. But only 3 880 screens with at least 60 days of activity in 2019.

Number of Italian feature films produced | 2016-2020

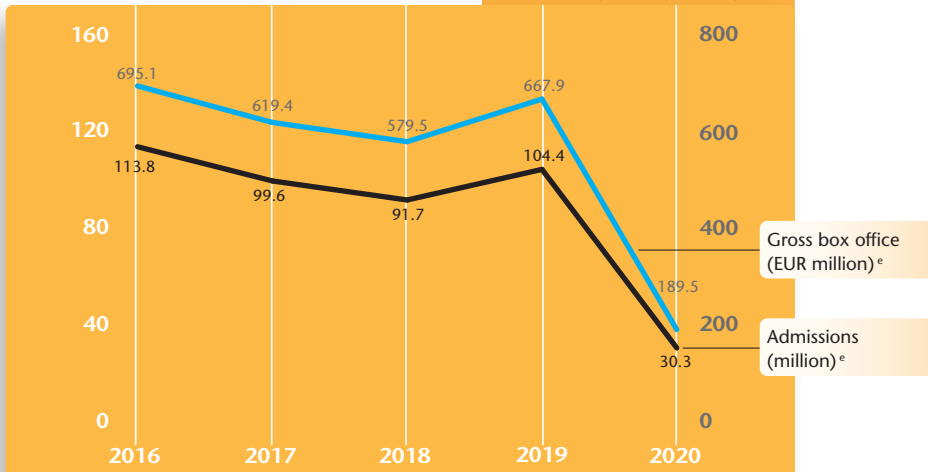
In units.

Sources: DG Cinema e Audiovisivo - MiC



Admissions and gross box office in Italy | 2016-2020^e

Sources: SIAE, ANICA, Cinetel, OBS



Top 20 films by admissions in Italy | 2020

Original title	Country of origin	Director	Distributor	Admissions
1 Tolo Tolo	IT	Checco Zalone	Medusa Film	6 674 622
2 Me contro Te - Il film: La vendetta del...	IT	Gianluca Leuzzi	Warner Bros.	1 548 994
3 Odio l'estate (I Hate Summer)	IT	Massimo Venier	Medusa Film	1 160 087
4 1917	GB INC/US	Sam Mendes	01 Distribution	1 031 183
5 Tenet	US/GB	Christopher Nolan	Warner Bros.	958 282
6 Little Women	US	Greta Gerwig	Warner Bros.	938 261
7 Gli anni più belli (The Best Years)	IT	Gabriele Muccino	01 Distribution	907 640
8 Hammamet	IT	Gianni Amelio	01 Distribution	901 122
9 Jumanji: The Next Level	US	Jake Kasdan	Warner Bros.	747 020
10 Dolittle	US/CN/GB/JP	Stephen Gaghan	Universal	733 158
11 Jojo Rabbit	US/NZ/CZ	Taika Waititi	Walt Disney	649 839
12 Gisaengchung (Parasite)	KR	Bong Joon Ho	Academy/L.Red	613 304
13 Pinocchio	IT/FR/GB	Matteo Garrone	01 Distribution	611 171
14 After We Collided	US	Roger Kumble	01 Distribution	605 201
15 Figli	IT	Giuseppe Bonito	Vision/Universal	519 456
16 18 regali (18 Presents)	IT	Francesco Amato	VIS/UNI/LRED	481 319
17 La dea fortuna (The Goddess of Fortune)	IT	Ferzan Ozpetek	Warner Bros.	464 655
18 Richard Jewell	US	Clint Eastwood	Warner Bros.	413 340
19 Sonic the Hedgehog	US/JP/CA	Jeff Fowler	20th Century Fox	404 921
20 Birds of Prey: And the Fantabulous...	US	Cathy Yan	Warner Bros.	357 932

Source: Cinetel

Distribution and exhibition

Italy 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 in early March. Cinemas reopened in mid-June but were closed again in late October, thus missing out on the traditionally particularly important holiday season. In 2021 Italy figured among the first countries to reopen movie theatres in late April, albeit via a slow and gradual process with strong restrictions and regional differences with most larger venues waiting for blockbuster releases in May and June. Slightly above the EU average, 2020 admissions consequently plummeted by 71.0% from 104 million in down to 30.3 million. GBO takings dropped fell from EUR 668 million in 2019 to EUR 190 million, down 71.6%.

Italy was one of the markets where national productions successfully filled the gap left by the rescheduling of most US blockbusters, cumulatively selling an estimated 17 million tickets which is only 25% down on 2019. Italian films consequently reached a record market share of 55.6%, up from 21.6% in 2019. A total of nine Italian productions featured among the top 20 films, compared to three in 2019. The family comedy *Tolo Tolo* (IT) sold 6.7 million tickets and became the by far most successful film of the year, followed by two other local comedies *Me*

contro Te – La Vendetta del Signor S (1.5 million) and *Odio l'estate* (1.2 million). All these top titles were released in January 2020 before the lockdown. In April 2021 Italy abolished film censorship, ending legislation that has been in place since 1962, and will instead allow distributors to classify their own features.

Production and funding

As expected, the pandemic put a temporary halt to the growth trend in Italian feature film production activity which had reached a record high of 325 films rated in 2019, but dropped to 253 films in 2020.

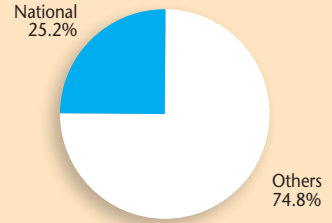
The Italian government put in place several support measures in 2020, including a EUR 130 million emergency fund, the acceleration of payments of ordinary funded aid, the relaxation of requirements and deadlines, the suspension of tax obligations and a revision of the rule on media chronology. In January 2021 the Italian government decided to allocate EUR 640 million to the film and TV industry with e.g. EUR 110 million going to movie theatres, EUR 25 million earmarked for distributors, EUR 35 million going to state film entity Istituto Luce Cinecittà and a refinancing of the 40% tax rebate for production.

Sources: DG Cinema e Audiovisivo - MiC, ANICA, Cinetel, UNIC, EFAD, *Variety*, *Screen International*, OBS

Spain

Population 2020 ^e	47.3 million
GDP per capita 2020 ^e	27 132 USD
Gross box office 2020 ^e	161.0 M EUR (183.9 M USD)
Admissions 2020 ^e	27.0 million
Average ticket price 2020 ^e	6.0 EUR (6.8 USD)
Average admissions per capita 2020 ^e	0.6
Screens 2019 2020	3 695 3 701

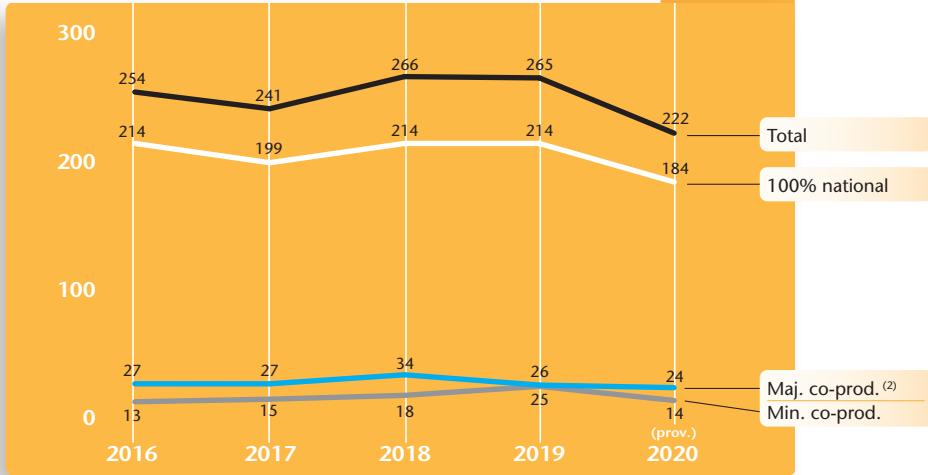
Market shares 2020^e



Number of Spanish feature films produced⁽¹⁾ | 2016-2020

In units.

Source: ICAA

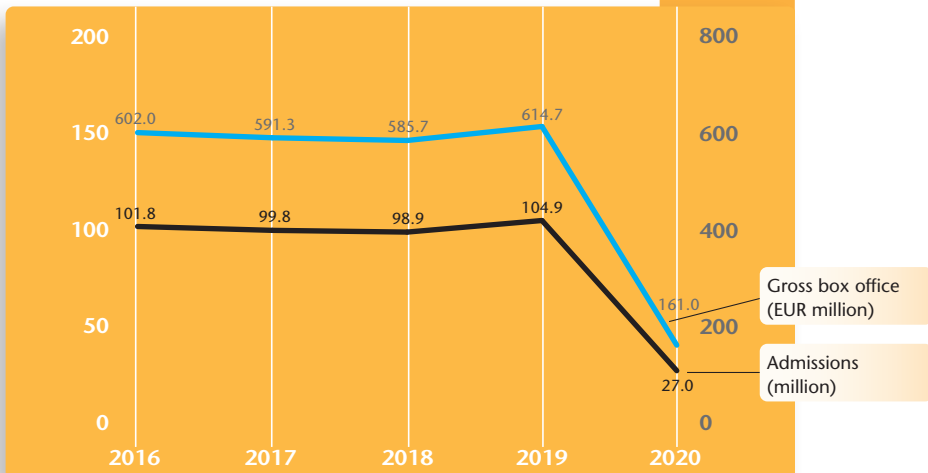


(1) Films certified, including 2 theatrical experimental feature films in 2019 and 7 in 2020.

(2) Including parity co-productions.

Admissions and gross box office in Spain | 2016-2020 *prov.*

Source: ICAA



Top 20 films by admissions in Spain | 2020 *prov.*

Original title	Country of origin	Director	Distributor	Admissions
1 Padre no hay más que uno 2: La...	ES	Santiago Segura	Sony Pict. Ent.	1 859 491
2 1917	GB INC/US	Sam Mendes	Aurum Producciones	1 497 550
3 Adú	ES	Salvador Calvo	Paramount	1 035 322
4 Dolittle	US/CN/GB/JP	Stephen Gaghan	UPI	1 019 099
5 Bad Boys for Life	US/MX	A. El Arbi, B. Fallah	Sony Pict. Ent.	1 018 181
6 Tenet	US/GB	Christopher Nolan	Warner Bros.	979 334
7 Sonic the Hedgehog	US/JP/CA	Jeff Fowler	Paramount	827 644
8 Malasaña 32	ES/FR	Albert Pintó	Warner Bros.	586 021
9 Jojo Rabbit	US/NZ/CZ	Taika Waititi	The Walt Disney Co.	512 039
10 Birds of Prey: And the Fantabulous...	US	Cathy Yan	Warner Bros.	506 968
11 The Croods: A New Age	US	Joel Crawford	UPI	469 614
12 Hasta que la boda nos separe	ES	Dani de la Orden	A Contracorriente Films	452 184
13 After We Collided	US	Roger Kumble	Diamond Films	417 783
14 Wonder Woman 1984	US	Patty Jenkins	Warner Bros.	405 833
15 The Invisible Man	US/AU	Leigh Whannell	UPI	400 854
16 Pinocchio	IT/FR/GB	Matteo Garrone	Warner Bros.	388 191
17 Trolls World Tour	US	W. Dohrn, D. Smith	UPI	379 428
18 The Call of the Wild	US/CA	Chris Sanders	The Walt Disney Co.	373 852
19 Onward	US	Dan Scanlon	The Walt Disney Co.	361 182
20 Greenland	US/GB	Ric Roman Waugh	Diamond Films	343 889

Sources: ICAA, Comscore

Distribution and exhibition

As elsewhere in Europe, Spain saw a major crash in admissions in 2020 as cinemas had to close in response to the COVID-19 crisis in mid-March and gradually re-opened – with differences at regional levels and limited capacity – from late May onwards. In contrast to most other European markets cinemas were in principle – with regional exceptions – allowed to operate during the autumn but a large number of Spanish cinemas closed their doors from late 2020 due to the lack of content and evolving local restriction measures. As of early April 2021, the share of opened cinemas rose to approximately 80%. Restrictions continue to vary widely from one region to another, with different occupancy limit and minimum safety distance enforced. Admissions consequently collapsed by 74.3% from 105 million to a mere EUR 27 million in 2020, as GBO plunged from EUR 615 million to EUR 161 million, down 73.8% from 2019.

Benefitting from the rescheduling of most US blockbusters, local comedy sequel *Padre no hay más que uno 2: La llegada de la suegra* (ES) topped the charts in 2020 selling 1.9 million tickets ahead of the GB INC/US war drama *1917* (1.5 million) and *Adú* (1.0 million). Like in 2019 a total of four Spanish productions featured among the top 20 films and national market share increased from 15.1% to 25.2%.

Production and funding

As film production activity in Spain is measured in terms of films certified by ICAA, the country's national public funding body, the number of film productions did not drop as heavily as in other markets which measure film production in terms of film releases or start of principal photography. A total of 222 Spanish films were certified in 2020, compared to 265 in 2019. As in other parts of Europe, film production came to a halt in March 2020 but became possible under strict conditions – again with regional differences – from late May onwards.

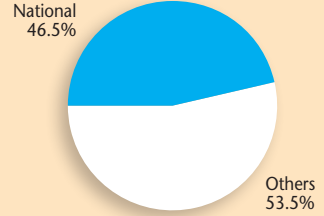
As in the rest of Europe, various non-sector as well as sector specific support measures were introduced to mitigate the effects of the crisis. For instance, a support package of EUR 76.4 million for the cultural sector was approved in May 2020. ICAA increased flexibility in funding obligations and the production incentive was increased by 5% upping the maximum amount from EUR 3 to EUR 10 million. In March 2021 the Spanish government announced a EUR 1.6 billion investment plan for the local film industry from 2021-2025 to increase production, attract international investment and talent, and strengthen the presence of Spanish productions in the international markets.

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

United Kingdom

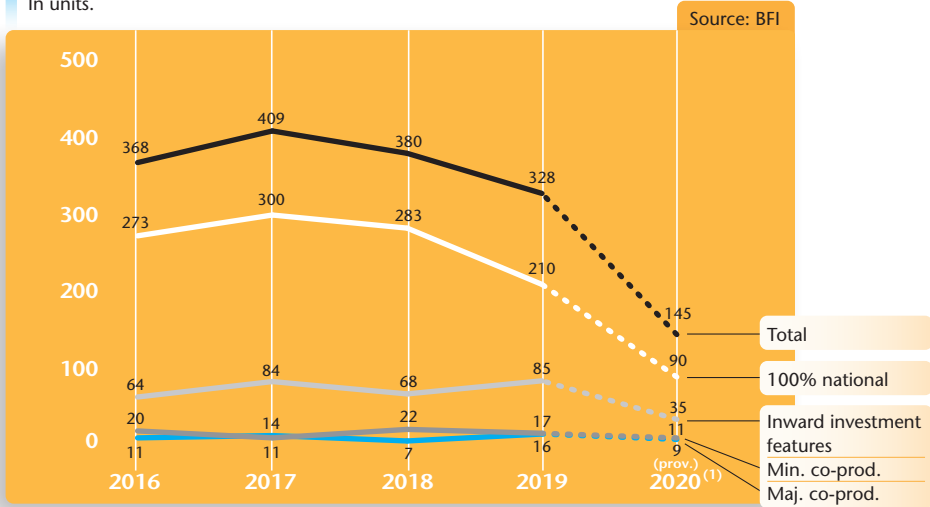
Population 2020 ^e	67.0 million
GDP per capita 2020 ^e	40 406 USD
Gross box office 2020 ^e	307.11 M GBP (394.21 M USD)
Admissions 2020 ^e	44.0 million
Average ticket price 2020 ^e	7.0 GBP (9.0 USD)
Average admissions per capita 2020 ^e	0.7
Screens 2019 2020	4 480 -

Market shares 2020^e



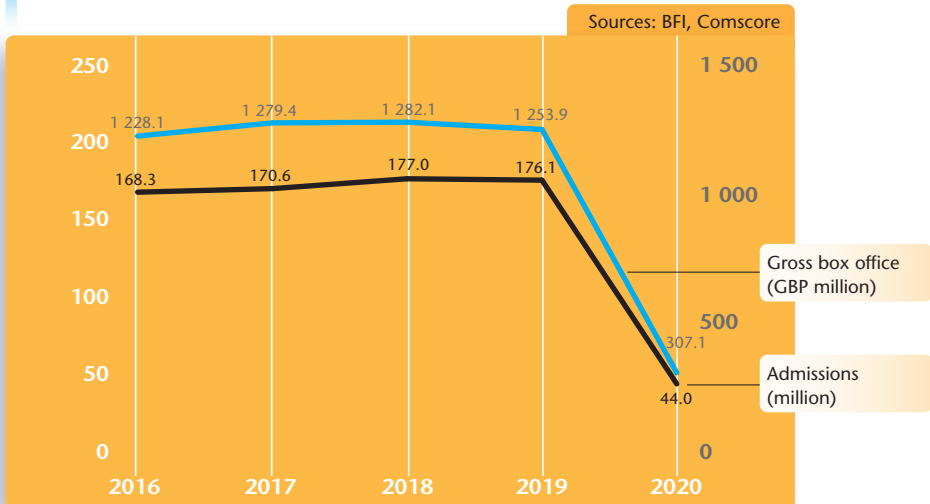
Number of films produced in the United Kingdom | 2016-2020 *prov.* ⁽¹⁾

In units.



(1) The apparent decline of film productions in 2020 is partially linked to a time lag in identifying film productions with budgets below GBP 500 000.

Admissions and gross box office in the United Kingdom | 2016-2020



Top 20 films by admissions in the United Kingdom & Ireland | 2020^e

Estimated admissions based on average ticket price of GBP 6.98.

	Original title	Country of origin	Director	Distributor	Admissions ^e
1	1917	GB INC/US	Sam Mendes	E1 Entertainment	6 284 904
2	Sonic the Hedgehog	US/JP/CA	Jeff Fowler	Paramount	2 765 252
3	Tenet	US/GB	Christopher Nolan	Version Digital	2 502 853
4	Little Women	US	Greta Gerwig	Sony Pictures	2 405 702
5	Bad Boys for Life	US/MX	Adil El Arbi, Bilall Fallah	Sony Pictures	2 323 133
6	Dolittle	US/CN/GB/JP	Stephen Gaghan	Universal Pictures	2 284 631
7	Star Wars: Episode IX - The Rise of...	US	J.J. Abrams	Walt Disney	2 055 693
8	Jumanji: The Next Level	US	Jake Kasdan	Sony Pictures	1 837 100
9	Gisaengchung (Parasite)	KR	Bong Joon Ho	StudioCanal	1 736 407
10	The Gentlemen	US	Guy Ritchie	Entertainment	1 727 855
11	Birds of Prey: And the Fantabulous...	US	Cathy Yan	Version Digital	1 264 425
12	Jojo Rabbit	US/NZ/CZ	Taika Waititi	Walt Disney	1 139 432
13	Onward	US	Dan Scanlon	Walt Disney	1 099 796
14	Emma.	GB	Autumn de Wilde	Universal Pictures	1 068 742
15	The Invisible Man	US/AU	Leigh Whannell	Universal Pictures	992 469
16	The Personal History of David Cop...	US/GB	Armando Iannucci	Lionsgate	917 240
17	Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney	903 964
18	Spies in Disguise	US	Nick Bruno, Troy Quane	Walt Disney	760 270
19	After We Collided	US	Roger Kumble	Shear Ent.	573 424
20	Cats	GB INC/US	Tom Hooper	Universal Pictures	523 799

Sources: BFI, Comscore

Distribution and exhibition

Just like elsewhere in Europe cinemas in the UK had to close in response to the pandemic, closing first in late March 2020 and gradually reopening throughout July. Localised restrictions in various regions were re-introduced however in September and all cinemas in the UK and Ireland closed by the end of 2020 and were able to open in late May 2021 operating with a maximum capacity of 50%. Annual ticket sales consequently plummeted by 75% to 44 million in 2020, while ranging between 170 and 180 million admissions in the four preceding years. Similarly, GBO dropped by 75.5% from GBP 1.25 billion in 2019 to GBP 307 million.

In contrast to many other European markets national market share did not surge thanks to the rescheduling of many US blockbusters but remained in line with recent record highs: UK qualifying films captured 46.5% of total GBO, the second highest level after 47.2% in 2019. Market share of independent UK films grew slightly from 13.1% to 14.2%, while the market share of US studio-backed UK-made films decreased from 34.1% to 32.3%. WWI drama *1917* (GB inc/US) topped the charts selling 6.3 million tickets, followed by *Sonic the Hedgehog* (US/JP/CA; 2.8 million) and *Tenet* (US/GB; 2.5 million). Apart from *Tenet* only one other film among the top 20 was released after the initial lockdowns in March:

After We Collided (US) released in early September (573 admissions).

Production and funding

By the end of March film and TV production had come to a complete shutdown in the UK and started to resume only mid-July. Measuring film productions as the number of films starting principal photography in any given year, production figures hence directly reflect the temporary halt on production activity. According to BFI interim figures, the number of UK film productions dropped from 328 UK feature films – including inward investment films – in 2019 to 145 films in 2020⁽¹⁾ and UK film production spend dropped from GBP 2.02 billion to GBP 1.36 billion, down 33% on 2019.

Alongside the UK government's coronavirus-related fiscal support measures and its Film and Television Production Restart Scheme (Oct. 2020), the BFI set up a GBP 4.6 million support package in March 2020 and launched a temporary fund to support UK sales companies in July. The BFI also set up a Covid-19 Response Screen Sector Taskforce and contributed to The Film and TV Emergency Relief Fund financed largely by donations from the industry.

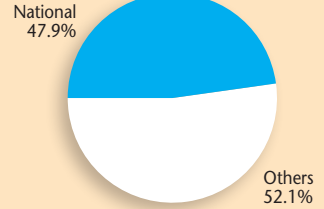
Sources: British Film Institute (BFI), DCM, UNIC, EFAD, Comscore, OBS

(1) Including feature documentaries. Apart from the COVID related impact, the decline in 2020 can be partly explained by a time lag in identifying films with a budget of less than GB 500 000, which account for the majority of domestic productions

Russian Federation

Population 2020 ^e	146.8 million
GDP per capita 2020 ^e	10 037 USD
Gross box office 2020 ^e	22.86 bn RUB (318 M USD)
Admissions 2020 ^e	88.8 million
Average ticket price 2020 ^e	257.6 RUB (3.6 USD)
Average admissions per capita 2020 ^e	0.6
Screens 2019 2020	5 597 5 337

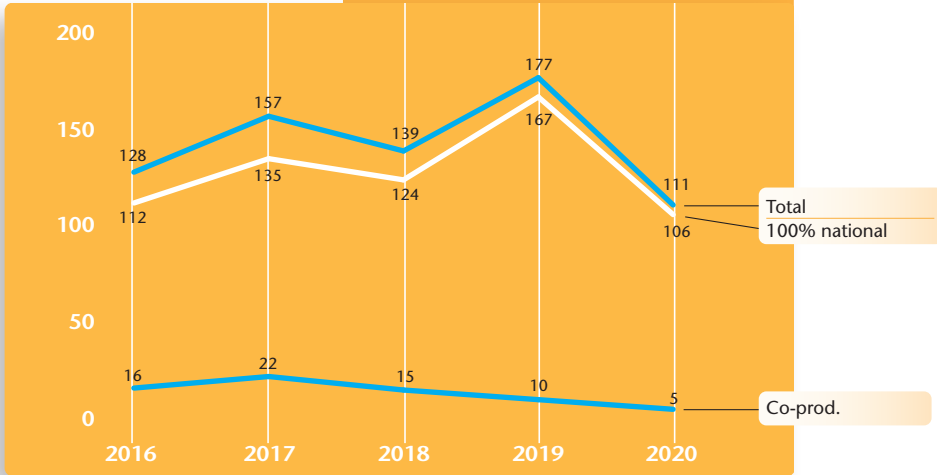
Market shares 2020^e



Number of Russian feature films produced | 2016-2020

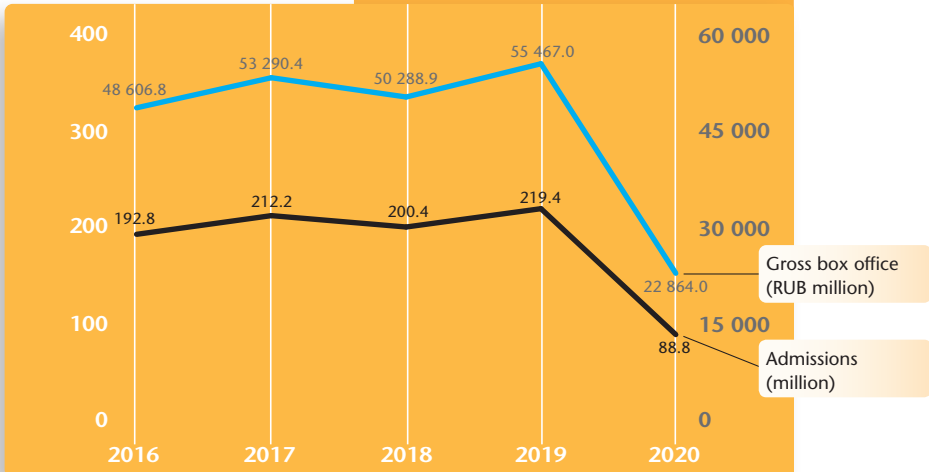
In units.

Source: Nevafilm, Russian Cinema Fund Analytics



Admissions and gross box office in Russia | 2016-2020

Sources: Nevafilm, Russian Cinema Fund Analytics



Top 20 films by admissions in the Russian Federation | 2020

	Original title	Country of origin	Director	Distributor	Admissions ⁶
1	Kholop (Son of a Rich)	RU	Klim Shipenko	Central Partnership	10 173 662
2	Led 2 (Ice 2)	RU	Zhora Kryzhovnikov	Sony Pictures	6 005 025
3	The Gentlemen	US	Guy Ritchie	Volga	4 038 839
4	Vtorzhenie (Invasion)	RU	Fedor Bondarchuk	Walt Disney/Sony	3 432 282
5	Tenet	US/GB	Christopher Nolan	Caro Premier	3 080 420
6	Sonic the Hedgehog	US/JP/CA	Jeff Fowler	Central P./Paramount	2 825 888
7	Bad Boys for Life	US/MX	A. El Arbi, B. Fallah	Sony Pictures	2 188 007
8	Dolittle	US/CN/GB/JP	Stephen Gaghan	UPI	2 169 556
9	The (UN)perfect Guy	RU	Marius Balchunas	Central Partnership	2 168 831
10	Neposredstvenno Kakha	RU	Viktor Shamirov	Central Partnership	2 145 019
11	Soyuz spaseniya	RU	Andrey Kravchuk	20 Century Fox	2 110 786
12	Spies in Disguise	US	N. Bruno, T. Quane	20 Century Fox	1 927 779
13	Ivan Tsarevich i Seryy Volk 4	RU	Feoktistov, Shmidt	Nashe Kino	1 708 860
14	Hotel Belgrade	RU	Konstantin Statskiy	Central Partnership	1 696 481
15	Birds of Prey: And the Fantabulous...	US	Cathy Yan	Caro Premier	1 607 548
16	Mulan	US/CA/HK	Niki Caro	Walt Disney/Sony	1 549 372
17	Onward	US	Dan Scanlon	Walt Disney/Sony	1 540 754
18	Streltsov	RU	Ilya Uchitel	Central Partnership	1 420 500
19	The Witches	US/MX/GB	Robert Zemeckis	Caro Premier	1 286 318
20	After We Collided	US	Roger Kumble	Volga	1 213 280

Source: Russian Cinema Fund Analytics

Distribution and exhibition

Russian cinemas were not allowed to operate between the end of March and mid-July, with regional differences applying and the percentage of operational cinemas increasing only gradually from about 30% in mid-August to about 80% in early October. While there were some temporary regional lockdowns, Russian cinemas – in contrast to most other European markets – generally remained open during autumn and winter, nevertheless operating with capacity limits ranging from 25% to 70%. These comparatively shorter periods of cinema closure seem to have contributed to reducing the drop in Russian cinema attendance with admissions falling from a record 219 million in 2019 to 88 million in 2020, down by “only” 59.5% - compared to 70% in the European Union. Russia hence kept its position as Europe’s largest theatrical market in terms of admissions even in time of COVID. Gross box office takings declined by 58.8% from RUB 55.5 billion to RUB 22.9 million (USD 318 million) in 2020.

Russian films successfully took advantage of the absence of US blockbusters which generally dominate the box office. Cumulatively Russian films sold 42.5 million tickets in 2020, only 16% less than in 2019, and reached a record market share of 47.9%. A total of nine Russian films featured among the top 20 films, compared to only three Russian films in 2019. Local comedy *Kholop (Son of a Rich)* topped the charts selling 10.2 mil-

lion tickets, ahead of local sports drama sequel *Led 2 (Ice 2)* (6.0 million), *The Gentlemen* (US/GB) (4.0 million), the Russian sci-fi action film *Vtorzhenie (Invasion)* (3.4 million) and *Tenet* (US/GB) (3.1 million), the latter being the only film among the top 5 to be released after the first lockdown in March.

Production and funding

As in the rest of Europe, Russian film production activity was comparatively less affected by the pandemic as productions continued to shoot throughout most of 2020 except for a brief shut down in the spring. Russian film production levels – measured in terms of film releases – declined nevertheless from their record high of 177 film in 2019 to 111 feature film released in 2020.

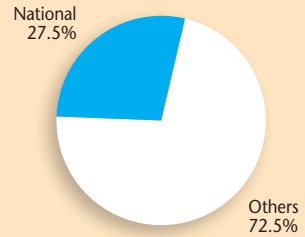
The Russian government provided support to help the industry to mitigate the effects of the crisis, offering relief packages for movie theaters as well as subsidies for producers to offset some of the financial risks of releasing films during the pandemic. Signed off in 2019, the Russian government has allocated USD 1.3 million for a trial period in 2021/2022 for a 40% cash rebate for foreign film productions shooting in Russia.

Sources: Russian Cinema Fund Analytics, UNIC, *Variety*, *Deadline*, OBS

Poland

Population 2020 ^e	38.0 million
GDP per capita 2020 ^e	15 654 USD
Gross box office 2020 ^e	312.9 M PLN (80.4 M USD)
Admissions 2020 ^e	17.1 million
Average ticket price 2020 ^e	18.3 PLN (4.7 USD)
Average admissions per capita 2020 ^e	0.5
Screens 2019 2020 ^e	1 513 1 513
National films produced 2019 2020	93 24

Market shares 2019^e



Top 10 films by admissions in Poland | 2020

	Original title	Country of origin	Director	Distributor	Admissions
1	365 dni (365 Days)	PL	B. Bialowas, T. Mandes	Next Film	1 639 390
2	Psy 3. W imie zasad (Dogs 3)	PL	Wladyslaw Pasikowski	Kino Swiat	1 185 030
3	Jak zostalem gangsterem. Historia...	PL	Maciej Kawulski	Mówi Serwis/ Next Film	1 136 056
4	Mayday	PL	Sam Akina	Kino Swiat	977 000
5	25 lat niewinnosci. Sprawa ...	PL	Jan Holoubek	Kino Swiat	718 541
6	Petla	PL	Patryk Vega	Kino Swiat	570 092
7	Trouble	CA/US/KY	Kevin Johnson	Monolith	567 436
8	Zenek	PL	Jan Hryniak	TVP	507 719
9	Scoob!	US	Tony Cervone	Warner	447 823
10	1917	GB INC/US	Sam Mendes	Monolith	423 924

Sources: Polski Instytut Sztuki Filmowej (PISF)

Distribution and exhibition

In response to the COVID crisis all Polish cinemas were firstly closed between mid-March and early June 2020, then between mid-November and mid-February, when they were briefly allowed to reopen under strict capacity restrictions before having to close again only one month later. Cinemas were set to reopen in late March with a 50% capacity limit. Cinema attendance in Poland consequently dropped from the 2019 record level of 60.6 million to 17.1 million admissions in 2020. This represents a year-on-year decline of 71.8% which is slightly above the average EU level of 70.2%. GBO plummeted by 72.6% from PLN 1.14 billion to PLN 313 million (USD 80.4 million). A total of 169 titles were released in cinemas, which is practically half as many as in 2019.

Benefitting from the rescheduling of most US blockbusters, Polish box office charts were topped by five national productions and there were a total of seven local films among the top 10, compared to four films in 2019. While official data for national market share was not available, the Observatory estimates that Polish films cumulatively took a record high of over 50% of total admissions in 2020, compared to 27.5% in 2019. Three films surpassed one million ticket sales: the erotic thriller *365 days* (1.6

million), crime action sequel *Psy 3* (1.2 million) and crime drama *How I Became a Gangster. A True Story* (1.1 million). All three films were released at the beginning of the year before the first lockdown in March.

Production and funding

Measuring film production in terms of films completed in any given year, Polish production figures already clearly reflect the impact of the lockdown related reduction in production activity, as the number of feature films produced dropped from 93 films in 2019 to only 24 films in 2020.

Mitigating the effects of the COVID pandemic, the PISF introduced several support measures for the film industry which include higher grants and funding levels, business loans as well as a 1.5% levy on VOD providers to strengthen the Polish Film Institute (PISF) funding budget. In October 2020 the Polish Government approved an additional PLN 120 million (USD 32 million) to support the cinema industry to recover from the pandemic fallout.

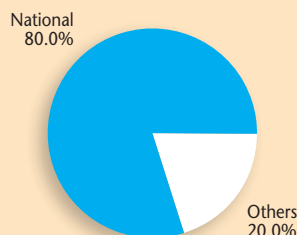
Sources: Polish Film Institute (PISF), UNIC, *Filmneweurope.com*, EFAD, OBS

Turkey

Population 2020 ^e	84.2 million
GDP per capita 2020 ^e	8 548 USD
Gross box office 2020 ^e	299.0 M TRY (43.0 M USD)
Admissions 2020 ^e	17.6 million
Average ticket price 2020 ^e	17.0 TRY (2.4 USD)
Average admissions per capita 2020 ^e	0.2
Screens 2019 2020 ⁽¹⁾ ^e	3 185 3 206
National films released ⁽¹⁾ 2019 2020	190 201

(1) Antrakt - Deniz Yavuz

Market shares 2020^e



Top 10 films by admissions in Turkey | 2020

Original title	Country of origin	Director	Distributor	Admissions
1 Eltilerin Savasi	TR	Onur Bilgetay	UIP	3 630 822
2 Baba Parasi	TR	Selçuk Aydemir	CJ Entertainment	1 872 347
3 Bayi Toplantisi (Vendors Meeting)	TR	Bedran Güzel	CJ Entertainment	1 047 163
4 Sifir Bir	TR	Kadri Beran Taskin	CGV Mars Dagitim	868 734
5 Hayaller Ülkesi: Gamonya	TR	Tuğçe Soysop	CJ Entertainment	808 671
6 Türkler Geliyor: Adaletin Kilici	TR	Kamil Aydin, Erdem Can	CJ Entertainment	506 524
7 Karakomik Filmler: Deli	TR	Cem Yilmaz	UIP	440 817
8 Ask Tesadüfleri Sever 2	TR	Ipek Sorak, Ömer Faruk Sorak	CGV Mars Dagitim	400 889
9 Biz Böyleyiz (The Way We Are)	TR	Caner Özyurtlu	CJ Entertainment	371 925
10 Gisaengchung (Parasite)	KR	Bong Joon Ho	Bir Film	331 051

Source: Antrakt - Deniz Yavuz

Distribution and exhibition

While in contrast to most European countries the Turkish government did not impose a strict lockdown in response to the COVID pandemic in 2020, cinemas – except for drive-ins – were ordered to close in mid-March and remained closed until early July. However, only 60% of Turkish cinemas had effectively reopened by August. A second round of closures followed in mid-November and cinemas were only allowed to open from June 2021 onwards with a 50% capacity. Turkish box office consequently collapsed just like in most other European countries by 70% with admissions falling from 59.3 million in 2019 to 17.6 million in 2020. Likewise, GBO dropped by 69.4% from TRY 977 million (USD 172 million) to TRY 299 million (USD 43 million).

Similar to the European trend, most US blockbuster releases for the year were rescheduled which led to an even stronger dominance of local productions as national market share soared from 56.9% in 2019 to an incredible estimated 80% of total admissions in 2020. This represents an unprecedented record level among European markets in past decades. Turkish films accounted for nine out of the top 10 performing films of 2020 with three films managing to sell more than 1 million tickets: family comedy *Eltilerin Savaşı* topped the

charts with 3.6 million admissions ahead of two other comedies *Baba Parasi* (1.9 million) and *Bayi Toplantisi (Vendors Meeting)* (1.0 million). All top performing films were released before the first shuttering of cinemas in March.

Production and funding

A total of 201 Turkish feature films were produced in 2020 but only 60 were released in cinemas. This compares to 190 feature films produced and 148 films released in 2019.

Film production in Turkey is supported by the Culture and Tourism Ministry which announced financial support, amounting to TRY 15.9 million (USD 1.86 million) for cinemas that were badly hit by the pandemic. The “Regulation on Supporting the Cinema Industry” which is part of the new cinema law that became effective in mid-2019, was amended in early 2021 to better support movie theatre operators during the pandemic as application terms and support payment procedures were softened.

Sources: DG Sinema, Antrakt – Deniz Yavuz, UNIC, OBS

Other Western Europe

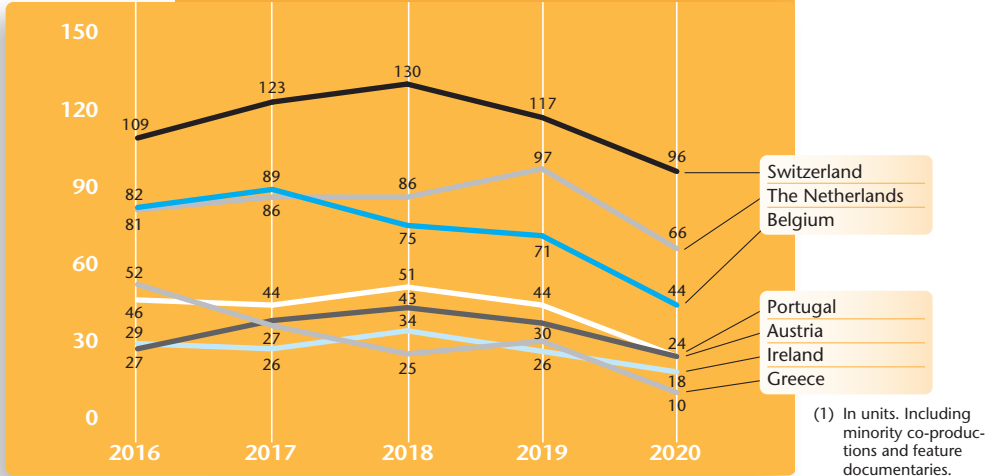
	Austria	Belgium	Greece	Ireland	Netherlands	Portugal	Switzerland
Population 2020 ^e (million)	8.9	11.5	10.7	5.0	17.4	10.3	8.6
GDP per capita 2020 ^e (USD)	48 154	44 529	17 670	83 850	52 248	22 489	86 849
Gross box office 2020 (M USD)	39.6	47.6	22.7	33.7	173.2	23.4	71.4
Admissions 2020 (million)	3.9	5.6	3.1	3.7	16.8	3.8	4.3
Average ticket price 2020 (USD)	10.3	8.5	7.3	9.0	10.3	6.2	16.4
Average admissions per capita 2020	0.4	0.5	0.3	0.7	1.0	0.4	0.5
Screens 2020 ^e	562	480	547	537	987 ⁽¹⁾	561	601
National market shares 2020 ^e	5.6%	13.9%	28.2%	1.5%	21.3%	3.5%	14.9%

(1) 2019

Number of feature films produced by selected Western European countries⁽¹⁾ | 2016-2020

In units.

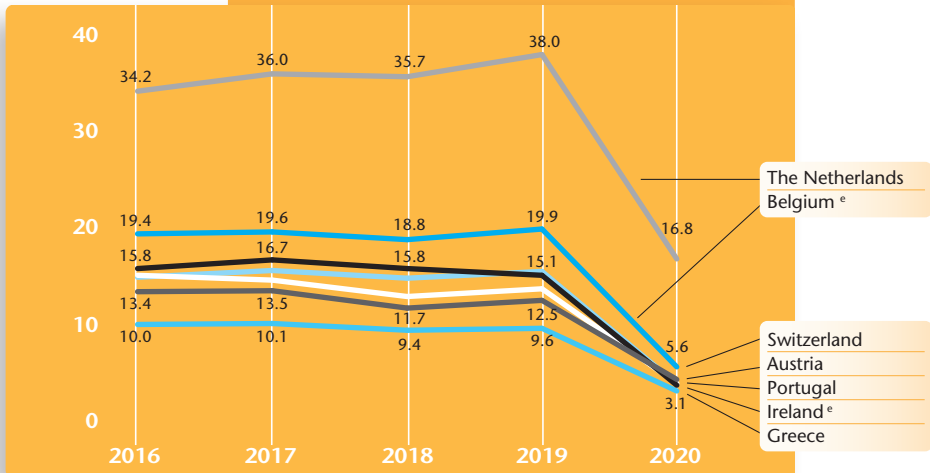
Sources: OFI / CFWB-VAF / Screen Ireland / GFC / NFF / ICA / OFS / OBS



Admissions in selected Western European countries | 2016-2020

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 | 2020

	Original title	Country of origin	Director	Distributor	Admissions
1	1917	GB/INC/US	Sam Mendes	WW Entertainment	1 002 340
2	Tenet	US/GB	Christopher Nolan	Warner Bros.	720 064
3	De beentjes van Sint-Hildegard	NL	Johan Nijenhuis	September Film Distr.	711 140
4	Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney	584 990
5	Bad Boys for Life	US/MX	Adil El Arbi, Bilall Fallah	UPI	579 237
6	Star Wars: Episode IX - The Rise...	US	J.J. Abrams	Walt Disney	487 948
7	Jumanji: The Next Level	US	Jake Kasdan	UPI	461 257
8	April, May en June	NL	Will Koopman	Independent Films	457 402
9	Sonic the Hedgehog	US/JP/CA	Jeff Fowler	UPI	338 197
10	Scoob!	US	Tony Cervone	Warner Bros.	337 622

Sources: MaccsBox - NVB & NVF

Top 10 films by admissions in Belgium | 2020

	Original title	Country of origin	Director	Distributor	Admissions
1	Bad Boys for Life	US/MX	Adil El Arbi, Bilall Fallah	Sony Pictures	450 618
2	1917	GB/INC/US	Sam Mendes	WW Entertainment	369 422
3	Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney	224 101
4	F.C. De Kampioenen 4: Viva Boma!	BE	Jan Verheyen	Independ. Films Distr.	214 938
5	Tenet	US/GB	Christopher Nolan	Warner Bros.	195 341
6	Jumanji: The Next Level	US	Jake Kasdan	Sony Pictures	181 816
7	Sonic the Hedgehog	US/JP/CA	Jeff Fowler	Sony Pict./Paramount	172 904
8	Star Wars: Episode IX - The Rise...	US	J.J. Abrams	Walt Disney	167 817
9	Dolittle	US/CN/GB/JP	Stephen Gaghan	Sony Pict./Universal	144 801
10	Bigfoot Family	BE/FR	J. Degruson, B. Stassen	Belga Films	125 826

Sources: CFWB, VAF, Cinedata

Top 10 films by admissions in Switzerland | 2020

	Original title	Country of origin	Director	Distributor	Admissions
1	Needle Park Baby	CH	Pierre Monnard	Elite Film	323 148
2	Tenet	US/GB	Christopher Nolan	Warner Bros.	206 553
3	Bad Boys for Life	US/MX	Adil El Arbi, Bilall Fallah	Sony Pictures	196 411
4	1917	GB/INC/US	Sam Mendes	Universal Pictures	138 094
5	Jumanji: The Next Level	US	Jake Kasdan	Sony Pictures	107 264
6	Star Wars: Episode IX - The Rise...	US	J.J. Abrams	Walt Disney	99 059
7	Dolittle	US/CN/GB/JP	Stephen Gaghan	Universal Pictures	94 404
8	Sonic the Hedgehog	US/JP/CA	Jeff Fowler	Warner Bros.	93 726
9	Knives Out	US	Rian Johnson	Impuls Pictures	89 124
10	Little Women	US	Greta Gerwig	Sony Pictures	78 991

Source: Swiss Federal Statistical Office

Top 10 films by admissions in Austria | 2020

	Original title	Country of origin	Director	Distributor	Admissions
1	Bad Boys for Life	US/MX	Adil El Arbi, Bilall Fallah	Sony Pictures	192 673
2	Tenet	US/GB	Christopher Nolan	Warner Bros.	177 918
3	Dolittle	US/CN/GB/JP	Stephen Gaghan	Universal Pictures	148 474
4	Sonic the Hedgehog	US/JP/CA	Jeff Fowler	Const/PPI	143 464
5	Knives Out	US	Rian Johnson	Constantin/Leonine	136 377
6	1917	GB/INC/US	Sam Mendes	Universal Pictures	125 197
7	After We Collided	US	Roger Kumble	Constantin Film	121 183
8	Nightlife	DE	Simon Verhoeven	Warner Bros.	113 522
9	Jumanji: The Next Level	US	Jake Kasdan	Sony Pictures	113 497
10	Star Wars: Episode IX - The Rise...	US	J.J. Abrams	Walt Disney	101 716

Sources: Austrian Film Institute (OFI) / Comscore

Nordic countries

	Denmark	Finland	Iceland	Norway	Sweden
Population 2020* (million)	5.8	5.5	0.4	5.4	10.3
GDP per capita 2020* (USD)	60 494	48 981	59 634	67 176	51 796
Gross box office 2020 (M USD)	96.4	49.8	4.9	58.8	73.7
Admissions 2020 (million)	7.2	3.9	0.5	4.8	5.7
Average ticket price 2020 (USD)	13.4	12.9	9.7	12.3	13.0
Average admissions per capita 2020	1.2	0.7	1.4	0.9	0.5
Screens 2020*	484	366	44	479	850 ⁽¹⁾
National market shares 2020*	50.4%	40.8%	14.1%	36.0% ⁽²⁾	26.8% ⁽²⁾

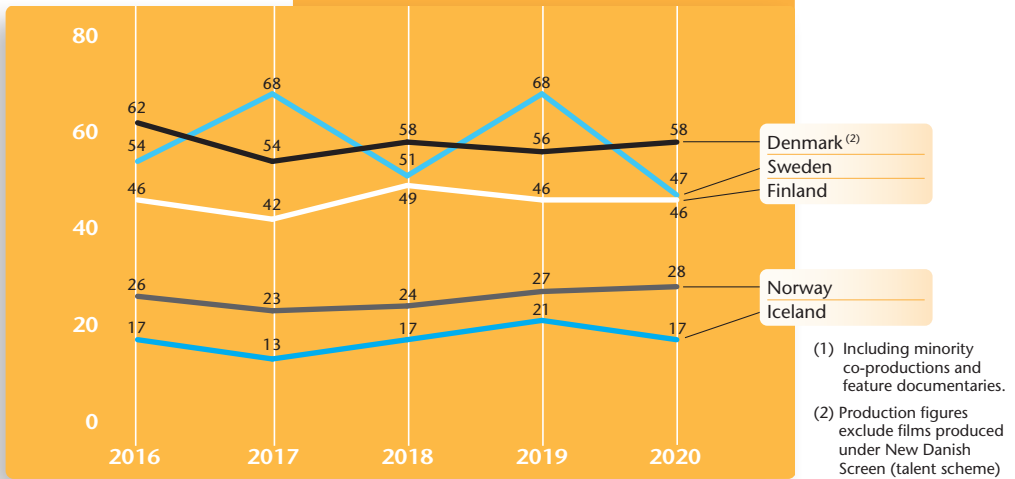
(1) 2018

(2) Excluding minority co-productions

Number of feature films produced by Nordic countries⁽¹⁾ | 2016-2020

In units.

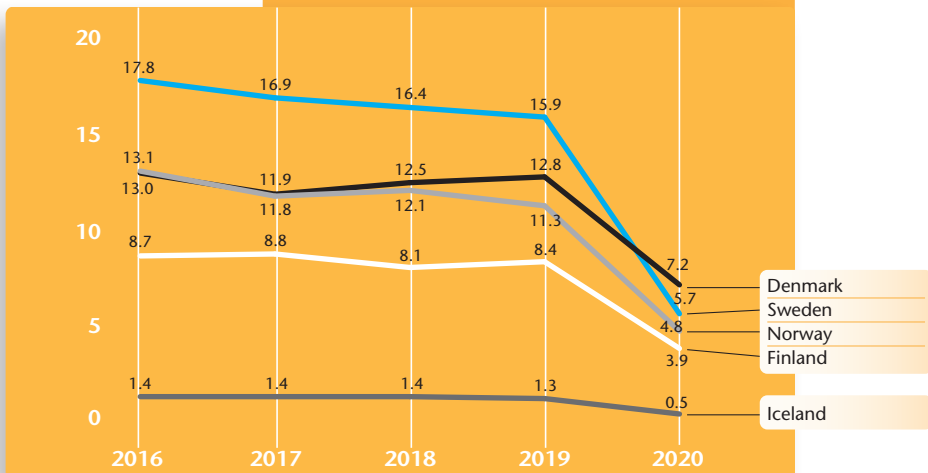
Sources: DFI / FFF / Icelandic Film Centre / NFI / SFI / OBS



Admissions in Nordic countries | 2016-2020

In millions.

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



Top 10 films by admissions in Sweden | 2020

	Original title	Country of origin	Director	Distributor	Admissions
1	Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney 2020	560 571
2	En del av mitt hjärta (A Piece of My...)	SE	Edward af Sillén	Nordisk Film	261 322
3	Star Wars: Episode IX - The Rise of...	US	J.J. Abrams	Walt Disney 2020	247 970
4	Tenet	US/GB	Christopher Nolan	Svensk Filmindustri	247 905
5	Bad Boys for Life	US/MX	Adil El Arbi, Bilall Fallah	Svensk Filmindustri	232 860
6	1917	GB INC/US	Sam Mendes	Nordisk Film	227 143
7	Gisaengchung (Parasite)	KR	Bong Joon Ho	TriArt Film	226 836
8	Min pappa Marianne (My Father...)	SE	Mårten Klingberg	Nordisk Film	220 621
9	LasseMajas detektivbyrå - Tågrånarens	SE	Moa Gammel	Svensk Filmindustri	187 105
10	Sune - Best Man	SE	Jon Holmberg	Nordisk Film	178 585

Source: Swedish Film Institute

Top 10 films by admissions in Denmark | 2020

	Original title	Country of origin	Director	Distributor	Admissions
1	Druk (Another Round)	DK/SE/NL	Thomas Vinterberg	Nordisk Film	802 693
2	Retfærdighedens ryttere (Riders of...)	DK	Anders Thomas Jensen	Nordisk Film	459 773
3	Klovn the Final	DK	Mikkel Nørgaard	Nordisk Film	437 381
4	De forbandede år (Into the Darkness)	DK	Anders Refn	Scanbox Entertain.	370 100
5	Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney	313 902
6	Far til fire & vikingerne	DK	Martin Miehe-Renard	Nordisk Film	310 356
7	Tenet	US/GB	Christopher Nolan	SF Studios	226 664
8	Vores mand i Amerika (The Good...)	DK	Christina Rosendahl	SF Studios	198 360
9	1917	GB INC/US	Sam Mendes	Nordisk Film	193 581
10	Bad Boys for Life	US/MX	Adil El Arbi, Bilall Fallah	SF Studios	186 670

Sources: Danmark Statistics / DFI

Top 10 films by admissions in Norway | 2020

	Original title	Country of origin	Director	Distributor	Admissions
1	Børning 3 (Asphalt Burning)	NO	Hallvard Bræin	SF Norway	285 904
2	Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney	283 403
3	Knutsen & Ludvigsen 2 - Det...	NO	G Enger, R Spaans	Norsk Filmdistr.	214 419
4	1917	GB INC/US	Sam Mendes	Nordisk Film	191 376
5	Tenet	US/GB	Christopher Nolan	SF Norway	188 416
6	Gisaengchung (Parasite)	KR	Bong Joon Ho	Arthaus	150 748
7	Flukten over grensen (The Crossing)	NO	Johanne Helgeland	Nordisk Film	139 708
8	Tunnelen (The Tunnel)	NO	Pål Øie	Nordisk Film	135 736
9	Knerten og sjøormen	NO	Tove Undheim	SF Norway	129 950
10	Bad Boys for Life	US/MX	Adil El Arbi, Bilall Fallah	SF Norway	117 879

Source: Film og Kino

Top 10 films by admissions in Finland | 2020

	Original title	Country of origin	Director	Distributor	Admissions
1	Frozen 2	US	Chris Buck, Jennifer Lee	Walt Disney	277 578
2	Teräsléidit (Ladies of Steel)	FI	Pamela Tola	SF Film Finland	246 714
3	Tenet	US/GB	Christopher Nolan	SF Film Finland	181 978
4	Heinähattu, Vilttitossu ja ärhäkkä...	FI	Lenka Hellstedt	SF Film Finland	179 830
5	Gisaengchung (Parasite)	KR	Bong Joon Ho	Future Film	178 905
6	Se mieleton remppa (The Renovation)	FI	Taneli Mustonen	Nordisk Film	178 043
7	Helene	FI	Antti Jokinen	Nordisk Film	177 678
8	Tove	FI/SE	Zaida Bergroth	Nordisk Film	154 788
9	Risto Räppääjä ja väärä Vincent	FI	Maria Sid	Nordisk Film	150 239
10	Star Wars: Episode IX - The Rise of...	US	J.J. Abrams	Walt Disney	133 800

Source: Finnish Film Foundation

Baltics and Central Europe

	Czech Republic	Estonia	Hungary	Latvia	Lithuania	Slovenia	Slovakia
Population 2020* (million)	10.7	1.3	9.8	1.9	2.8	2.1	5.5
GDP per capita 2020* (USD)	22 579	23 330	15 820	17 560	19 916	19 071	25 211
Gross box office 2020 (M USD)	39.1	12.2	21.2	5.8	9.7	3.3	16.0
Admissions 2020 (million)	6.4	1.8	4.3	0.9	1.5	0.6	2.4
Average ticket price 2020 (USD)	6.1	6.8	4.9	6.5	6.3	5.8	6.7
Average admissions per capita 2020	0.6	1.4	0.4	0.5	0.5	0.3	0.4
Screens 2020*	802	116	375	69	77	107	261
Films produced 2020	64	23	21	14	12	13	28
National market shares 2020*	48.3%	26.7%	5.2%	19.9%	22.0%	5.4%	32.8%

Top 10 films by admissions in the Czech Republic | 2020

Original title	Country of origin	Director	Distributor	Admissions
1 V síti (Caught in the Net)	CZ	B. Chalupová, V. Klusák	Aerofilms	413 250
2 Příliš osobní známost (Far Too Personal)	CZ	Marta Ferencová	Bioscop	312 807
3 3Bobule (3Grapes)	CZ	Martin Kopp	Bioscop	297 008
4 Charlatan	CZ/IE/SK/PL	Agnieszka Holland	CinemArt	252 686
5 Chlap na strídacku	CZ	Petr Zahrádka	Bohemia Motion Pict.	238 438
6 Sonic the Hedgehog	US/JP/CA	Jeff Fowler	CinemArt	205 845
7 Jumanji: The Next Level	US	Jake Kasdan	Falcon	165 861
8 Stastny nový rok	SK/CZ	Jakub Kroner	Bontonfilm	164 261
9 Frozen 2	US	Chris Buck, Jennifer Lee	Falcon	156 403
10 Dolittle	US/CN/GB/JP	Stephen Gaghan	CinemArt	156 143

Sources: Czech Film Fund / Unie Filmovych Distributoru

Top 10 films by admissions in Hungary | 2020

Original title	Country of origin	Director	Distributor	Admissions
1 Bad Boys for Life	US/MX	Adil El Arbi, Bilall Fallah	Intercom	345 915
2 The Gentlemen	US	Guy Ritchie	Vertical Entertainment	214 249
3 Tenet	US/GB	Christopher Nolan	Intercom	188 456
4 Knives Out	US	Rian Johnson	Vertical Entertainment	158 988
5 Star Wars: Episode IX - The Rise of...	US	J.J. Abrams	Forum-Hungary	152 683
6 Jumanji: The Next Level	US	Jake Kasdan	Intercom	139 076
7 Dolittle	US/CN/GB/JP	Stephen Gaghan	UIP-Dunafilm	132 075
8 Sonic the Hedgehog	US/JP/CA	Jeff Fowler	UIP-Dunafilm	124 299
9 The War with Grandpa	US/GB/CA	Tim Hill	Prorum Entertainment	117 019
10 Scoob!	US	Tony Cervone	Intercom	109 675

Source: National Film Office

Top 10 films by admissions in Slovakia | 2020

Original title	Country of origin	Director	Distributor	Admissions
1 Scumbag	SK	Biermann, C.-Solcanská	CinemaArt	395 604
2 Příliš osobní známost (Far Too Personal)	CZ	Marta Ferencová	Continental Film	176 080
3 Stastny nový rok	SK/CZ	Jakub Kroner	Continental Film	78 113
4 Chlap na strídacku	CZ	Petr Zahrádka	Continental Film	76 427
5 Sonic the Hedgehog	US/JP/CA	Jeff Fowler	CinemaArt	70 024
6 Paw Patrol: Ready, Race, Rescue!	CA/US	Charles E. Bastien	Bontonfilm	62 900
7 After We Collided	US	Roger Kumble	Bontonfilm	59 637
8 Scoob!	US	Tony Cervone	Continental Film	59 528
9 Tenet	US/GB	Christopher Nolan	Continental Film	58 639
10 Bad Boys for Life	US/MX	Adil El Arbi, Bilall Fallah	Itafilm	55 708

Sources: Slovak Film Institute / UFD

South-Eastern Europe

	BA ⁽¹⁾	Bulgaria	Croatia	Cyprus	Montenegro	Romania	Ukraine
Population 2020 ^e (million)	3.5	7.0	4.1	0.9	0.6	19.3	41.7
GDP per capita 2020 ^e (USD)	5 913	9 919	14 072	27 054	7 689	12 797	3 653
Gross box office 2020 (M USD)	1.2	7.4	6.8	1.6	0.4	16.2	33.8
Admissions 2020 (million)	0.4	1.3	1.4	0.2	0.1	3.3	10.0
Average ticket price 2020 (USD)	3.2	5.5	4.9	9.1	4.1	4.9	3.4
Average admissions per capita 2020	0.1	0.2	0.3	0.2	0.1	0.2	0.2
Screens 2020 ^e	64	211	192	47 ⁽²⁾	18 ⁽²⁾	449	600
Films produced 2020 ^e	9	25	17	3 ⁽²⁾	6 ⁽²⁾	47	32
National market shares 2020 ^e	3.2%	10.2%	1.9%	~	3.9%	18.1%	5.0%

(1) Bosnia-Herzegovina (2) 2019

Top 10 films by admissions in Romania | 2020

	Original title	Country of origin	Director	Distributor	Admissions
1	Miami Bici (Miami Beach)	RO	Jesús del Cerro	Vertical Ent.	553 941
2	Bad Boys for Life	US/MX	Adil El Arbi, Bilall Fallah	Intercomfilm	419 987
3	5Gang: Un Altfel de Craciun	RO	Matei Dima	Vertical Ent.	176 709
4	Dolittle	US/CN/GB/JP	Stephen Gaghan	Ro-Image 2000	129 954
5	Jumanji: The Next Level	US	Jake Kasdan	Intercomfilm	126 653
6	1917	GB INC/US	Sam Mendes	Vertical Ent.	119 204
7	Knives Out	US	Rian Johnson	Vertical Ent.	106 450
8	The Grudge	US/CA	Nicolas Pesce	Intercomfilm	101 544
9	Birds of Prey: And the Fantabulous...	US	Cathy Yan	Vertical Ent.	98 383
10	Star Wars: Episode IX - The Rise ...	US	J.J. Abrams	Forum Film Ro	89 592

Source: Centrul National al Cinematografiei

Top 10 films by admissions in Bulgaria | 2020

	Original title	Country of origin	Director	Distributor	Admissions
1	Bad Boys for Life	US/MX	Adil El Arbi, Bilall Fallah	Aleksandra	126 690
2	Dolittle	US/CN/GB/JP	Stephen Gaghan	Forum Film	88 263
3	Sonic the Hedgehog	US/JP/CA	Jeff Fowler	Forum Film	87 675
4	After We Collided	US	Roger Kumble	bTV	50 048
5	Star Wars: Episode IX - The Rise ...	US	J.J. Abrams	Forum Film	48 364
6	Tenet	US/GB	Christopher Nolan	Aleksandra	44 067
7	The War with Grandpa	US/GB/CA	Tim Hill	bTV	43 730
8	Wildlings	BG	Martin Makariev	Silvernoise	42 478
9	Volki i ovtsy. Khod sviney (Sheep ...	RU	Vladimir Nikolaev	Pro Films	41 096
10	Mulan	US/CA/HK	Niki Caro	Forum Film	40 568

Source: Bulgarian National Film Center

Top 10 films by admissions in Croatia | 2020

	Original title	Country of origin	Director	Distributor	Admissions
1	The Gentlemen	US	Guy Ritchie	Blitz Film	86 092
2	Bad Boys for Life	US/MX	Adil El Arbi, Bilall Fallah	CF	68 635
3	1917	GB INC/US	Sam Mendes	Duplicato	59 122
4	Tenet	US/GB	Christopher Nolan	Blitz Film	56 586
5	Sonic the Hedgehog	US/JP/CA	Jeff Fowler	Blitz Film	51 989
6	Gisaengchung (Parasite)	KR	Bong Joon Ho	Discovery	47 521
7	Dolittle	US/CN/GB/JP	Stephen Gaghan	Editus	47 297
8	Trouble	CA/US/KY	Kevin Johnson	Duplicato	45 076
9	After We Collided	US	Roger Kumble	Blitz Film	40 767
10	Greenland	US/GB	Ric Roman Waugh	Duplicato	34 751

Source: HAVCR (Croatian Audiovisual Centre)

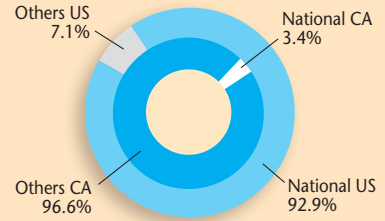
North America

	North America	US	Canada
Population 2020 ^e (million)	366.8	330.1	38.0
GDP per capita 2020 ^e (USD)	61 338.4	63 416	43 278
Gross box office 2020 ^e (M USD) ⁽¹⁾	2 219.4	2 019.0 ⁽¹⁾	199.4 ⁽¹⁾
Admissions 2020 ^e (million) ⁽¹⁾	236.8	215.5 ⁽¹⁾	21.3 ⁽¹⁾
Average ticket price 2020 ^e (USD) ⁽²⁾	9.4	9.4	9.4
Average admissions per capita 2020 ^e	0.6	0.7	0.6
Screens 2020 ^e	44 111	40 998	3 113

(1) Estimated.

(2) Arithmetic mean.

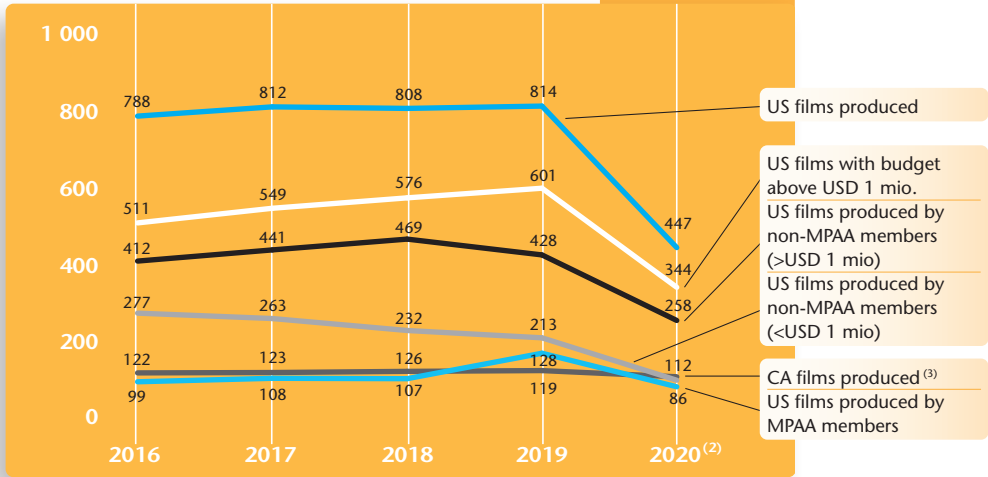
Market shares 2020^e



Number of US⁽¹⁾ and Canadian feature films produced | 2016-2020

In units

Sources: MPA, CMPA



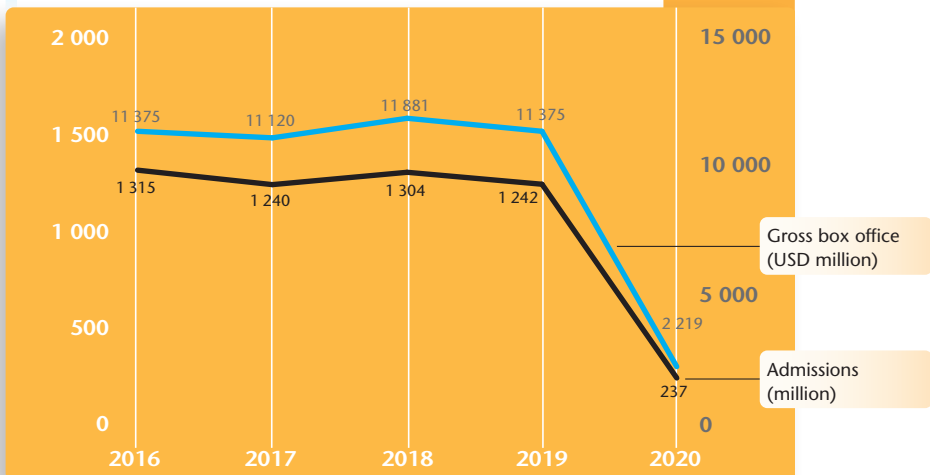
(1) English-language films (including co-productions) that began production in the reported year. The counts include films that were made for or by an online video service, but do not include student films, documentaries, films created for straight-to-DVD or Blue-ray release.

(2) US data are provisional as of February 2021. Netflix was added as a member in 2019, 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 | 2016-2020

Source: MPA



Top 20 films by admissions in North America | 2020

Original title	Country of origin	Director	Distributor	Admissions
1 Bad Boys for Life	US/MX	A. El Arbi, B. Fallah	Sony Pictures	22 424 483
2 1917	GB INC/US	Sam Mendes	Universal	17 145 740
3 Sonic the Hedgehog	US/JP/CA	Jeff Fowler	Paramount/Dream.	15 876 790
4 Jumanji: The Next Level	US	Jake Kasdan	Sony Pictures	12 022 669
5 Star Wars: Episode IX - The Rise of...	US	J.J. Abrams	Walt Disney	10 667 946
6 Birds of Prey: And the Fantabulous...	US	Cathy Yan	Warner Bros.	9 174 558
7 Dolittle	US/CN/GB/JP	Stephen Gaghan	Universal	8 532 656
8 The Invisible Man	US/AU	Leigh Whannell	Universal	7 655 902
9 The Call of the Wild	US/CA	Chris Sanders	20th Century Fox	6 776 345
10 Little Women	US	Greta Gerwig	Sony Pictures	6 701 400
11 Onward	US	Dan Scanlon	Walt Disney	6 690 777
12 Tenet	US/GB	Christopher Nolan	Warner Bros.	6 221 216
13 Knives Out	US	Rian Johnson	Lionsgate	4 800 024
14 Frozen 2	US	C. Buck, J. Lee	Walt Disney	4 216 110
15 The Gentlemen	US	Guy Ritchie	STX Entertainment	3 964 297
16 Just Mercy	US	D.D. Cretton	Warner Bros.	3 882 855
17 The Croods: A New Age	US	Joel Crawford	Universal	3 514 595
18 Gisaengchung (Parasite)	KR	Bong Joon Ho	Neon	3 299 689
19 Spies in Disguise	US	T. Quane, N. Bruno	20th Century Fox	3 272 941
20 Fantasy Island	US	Jeff Wadlow	Sony Pictures	2 968 401

Sources: LUMIERE/OBS, Comscore

Distribution and exhibition

After being forced to lower the curtain in March 2020 due to the pandemic, North American cinemas remained closed for the greater part of the year, with variations across the states. Some theatres reopened temporarily in the summer, but movie-going struggled to recover amid the restrictions and the lack of tentpole Hollywood releases. In New York and Los Angeles, two key cinema markets in the US, cinemas were only allowed to reopen in March 2021 with social distancing measures. Cinema attendance consequently plummeted in 2020, falling by 89.9% to 236.8 million admissions, down from 1.2 billion in 2019. GBO takings hit a 40-year low, dropping by 80.5% to USD 2.2 billion, after registering the second best level on record in 2019, at USD 11.4 billion.

The number of films on release in North America sharply declined in 2020, from 987 to 338 films, of which 319 new titles. The 2020 box office was particularly concentrated at the top end, as the first 20 films accounted for 67.5% of ticket sales (compared to 52.8% in 2019). Only five films generated more than 10 million admissions at the North American box office, versus 32 titles in 2019. Action comedy *Bad Boys for Life* was the highest-grossing film for the year, taking 22.4 million admissions, ahead of war drama *1917* (17.1 million admissions) and animated feature *Sonic*

the Hedgehog (15.9 million). In Canada the most successful local productions were three Quebec features: crime drama *Mafia Inc.*, followed by comedy *Merci pour tout* and *Target Number One*.

After several years of growth, the total number of US screens fell from 41 172 to 40 998 in 2020, as some locations shut down permanently during the year.

Production and funding

The pandemic heavily disrupted production activities, interrupting or delaying a significant number of film shoots. As a consequence, only 447 films were produced in the US, compared to 814 in 2019. Among these productions, only 344 films had a budget higher than USD 1 million (down from 601 in 2019). In Canada, 112 films were produced in the fiscal year ending in March 2020, 16 titles less than in the previous year, a figure that still does not reflect the impact of COVID-19.

In December 2020, the US finally approved a coronavirus relief package including USD 15 billion to help movie theatres and music venues weather the crisis. In 2021 the Canadian government announced an increase of CAD 49 million (USD 36.6 million) to its emergency fund targeting productions halted due to the pandemic.

Sources: MPA, CMPA, Telefilm Canada, Comscore, Cinéac, *Variety*, *Screen International*, *La Presse*

Latin America

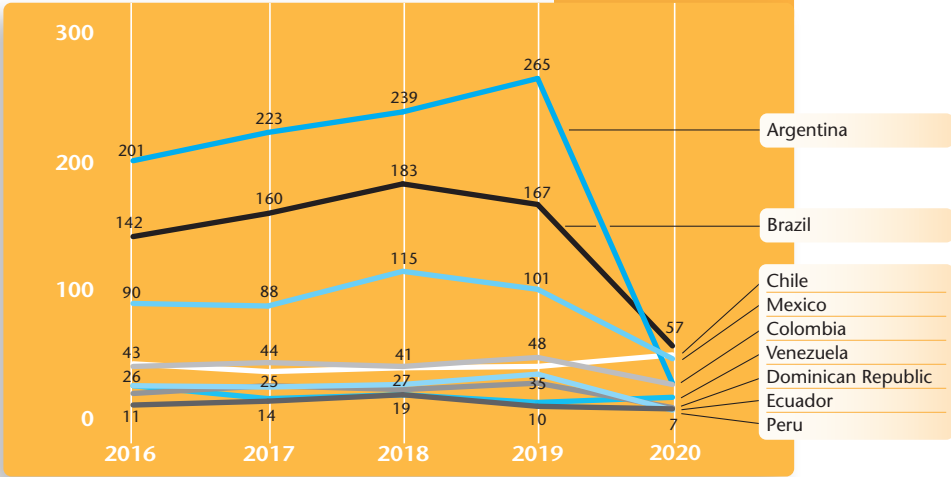
	Argentina	Brazil	Chile	Colombia	Costa Rica
Population 2020* (million)	45.4	211.4	19.5	50.9	5.1
GDP per capita 2020 (USD)	8 555	6 783	12 990	5 336	11 982
Gross box office 2020* (M USD)	27.9	122.7	18.7	32.4	6.9
Admissions 2020 (million)	9.0	39.3	4.9	12.7	1.4
Average ticket price 2020 (USD)	3.1	3.1	3.8	2.7	5.0
Average admissions per capita 2020*	0.2	0.2	0.2	0.3	0.3
Screens 2020	965	1 860	518 ⁽¹⁾	1 227	167 ⁽¹⁾
National market shares 2020	24.3%	21.7%	7.7% e	6.7%	1.0% e

(1) 2019

Number of national feature films released in Latin America | 2016-2020

In units.

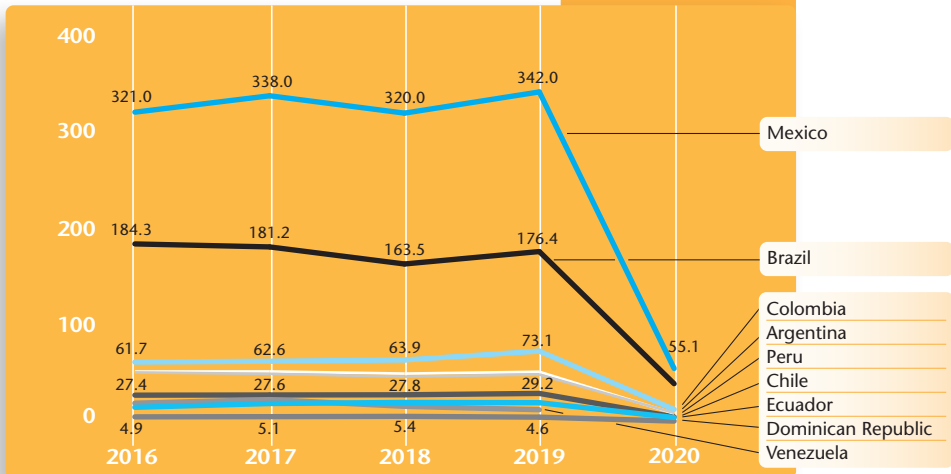
Sources: OIA^(*), OBS/IMDb



Admissions in Latin America | 2016-2020

In millions.

Sources: OIA^(*), Comscore



(*) Observatorio Iberoamericano do Audiovisual grouping INCAA, ANCINE, CNCA, Colombian Ministry of Culture, ICCA, IMCINE, Peruvian Ministry of Culture, DGCINE, CNAC.

	Dominican Republic	Ecuador	Mexico	Peru	Venezuela
Population 2020 ^e (million)	10.5	17.5	127.8	33.5	28.0
GDP per capita 2020 (USD)	7 530	5 520	8 421	6 084	1 691
Gross box office 2020 ^e (M USD)	2.4	20.2	147.7	23.9	36.0 ⁽¹⁾
Admissions 2020 (million)	0.5	4.2	55.1	8.4	12.3 ⁽¹⁾
Average ticket price 2020 (USD)	4.5	4.8	2.7	2.8	2.9 ⁽¹⁾
Average admissions per capita 2020 ^e	0.1	0.2	0.4	0.3	0.4 ⁽¹⁾
Screens 2020	202	315	7 494	663	378 ⁽¹⁾
National market shares 2020	9.0%	0.4%	12.0%	10.1%	0.7% ⁽¹⁾

Mexico

In Latin America's largest cinema market, theatres initially shut down in March 2020, before reopening in August to close again in December. As a result, ticket sales plummeted by a whopping 83.9% to 55.1 million admissions in 2020, one of the highest decrease rates in the region. GBO revenues similarly dropped by 83.1% to MXN 3.15 billion (USD 147.7 million). Once again, US titles dominated the box office chart, led by the animation *Sonic the Hedgehog* which ranked first with 6.8 million admissions. Local titles captured a market share of 12.0% in 2020, slightly up from 10.0% in 2019, led by Mexican comedy *Cindy la Regia*, the only local film to break into the top 10 list with 1.9 million admissions. A total of 111 Mexican films were produced in 2020 (105 less than in 2019), while the number of domestic releases fell from 101 to 47 titles. Amid austerity measures linked to the coronavirus crisis, the Mexican government suspended its public support fund Fidecine, sparking disquiet across the industry before a new stimulus programme (Focine) was introduced in 2021.

Brazil

Amid the prolonged closure of cinemas and other restrictive measures, Brazilian cinema attendance plunged by 77.7% to 39.3 million tickets sold in 2020, with GBO takings falling to BRL 626.8 million (USD 122.7 million). The share captured by local productions rose from 11.8% to 21.7% in 2020, driven by the box office success of Brazilian comedy *Minha Mãe é uma Peça 3*. The film generated 8.3 million admissions and was the top-grossing title for the year, ahead of Disney's *Frozen 2* (7.8 million). Only 57 domestic films were released in 2020, as opposed to 167 in

2019. COVID-19 took a heavy toll on the country's theatrical infrastructure, leaving a total of 1 860 operating screens (almost half than in 2019). The pandemic has further exacerbated pre-existing struggles of the industry, already hit by the controversial freeze of public funding schemes in 2019. In 2021 Sony, in partnership with Brazilian promotional program *Show Me The Fund*, launched a USD 400 000 relief fund to support local independent producers.

Argentina

As the epidemic raged, Argentinian cinemas shut down in March 2020 and remained closed for roughly a year. As a result, ticket sales dropped by 81.6% to 9.0 million in 2020 while box office revenues fell by 77.0% to ARS 1.9 billion (USD 27.9 million). The national market share grew from 8.4% to 24.3% in 2020. The upturn was driven by the box office performance of comedy thriller *El Robo del Siglo*, which sold 2.1 million tickets, the second highest-grossing film for the year closely behind *Frozen 2*. As film shoots came to a halt due to the pandemic, the number of Argentinian releases sharply declined from 265 to 28 titles in 2020. With infection cases still on the rise, the 2020 edition of the Mar del Plata International Film Festival, a key industry event in the region, took place entirely online in November. In 2021, the Argentinian national film agency (INCAA) announced plans for the creation of three animation schools as part of a strategy to boost the local animation sector.

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

Top 10 films by admissions in Argentina | 2020

Original title	Country of origin	Director	Admissions
1 Frozen 2	US	Chris Buck, Jennifer Lee	2 118 859
2 El Robo del Siglo (The Great Heist)	AR	Ariel Winograd	2 082 886
3 Jumanji: The Next Level	US	Jake Kasdan	802 236
4 Sonic the Hedgehog	US/JP/CA	Jeff Fowler	699 045
5 Gisaengchung (Parasite)	KR	Bong Joon Ho	382 328
6 Birds of Prey: And the Fantabulous Emancipation of...	US	Cathy Yan	308 731
7 Spies in Disguise	US	Troy Quane, Nick Bruno	301 885
8 1917	GB INC/US	Sam Mendes	280 701
9 Bad Boys for Life	US/MX	Adil El Arbi, Bilal Fallah	251 682
10 Star Wars: Episode IX - The Rise of Skywalker	US	J.J. Abrams	240 729

Sources: OIA, INCAA

Top 10 films by admissions in Brazil | 2020

Original title	Country of origin	Director	Admissions
1 Minha Mãe é uma Peça 3 (My Mom Is A ...)	BR	Susana Garcia	8 335 961
2 Frozen 2	US	Chris Buck, Jennifer Lee	7 823 109
3 Jumanji: The Next Level	US	Jake Kasdan	3 357 816
4 Sonic the Hedgehog	US/JP/CA	Jeff Fowler	3 003 686
5 Birds of Prey: And the Fantabulous Emancipation of...	US	Cathy Yan	2 005 029
6 Bad Boys for Life	US/MX	Adil El Arbi, Bilal Fallah	1 392 385
7 Wonder Woman 1984	US	Patty Jenkins	1 323 644
8 1917	GB INC/US	Sam Mendes	1 230 035
9 Dolittle	US/CN/GB/JP	Stephen Gaghan	860 814
10 Gisaengchung (Parasite)	KR	Bong Joon Ho	827 514

Sources: OIA, ANCINE

Top 10 films by admissions in Chile | 2020

Original title	Country of origin	Director	Admissions
1 Sonic the Hedgehog	US/JP/CA	Jeff Fowler	628 204
2 Jumanji: The Next Level	US	Jake Kasdan	609 262
3 Frozen 2	US	Chris Buck, Jennifer Lee	364 704
4 Gisaengchung (Parasite)	KR	Bong Joon Ho	308 298
5 Birds of Prey: And the Fantabulous Emancipation of...	US	Cathy Yan	276 061
6 Spies in Disguise	US	Troy Quane, Nick Bruno	249 343
7 Star Wars: Episode IX - The Rise of Skywalker	US	J.J. Abrams	244 045
8 Pacto de Fuga (jailbreak Pact)	CL	David Albala	228 656
9 1917	GB INC/US	Sam Mendes	216 635
10 Dolittle	US/CN/GB/JP	Stephen Gaghan	183 698

Sources: OBS/LUMIERE, Comscore

Top 10 films by admissions in Colombia | 2020

Original title	Country of origin	Director	Admissions
1 Jumanji: The Next Level	US	Jake Kasdan	1 942 640
2 Bad Boys for Life	US/MX	Adil El Arbi, Bilal Fallah	1 695 181
3 Sonic the Hedgehog	US/JP/CA	Jeff Fowler	1 197 707
4 Dolittle	US/CN/GB/JP	Stephen Gaghan	958 000
5 Gisaengchung (Parasite)	KR	Bong Joon Ho	675 746
6 Birds of Prey: And the Fantabulous Emancipation of...	US	Cathy Yan	521 766
7 Al Son Que Me Toquen Bailo	CO	Juan Carlos Mazo	430 315
8 Onward	US	Dan Scanlon	405 577
9 The Call of the Wild	US/CA	Chris Sanders	363 151
10 The Invisible Man	US/AU	Leigh Whannell	345 466

Sources: OIA, Colombian Ministry of Culture

Top 10 films by admissions in the Dominican Republic | 2020

	Original title	Country of origin	Director	Admissions
1	Bad Boys for Life	US/MX	Adil El Arbi, Bilall Fallah	177 309
2	Sonic the Hedgehog	US/JP/CA	Jeff Fowler	67 230
3	Me Gusta La Tuya	DO	Roberto Ángel Salcedo	41 594
4	Birds of Prey: And the Fantabulous Emancipation of...	US	Cathy Yan	39 648
5	Little Women	US	Greta Gerwig	31 314
6	The Invisible Man	US/AU	Leigh Whannell	13 981
7	Charlie's Angels	US	Elizabeth Banks	13 783
8	Wonder Woman 1984	US	Patty Jenkins	10 280
9	1917	GB INC/US	Sam Mendes	9 559
10	Onward	US	Dan Scanlon	8 841

Sources: OIA, DGCINE

Top 10 films by admissions in Ecuador | 2020

	Original title	Country of origin	Director	Admissions
1	Sonic the Hedgehog	US/JP/CA	Jeff Fowler	468 697
2	Dolittle	US/CN/GB/JP	Stephen Gaghan	224 205
3	Birds of Prey: And the Fantabulous Emancipation of...	US	Cathy Yan	176 297
4	Bad Boys for Life	US/MX	Adil El Arbi, Bilall Fallah	178 870
5	Playing with Fire	US	Andy Fickman	158 458
6	Onward	US	Dan Scanlon	117 427
7	The Call of the Wild	US/CA	Chris Sanders	113 731
8	Greenland	US/GB	Ric Roman Waugh	108 867
9	Gisaengchung (Parasite)	KR	Bong Joon Ho	91 095
10	Scooby!	US	Tony Cervone	67 982

Sources: OIA, ICCA

Top 10 films by admissions in Mexico | 2020

	Original title	Country of origin	Director	Admissions
1	Sonic the Hedgehog	US/JP/CA	Jeff Fowler	6 811 679
2	Bad Boys for Life	US/MX	Adil El Arbi, Bilall Fallah	4 373 492
3	Birds of Prey: And the Fantabulous Emancipation of...	US	Cathy Yan	3 819 116
4	Dolittle	US/CN/GB/JP	Stephen Gaghan	3 169 952
5	Onward	US	Dan Scanlon	2 072 515
6	Cindy la Regia	MX	C.A. Mastretta, S. Limón	1 876 683
7	The Invisible Man	US/AU	Leigh Whannell	1 832 619
8	1917	GB INC/US	Sam Mendes	1 584 664
9	The Call of the Wild	US/CA	Chris Sanders	1 478 012
10	Charlie's Angels	US	Elizabeth Banks	1 340 629

Sources: OIA, IMCINE

Top 10 films by admissions in Peru | 2020

	Original title	Country of origin	Director	Admissions
1	La Foquita: El 10 de la Calle	PE	Martin Casapía Casanova	970 831
2	Sonic the Hedgehog	US/JP/CA	Jeff Fowler	893 634
3	Sí, mi amor	PE	Pedro Flores Maldonado	662 539
4	Dolittle	US/CN/GB/JP	Stephen Gaghan	655 988
5	Locos de Amor 3	PE	Frank Pérez-Garland	648 484
6	Birds of Prey: And the Fantabulous Emancipation of...	US	Cathy Yan	448 904
7	Bad Boys For Life	US	Adil El Arbi, Bilall Fallah	434 520
8	The Call of the Wild	US/CA	Chris Sanders	341 412
9	Gisaengchung (Parasite)	KR	Bong Joon Ho	334 195
10	Playing with Fire	US	Andy Fickman	298 769

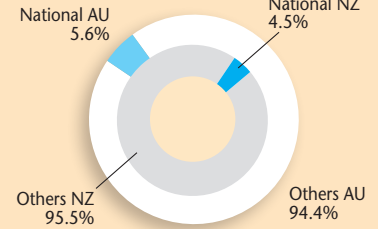
Sources: OIA, Peruvian Ministry of Culture

Australia and New Zealand

	Australia	New Zealand
Population 2020* (million)	25.6	5.0
GDP per capita 2020* (USD)	53 825	40 634
Gross box office 2020 (M USD)	277.3	51.1
Admissions 2020 (million)	28.2	5.9
Average ticket price 2020 (USD)	9.8	8.7
Average admissions per capita 2020	1.1	1.2
Screens 2020	2 241	477

(1) By GBO

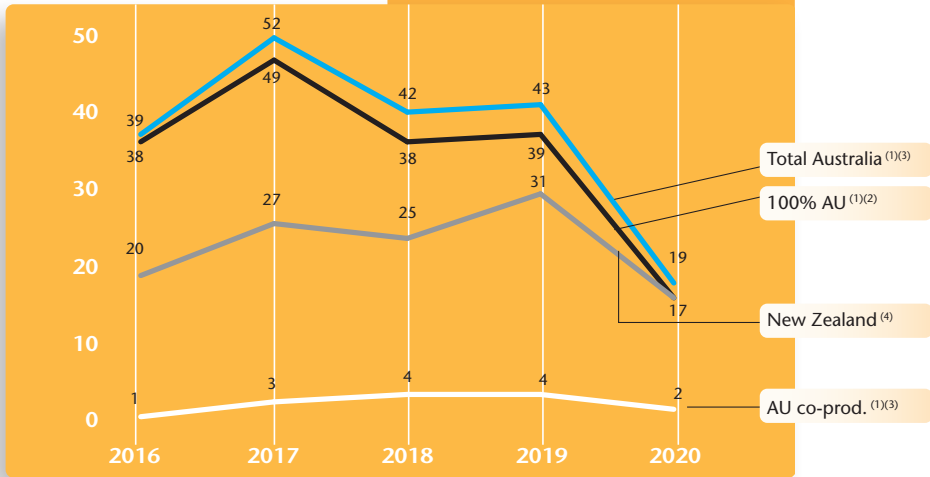
Market shares 2020 ^{(1) e}



Number of Australian and New Zealand feature films produced | 2016-2020

In units.

Sources: Screen Australia, NZ Film Commission

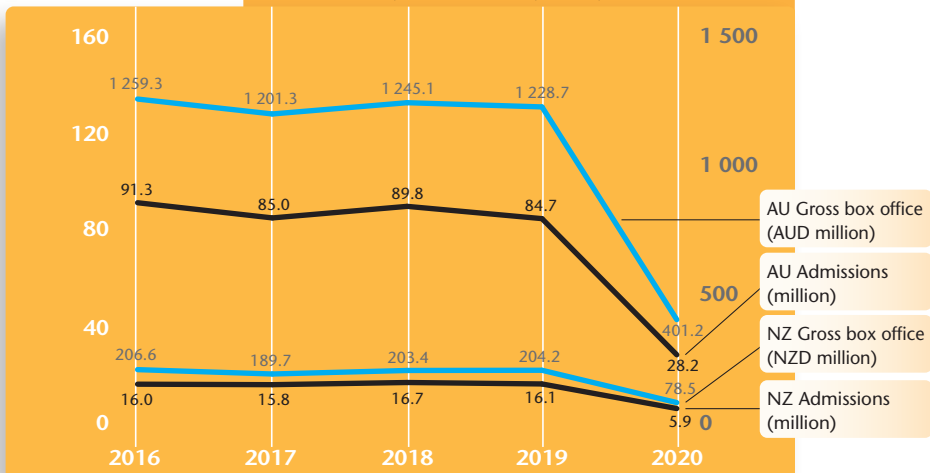


- (1) Restated series. Films with budgets below AUD 0.5 million are only included if they had a theatrical release or major festival screening. Refers to fiscal year ending that year.
 (2) Includes films under Australian creative control that were 100% foreign financed.

- (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.

Admissions and gross box office in Australia and New Zealand | 2016-2020

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



Top 10 films by admissions in Australia | 2020^e

Estimated admissions based on average ticket price of AUD 14.2.

Original title	Country of origin	Director	Distributor	Admissions ^e
1 Jumanji: The Next Level	US	Jake Kasdan	Sony Pictures	1 970 490
2 1917	GB INC/US	Sam Mendes	Universal	1 634 236
3 Bad Boys for Life	US/MX	A. El Arbi, B. Fallah	Sony Pictures	1 375 254
4 Tenet ⁽¹⁾	US/GB	Christopher Nolan	Warner Bros.	1 120 391
5 Little Women	US	Greta Gerwig	Sony Pictures	1 099 102
6 The Gentlemen	US	Guy Ritchie	Roadshow	1 084 530
7 Sonic the Hedgehog	US/JP/CA	Jeff Fowler	Paramount	985 447
8 Star Wars: the Rise of Skywalker	US	J.J. Abrams	Walt Disney	960 731
9 Wonder Woman 1984 ⁽¹⁾	US	Patty Jenkins	Warner Bros.	834 807
10 Dolittle	US/CN/GB/JP	Stephen Gaghan	Universal	816 740

(1) Still grossing in 2021.

Source: MPDAA

Top 10 films by admissions in New Zealand | 2020^e

Estimated admissions based on average ticket price of NZD 13.3.

Original title	Country of origin	Director	Distributor	Admissions ^e
1 Jumanji: The Next Level	US	Jake Kasdan	Sony Pictures	478 803
2 1917	GB INC/US	Sam Mendes	Universal	267 755
3 Tenet	US/GB	Christopher Nolan	Warner Bros.	226 680
4 Little Women	US	Greta Gerwig	Sony Pictures	204 968
5 Trolls World Tour	US	D. Smith, W. Dohrn	Universal	176 704
6 Sonic the Hedgehog	US/JP/CA	Jeff Fowler	Paramount	174 764
7 Bad Boys for Life	US/MX	A. El Arbi, B. Fallah	Sony Pictures	152 599
8 The Gentlemen	US	Guy Ritchie	Roadshow	130 240
9 Wonder Woman 1984 ⁽¹⁾	US	Patty Jenkins	Warner Bros.	124 117
10 Savage	NZ	Sam Kelly	Madman	116 617

(1) Still grossing in 2021.

Source: MPDAA

Distribution and exhibition

The lockdowns enforced during the COVID-19 outbreak, coupled with capacity restrictions for cinemas and the delayed release of blockbusters, put a major strain on the exhibition sector in Australia and New Zealand. In Australia ticket sales plummeted by 66.7% in 2020 to 28.2 million with GBO plunging by 67.3% to AUD 401.2 million (USD 277.3 million). In New Zealand, admissions fell by 63.4% in the same year to 5.9 million, while the drop in GBO was marginally lower, as revenues went down 61.6% to NZD 78.5 million (USD 51.1 million). With major international releases postponed, the share captured by national productions increased in both markets, to reach 5.6% in Australia (from 3.3% in 2019) and 4.5% in New Zealand (from 2.3%). In both countries, Sony's *Jumanji: The Next Level* topped the box office chart, ahead of *1917*. In Australia, the highest grossing local film was US co-production *The Invisible Man*, followed by the comedy *Rams*. In New Zealand the crime drama *Savage* was the top domestic title at the box office.

In 2021 Australia launched a support fund targeting independent cinema operators who experienced significant losses due to the pandemic. With the vaccination campaign still rolling

out, the New Zealand International Film Festival postponed its 2021 edition from July to October, when an estimated 80% of the adult population will have been vaccinated.

Production and funding

The pandemic had repercussions on the number of films produced in 2020, with many film shoots interrupted or postponed throughout the year. A total of 19 films were produced in Australia in 2020, 24 less than in 2019, while overall production spend was AUD 205 million (USD 142 million), 36% below the previous year and 20% below the 5-year average. In New Zealand production volume declined to 17 films in 2020, down from 31 titles in 2019.

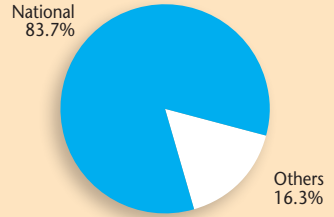
Both Australia and New Zealand adopted initiatives to help the film industry, including recovery funds for film productions. As the COVID crisis in the region was contained and filming could resume, the two countries saw a boom of high-budget international productions, attracted by their diverse locations and appealing incentive schemes.

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

People's Republic of China

Population 2020 ^e	1.40 billion
GDP per capita 2020 ^e	10 484 USD
Gross box office 2020 ^e	20.42 bn CNY (2.96 bn USD)
Admissions 2020 ^e	548.0 million
Average ticket price 2020 ^e	37.3 CNY (5.4 USD)
Average admissions per capita 2020 ^e	0.4
Screens 2019 2020 ^e	69 787 75 581 ⁽¹⁾

Market shares 2020⁽²⁾

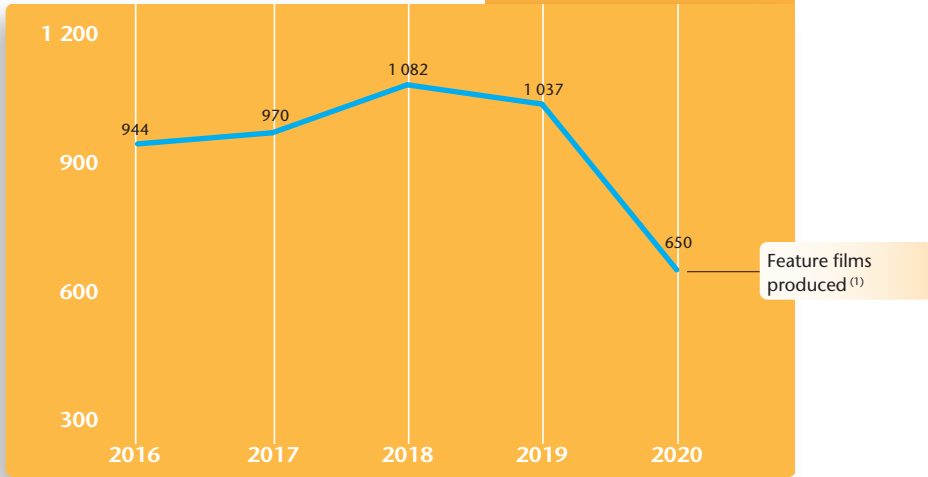


(1) As per February 2021. (2) By GBO.

Number of feature films produced in China | 2016-2020^e

In units.

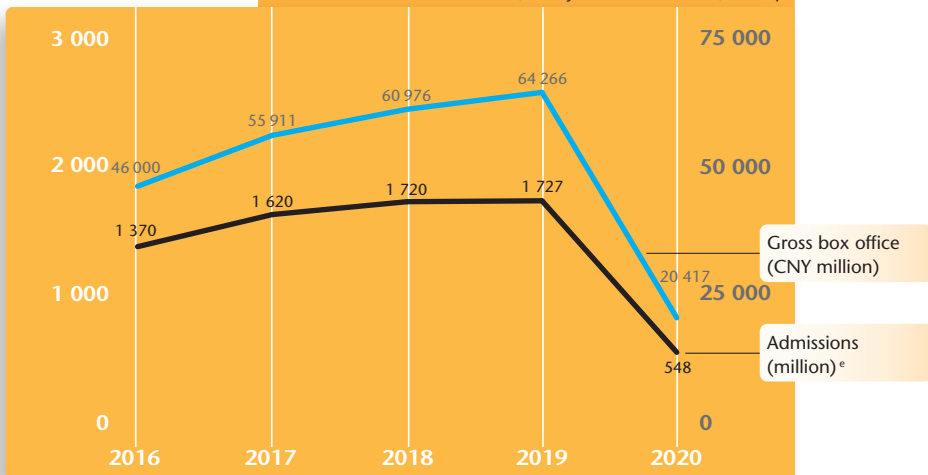
Sources: China Film Bureau, *Variety*



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

Admissions and gross box office in China | 2016-2020^e

Sources: China Bureau of Film, Maoyan Entertainment, *Variety*



Top 20 films by admissions in China | 2020

English Title	Country of origin	Director	Admissions
1 Ba bai (The Eight Hundred)	CN	Hu Guan	79 841 700
2 My People, My Homeland	CN	Hao Ning, Zheng Xu, Chao Deng, Fei Yan, ... ⁽¹⁾	72 532 272
3 Legend of Deification	CN	Li Wei, Teng Cheng	39 473 557
4 The Sacrifice	CN	Yang Lu, Frant Gwo, Yusheng Tian, Hu Guan	29 923 359
5 Leap	CN	Peter Ho-Sun Chan	21 137 955
6 Shock Wave 2	HK/CN	Herman Yau	15 638 211
7 Caught in Time	CN	Ho-Leung Lau	14 239 447
8 Love You Forever	CN	Tingting Yao	14 054 525
9 Sheep Without a Shepherd	CN	Sam Quah	13 439 778
10 Bath Buddy	CN	Xiaoxing Yi	11 651 210
11 Tenet	US/GB	Christopher Nolan	11 502 489
12 The Rescue	CN	Dante Lam, Chi-Hung Choi	11 174 085
13 Adoring	CN	Larry Yang	10 099 111
14 Yin-Yang Master I	CN	Jingming Guo	9 772 901
15 Ip Man 4: The Finale	HK/CN	Wilson Yip	9 566 293
16 The Croods: A New Age	US	Joel Crawford	9 360 944
17 The End of Endless Love	CN	Luo Luo	8 964 111
18 Coffee or Tea?	CN	Derek Hui	8 134 306
19 Vanguard	CN	Stanley Tong	7 618 843
20 Mulan	US	Niki Caro	7 585 138

(1) Sicheng Chen, Baimei Yu, Ao Shen, Da-Mo Peng.

Sources: LUMIERE/OBS, Comscore

Distribution and exhibition

The first country to be hit by the COVID-19 outbreak, China's exhibition industry was heavily affected by the shutdown of cinemas in 2020. Theatres were closed for 178 days between late January and mid- July, when they reopened with 30% seating capacity before gradually increasing it to 75% in September as restrictions were lifted. As a result, admissions plummeted by 68.3% to 548.0 million after a record high in 2019. In 2020 China confirmed its position as the largest cinema market worldwide, overtaking North America for the first time in terms of GBO at CNY 20.42 billion (USD 2.96 billion), despite a 68.2% interannual drop. Like elsewhere, as Hollywood releases were put on hold, domestic productions dominated the box office, generating 83.7% of theatrical revenues, compared to an already significant 64.1% in 2019. Chinese historical war movie *Ba bai (The Eight Hundred)* topped the box office chart, selling 79.8 million tickets, ahead of the anthology film *My People, My Homeland* (72.5 million) and the animation *Legend of Deification* (39.5 million). Only three US films appear among the top 20 films for the year: *Tenet* (ranking 11th with 11.5 million admissions), *The Croods: A New Age* (16th, 9.4 million) and Disney's live-action adaptation of *Mulan* (20th, 7.6 million). In 2020 admissions were more concentrated at the top than in the

previous years, with the three highest-grossing titles accounting for 35.0% of ticket sales, compared to 19.0% in 2019. Although many small cinema sites were wiped out by the crisis, China's screen infrastructure continued to grow in 2020, albeit at a slower pace, adding 5 794 new screens (mainly within big multiplexes) and bringing the total count to 75 581 units.

In 2021, while cinemas continue to operate at 75% of their seating capacity, China's exhibition industry appears to be on the rebound: as of June 20 annual box office revenues topped CNY 27 billion (USD 4.2 billion) driven by the success of local hits *Hi, Mom* and *Detective Chinatown 3*. In June, the country imposed a partial shutdown of cinemas in the Guangdong province over fears of new infection outbreaks.

Production and funding

Although China resumed film shooting early in March 2020, production volume suffered a major blow as only 650 features were produced in 2020, compared to 1 037 titles in 2019. In order to alleviate the impact of the pandemic, Chinese authorities introduced a number of support policies including tax breaks, fee waivers and the launch of dedicated funds.

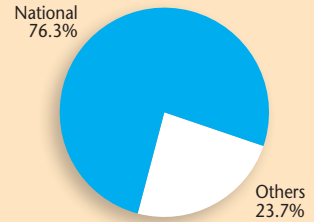
Sources: China Bureau of Film, *Screen International*, *Variety*, Maoyan Entertainment, OBS, Comscore

Japan

Population 2020 ^e	126.2 million
GDP per capita 2020 ^e	40 847 USD
Gross box office 2020	143.3 bn JPY (1.34 bn USD)
Admissions 2020	106.1 million
Average ticket price 2020	1 350 JPY (12.7 USD)
Average admissions per capita 2020	0.8
Screens 2019 2020	3 583 3 616

(1) By GBO

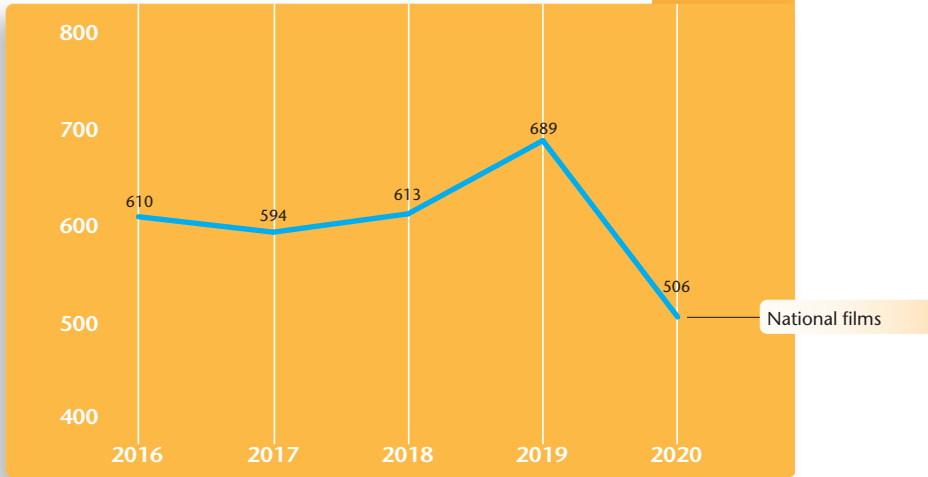
Market shares 2020^{e (1)}



Number of Japanese feature films released | 2016-2020

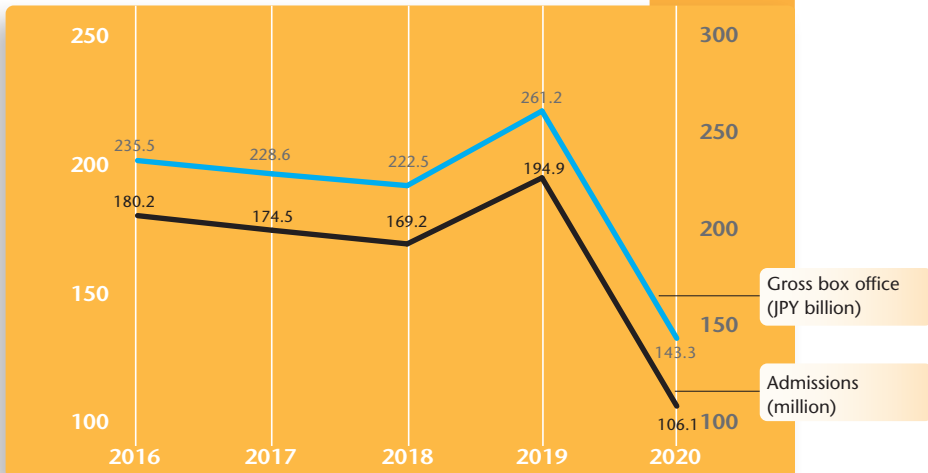
In units.

Source: EIREN



Admissions and gross box office in Japan | 2016-2020

Source: EIREN



Top 20 films by admissions in Japan | 2020

Estimated admissions based on average ticket price of JPY 1 350.

English Title	Country of origin	Director	Distributor	Admissions*
1 Demon Slayer: Mugen Train	JP	Haruo Sotozaki	Toho/Aniplex	27 074 074
2 Star Wars: Episode IX - The Rise of Skywalker	US	J.J. Abrams	Walt Disney	5 422 222
3 From Today, It's My Turn: The Movie	JP	Yūichi Fukuda	Toho	3 977 778
4 Gisaengchung (Parasite)	KR	Bong Joon Ho	Bitters End	3 511 111
5 The Confidence Man JP: Princess	JP	Ryō Tanaka	Toho	2 844 444
6 Doraemon the Movie: Nobita's New Dinosaur	JP/TH	Kazuaki Imai	Toho	2 481 481
7 Tenet	US/GB	Christopher Nolan	Walt Disney	2 022 222
8 Stigmatized Properties	JP	Hideo Nakata	Shochiku	1 733 333
9 Threads - Our Tapestry of Love	JP	Takahisa Zeze	Toho	1 681 481
10 Violet Evergarden: The Movie	JP	Taichi Ishidate	Shochiku	1 577 778
11 Kaiji: Final Game	JP	Tōya Satō	Toho	1 525 926
12 Gekijouban Fate/Stay Night: Heaven's Feel...	JP	Tomonori Sudō	Aniplex	1 444 444
13 My Hero Academia: Heroes Rising	JP	Kenji Nagasaki	Toho	1 325 926
14 Tora-san, Wish You Were Here	JP	Yoji Yamada	Shochiku	1 088 889
15 Howling Village	JP	Takashi Shimizu	Toei	1 044 444
16 Cats	GB INC/US	Tom Hooper	Toho/Towa	1 000 000
17 Wotakoi: Love Is Hard for Otaku	JP	Yūichi Fukuda	Toho	992 926
18 The Voice of Sin	JP	Nobuhiro Doi	Toho	903 704
19 The Asadas	JP	Ryōta Nakano	Toho	896 296
20 Stolen Identity 2	JP	Hideo Nakata	Toho	881 481

Sources: EIREN, OBS

Distribution and exhibition

After a record-breaking 2019, the coronavirus outbreak took its toll on the Japanese box office, as theatrical revenues fell by 45.1% in 2020, to JPY 143.3 billion (USD 1.3 billion). Cinema attendance similarly dropped by 45.5% on 2019 to 106.1 million tickets sold. While this represents a significant decrease, marking the lowest level on record, the impact of the pandemic on cinema-going was far less severe in Japan than in the vast majority of other markets worldwide. This resilience can be ascribed to the fact that in 2020 cinemas remained closed for a shorter period of time compared to other territories: after shutting down in mid-April some key chains gradually re-opened starting from mid-May, with sanitary protocols in place. Since the release of most big-budget Hollywood titles was pushed back due to the pandemic, local productions were given an open field, accounting for 76.3% of box office takings, up from 54.4% in the previous year. Out of the top 20 box office earners, 16 were domestic productions, led by animated feature *Demon Slayer: Mugen Train*, the second instalment of a franchise based on a popular manga series. The success of the film would have been extraordinary even under normal circumstances as it took 27.1 million admissions and JPY 36.6 billion (USD 342.5 million) – 25.5% of the box office takings for the year – becoming the highest-grossing film in Japan of all times. The top-earning foreign films were

the latest episode of the Star Wars saga *The Rise of Skywalker*, ranking second place with 5.4 million admissions, ahead of Korean black comedy *Parasite* (3.5 million) and *Tenet* (2.0 million).

In 2021, following a new pandemic wave Japan announced a state of emergency in April, introducing shutdown measures for cinemas in key prefectures such as Tokyo and Osaka. In June 2021, theatres were finally allowed to reopen under capacity restrictions and with shortened opening hours.

Production and funding

As COVID-19 halted or slowed down film production in 2020, the number of national films released decreased to 506, down from the record high of 689 titles registered in 2019.

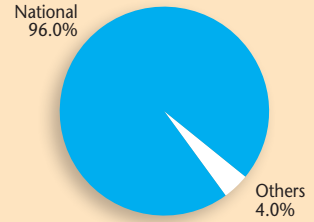
According to the Association of Japanese Animation (AJA), the national animation industry continued to expand in 2019 registering a 5.1% increase to total value of JPY 2.51 trillion (USD 23.5 billion), driven by significant growth in theatrical and streaming sales. While it is too early to estimate the overall impact of COVID-19 on the sector, the pandemic considerably boosted the demand for animation streaming, which might give an impulse to production investment.

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

India

Population 2020 ^e	1.38 billion
GDP per capita 2020 ^e	1 965 USD
Gross box office 2020 ^e	24.9 bn INR (323.7 M USD)
Admissions 2020 ^e	390.0 million
Average ticket price 2020 ^e	63.8 INR (0.8 USD)
Average admissions per capita 2020 ^e	0.3
Screens 2019 2020 ^e	9 527 8 000

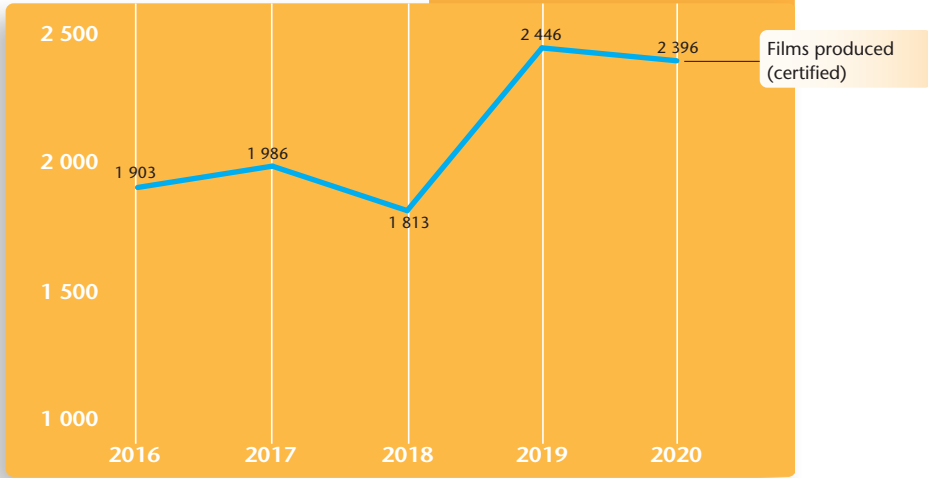
Market shares 2020



Number of Indian feature films certified⁽¹⁾ | 2016-2020

In units.

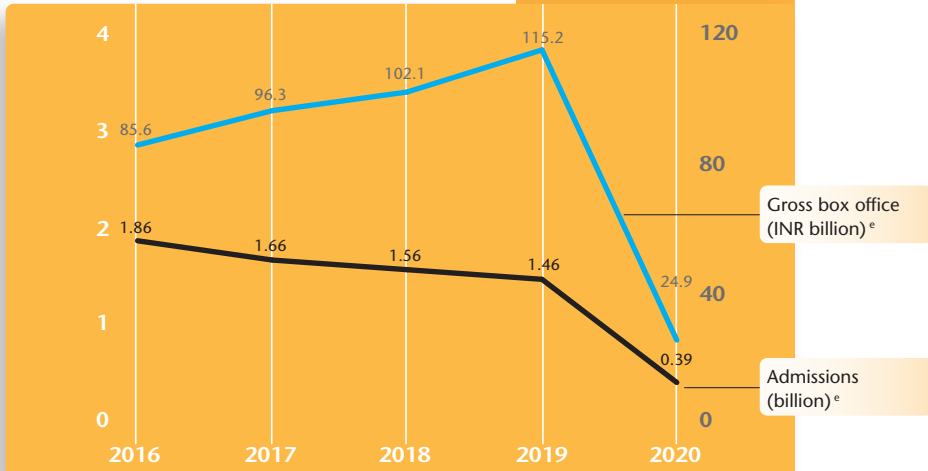
Source: Central Board of Film Certification



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

Admissions and gross box office in India | 2016-2020

Sources: FICCI-EY, Omdia, OBS



Top 10 Bollywood films by gross box office in India | 2020

GBO calculated using an average exchange rate of 1 USD = 73.07 INR.

Original title	Country of origin	Director	Gross box office (in USD)
1 Tanhaji - The Unsung Warrior	IN	Om Raut	43 257 344
2 Baaghi 3	IN	Ahmed Khan	14 447 277
3 Street Dancer 3D	IN	Remo D'Souza	10 566 074
4 Shubh Mangal Zyada Saavdhan	IN	Hitesh Kewalya, Rohit Sharma	9 405 353
5 Malang	IN	Mohit Suri	9 128 495
6 Love Aaj Kal	IN	Imtiaz Ali	5 413 667
7 Chhapaak	IN	Meghna Gulzar	5 273 289
8 Thapaad	IN	Anubhav Sinha	4 736 471
9 Jawaani Jaaneman	IN	Nitin Kakkar	4 484 310
10 Panga	IN	Ashwiny Iyer Tiwari	4 475 211

Source: Bollywood Hungama

Top 10 US films by gross box office in India | 2020

Original title	Country of origin	Director	Gross box office (in USD)
1 1917	GB INC/US	Sam Mendes	1 736 213
2 Tenet	US/GB	Christopher Nolan	1 721 519
3 Jumanji: The Next Level	US	Jake Kasdan	1 432 277
4 Dolittle	US/CN/GB/JP	Stephen Gaghan	1 364 727
5 Bad Boys For Life	US/MX	Adil El Arbi, Bilal Fallah	1 306 099
6 Wonder Woman 1984	US	Patty Jenkins	1 269 793
7 Birds of Prey: And the Fantabulous...	US	Cathy Yan	818 918
8 The Invisible Man	US/AU	Leigh Whannell	391 946
9 The Grudge	US/CA	Nicolas Pesce	362 142
10 Bloodshot	US	Dave Wilson	345 963

Source: Comscore

Distribution and exhibition

In 2020 the pandemic dealt a hard blow to cinema attendance in India, with cinemas closing in mid-March and gradually re-opening in mid-October. Only 441 films were released during the year, compared to 1 833 in 2019. The shutdown of cinemas, as well as the postponement of films scheduled for release, caused theatrical revenues to shrink by 78.4% to INR 24.9 billion (USD 324 million). The country's theatrical infrastructure was severely impacted by the crisis, with over 1 500 screens permanently shutting down in 2020, to leave an estimated 8 000 screens still in operation. Once again, domestic productions took the lion's share at the box office, accounting for 96.0% of theatrical revenues, up from 87.9% in 2019. Films in Hindi language (Bollywood), traditionally a cornerstone of the Indian box office, saw their share decline from 46% in 2019 to 39% in 2020, while films in other regional languages represented 57% of box office takings. Only two Hindi titles crossed the symbolic bar of 1 billion rupees, compared to 20 the previous year: period action film *Tanhaji – The Unsung Warrior* (grossing USD 43.3 million) followed by thriller the *Baaghi 3* (USD 14.4 million). Hollywood productions only took 4% of total revenues in 2020,

down from 14% in 2019, as no US film became a significant hit at the box office.

In 2021, with the easing of restrictions, theatres were allowed to operate at full capacity from February. As a new wave of COVID-19 struck in India, cinemas shut down again in April with no fixed date announced for reopening at the time of writing.

Production and funding

In 2020, a total of 2 396 domestic films were certified for release, compared to 2 446 in 2019. Nonetheless, since these figures are based on the fiscal year ending in March 2020, they do not reflect the impact of the pandemic. According to EY/FICCI reports, only 407 domestic productions were tracked as on release in India during the calendar year 2020, 1 318 less than in 2019.

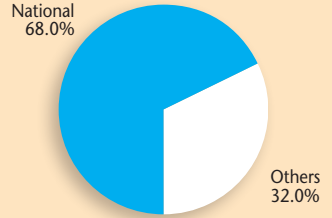
As a new outbreak of the pandemic raged across the country in the spring of 2021, despite reinforced safety protocols, many high-profile productions came to a temporary halt, amid restrictions announced by regional governments and self-imposed industry regulations.

Sources: CBFC, FICCI, Ernst & Young (EY), *Variety*, *The Hollywood Reporter*, *Deadline*

South Korea

Population 2020 ^e	51.8 million
GDP per capita 2020 ^e	31 497 USD
Gross box office 2020	510.0 bn KRW (433.0 M USD)
Admissions 2020	59.5 million
Average ticket price 2020	8 571.4 KRW (7.3 USD)
Average admissions per capita 2020	1.1
Screens 2019 2020	3 079 3 015

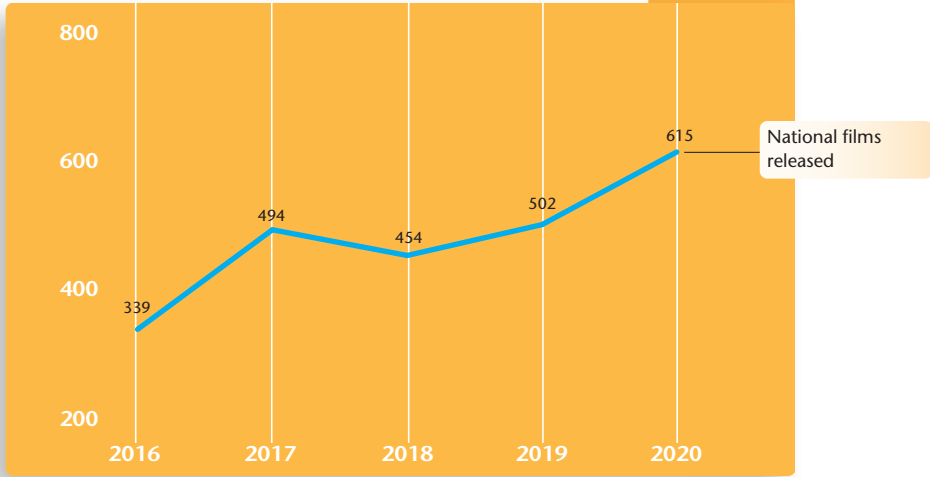
Market shares 2020^e



Number of Korean feature films released | 2016-2020

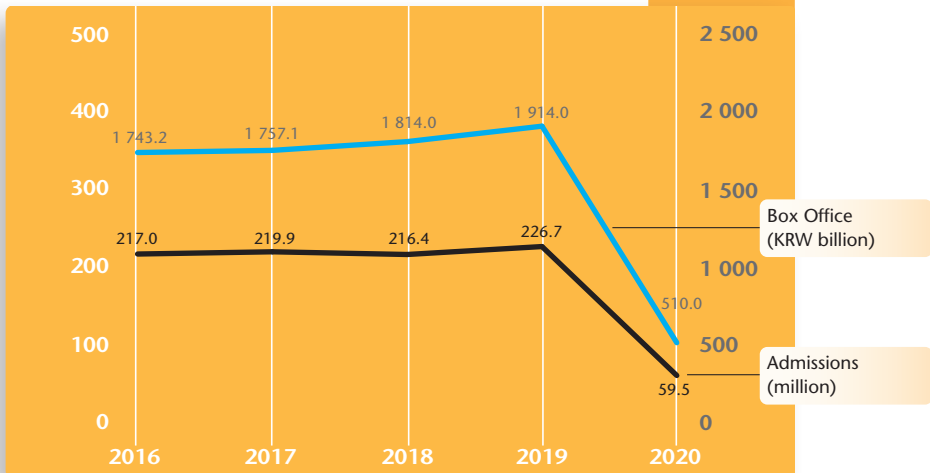
In units.

Source: KOFIC



Admissions and gross box office in South Korea | 2016-2020

Source: KOFIC



Top 20 films by admissions in South Korea | 2020

	Original title	Country of origin	Director	Distributor	Admissions
1	The Man Standing Next	KR	Min-ho Woo	Showbox	4 750 345
2	Deliver Us from Evil	KR	Won-Chan Hong	CJ Ent.	4 357 803
3	Peninsula	KR	Sang-ho Yeon	Next Ent. World	3 812 250
4	Hitman: Agent Jun	KR	Choi Won-sub	Lotte Ent.	2 406 232
5	Tenet	US/GB	Christopher Nolan	Warner Bros.	1 992 214
6	Ashfall	KR	Byung-seo K, Hae-jun L	CJ Ent. / Dexter	1 962 167
7	#Alive	KR	Il Cho	Lotte Ent.	1 903 992
8	Steel Rain 2	KR	WooSuk Yang	Lotte Ent.	1 809 839
9	Pawn	KR	Dae-gyu Kang	CJ Ent.	1 719 706
10	Dolittle	US/CN/GB/JP	Stephen Gaghan	Universal	1 607 082
11	Samjin Company English ...	KR	Jong-pil Lee	Lotte Ent.	1 571 336
12	Honest Candidate	KR	You-jeong Jang	Next Ent. World	1 538 038
13	Collectors	KR	Park Jung-bae	CJ Ent.	1 523 514
14	The Closet	KR	Kwang-bin Kim	CJ Ent.	1 270 835
15	Okay Madam	KR	Cheol-ha Lee	Megabox	1 228 968
16	Secret Zoo	KR	Jae-gon Son	Acemaker	1 209 689
17	Forbidden Dream	KR	Jin-ho Hur	Lotte Ent.	1 034 866
18	Innocence	KR	Sang-Hyun Park	Sony / Kidari	894 025
19	1917	GB INC/US	Sam Mendes	Smile	877 017
20	Little Women	US	Greta Gerwig	Sony	864 782

Source: KOFIC

Distribution and exhibition

Just like elsewhere, the COVID-19 crisis wreaked havoc on box office in South Korea, as theatrical revenues plunged to KRW 510.0 billion (USD 433 million) in 2020, a 74.4% decrease on the record levels registered in 2019. Cinema attendance similarly shrank by 73.8% to 59.5 million tickets sold. Local films dominated the box office chart, as 8 out of the 10 top-grossing titles were Korean titles (compared to 4 in 2019). In 2019 five films had sold more than 10 million admissions, while no title crossed this benchmark in 2020. The box office winner for the year, political drama *The Man Standing Next*, sold 4.8 million admissions, followed by action film *Deliver Us from Evil* (4.4 million) and *Train to Busan* sequel *Peninsula* (3.8 million). Cumulatively, domestic productions generated 68% of all admissions, compared to 51% in 2019. In turn, *Tenet* was the top-grossing US title, ranking fifth place with 2.0 million tickets sold, ahead of *Doolittle* (1.6 million) and *1917* (0.9 million). As many Hollywood films were postponed due to the pandemic, the number of foreign films released declined to 1078 (160 less than in 2019). In contrast, as cinemas needed content to fill their schedule, the number of re-released titles increased to 250 in 2020 (compared to 95 in 2019).

The damaging effects of the pandemic are still visible in 2021. Box office recovery has been

struggling to pick up pace in the first half of the year: audiences appear still hesitant to go back to cinemas amid fears of infection and distributors are withholding local titles for fear of low box office returns. As the exhibition sector is suffering heavy financial losses, two leading multiplex cinema operators announced increases in ticket prices as well as plans to significantly cut down the number of screens in the coming years.

Production and funding

The number of national films released surged to an unprecedented total of 615 titles in 2020, 113 more than in 2019. However, only 165 of these titles had more than 40 screenings and were running for more than seven days.

In March 2020 the government-funded Korean Film Council (KOFIC) launched a series of measures to sustain the local film industry through the COVID crisis, including the distribution of discount vouchers for the purchase of film tickets. Emergency programmes were extended into 2021, with the announcement of a KW 19.95 billion (USD 16.7 million) stimulus package to support production, training and project development as well as distributors and exhibitors.

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

Other Asia

	Hong Kong	Indonesia	Malaysia	Singapore	Taiwan	Thailand
Population 2020 ^e (million)	7.5	270.2	32.9	5.8	23.6	69.8
GDP per capita 2020 ^e (USD)	46 753	3 922	10 270	58 902.2	28 306	7 190
Gross box office 2020 ^e (M USD)	69.2	61.0	54.4	36.0	171.2	151.7 ⁽²⁾
Admissions 2020 ^e (million)	8.0	20.4	11.0	4.7	21.8	33.1 ⁽²⁾
Average ticket price 2020 ^e (USD)	8.7	3.0	5.0	7.6	7.8	4.6 ⁽²⁾
Average admissions per capita 2020 ^e	1.1	0.1	0.3	0.8	0.9	0.5 ⁽²⁾
Screens 2020 ^e	323 ⁽¹⁾	2 149	1 216	274	928	1 321 ⁽¹⁾
National market shares 2020 ^e	19.7%	61.2%	27.2%	4.9% ⁽³⁾	17.5%	~

(1) As per March 2020

(2) 2019

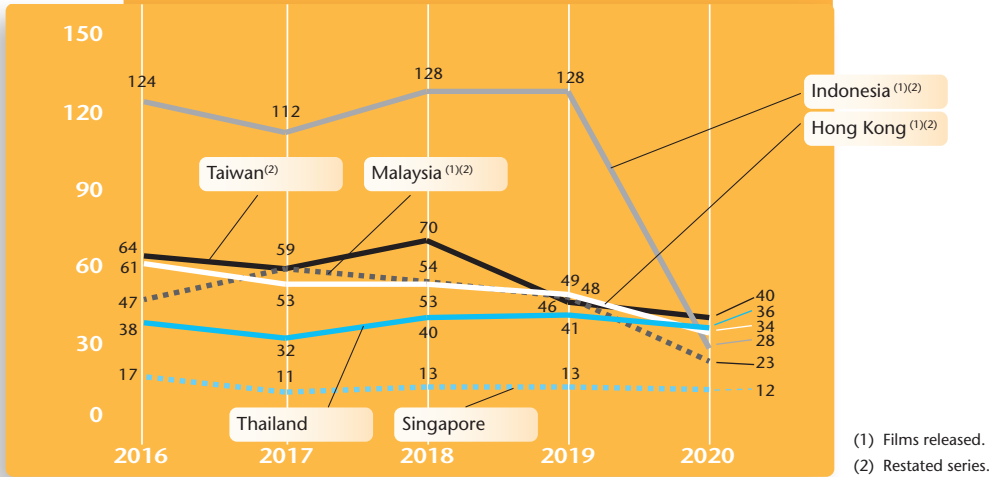
(3) By GEO

Sources: OBS, IMF, Omdia, Hong Kong Box Office Ltd, Pusbangfilm, Indonesian Film Board, IMDA/Singapore Film Commission, Taiwan Cinema, NAFF BIFAN, Comscore

Number of feature films produced in selected Asia countries | 2016-2020

In units.

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

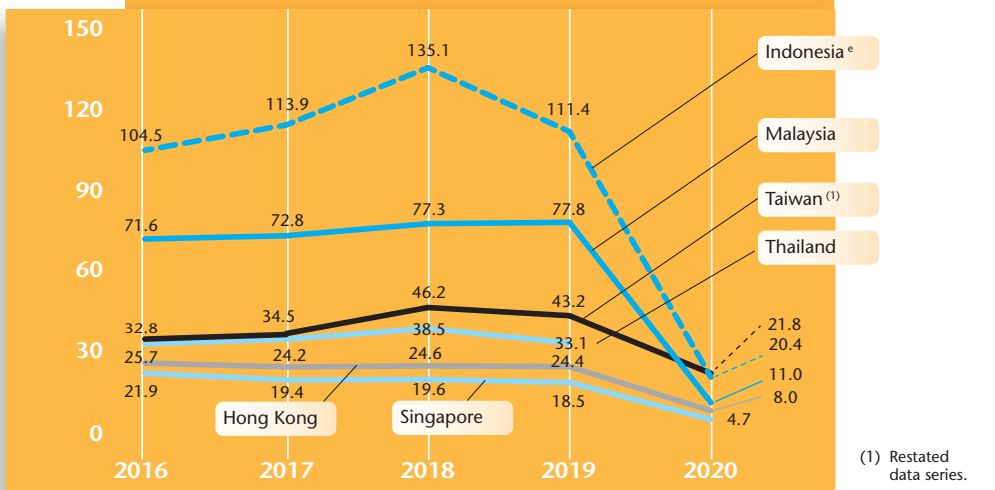


(1) Films released.
(2) Restated series.

Admissions in selected Asian countries | 2016-2020^e

In million.

Sources: Hong Kong Box Office Ltd., Pusbangfilm, Indonesian Film Board, Film Indonesia, FINAS, IMDA/Singapore Film Commission, Taiwan Cinema, NAFF BIFAN, Omdia, Comscore, OBS



(1) Restated data series.

Top 10 films by admissions in Hong Kong | 2020

	Original title	Country of origin	Director	Distributor	Admissions
1	Tenet	US/GB	Christopher Nolan	Warner Bros.	619 820
2	Demon Slayer: Mugen Train	JP	Haruo Sotozaki	Muse	446 828
3	The Grand Grandmaster	HK/CN	Chi Wah Wong	Golden Scene	395 371
4	Beyond the Dream	HK	Kiwi Chow	Golden Scene	266 248
5	Peninsula	KR	Sang-ho Yeon	Edko	226 123
6	1917	GB INC/US	Sam Mendes	Intercontinental	207 653
7	Digimon Adventure: Last Evolution...	JP/MX/ES	Tomohisa Taguchi	NFi	192 523
8	Eiga Doraemon: Nobita no shin kyōryū	JP/TH	Kazuaki Imai	Intercontinental	191 103
9	Dolittle	US/CN/GB/JP	Stephen Gaghan	Universal	186 530
10	Birds of Prey: And the Fantabulous...	US	Cathy Yan	Warner Bros.	175 043

Sources: OBS/LUMIERE, Comscore

Top 10 films by gross box office in Singapore | 2020

	Original title	Country of origin	Director	Distributor	Admissions
1	Wonder Woman 1984	US	Patty Jenkins	Warner Bros.	346 029
2	Peninsula	KR	Sang-ho Yeon	GSC Movies	256 546
3	Mulan	US	T. Bancroft, B. Cook	Walt Disney	251 348
4	Tenet	US/GB	Christopher Nolan	Warner Bros.	230 874
5	Enter the Fat Dragon	HK	A. Chang, K. Tanigaki	Shaw	159 907
6	Ip Man 4: The Finale	HK/CN	Wilson Yip	Shaw	152 766
7	Birds of Prey: And the Fantabulous...	US	Cathy Yan	Warner Bros.	141 683
8	1917	GB INC/US	Sam Mendes	Universal	140 024
9	Vanguard	CN	Stanley Tong	Shaw	120 169
10	Dolittle	US/CN/GB/JP	Stephen Gaghan	Universal	118 715

Sources: OBS/LUMIERE, Comscore

Distribution and exhibition

The Asian exhibition sector was heavily battered by the effects of the COVID-19 crisis. In most territories, cinemas closed in March before gradually reopening from May onwards, with social distancing and preventive measures in place. However, as new waves of the epidemic surged, theatres had to close again intermittently in most areas. Consequently, 2020 ticket sales plummeted in all Asian markets for which data were available: Indonesia (-81.7% to 20.4 million admissions), Malaysia (-85.9% to 11.0 million admissions), Hong Kong (-67.2% to 8.0 million admissions), Singapore (-74.4% to 4.7 million admissions). In Taiwan, where cinemas remained open in 2020, operating at reduced capacity, attendance fell by “only” 49.5% to 21.8 million admissions – one of the lowest decline rates on record worldwide.

In 2020, as Hollywood releases were rescheduled, the share taken by local productions increased to different extents in all the markets tracked and box offices saw the presence of more diverse titles compared to previous years. In Hong Kong, 6 Asian movies ranked among the 10 top-grossing films, including the domestic productions *The Grand Grandmaster* and *Beyond the Dream*. In contrast to previous years, when US titles dominated the

Hong Kong box office, only 4 US productions featured among the first 10 films, with *Tenet* topping the chart. In Singapore *Wonder Woman 1984* was the highest-grossing title for the year, followed by the Korean thriller *Peninsula* and Disney's live action remake of *Mulan*.

Production and funding

A decline in production volumes could be observed to various degrees across the region, particularly in markets where film production is measured as films released, such as Indonesia (-100 films), Malaysia (-25) and Hong Kong (-15). Several countries announced initiatives and relief schemes aimed at supporting the local industry in the wake of the pandemic. Among others, Indonesia launched a relief programme in partnership with tech giant Gojek while Singapore launched a fund to help film and TV freelancers hit by the crisis.

In 2021, in accordance with the National Security Law passed by the Mainland, Hong Kong amended its film classification guidelines to comply to Chinese censorship rules.

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

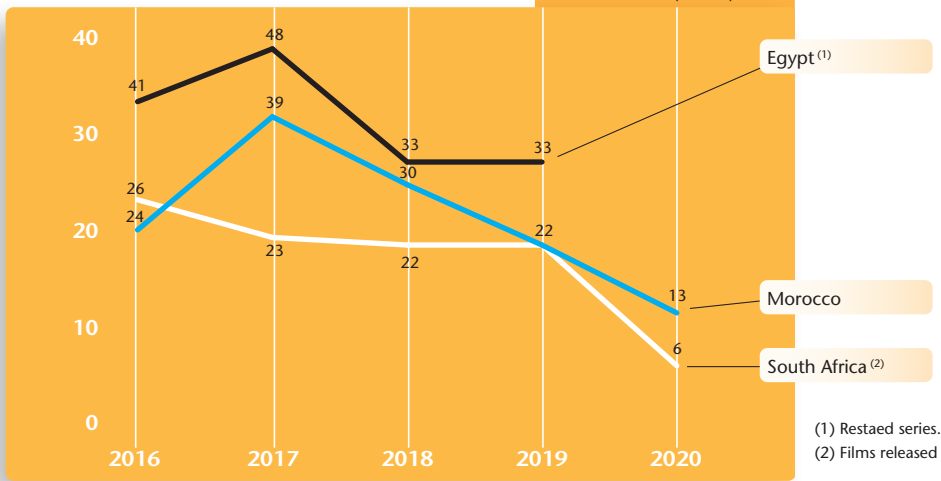
	Egypt	Morocco	South Africa
Population 2020 ^e (million)	100.9	36.0	59.6
GDP per capita 2020 ^e (USD)	3 587	3 158	5 067
Gross box office 2020 ^e (in M USD)	20.3	2.5	19.0
Admissions 2020 ^e (million)	3.7	0.5	4.2
Admissions per capita 2020 ^e	0.04	0.01	0.07
Average ticket price 2020 ^e (in USD)	5.6	5.0	4.5
Screens 2020 ^e	289	74	751
National market shares 2020 ^e	55.8% ⁽¹⁾	57.0%	3.5% ⁽²⁾

(1) 2019 (2) By GBO.

Number of feature films produced in selected African countries | 2016-2020

In units.

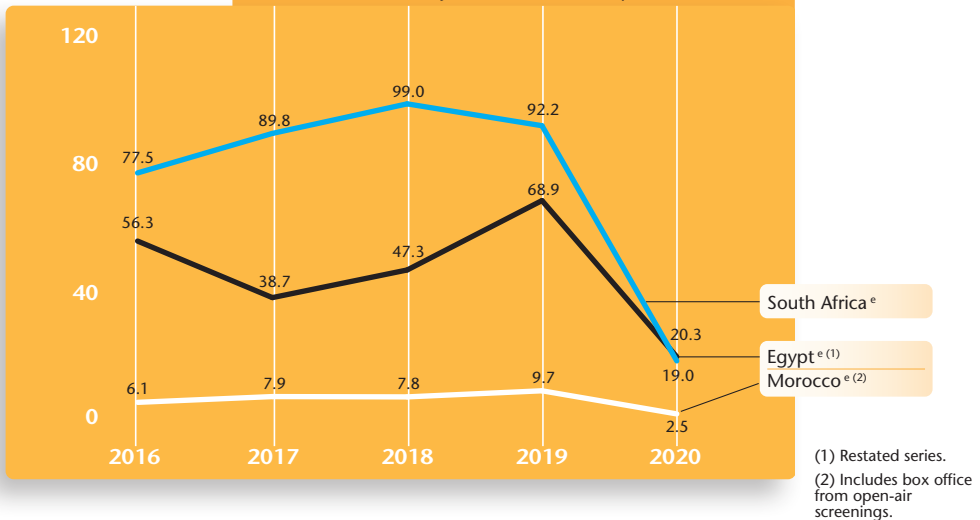
Sources: ECES, CCM, NFVF



Gross box office in selected African countries | 2016-2020

In USD million.

Sources: NFVF, Filmfinity, ECES, CAPMAS, Empire Cinemas, CCM



Top 10 films by gross box office in South Africa | 2020

Original title	Country of origin	Director	Gross Box Office (in USD)
1 Bad Boys for Life	US/MX	A. El Arbi, B. Fallah	3 145 763
2 The Croods: A New Age	US	Joel Crawford	764 708
3 Dolittle	US/CN/GB/JP	Stephen Gaghan	676 174
4 Wonder Woman 1984	US	Patty Jenkins	650 578
5 Sonic the Hedgehog	US/JP/CA	Jeff Fowler	645 481
6 1917	GB INC/US	Sam Mendes	418 392
7 Mulan	US/CA/HK	Niki Caro	376 921
8 Birds of Prey: And the Fantabulous Emancipation of...	US	Cathy Yan	373 750
9 Honest Thief	US	Mark Williams	334 171
10 Like a Boss	US	Miguel Arteta	306 740

Source: Filmfinity/ NFVF

Top 10 films by admissions in Morocco | 2020

Original title	Country of origin	Director	Admissions
1 Tlatine Melioune	MA	Rabii Chajid	226 473
2 Bad Boys for Life	US/MX	A. El Arbi, B. Fallah	35 832
3 Jumanji: The Next Level	US	Jake Kasdan	25 388
4 Frozen 2	US	Chris Buck, Jennifer Lee	20 668
5 Adam	MA	Maryam Touzani	15 725
6 El Felos (The Money)	EG	Said El Marouk	15 115
7 Sonic the Hedgehog	US/JP/CA	Jeff Fowler	13 760
8 Ils sont grands et ne peuvent quitter le nid familial	MA	Nourddine Douguena	9 348
9 Akhnatoune à Marrakech	MA	Said Naciri	9 099
10 Birds of Prey: And the Fantabulous Emancipation of...	US	Cathy Yan	8 580

Source: Centre Cinématographique Marocain (CCM)

South Africa

After closing in March 2020, South African cinemas finally re-opened in August, operating with capacity restrictions. The crisis had a devastating impact on the box office as revenues shrank by 76.6% to ZAR 301.5 million (USD 19.0 million) and attendance declined by 79.4% to 19.0 million admissions. Only 6 national films were released in 2020, 16 less than in 2019, accounting for 3.5% of total GBO takings (versus 5.0% the previous year). US productions dominated the box office, with *Bad Boys for Life* topping the chart, while romantic comedy *Vergeet my nie*, was the top-grossing domestic title for the year, ranking 16th. As the pandemic put a severe strain on cinema operators, several screens shut down permanently leaving a total of 751 screens in 2020.

Egypt

Egyptian cinemas were shut from March to end of June, when they reopened with a 25% seating capacity to ensure social distancing. As a result, admissions dropped by 75.1% in 2020, to an estimated total of 3.7 million. Box office takings similarly went down by 72.3% to EGP 320.7 million (USD 20.3 million), as the average ticket price registered an increase. As the lock-

downs boosted the growth of streaming services, a number of Egyptian productions premiered on digital platforms, sparking a heated debate within the industry. While several festivals were cancelled or postponed due to the pandemic, the Cairo Film Festival, a key industry event in the region, finally took place in December, respecting mask-wearing and social distancing protocols.

Morocco

With cinemas closed during lockdown, annual admissions went down by 73.6% in 2020 to less than 500 000 tickets sold. Theatrical revenues similarly plummeted by 74.6% to MAD 23.6 million (USD 2.5 million). Local productions captured 57.0% of total ticket sales (up from 26.0% in 2019), driven by the box office performance of the local hit *Tlatine Melioune*, which alone generated 45.6% of admissions for the year. The COVID-19 crisis significantly affected production volume, as only 13 Moroccan films were produced in 2020, 9 less than 2019. The number of foreign productions shot in the Kingdom also fell from 22 to 8 titles.

Sources: ECES, CAPMAS, OBS, Empire Cinemas, Al-Monitor, Filmfinity, NFVF, Omdia, CCM, *Screen International*

Middle East

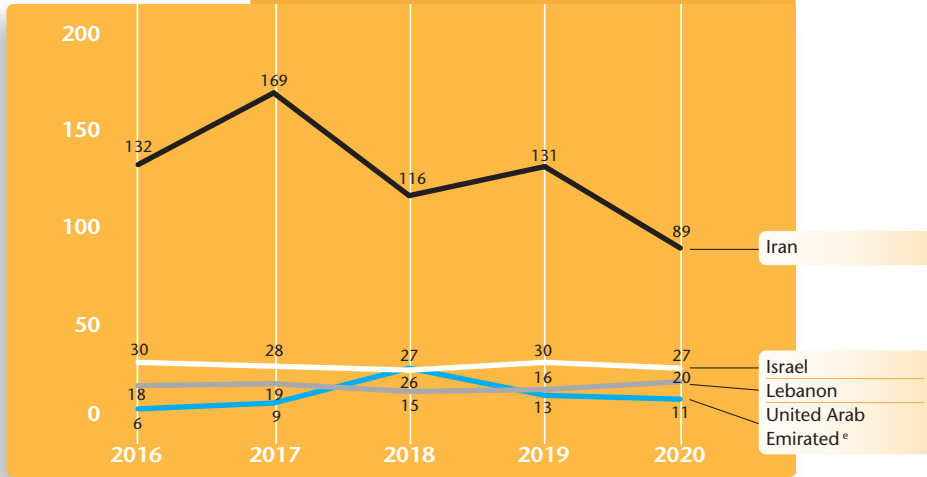
	Iran	Israel	Kuwait	Lebanon	Qatar	Saudi Arabia	United Arab Emirates
Population 2020 ^e (million)	84.1	9.2	4.9	6.8	2.8	34.8	11.1
GDP per capita 2020 ^e (USD)	7 555	43 689	22 105	2 802	52 144.2	20 178	31 982
Gross box office 2020 ^e (in M USD)	3.4	193.8 ¹	69.4 ¹	25.6 ¹	8.7	115.4	64.9
Admissions 2020 ^e (million)	0.8	17.3 ¹	5.91	2.7 ¹	0.6	6.4	5.0
Admissions per capita 2020 ^e	0.0	1.9 ¹	1.2 ¹	0.4 ¹	0.2	0.2	0.4
Average ticket price 2020 ^e (USD)	4.1	11.2	11.8	9.4 ¹	14.5	17.9	13.0
Screens 2020 ^e	659	464 ²	115 ²	154 ²	139 ²	300	618 ²
National market shares 2020 ^e	95.5%	7.87 ¹	~	20.2% ¹	~	~	~

(1) 2019 (2) As per March 2020 (3) 2018

Number of films produced in selected Middle East countries | 2016-2020^e

In units.

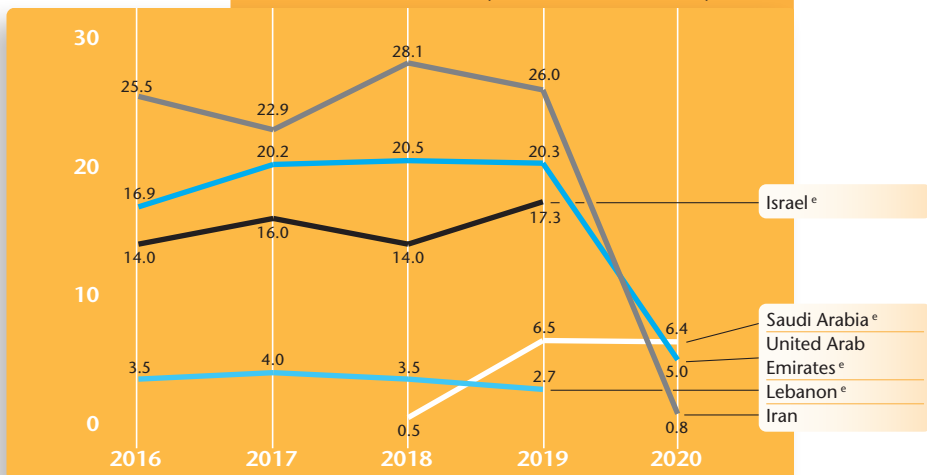
Sources: Iranian Independents, Israel Film Fund, IHS, IMDb/OBS



Admissions in selected Middle Eastern countries | 2016-2020^e

In millions.

Sources: Israeli Film Fund, Empire Cinemas, Iranian Independents



Top 10 films by admissions in the United Arab Emirates | 2020

Original title	Country of origin	Director	Distributor	Admissions
1 Bad Boys for Life	US/MX	A. El Arbi, B. Fallah	Columbia/Empire	353 277
2 Mulan	US/CA/HK	Niki Caro	Disney/Italia Film	173 686
3 Sonic the Hedgehog	US/JP/CA	Jeff Fowler	Paramount/Fox Star	161 715
4 Wonder Woman 1984	US	Patty Jenkins	Warner Bros./Shooting Stars	160 686
5 Tenet	US/GB	Christopher Nolan	Warner Bros./Shooting Stars	148 722
6 1917	GB INC/US	Sam Mendes	Italia Film	129 951
7 Dolittle	US/CN/GB/JP	Stephen Gaghan	Universal/Fox Star	123 460
8 Anjaam Pathiraa	IN	Midhun Manuel Thomas	Phars Film	111 330
9 Birds of Prey: And the...	US	Cathy Yan	Warner Bros./Shooting Stars	109 725
10 The Croods: A New Age	US	Joel Crawford	Universal/Fox Star	108 118

Source: Empire Cinemas

Top 10 films by admissions in Saudi Arabia | 2020

Original title	Country of origin	Director	Distributor	Admissions
1 Bad Boys for Life	US/MX	A. El Arbi, B. Fallah	Columbia Pictures	506 319
2 Honest Thief	US	Mark Williams	Eagle Films	354 759
3 Tenet	US/GB	Christopher Nolan	Warner Bros.	323 466
4 Greenland	US/GB	Ric Roman Waugh	Italia Film	274 712
5 Mulan	US/CA/HK	Niki Caro	Walt Disney	247 376
6 El Khetta El Aayma	EG	Moataz El Tony	VOX	226 452
7 1917	GB INC/US	Sam Mendes	Italia Film	225 909
8 Unhinged	US/GB	Derrick Borte	Eagle Films	186 547
9 War with Grandpa	US/GB/CA	Tim Hill	Italia Film	134 827
10 Vanguard	CN	Stanley Tong	Phoenicia/VOX	133978

Source: Empire Cinemas

Iran

The Iranian exhibition circuit was one of the most ravaged by the pandemic as total revenues registered a 95.3% decline in 2020, falling to IRR 139.8 million (USD 3.4 million). In a similar way, cinema attendance dropped steeply by 96.8% to around 800 000 tickets sold. In line with previous years, local productions generated 95.5% of annual revenues. The number of national films produced dropped from 131 to 89 titles, many of which were blocked for released due to the crisis. In 2021 The Cinema Organization of Iran (COI) announced the signature of a three-year memorandum of understanding with China to reinforce relations in the film industry.

Israel

Before the COVID-19 crisis hit, Israeli cinema attendance had grown by 23.3% to 17.3 million admissions in 2019. No box office information was available for 2020, as cinemas stayed closed for most of the year after shutting down in March. As the vaccination campaign rolled out, the country reopened its cinemas at the end of May 2021, after 14 months of shutdown. Despite the crisis, 27 films were produced in 2020, 3 less than the previous year.

Saudi Arabia

In 2020 Saudi Arabia was the only market worldwide to register growth at the box office despite the fact that cinemas were closed between March and mid-June. As theatrical revenues rose by 2.9% to SAR 432.6 (USD 115.4 million), the Kingdom became the region's top-grossing territory ahead of the United Araba Emirates. As the average ticket price continued to increase to USD 17.9 (one of the highest in the world), box office takings grew despite a marginal decline in ticket sales, falling by 1.0% to 6.4 million in 2020. These positive results were driven by a strong appetite for movie-going among Saudi audiences after a 35-year ban of cinemas that was lifted in 2018. The country's screen estate has been expanding rapidly, unveiling 171 new screens in 2020 to an estimated total of 300 screens. To compensate for the lack of new titles due to the pandemic, cinema chains are enriching their offer with re-releases as well as alternative content such as concerts, opera and live soccer matches.

Sources: Israel Film Fund, *The Jerusalem Post*, Iranian Independents, *Tehran Times*, Empire Cinemas, *Variety*, Omdia

Sources

FOCUS 2021 was prepared by the European Audiovisual Observatory. We would like to thank the following sources:

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MPDAA	AU	www.mpdAA.org.au	Motion Picture Association of Japan (EIREN)	JP	www.eiren.org
Screen Australia	AU	www.screenaustralia.gov.au	The Association of Japanese Animation (AJA)	JP	aja.gr.jp
Sarajevo Film Festival (SFF)	BA	www.sff.ba	Korean Film Council (KOFIC)	KR	www.koreanfilm.or.kr
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Czech Film Fund	CZ	www.fondkinematografie.cz	Norsk Filminstitutt (NFI)	NO	www.nfi.no
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Le film français	FR	www.lefilmfrancais.com	Taiwan Cinema	TW	www.taiwancinema.com
British Film Institute (BFI)	GB	www.bfi.org.uk	MPA	US	www.motionpictures.org
Greek Film Center	GR	www.gfc.gr	Dirección del Cine y Audiovisual Nacional (ICAU)	UY	ica.u.uy
Hong Kong Box Office Ltd	HK	www.hkbo.com.hk	Centro Nacional Autónomo de Cinematografía (CNAC)	VE	www.cnac.gov.ve
Croatian Audiovisual Centre (HAVCR)	HR	www.havc.hr	Filmfinty	ZA	
National Film Office (NFO)	HU	www.nemzetifilmiroda.hu	National Film and Video Fund (NFVF)	ZA	www.nfvf.co.za
Film Indonesia	ID	filmindonesia.or.id	Box Office Mojo		www.boxofficemojo.com
Indonesian Film Board (Badan Perfilman Indonesia/BPI)	ID	www.bpi.or.id	Comscore		www.comscore.com
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Screen Ireland	IE	www.screenireland.ie	International Monetary Fund		www.imf.org
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