



MARCHÉ DU FILM
FESTIVAL DE CANNES



COUNTRY OF HONOUR

2022

Marché du Film

focus

WORLD FILM MARKET TRENDS
TENDANCES DU MARCHÉ MONDIAL DU FILM

25TH ANNIVERSARY EDITION

30
Years



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***Circulation of
European films:
is availability
enough?***

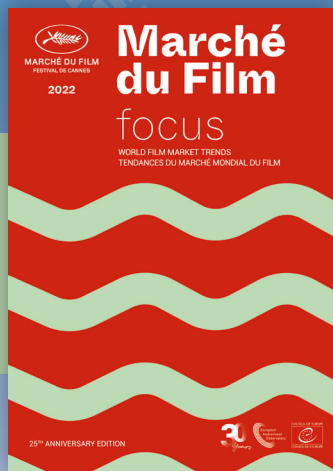
This conference will explore if and to what extent making European films circulate is problematic. What ideas are currently being debated to ensure that European films reach a diverse audience in a culturally diverse Europe? Join us in person and find out!

9.30 – 11.30, Saturday 21 May, 2022
Main stage (Palais - Riviera)



**LAUNCH EVENT
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*Key Trends
in the film sector***

16.30 - 17.15, Thursday 19 May, 2022
Marina Stage (Palais - Riviera)



Market, festival or press accreditation necessary to attend both events.

For more information, come and see us on the European Audiovisual Observatory stand:
Stand: H3, Riviera Hall, Ground floor (in front of the Marina Club)



Information products and services for the audiovisual sector
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focus 2022

World Film Market Trends

Tendances du marché mondial du film



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



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FESTIVAL DE CANNES

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The European Audiovisual Observatory, set up in 1992, is a public-service body whose mission is to supply information services (concerning film, television, home video, on demand audiovisual services as well as related public policies) to the audiovisual industry in Europe. The Observatory has 40 member countries, along with the European Union represented by the European Commission. The Observatory is part of the Council of Europe and located in Strasbourg, France. It carries out its mission with the help of a network of partners, correspondents and professional organisations. The Observatory provides information on markets, financing and legal aspects of the audiovisual sector and edits the "FOCUS, World Film Market Trends".

➔ <http://www.obs.coe.int>

Créé en 1992, l'Observatoire européen de l'audiovisuel est un organisme de service public qui a pour mission de proposer des services d'information au secteur audiovisuel en Europe (concernant le cinéma, la télévision, la vidéo, les services audiovisuels à la demande et les politiques publiques afférentes). Il compte actuellement 40 Etats membres, ainsi que l'Union européenne qui est représentée par la Commission européenne. L'Observatoire fait partie du Conseil de l'Europe et a son siège à Strasbourg en France. Pour accomplir sa mission, il s'appuie sur un réseau de partenaires, de correspondants et d'organisations professionnelles. L'Observatoire propose des informations relatives aux différents marchés audiovisuels, au financement et aux aspects juridiques du secteur ; il édite aussi FOCUS, Tendances du marché mondial du film.

Editorial

This is a special anniversary for our partnership with the European Audiovisual Observatory as this is the 25th edition of the *FOCUS*! Throughout the years, it has become a 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. In these changing times for the whole film industry, the Marché du Film is proud to be back in Cannes and to continue to provide these clear data and key trends that are more important than ever to understand. 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

Guillaume Esmiol
Co-Director
Marché du Film

This *FOCUS* marks a double anniversary for the European Audiovisual Observatory: this year we celebrate the 25th edition of this publication and also the 30th anniversary of the Observatory itself. The fact that *FOCUS* goes back 25 years in our history proves that the film market is of crucial importance to our work! In 25 years, we have constantly expanded our film-related expertise and services, and in parallel the scope of our data collection. This was only possible due to our invaluable networks, especially the EFARN, which therefore deserves our sincere thanks on the occasion of these anniversaries. The *FOCUS* report, however, would not have developed as it did without the vision of our partner, the Marché du Film and in particular Jérôme Paillard, its long-standing Executive Director, whom we will always link to this publication even after his imminent retirement. Thank you Jérôme for all these years of wonderfully easy cooperation! We are looking forward to continuing our work with your successor Guillaume Esmiol and the exceptional staff that he “inherits” from you.

Susanne Nikoltchev
Executive Director
European Audiovisual Observatory

Nous fêtons cette année une étape importante dans notre partenariat avec l'Observatoire européen de l'audiovisuel, puisqu'il s'agit de la 25^e édition de *FOCUS* ! Au fil des ans, ce guide est devenu un ouvrage de référence pour les professionnels. Non seulement il permet de saisir l'évolution des pratiques de l'industrie cinématographique, mais il fournit également des informations spécifiques sur la production et la distribution au niveau mondial. En cette période de mutation qui touche l'ensemble du secteur, le Marché du Film est heureux d'être de retour à Cannes pour fournir des données claires et pointer les tendances clés, dont la compréhension s'avère plus cruciale que jamais. Nous remercions tout particulièrement Susanne Nikoltchev et son équipe, avec qui nous avons collaboré pour produire ce précieux panorama des tendances du marché du film.

Jérôme Paillard
Directeur Délégué
Marché du Film

Guillaume Esmiol
Co-Directeur
Marché du Film

Ce *FOCUS* marque un double anniversaire pour l'Observatoire européen de l'audiovisuel, puisque nous célébrons cette année la 25^e édition de cette publication et le 30^e anniversaire de l'Observatoire lui-même. Le fait que *FOCUS* remonte à 25 ans dans notre histoire témoigne de la place cruciale du marché du film dans notre travail ! En 25 ans, nous n'avons pas cessé d'élargir notre expertise et nos services dans le domaine du cinéma et, parallèlement, le champ de collecte des données pertinentes. Cela n'aurait pas été possible sans nos précieux réseaux, en particulier l'EFARN, qui mérite nos sincères remerciements à l'occasion de ces deux anniversaires. Le rapport *FOCUS* n'aurait certainement pas pu se développer comme il l'a fait sans la vision de notre partenaire, le Marché du Film, et notamment de Jérôme Paillard, son directeur général de longue date, que nous associerons toujours à cette publication, même après sa retraite imminente. Un grand merci, Jérôme, pour toutes ces années d'une collaboration merveilleusement fluide ! Nous nous réjouissons de poursuivre notre travail avec son successeur, Guillaume Esmiol, et la formidable équipe de collaborateurs dont il « hérite ».

Susanne Nikoltchev
Directrice exécutive
Observatoire européen de l'audiovisuel



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Mixed signals in year two under COVID

This 25th edition of FOCUS – World Film Market Trends provides a full view of the situation of the film industry up until the beginning of 2022. The facts and figures we have collected draw a mixed landscape of encouraging trends and critical issues.

Will cinema admissions fully recover?

After the 2020 collapse, cinema admissions in Europe⁽¹⁾ showed a sign of modest recovery in 2021, with a 31% increase, but remained well below pre-pandemic levels, namely at -60% of the average 2017-2019 figures. More worryingly, the figures for the first quarter of 2022 – where health restrictions have mostly been completely lifted – remain much lower in all major European markets than they were in the first quarter of 2019: in the first quarter of 2022, box office in the United Kingdom underperformed by -19% and it was significantly worse in Spain (-36%), France (-38%), Germany (-50%), Poland (-50%) and Italy (-61%)⁽²⁾.

Why is part of the public (still) missing? There are many possible explanations, including the hypothesis that older audiences may be reluctant to return to cinemas as long as the COVID pandemic is not over. But the figures in France suggest that the audience share of cinema goes above 50 years of age, which had fallen sharply during the crisis, has returned to previous levels. The supply of US studio films is also under scrutiny. Their theatrical slate rebounded in 2021, with 62 films

against 38 in 2020. 2022 should see a further increase with 72 US theatrical releases, but still lower than 2019 (82). But at the same time, the studios are investing more in the production of films reserved for their platforms, including franchises that were previously exploited theatrically.

Cinemas and VOD: intertwined destinies?

Competition but also common interests seem indeed to characterise the relationships between cinemas and VOD services. On the one hand, Hollywood studios experimented with the release of their films on their SVOD proprietary services during the COVID-19 crisis. But on the other, figures suggest that, at least for their higher budget tentpole releases, US studios cannot do without the revenues from cinemas⁽³⁾. The shortening of cinema exclusivity windows (in the United States but also in France or in Italy) illustrates the tensions between players.

As regards European films, research from the Observatory suggests that theatrical release and admissions are key to VOD availability. Figures show a strong correlation between the number of countries of theatrical release

(1) EU27 + United Kingdom.

(2) Sources : Spain: Comscore (top week-end box office); France: CNC (admissions); Germany: Blickpunkt Film (admissions); Poland: boxoffice.pl (admissions); Italy: Cinetel (admissions); United Kingdom: BFI (top 15 week-end box office).

(3) AmpereAnalysis: "Theatrical remains key for studios' film release strategies", March 2022 presentation.

and of VOD availability and highlights that films available on VOD made 10 times more admissions in cinemas than films not available on VOD. In other words, VOD services tend to pick up films which had exposure through a theatrical release⁽⁴⁾.

The alleged competition between cinemas and VOD is likely to evolve further. The COVID-19 crisis has made the cinema sector more fragile and has at least prolonged the growth dynamics of VOD. But the latter sector is far from being future proof. The landscape is changing, with more and more services (the Observatory estimates that the number of SVOD services available in Europe has almost doubled between the end of 2020 and the end of 2021). Let's add to the equation the rise of free-VOD services financed by advertising (or cheaper SVOD subscriptions including advertising). Several consequences could result from this: a decrease in investments in content by the major SVOD services; more alternative distribution schemes for films; the weakening of free television channels challenged in their advertising market and, therefore, with a reduced capacity for them to invest in films.

No recovery for European films in 2021

In 2020 European films achieved a historical record market share, capturing 39.5% of total admissions. In 2020, admissions to European films dropped by "only" 56% compared to 2019, while admissions to US films collapsed by 78%. In contrast, admissions growth in 2021 was driven exclusively by the return of US blockbusters. US films are estimated to have sold around 230 million tickets in 2021, 82 million more than in 2020, while admissions to European films actually declined from an estimated 118 million in 2020 to 104 mil-

lion in 2021. This means that in 2021 US films reached only 36% and European films only 38% of their pre-pandemic admissions level.

Lower average admissions and higher concentration among top films

As the number of films on release declined significantly less than overall admissions, average admissions per film halved in 2021 compared to pre-pandemic levels. On average US films sold 350 000 tickets before the pandemic, but only 79 000 tickets in 2020 and 170 000 in 2021. While average admissions to European films did not drop as sharply in 2020, they remained practically stable in 2021 with the average European film selling 41 000 tickets in the EU and the UK before the pandemic, compared to 20 000 tickets in 2020 as well as in 2021.

This decline in average admissions also concerns the top performing films. Average admissions to European films ranking among the top 100 titles in 2021 amounted to only 1.1 million, compared to a pre-pandemic average of 3.4 million. This represents a drop of 67%. The decline is a little less pronounced for US titles among the top 100 films, which sold on average 3.9 million tickets in 2021, compared to a pre-pandemic average of 8.2 million (-52%).

The concentration of admissions to the top performing titles also increased in 2021. The top 50 films used to account for about 59% of cumulative admissions in the EU and the UK between 2017 and 2019 but their share increased to 69% in 2021.

(4) European Audiovisual Observatory: "Circulation of European films on VOD and in cinemas", December 2021.

(5) EU27 + United Kingdom.

Film production: catch-up or back to normal?

After a drop in 2020, the number of films produced in Europe⁽⁶⁾ has returned to its pre-crisis levels, with significant variations between countries. The rebound is particularly spectacular in Poland, Italy (especially in both cases for documentary films) and France (with a more marked recovery for fiction films) which all produced more films in 2021 than on average between 2017 and 2019⁽⁶⁾. This recovery certainly also concerns other countries, but whose method of accounting for films (at the time of release) means that the 2021 figures do not yet fully reflect the reality of the recovery in production.

Is this recovery sustainable? There are two hypotheses: on the one hand, that of a durable return to the production levels of the years prior to the crisis; on the other, that of a mere catch-up in 2021 of films whose production was interrupted or stopped during the crisis to a level that will not be sustainable as long as cinemas have not returned to their usual attendance levels.

Taking again the French example, it is noticeable that the financing structure of films supported in 2021 in France does not (yet) show any significant change compared to the pre-crisis period: in particular minimum guarantees specific to cinema exploitation were 50% higher in 2021 than, on average, between 2017 and 2019⁽⁷⁾. The big question is now how a lasting drop in cinema admissions may in future impact the financing of feature films.

Gilles Fontaine
Head of the Market Information
Department

Martin Kanzler
Film Analyst

Patrizia Simone
Film Analyst

(6) Poland : +29% ; France : +14% ; Italy : +10%

(7) CNC : « La production cinématographique en 2021 », March 2022.



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Top 10 markets worldwide by gross box office | 2017-2021^e

In USD billion. Converted at average annual exchange rates. Ranked by 2021 values.

Sources: OBS, MPA, Omdia, National data sources

Rank	Market	2017	2018	2019	2020	2021	Year-over-year change 2021/2020	Comparison 2021/avg 2017-2019
1	China	8.27	9.24	9.30	2.96	7.33	147.5%	82.0%
2	US & Canada	11.12	11.88	11.38	2.22	4.54	104.7%	39.7%
3	Japan	2.04	2.02	2.40	1.34	1.48	9.9%	68.6%
4	France	1.56	1.58	1.62	0.49	0.80	60.9%	50.1%
5	United Kingdom	1.65	1.71	1.60	0.39	0.75	88.9%	45.0%
6	Russian Federation	0.91	0.81	0.86	0.32	0.55	73.7%	64.1%
7	India ⁽¹⁾	1.48	1.57	1.69	0.32	0.53	63.0%	33.4%
8	South Korea	1.55	1.65	1.64	0.43	0.51	18.2%	31.7%
9	Australia	0.92	0.93	0.85	0.28	0.45	64.0%	50.4%
10	Germany	1.19	1.06	1.15	0.36	0.44	21.5%	39.0%
World total		40.9	41.8	42.39	11.8	21.3	80.6%	51.0%
Growth rate - World		4.1%	2.2%	1.4%	-72.2%	80.6%	80.6%	51.0%
Growth rate - Top 10		6.3%	5.7%	0.1%	-71.9%	90.4%	90.4%	54.5%
Growth rate - Top 10 without China		0.6%	3.5%	-0.1%	-73.4%	62.9%	62.9%	43.8%

(1) Restated series.

Top 10 markets worldwide by admissions⁽¹⁾⁽²⁾ | 2017-2021^e

In million. Ranked by 2021 admissions.

Sources: OBS, Omdia, national data sources

Rank	Market	2017	2018	2019	2020	2021	Year-over-year change 2021/2020	Comparison 2021/avg 2017-2019
1	China	1 620	1 720	1 727	548	1 167	112.9%	69.1%
2	US & Canada	1 240	1 304	1 242	237	475	100.4%	37.6%
3	India ^{(1) e}	1 660	1 560	1 460	387	418	8.0%	26.8%
4	Russian Federation	212	200	219	89	146	64.2%	69.2%
5	Japan	174	169	195	106	115	8.2%	64.0%
6	Mexico	338	320	342	55	110	99.5%	33.0%
7	France	209	201	213	65	95	46.3%	45.9%
8	United Kingdom	171	177	176	44	74	68.3%	42.4%
9	South Korea	220	216	227	60	61	1.7%	27.4%
10	Brazil	181	163	178	39	51	28.4%	29.1%
World total^e		7 499	7 517	7 475	2 024	3 181	57.2%	42.4%
Growth rate - World^e		-0.8%	0.2%	-0.6%	-72.9%	57.2%	57.2%	42.4%
Growth rate - Top 10^e		0.1%	0.1%	-0.9%	-72.7%	66.3%	66.3%	45.1%
Growth rate - Top 10^e without China		-5.3%	-2.1%	-1.4%	-74.6%	42.7%	42.7%	35.7%

(1) Restated series.

(2) Only includes available data.

Top 10 markets worldwide by number of screens ⁽¹⁾ | 2017-2021 ^e

In units. Ranked by 2021 values.

Sources: OBS, MPA, Omdia, National data sources

Rank	Market	2017	2018	2019	2020	2021	Year-over-year change 2021/2020	Comparison 2021/avg 2017-2019
1	China	50 776	60 079	69 787	75 581	82 248	8.8%	136.6%
2	US & Canada ⁽¹⁾	43 216	43 459	43 679	44 111	43 646	-1.1%	100.4%
3	India ⁽²⁾	9 530	9 601	9 527	9 473	9 423	-0.5%	98.6%
4	Mexico	6 633	7 024	7 493	7 494	7 361	-1.8%	104.4%
5	France	5 913	5 983	6 114	6 127	6 193	1.1%	103.2%
6	Russian Federation	4 805	5 341	5 597	5 337	5 751	7.8%	109.6%
7	Italy	5 315	5 205	5 385	5 325	~	~	~
8	Germany	4 803	4 849	4 961	4 926	4 931	0.1%	101.2%
9	United Kingdom	4 512	4 640	4 782	4 682	4 610	-1.5%	99.3%
10	Japan	3 525	3 561	3 583	3 616	3 648	0.9%	102.6%
World total		171 755	186 859	200 954	207 650	215 337	3.7%	115.4%
Growth rate - World ^e		4.8%	8.8%	7.5%	3.3%	3.7%	3.7%	115.4%
Growth rate - Top 10 ^e		7.7%	7.7%	7.5%	3.6%	3.9%	3.9%	115.5%
Growth rate - Top 10 ^e without China and India		2.6%	1.7%	1.9%	0.0%	-0.2%	-0.2%	101.7%

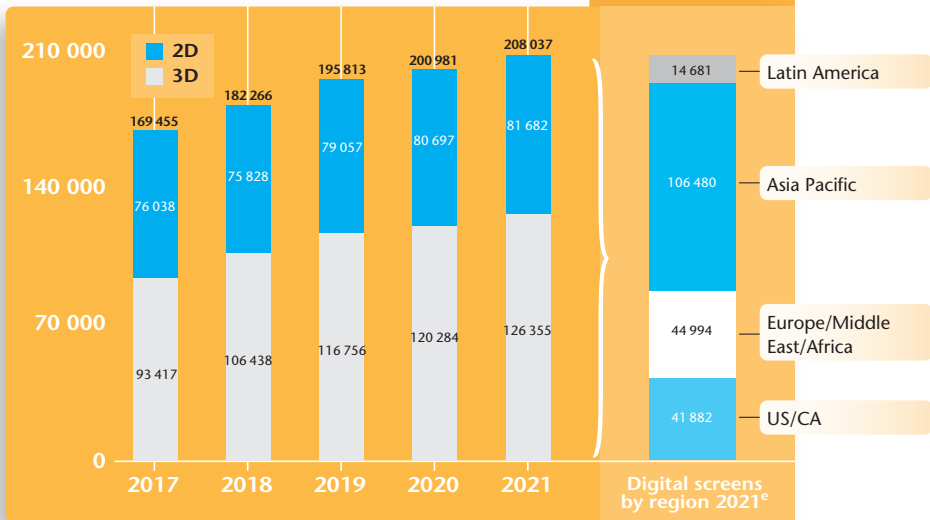
(1) Restated series.

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

Worldwide number of digital and 3D screens | 2017-2021 ^e

In units.

Sources: MPA, Omdia



Top 10 markets worldwide by feature film production ⁽¹⁾ | 2017-2021 ^e

In units. Ranked by 2021 values.

Sources: OBS, National data sources

Rank	Market	2017	2018	2019	2020	prov. 2021	Year-over-year change 2021/2020	Comparison 2021/avg 2017-2019
1	India ⁽²⁾	1813	2446	2524	1238	1818	46.8%	80.4%
2	United States ⁽³⁾	812	808	814	443	943	112.9%	116.2%
3	China ⁽⁴⁾	970	1082	1037	650	740	13.8%	71.9%
4	Japan	594	613	689	506	490	-3.2%	77.5%
5	South Korea ⁽⁵⁾	594	613	689	506	490	-3.2%	77.5%
6	France	300	300	301	237	340	43.5%	113.2%
7	Italy	235	273	325	252	313	24.2%	112.7%
8	Spain ⁽⁶⁾	241	266	263	215	263	22.3%	102.5%
9	United Kingdom ⁽⁷⁾	381	350	349	237	209	-11.8%	58.1%
10	Russian Federation	157	139	177	110	186	69.1%	118.0%
World total ^e		8 629	9 579	9 926	5 886	7 865	33.6%	83.9%
Growth rate - World ^e		-0.5%	11.0%	3.6%	-40.7%	33.6%	33.6%	83.9%
Growth rate - Top 10 ^e		-1.6%	13.0%	4.0%	-38.7%	31.8%	31.8%	86.2%
Growth rate - Top 10 ^e without China and India		1.4%	1.4%	7.3%	-30.5%	29.1%	29.1%	94.4%

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

(2) Films certified. Restated data series.

(3) 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.

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

(5) Feature films released.

(6) Films certified. Excluding experimental films.

(7) The apparent decline of film productions in 2021 may be 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 | 2021

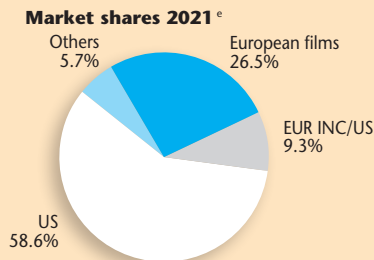
In USD million. GBO for 2021 only. Does not include carryovers.

Original title	Country of origin	Distributor	North American box office	International box office	Global box office
1 Spider-Man: No Way Home	US	Sony	797.7	1 087.0	1 884.7
2 The Battle at Lake Changjin	CN	China Media Capital	0.3	902.2	902.5
3 Hi, Mom	CN	China Film / Maoyan	~	822.0	822.0
4 No Time to Die	GB INC/US	Universal	160.9	613.3	774.2
5 F9: The Fast Saga (Fast & Furious 9)	US	Universal	173.0	553.2	726.2
6 Detective Chinatown 3	CN	Wanda	~	686.3	686.3
7 Venom: Let There Be Carnage	US	Sony	213.6	288.5	502.1
8 Godzilla vs. Kong	US	Warner Bros.	100.9	367.3	468.2
9 Shang-Chi and the Legend of the...	US	Disney	224.5	207.7	432.2
10 Eternals	US	Disney	164.9	237.2	402.1
11 Dune	US/CA	Warner Bros.	108.2	292.3	400.6
12 Black Widow	US	Disney	183.7	196.1	379.8
13 Sing 2	US	Universal	158.5	218.7	377.2
14 Free Guy	US	20th Century Fox	121.6	209.9	331.5
15 A Quiet Place Part II	US	Paramount	160.1	137.3	297.4
16 Encanto	US	Disney	95.9	155.7	251.7
17 Cruella	US	Disney	86.1	147.4	233.5
18 My Country, My Parents	CN	China Media Capital	0.2	221.5	221.7
19 Jungle Cruise	US	Disney	117.0	103.9	220.9
20 Raging Fire	HK/CN	Emperor / Tencent	0.4	205.5	205.8

Sources: Box Office Mojo / OBS

Europe 28⁽¹⁾

Population 2021 °	584.4 million
GDP per capita 2021 °	48 750 USD
Gross box office 2021 °	2.95 bn EUR (3.49 bn USD)
Admissions 2021 °	393.7 million
Average ticket price 2021 °	7.5 EUR (8.9 USD)
Average admissions per capita 2021 °	0.7
Screens 2020 2021	34 436 34 387



Limited recovery in cinema attendance in the EU and the UK in 2021

2021 turned out to be another difficult year for cinema going in Europe. Multiple factors, like the ongoing closures of cinemas, particularly in the first half of the year, the negative effect of attendance restrictions, possible hesitance among audiences to return to cinemas, the return of US studio blockbusters and the differing strength of local films, contributed to the European theatrical markets making rather slow progress in returning to pre-pandemic levels. Cinema attendance in the EU and the UK increased by 31.5% from 299 million in 2020 to 394 million in 2021. However, this level accounts for only 40% of the average pre-pandemic admission level registered between 2017 and 2019. Similarly, GBO grew by 38.2% from EUR 2.1 billion to an estimated EUR 2.9 billion, accounting for only 42% of pre-pandemic box office levels. There were significant differences in box office development across the individual European markets, as the year-on-year growth ranged from a 186% increase in Bosnia Herzegovina to a 44% decline in Latvia. Overall admissions increased in 18 and decreased in nine of the 26 EU member states and the UK for which 2021 data were available.

Admissions growth in 2021 was primarily driven by the return of US blockbusters. US films are estimated to have sold around 230 million tickets in 2021, 82 million more than in 2020, while admissions to European films actually declined from an estimated 118 million in 2020 to 104 million in 2021. This compares to a pre-pandemic average of 644 million and 271 million tickets sold to US and European films, respectively. The market share of European films hence dropped from its exceptional record high of 39.5% in 2020 to 26.5%, which

is well within its normal range. US market share on the other hand jumped from its record low of 49.5% in 2020 to 58.6%, which is still below its pre-pandemic levels as EUR INC⁽¹⁾ films and films from the rest of the world captured above average market shares of 9.3% and 5.7%, respectively.

Thanks to public crisis support, screen figures have remained stable so far, decreasing only slightly from 34 541 screens in 2019, to 34 436 in 2020 and 34 387 in 2021.

Production levels in the EU and the UK seemingly back to normal

European film production seems to have recovered fully by 2021 with an estimated total of 1 836 feature films produced in the EU and the UK in 2021, up 426 films from 2020. While this production level comes in shy of the record high of 2 018 feature film productions in 2019 it is the third highest level registered in recent history.

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 2021 figures still remained well below pre-pandemic figures. Whereas in markets where film production is measured e.g. in terms of films starting principal photographs, receiving public funding or being certified, the 2021 production activity often exceeded its pre-pandemic levels. The question is whether this increase in production activity indicates a sustainable return to preceding levels or whether it represents a mere catch-up in 2021 of films whose production was interrupted in 2020, i.e. a level that will not be sustainable as long as cinemas have not returned to their usual attendance levels.

Source: European Audiovisual Observatory (OBS)

(1) Please note that all 2021 figures Europe 28 (EU+GB) are provisional estimates. "EUR INC" refers to films produced in Europe with US studio incoming investment.

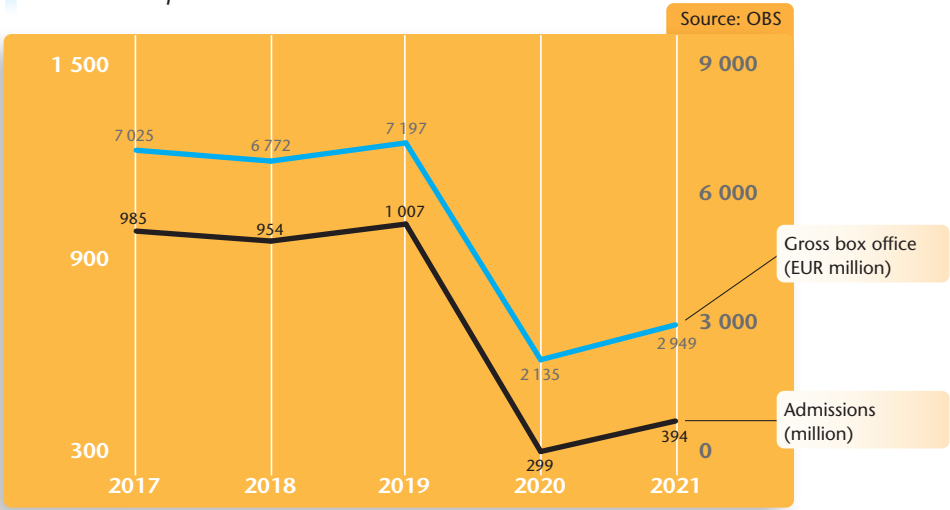


Complementary admissions data to top European films are provided by Europa Cinemas, the first international network of cinemas for the circulation of European films with members in 33 MEDIA countries, 692 cities, 1 144 cinemas and 2 741 screens.



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

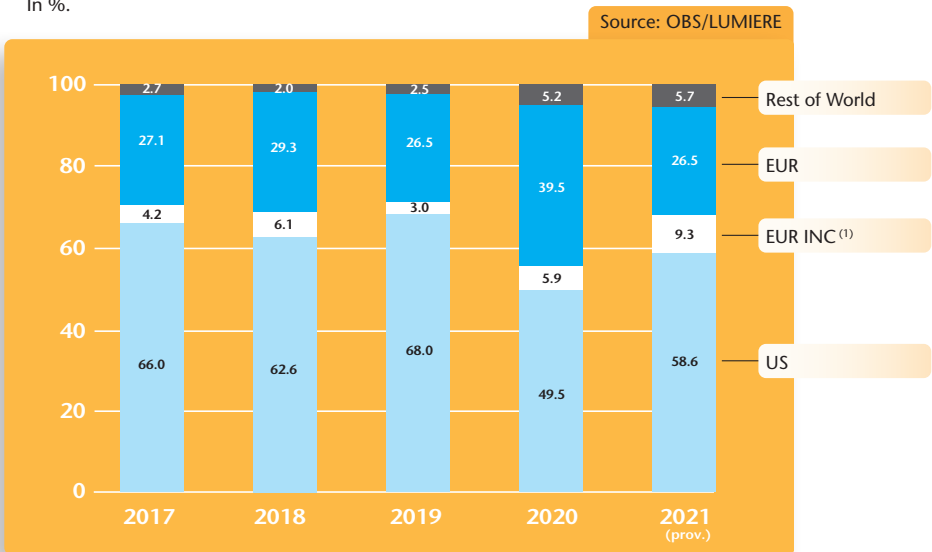
Admissions and GBO in the European Union & GB ⁽¹⁾
 2017-2021 prov.



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

Breakdown of EU & GB admissions by nationality of films | 2017-2021 ^e

In %.



(1) 'INC' refers to films produced in Europe with US studio investments.

Number of feature films produced in the European Union & GB | 2017-2021 *prov.*

In units.

Country		2017	2018	2019	2020	prov. 2021	Sources
Austria ⁽²⁾	100% national fiction	9	12	14	4	9	Austrian Film Institute
	maj. co-prod. fiction	6	5	1	1	3	Austrian Film Institute
	min. co-prod. fiction	9	9	3	3	6	Austrian Film Institute
	Feature documentaries	20	25	26	17	14	Austrian Film Institute
Belgium ⁽¹⁾	100% national fiction	14	14	9	1	12	CFWB / VAF
	maj. co-prod. fiction	22	13	20	12	16	CFWB / VAF
	min. co-prod. fiction	38	31	28	25	33	CFWB / VAF
	Feature documentaries	15	17	14	6	8	CFWB / VAF
Bulgaria ⁽²⁾	100% national fiction	10	5	9	12	9	National Film Center
	maj. co-prod. fiction	4	1	2	2	2	National Film Center
	min. co-prod. fiction	5	5	1	4	4	National Film Center
	Feature documentaries	4	10	12	7	5	National Film Center
Cyprus ^{(2)e}	100 % national fiction	2	2	2	2	3	OBS / Min. Cult
	maj. co-prod. Fiction	0	1	0	0	3	OBS / Min. Cult
	min. co-prod. Fiction	0	0	0	1	2	OBS / Min. Cult
	Feature documentaries	1	0	1	0	0	OBS / Min. Cult
Croatia ⁽²⁾	100% national fiction	6	10	6	2	3	Croatian Audiovisual Centre
	maj. co-prod. fiction	2	4	6	1	4	Croatian Audiovisual Centre
	min. co-prod. fiction	9	8	15	3	5	Croatian Audiovisual Centre
	Feature documentaries	16	14	13	11	11	Croatian Audiovisual Centre
Czech Rep. ⁽²⁾	100% national fiction	16	23	21	16	21	State Cinematography Fund
	maj. co-prod. fiction	8	13	16	7	14	State Cinematography Fund
	min. co-prod. fiction	5	11	12	7	14	State Cinematography Fund
	Feature documentaries	25	30	39	30	35	State Cinematography Fund
Denmark ⁽³⁾	100% national fiction	13	13	11	14	17	Danish Film Institute
	maj. co-prod. fiction	8	9	8	6	4	Danish Film Institute
	min. co-prod. fiction	9	10	9	8	9	Danish Film Institute
	Feature documentaries	24	26	28	30	24	Danish Film Institute
Estonia ⁽²⁾	100% national fiction	3	6	9	5	6	Estonian Film Institute
	maj. co-prod. fiction	5	1	3	4	1	Estonian Film Institute
	min. co-prod. fiction	5	3	2	5	2	Estonian Film Institute
	Feature documentaries	7	11	12	9	14	Estonian Film Institute
Finland ⁽³⁾	100% national fiction	20	18	17	17	12	Finnish Film Foundation
	maj. co-prod. fiction	2	0	2	4	4	Finnish Film Foundation
	min. co-prod. fiction	2	7	4	4	6	Finnish Film Foundation
	Feature documentaries	18	24	23	21	19	Finnish Film Foundation
France	100% national fiction	147	140	138	115	169	CNC
	maj. co-prod. fiction	38	48	46	25	52	CNC
	min. co-prod. fiction	72	56	52	45	69	CNC
	Feature documentaries	43	56	65	52	50	CNC
Germany ⁽²⁾	100% national fiction	80	78	96	44	57	SPIO
	maj. co-prod. fiction	27	35	38	24	22	SPIO
	min. co-prod. fiction	34	40	23	23	28	SPIO
	Feature documentaries	106	94	108	61	78	SPIO
Greece ^{(2)e}	100% national fiction	9	9	12	6	12	GFC / OBS
	maj. co-prod. fiction	4	2	5	2	8	GFC / OBS
	min. co-prod. fiction	8	4	4	8	1	GFC / OBS
	Feature documentaries	15	10	9	2	7	GFC / OBS
Hungary ⁽²⁾	100% national fiction	12	15	11	13	16	National Film Office (NMHH)
	maj. co-prod. fiction	2	2	4	3	2	National Film Office (NMHH)
	min. co-prod. fiction	2	1	3	2	8	National Film Office (NMHH)
	Feature documentaries	3	0	1	3	0	National Film Office (NMHH)
Ireland	100% national fiction	2	3	6	5	4	Screen Ireland
	maj. co-prod. fiction	12	11	4	3	7	Screen Ireland
	min. co-prod. fiction	6	6	6	3	3	Screen Ireland
	Feature documentaries	7	14	10	7	12	Screen Ireland
Italy	100% national fiction	153	147	160	124	128	MiC
	maj. co-prod. fiction	18	23	32	27	44	MiC
	min. co-prod. fiction	5	10	11	12	14	MiC
	Feature documentaries	59	93	122	89	127	MiC

Continued

Number of feature films produced in the European Union & GB | 2017-2021 *prov.*

In units.

Country		2017	2018	2019	2020	prov. 2021	Sources
Latvia ⁽²⁾	100% national fiction	3	6	10	5	4	National Film Centre of Latvia
	maj. co-prod. fiction	2	3	2	2	3	National Film Centre of Latvia
	min. co-prod. fiction	1	1	5	2	0	National Film Centre of Latvia
	Feature documentaries	15	17	20	7	5	National Film Centre of Latvia
Lithuania ⁽²⁾	100% national fiction	6	9	10	8	6	Lithuanian Film Centre
	maj. co-prod. fiction	4	2	4	0	0	Lithuanian Film Centre
	min. co-prod. fiction	0	3	2	2	3	Lithuanian Film Centre
	Feature documentaries	1	9	9	2	3	Lithuanian Film Centre
Luxembourg ^{(2) e}	100% national fiction	1	0	1	0	1	OBS / LFF
	maj. co-prod. fiction	3	3	4	3	2	OBS / LFF
	min. co-prod. fiction	7	8	22	25	13	OBS / LFF
	Feature documentaries	2	3	5	4	3	OBS / LFF
Malta ^{(2) e}	Total	7	11	4	2	4	IMDB / OBS
	100% nat. & majority	3	5	3	2	2	IMDB / OBS
The Netherlands	100% national fiction	19	23	26	25	28	NFF
	maj. co-prod. fiction	10	11	16	6	9	NFF
	min. co-prod. fiction	25	21	15	16	23	NFF
Poland	Feature documentaries	32	31	40	19	18	NFF
	100% national fiction	37	25	27	15	26	Polish Film Institute
	maj. co-prod. fiction	6	4	13	3	12	Polish Film Institute
	min. co-prod. fiction	15	5	14	1	14	Polish Film Institute
Portugal	Feature documentaries	14	8	39	5	38	Polish Film Institute
	100% national fiction	12	13	12	7	8	ICA
	maj. co-prod. fiction	0	8	4	2	3	ICA
	min. co-prod. fiction	8	2	6	3	4	ICA
Romania	Feature documentaries	18	20	15	12	17	ICA
	100% national fiction	22	32	38	23	32	CNC
	maj. co-prod. fiction	6	10	3	5	6	CNC
	min. co-prod. fiction	2	1	2	5	6	CNC
Slovakia ⁽²⁾	Feature documentaries	11	7	11	8	11	CNC
	100% & maj feat. docs	11	5	11	7	7	CNC
	100% national fiction	4	1	8	0	1	Slovak Film Institute
	maj. co-prod. fiction	5	6	7	4	3	Slovak Film Institute
Slovenia ⁽²⁾	min. co-prod. fiction	12	12	13	7	12	Slovak Film Institute
	Feature documentaries	6	14	16	17	10	Slovak Film Institute
	100% & maj feat. docs	4	12	9	13	7	Slovak Film Institute
	100% national fiction	5	2	6	0	5	Slovenian Film Center
Spain ⁽⁷⁾	maj. co-prod. fiction	6	4	5	1	2	Slovenian Film Center
	min. co-prod. fiction	1	3	8	5	7	Slovenian Film Center
	Feature documentaries	9	12	12	7	10	Slovenian Film Center
	100% & maj feat. docs	7	12	9	6	8	Slovenian Film Center
Sweden ⁽²⁾	100% national fiction	84	95	85	76	92	ICAA
	maj. co-prod. fiction	22	26	22	17	28	ICAA
	min. co-prod. fiction	15	14	21	9	7	ICAA
	Feature documentaries	120	131	135	113	136	ICAA
United Kingdom ⁽⁴⁾	100% national fiction	18	22	20	16	20	SFI
	maj. co-prod. fiction	7	9	9	6	5	SFI
	min. co-prod. fiction	13	0	14	5	10	SFI
	Feature documentaries	30	20	25	21	27	SFI
Total fiction films EU 27 & GB ^{(6) e}	Inward features ⁽⁵⁾	80	67	97	44	55	BFI
	100% national fiction	183	176	163	135	104	BFI
	maj. co-prod. fiction	8	8	9	8	10	BFI
	min. co-prod. fiction	10	17	16	10	14	BFI
Total feature docs. EU 27 & GB ^{(6) e}	Feature documentaries	100	82	64	40	26	BFI
	100% national fiction	1 130	1 166	1 215	870	1 153	OBS
	Total feature docs. EU 27 & GB ^{(6) e}	646	710	803	540	683	OBS
Total feature films EU 27 & GB ^{(6) e}		1 776	1 876	2 018	1 410	1 836	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) Updated time series. The decline of film productions in 2021 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 12 theatrical experimental feature films in 2021 and six in 2020.

Admissions in the European Union & GB | 2017-2021 *prov.*

In millions. Provisional data.

ISO	Country	2017	2018	2019	2020	prov. 2021	2021/20	Sources
AT	Austria ^e	14.6	12.9	13.7	3.9	5.2	36.0%	Austrian Film Institute
BE	Belgium ^e	19.6	18.8	19.9	5.6	7.5	34.8%	VAF / CFWB / Cinedata
BG	Bulgaria	5.6	4.9	5.0	1.3	2.6	90.9%	National Film Center (NFC)
CY	Cyprus ^e	0.7	0.8	0.8	0.2	0.3	56.7%	Min. Cult.
CZ	Czech Republic	15.2	16.3	18.3	6.4	7.1	11.9%	Czech Film Fund
DE	Germany	122.3	105.4	118.6	38.1	42.1	10.4%	FFA
DK	Denmark	11.9	12.5	12.8	7.0	6.8	-2.0%	Statistics Denmark / Danish Film Institute
EE	Estonia	3.5	3.6	3.7	1.8	1.4	-23.0%	Estonian Film Institute
ES	Spain ^e	99.8	98.9	104.9	27.0	41.4	53.5%	ICAA
FI	Finland ^e	8.8	8.1	8.4	3.9	3.4	-11.4%	Finnish Film Foundation
FR	France	209.4	201.2	213.2	65.3	95.5	46.3%	CNC
GB	United Kingdom	170.6	177.0	176.1	44.0	74.0	68.3%	BFI / DCM
GR	Greece ^e	10.1	9.4	9.6	3.1	3.1	-2.2%	Greek Film Center
HR	Croatia	4.5	4.6	4.9	1.4	2.5	77.1%	Croatian Audiovisual Centre
HU	Hungary ^e	15.1	15.5	15.2	4.3	6.2	45.1%	National Film Office
IE	Ireland ^e	16.7	15.8	15.1	3.7	5.8	56.0%	Screen Ireland
IT	Italy ^e	99.6	91.7	104.4	30.3	26.6	-12.2%	SIAE / Cinetel / ANICA
LT	Lithuania	4.1	4.3	4.2	1.5	1.3	-12.7%	Lithuanian Film Centre
LU	Luxembourg ^e	1.2	1.1	1.1	0.3	0.5	44.1%	CNA
LV	Latvia	2.5	2.5	2.7	0.9	0.5	-44.0%	National Film Centre of Latvia
MT	Malta	0.8	0.8	0.7	0.2	~	~	National Statistics Office Malta
NL	Netherlands	36.0	35.7	38.0	16.8	14.3	-14.6%	NFF / MaccsBox - NVB & NVF
PL	Poland	56.6	59.7	60.6	17.1	26.4	54.5%	Polish Film Institute
PT	Portugal	15.6	14.8	15.5	3.8	5.5	43.8%	Instituto do Cinema e do Audiovisual
RO	Romania	13.9	13.3	14.3	3.1	4.7	52.5%	Centrul National al Cinematografiei
SE	Sweden	16.9	16.4	15.9	5.7	6.0	6.4%	Swedish Film Institute
SI	Slovenia	2.4	2.5	2.4	0.6	0.7	25.7%	Slovenian Film Centre
SK	Slovak Republic	6.7	6.0	6.5	2.4	2.0	-13.8%	Slovak Film Institute / UFD
EU 27 & GB - Total ^e		985	954	1 007	299	394	31.5%	European Audiovisual Observatory

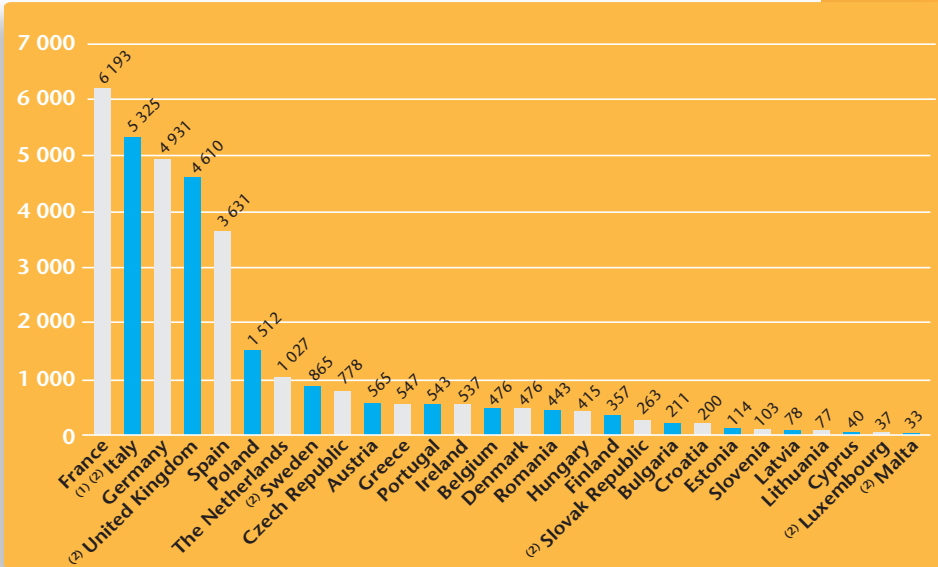
Source: OBS

Number of screens in the EU & GB by country

December 2021^e

In units.

Source: OBS



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

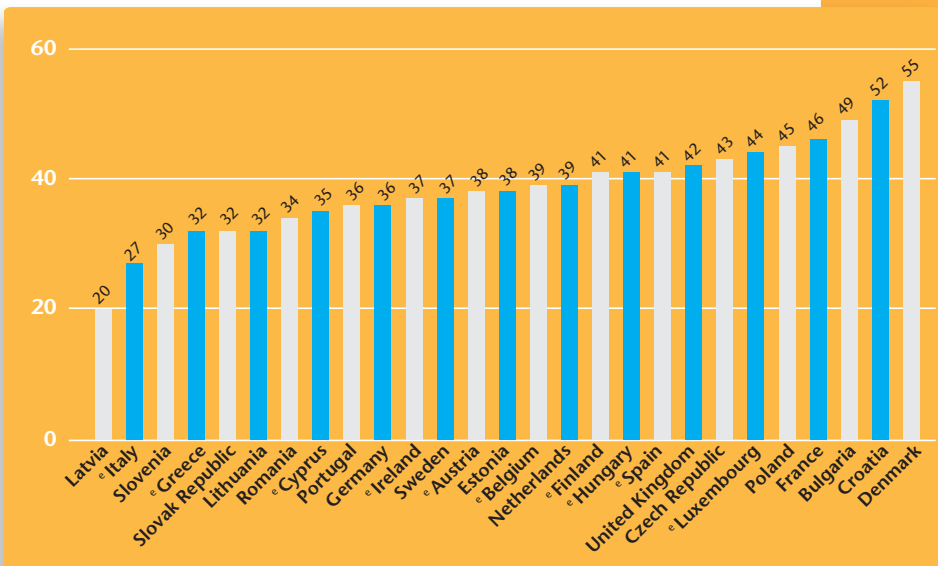
(2) Estimated as of December 2020.

Relative recovery rate of admissions in the EU & GB

2021 in relation to average 2017 to 2019^e

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 97% of all admissions in the EU and the UK.

Top 25 films by admissions in the European Union and GB | 2021 *prov.*

Original title	Country of origin	Director(s)	Release markets	Admissions <i>prov.</i>
1 No Time to Die	GB INC/US	Cary Joji Fukunaga	27	34 354 560
2 Spider-Man: No Way Home	US	Jon Watts	26	26 762 890
3 Dune	US/CA	Denis Villeneuve	26	14 345 728
4 F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	27	12 134 264
5 Venom: Let There Be Carnage	US	Andy Serkis	27	10 502 556
6 Black Widow	US	Cate Shortland	27	9 106 733
7 Eternals	US	Chloé Zhao	27	8 733 957
8 Shang-Chi and the Legend of the Ten...	US	Destin Daniel Cretton	27	8 707 880
9 PAW Patrol: The Movie	CA/US	Cal Bruner	26	7 875 277
10 The Conjuring: The Devil Made Me Do It	US	Michael Chaves	27	6 856 173
11 Encanto	US	Jared Bush, ... ⁽²⁾	25	6 248 477
12 The Croods: A New Age ⁽¹⁾	US	Joel Crawford	27	6 038 288
13 Free Guy	US	Shawn Levy	27	5 798 945
14 The Suicide Squad	US	James Gunn	27	5 717 082
15 Peter Rabbit 2: The Runaway	AU/US/IN/GB/CA	Will Gluck	23	5 686 374
16 House of Gucci	US/CA/GB	Ridley Scott	27	5 587 927
17 Space Jam: A New Legacy	US	Malcolm D. Lee	26	5 220 146
18 Jungle Cruise	US	Jaume Collet-Serra	26	5 134 012
19 The Boss Baby: Family Business	US	Tom McGrath	26	5 044 731
20 Cruella	US	Craig Gillespie	27	4 875 847
21 The Addams Family 2	US/CA	Greg Tiernan, ... ⁽³⁾	26	4 696 390
22 Ghostbusters: Afterlife	US/CA	Jason Reitman	24	3 784 527
23 A Quiet Place Part II	US	John Krasinski	26	3 623 292
24 Tom & Jerry	US/GB/FR/DE	Tim Story	25	2 810 136
25 Kaamelott - Premier volet	FR	Alexandre Astier	4	2 759 457

(1) 359 759 admissions in the EU in 2020.

(2) Byron Howard, Charise Castro Smith.

(3) Conrad Vernon, Laura Brousseau, Kevin Pavlovic.

Source: OBS/LUMIERE

Top 25 European films (including EUR INC) by admissions in the European Union and GB | 2021 *prov.*

Original title	Country of origin	Director(s)	Release markets	Admissions <i>prov.</i>
1 No Time to Die	GB INC/US	Cary Joji Fukunaga	27	34 354 560
2 Kaamelott - Premier volet	FR	Alexandre Astier	4	2 759 457
3 The Father ⁽¹⁾	GB/FR	Florian Zeller	23	2 431 245
4 BAC Nord ⁽²⁾	FR	C. Jimenez, M. Osswald	1	2 218 308
5 Druk (Another Round) ⁽³⁾	DK/SE/NL	Thomas Vinterberg	26	1 990 674
6 Les Tuche 4	FR	Olivier Baroux	3	1 985 504
7 OSS 117: Alerte rouge en Afrique noire	FR	Nicolas Bedos	4	1 688 803
8 Le loup et le lion (The Wolf and the Lion)	FR/CA	Gilles de Maistre	14	1 646 044
9 Eiffel	FR/DE	Martin Bourboulon	10	1 636 138
10 Les Bodin's en Thaïlande (The Bodin's...)	FR	Frédéric Forestier	3	1 498 673
11 Die Schule der magischen Tiere	DE/AT	Gregor Schnitzler	3	1 462 590
12 ¡A todo tren! Destino Asturias	ES	Santiago Segura	1	1 439 108
13 Madres paralelas (Parallel Mothers)	ES	Pedro Almodóvar	17	1 369 378
14 Kaiserschmarrndrama	DE	Ed Herzog	3	1 367 559
15 Adieu les cons (Bye Bye Morons) ⁽⁴⁾	FR	Albert Dupontel	9	1 353 255
16 Aline (Aline, The Voice of Love) ⁽⁵⁾	FR/CA	Valérie Lemercier	12	1 338 507
17 Boîte noire (Black Box)	FR	Yann Gozlan	7	1 213 728
18 Dziewczyny z Dubaju	PL	Maria Sadowska	4	986 508
19 Ternet Ninja 2 (Checkered Ninja 2)	DK/US	T. Christoffersen, A. Matthesen	3	948 596
20 Way Down	ES/FR	Jaume Balagueró	8	939 782
21 The Courier	GB/US	Dominic Cooke	18	921 312
22 Illusions perdues (Lost Illusions)	FR	Xavier Giannoli	5	851 867
23 Last Night in Soho	GB	Edgar Wright	24	812 741
24 Me contro te - Il mistero della scuola...	IT	Gianluca Leuzzi	1	805 559
25 Catweazle	DE	Sven Unterwaldt Jr.	3	686 955

Admissions in the EU in 2020 : (1) 40 279

(2) 6 846

(3) 1 041 791

(4) 728 409

(5) 11 324

Source: OBS/LUMIERE

Top 25 European films by admissions in the Europa Cinemas Network ⁽¹⁾ | 2021

Original title	Country of origin ⁽²⁾	Director(s)	Release markets	prov. Admissions
1 Druk (Another Round)	DK/SE/NL	Thomas Vinterberg	32	323 450
2 The Father	GB/FR	Florian Zeller	26	298 907
3 Madres paralelas (Parallel Mothers)	ES	Pedro Almodóvar	19	277 069
4 Tre Piani (Three Floors)	IT/FR	Nanni Moretti	13	266 807
5 Annette	FR/DE/BE	Leos Carax	28	258 694
6 È stata la mano di Dio (The Hand of God)	IT	Paolo Sorrentino	14	233 071
7 Illusions perdues (Lost Illusions)	FR	Xavier Giannoli	8	202 724
8 Adieu les cons (Bye Bye Morons)	FR	Albert Dupontel	17	199 928
9 Verdens verste menneske (The Worst...)	NO/FR/SE	Joachim Trier	21	197 530
10 Titane	FR/BE	Julia Ducournau	28	195 312
11 El buen patrón (The Good Boss)	ES	Fernando L. de Aranoa	5	194 326
12 Supernova	GB	Harry MacQueen	30	180 412
13 Hytti nro 6 (Compartment Number 6)	FI/RU/EE/DE	Juho Kuosmanen	14	178 582
14 Toma	RS	D. Bjelogrić, Z. Lisinac	12	167 442
15 Benedetta (Blessed Virgin)	FR/BE/NL	Paul Verhoeven	23	164 270
16 Schachnovelle (The Royal Game)	DE/AT	Phillip Stölzl	5	157 214
17 Contra	DE	Sönke Wortmann	4	142 066
18 Retfærdighedens ryttere (Riders of Justice)	DK	Anders Thomas Jensen	23	133 233
19 Kaiserschmarrndrama	DE	Ed Herzog	3	130 254
20 Maixabel	ES	Icíar Bollaín	3	130 085
21 Quo Vadis, Aida?	BA/RO/AT/... ⁽³⁾	Jasmila Zbanic	26	121 662
22 Die Unbeugsamen	DE	Torsten Körner	2	121 129
23 Les 2 Alfred (French Tech)	FR	Bruno Podalydès	4	120 904
24 Wolfwalkers	IE/GB/LU/FR	T. Moore, R. Stewart	19	120 114
25 Qui rido io (The King of Laughter)	IT/ES	Mario Martone	5	119 150

(1) Data based on Europa Cinemas members in 33 MEDIA countries, 692 cities, 1 144 cinemas, 2 741 screens.

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

(3) NL/FR/PL/DE/NO/TR

Sources: Europa Cinemas, OBS

Top 25 European films (including EUR INC) by admissions in the US & Canada | 2021 ^e

Admissions estimated based on average ticket price of USD 9.57.

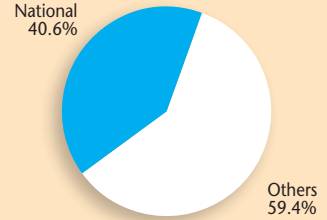
Original title	Country of origin	Director(s)	Distributor	Admissions ^e
1 No Time to Die	GB INC/US	Cary Joji Fukunaga	United Artists Rel.	17 551 529
2 The King's Man	GB INC/US	Matthew Vaughn	20th Century Fox	1 639 248
3 Last Night in Soho	GB	Edgar Wright	Focus Features	1 105 636
4 Spencer	DE/GB/CL	Pablo Larraín	Neon Rated	773 650
5 Belfast	GB	Kenneth Branagh	Focus Features	750 748
6 The Courier	GB/US	Dominic Cooke	Roadside Attractions	721 990
7 Dream Horse	GB	Euros Lyn	Bleecker Street	316 434
8 Lamb	IS/PL/SE	V. Jóhannsson	A24 Films	288 168
9 The Father	GB/FR	Florian Zeller	Sony	225 589
10 Harry Potter and the Philo...	GB INC/US	Chris Columbus	Warner Bros.	174 529
11 Titane	FR/BE	Julia Ducournau	Neon Rated	157 532
12 Pinocchio	IT/FR/GB	Matteo Garrone	Roadside Attractions	146 602
13 In the Earth	GB	Ben Wheatley	Neon Rated	121 585
14 The Mauritanian	GB/US	Kevin Macdonald	STX Entertainment	91 325
15 Kaamelott - Premier volet	FR	Alexandre Astier	MK2 Mile End	78 209
16 The Sparks Brothers	GB/US	Edgar Wright	Focus Features	70 815
17 City of Lies	GB/US	Brad Furman	Independent	62 499
18 The Truffle Hunters	IT/GR/US	M. Dweck, G. Kershaw	Sony	53 647
19 The Lost Leonardo	DK/FR	Andreas Koefoed	Sony	48 705
20 Benedetta	FR/BE/NL	Paul Verhoeven	IFC Films	36 144
21 Final Account	GB/US	Luke Holland	Focus Features	33 731
22 Blithe Spirit	GB/US/AU	Edward Hall	IFC Films	30 841
23 American Skin	IT/US	Nate Parker	Vertical Entertain.	30 822
24 Ich bin dein Mensch	DE	Maria Schrader	Bleecker Street	30 039
25 Oasis Knebworth 1996	GB	Jake Scott	Trafalgar	29 189

Note: A total of 127 European films (including 10 EUR inc films) were identified among the top 732 films on release in the US and Canada in 2021, generating cumulative admissions of 25.0 million (5.1% market share) Sources: Comscore, OBS/LUMIERE

France

Population 2021 °	67.4 million
GDP per capita 2021 °	45 028 USD
Gross box office 2021 °	672.4 M EUR (795.2 M USD)
Admissions 2021 °	95.5 million
Average ticket price 2021 °	7.0 EUR (8.3 USD)
Average admissions per capita 2021 °	1.4
Screens 2020 2021	6 127 6 193

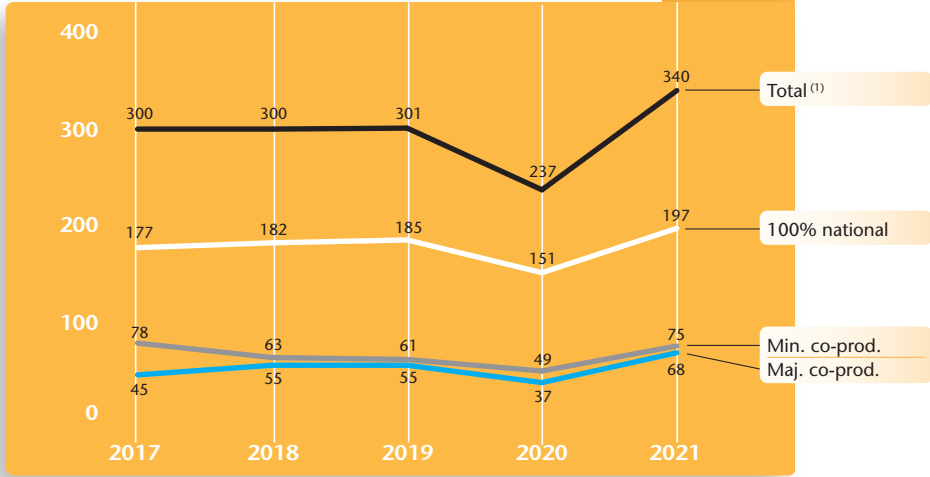
Market shares 2021 °



Number of French feature films produced | 2017-2021

In units.

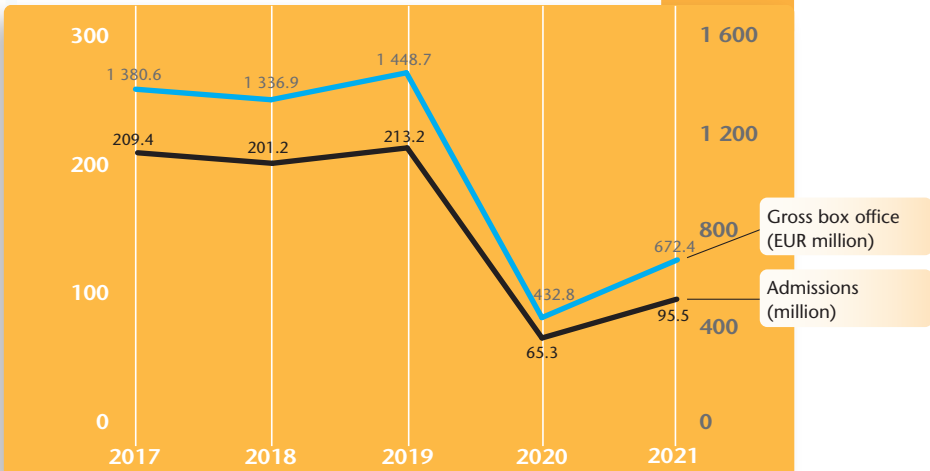
Source: CNC



(1) Officially recognised films.

Admissions and gross box office in France | 2017-2021

Source: CNC



Top 20 films by admissions in France | 2021

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Spider-Man: No Way Home	US	Jon Watts	Sony	4 604 615
2	No Time to Die	GB INC/US	Cary Joji Fukunaga	Universal	4 018 000
3	Dune	US/CA	Denis Villeneuve	Warner Bros.	3 188 072
4	Kaamelott - Premier volet	FR	Alexandre Astier	SND Films	2 654 037
5	BAC Nord	FR	Cédric Jimenez, Max Osswald	StudioCanal	2 218 308
6	Encanto	US	Jared Bush, Byron Howard, ... ⁽¹⁾	Disney	2 187 435
7	F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Universal	2 029 041
8	Les Tuche 4	FR	Olivier Baroux	Pathé	1 938 949
9	The Conjuring: The Devil Made...	US	Michael Chaves	Warner Bros.	1 887 284
10	Eternals	US	Chloé Zhao	Disney	1 749 071
11	Black Widow	US	Cate Shortland	Disney	1 717 430
12	Venom: Let There Be Carnage	US	Andy Serkis	Sony	1 630 289
13	OSS 117: Alerte rouge en Afrique...	FR	Nicolas Bedos	Gaumont	1 625 178
14	Les Bodin's en Thaïlande	FR	Frédéric Forestier	SND Films	1 496 640
15	Eiffel	FR/DE	Martin Bourboulon	Pathé	1 480 502
16	PAW Patrol: The Movie	CA/US	Cal Brunker	Paramount	1 474 580
17	Cruella	US	Craig Gillespie	Disney	1 455 142
18	Shang-Chi and the Legend of the...	US	Destin Daniel Cretton	Disney	1 413 220
19	Adieu les cons	FR	Albert Dupontel	Gaumont	1 283 919
20	Aline	FR/CA	Valérie Lemercier	Gaumont	1 278 589

(1) Charise Castro Smith.

Source: *Le film français*

Distribution and exhibition

Cinema attendance in France rose well above the EU average, growing by 46.3% from 65.3 million admissions in 2020 to 95.5 million in 2021. This represents of course only 45% of the 213 million admissions registered before the pandemic in 2019 as COVID related measures continued to heavily impact the theatrical market and cinemas were only allowed to re-open from May 19 onwards. Thanks to a 6% increase in the average ticket price GBO grew by 55.4% from EUR 433 million in 2020 to EUR 672 million in 2021, about 46% of the EUR 1.4 billion generated in 2019. Thanks to public support measures the pandemic did not negatively affect the number of screens in France, with 6 193 screens operating in 2021, compared to 6 114 in 2019.

The year-on-year growth of the French box office, was driven by the return of US blockbusters as well as a continued strong performance of local titles. In contrast to most other European markets, national market share remained at above pre-pandemic levels for the second year in a row with French films capturing 40.6% of total admissions, compared to 45.0% in 2020 and 34.8% in 2019. Led by comedy sequel *Kaamelott - Premier volet* (FR) selling 2.7 million tickets and ranking in fourth place, a total of eight French productions featured among the top 20 films, compared to six in 2020 and two in 2019. The French charts were topped by *Spider-Man: No Way Home* (US) selling 4.6 million tickets and *No Time To Die* (GB INC/US) with 4.0 million admissions.

Production and funding

Just like elsewhere in Europe production levels jumped back in 2021 and actually reached a new record high as a total of 340 feature films were approved by the country's national funding body, the CNC, compared to 237 in 2020 and a previous record 301 films in 2019. The mean production cost of French initiative films – leaving aside four productions with a budget of over EUR 30 million – increased from EUR 3.4 million in 2020 to EUR 3.7 million but remained below the levels registered in previous years: 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 increased from EUR 784 million in 2020 to EUR 1.36 billion, EUR 1.12 billion of which was invested in French initiative films. This is the highest investment level registered since 2016.

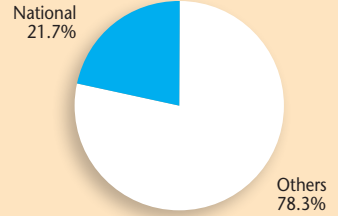
In late 2021 the Film France film commission moved under direct control of the CNC as its budget increased by an additional EUR 800 million for new initiatives to attract more international business. This ties in with France's COVID 19 recovery investment plan which has earmarked EUR 600 million to be invested in the film and audiovisual industries from 2022 over the course of five years.

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

Germany

Population 2021 °	83.2 million
GDP per capita 2021 °	50 788 USD
Gross box office 2021 °	373.2 M EUR (441.3 M USD)
Admissions 2021 °	42.1 million
Average ticket price 2021 °	8.9 EUR (10.5 USD)
Average admissions per capita 2021 °	0.5
Screens 2020 2021	4 926 4 931

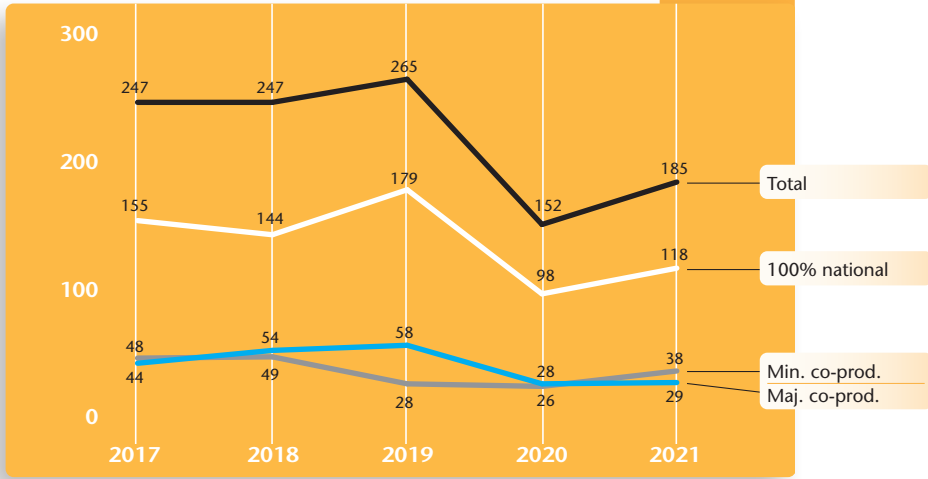
Market shares 2021 °



Number of German feature films produced ⁽¹⁾ | 2017-2021

In units.

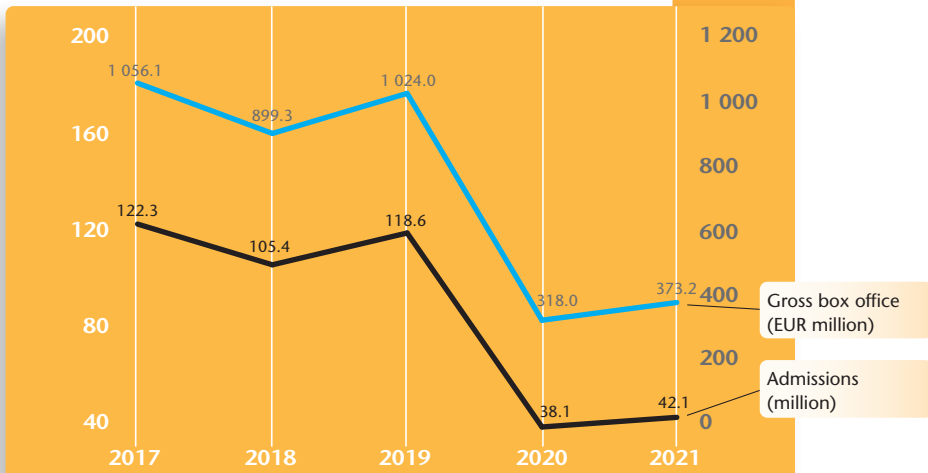
Source: SPIO



(1) Films on first release.

Admissions and gross box office in Germany | 2017-2021

Source: FFA



Top 20 films by admissions in Germany | 2021

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	No Time to Die	GB INC/US	Cary Joji Fukunaga	Universal	5 921 334
2	Spider-Man: No Way Home	US	Jon Watts	Sony	2 573 885
3	F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Universal	1 966 180
4	Dune	US/CA	Denis Villeneuve	Warner Bros.	1 823 275
5	PAW Patrol: The Movie	CA/US	Cal Brunker	Paramount	1 521 935
6	Die Schule der magischen Tiere	DE/AT	Gregor Schnitzler	Leonine Distr.	1 325 997
7	Kaiserschmarrndrama	DE	Ed Herzog	Constantin Film	1 140 451
8	Venom: Let There Be Carnage	US	Andy Serkis	Sony	1 133 956
9	The Croods: A New Age	US	Joel Crawford	Universal	833 679
10	Shang-Chi and the Legend of the...	US	Destin Daniel Cretton	Disney	814 528
11	Eternals	US	Chloé Zhao	Disney	772 284
12	Black Widow	US	Cate Shortland	Disney	768 399
13	Peter Rabbit 2: The Runaway	AU/US/IN/GB/CA	Will Gluck	Sony	752 168
14	The Conjuring: The Devil Made...	US	Michael Chaves	Warner Bros.	750 561
15	Tom & Jerry	US/GB/FR/DE	Tim Story	Warner Bros.	681 359
16	House of Gucci	US/CA/GB	Ridley Scott	Universal	671 409
17	After We Fell	US	Castille Landon	Constantin Film	657 229
18	Contra	DE	Sönke Wortmann	Constantin Film	635 063
19	Catweazle	DE	Sven Unterwaldt Jr.	Tobis Film	628 369
20	Ostwind - Der große Orkan	DE	Lea Schmidbauer	Constantin Film	593 354

Source: FFA

Distribution and exhibition

For the second year in a row the German theatrical market was hit hard by the pandemic in 2021. Cinemas only returned to regular operations in July 2021 with more local closures towards the end of the year. As a result admission levels remained 65% below 2019 levels, even though cinema attendance increased by 10.4% compared with 2020 to 42.1 million tickets sold. GBO increased by 17.4% to EUR 373 million, 64% below 2019 levels. The year-on-year increase of German box office figures was hence well below the EU average where admissions increased by 31.5% and GBO increased by 38.2%.

A total of 429 films were theatrically released in Germany in 2021, compared to 339 films in 2020 and 606 films in 2019. 45% of these films were German films as first releases of US and other European films continued to remain well below their pre-pandemic levels. It was nevertheless US studio titles which dominated the German box office and caused national market share to drop from an exceptional 35.1% in 2020 to 21.7% of total tickets sold. Topping the charts, *No Time To Die* (GB INC/US) was the only film to sell more than five million tickets. A total of only eight films sold more than one million tickets in 2021, including two German productions: *Die Schule der magischen Tiere* (1.3 million) and *Kaiserschmarrndrama* (1.1 million). In the short term the number of cinema screens remained stable at 4 931 screens in 2021, compared to 4 961 in 2019.

Production and funding

Despite being faced with high uncertainty and strict safety protocols German production activity picked up full speed in 2021, and German production spend reached a record high of EUR 740 million in 2021, exceeding 2019 spend of EUR 715 million. Production activity was driven primarily by strong demand for high-end series, which also led to the German Motion Picture Fund (GMPF) increasing its budget from EUR 30 million to EUR 50 million for 2022. However, the impact of the pandemic on German film production activity cannot be measured directly as production figures are officially measured in terms of film releases and are hence intrinsically linked to the temporary closures of cinemas. In line with an increase in the overall number of releases the number of German feature film releases increased from 152 in 2020 to 185 films in 2021, still well below the 2019 level of 265 national film releases.

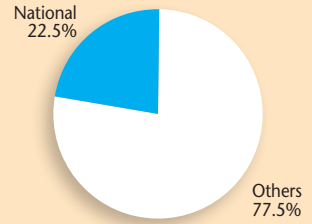
In order to mitigate the effects of the crisis the federal government, the federal States and film funds maintained numerous support measures for the entire film industry. Reforms to the German funding system may come through a new German Film Law (FFG) which is expected to come before the Bundestag in 2022 and come into effect from the beginning of 2023.

Sources: FFA, SPIO, UNIC, *Screen International*, OBS

Italy

Population 2021 ^e	59.3 million
GDP per capita 2021 ^e	35 585 USD
Gross box office 2021 ^e	176.9 M EUR (209 M USD)
Admissions 2021 ^e	26.6 million
Average ticket price 2021 ^e	6.6 EUR (7.9 USD)
Average admissions per capita 2021 ^e	0.4
Screens 2020 2021	5 325 ~

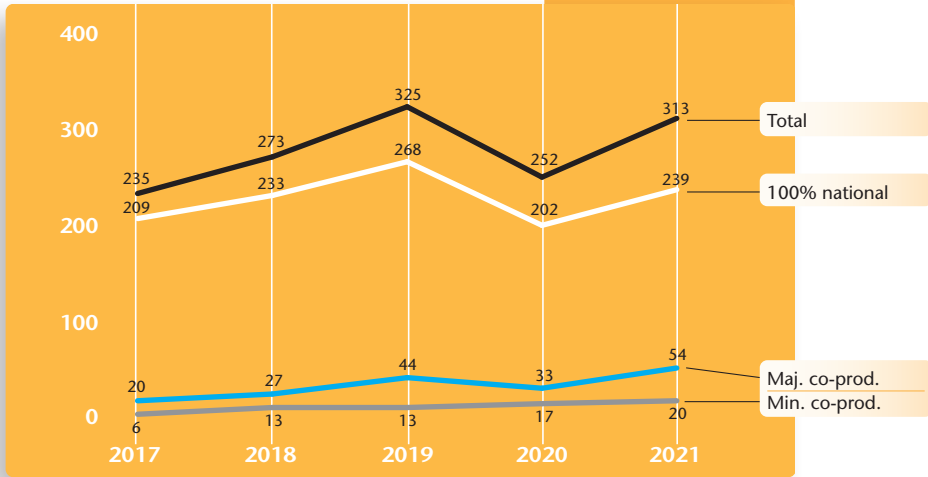
Market shares 2021 ^e



Number of Italian feature films produced | 2017-2021

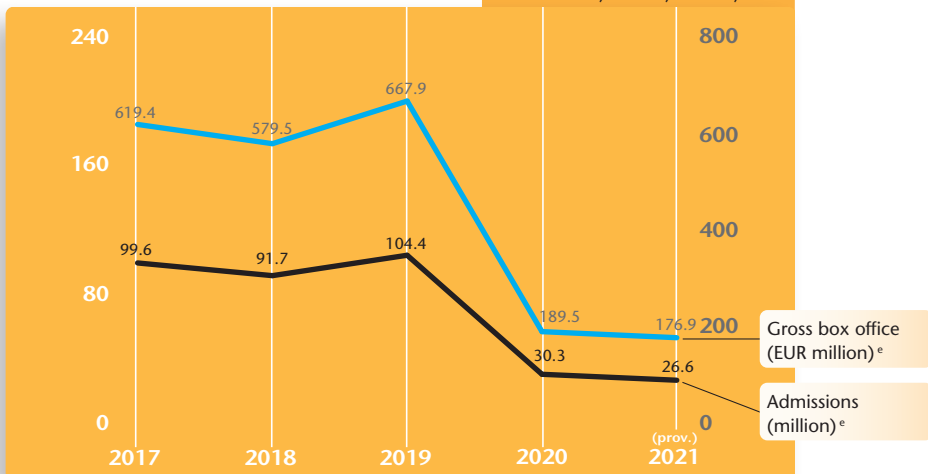
In units.

Sources: DG Cinema - MiC



Admissions and gross box office in Italy | 2017-2021 ^e

Sources: SIAE, ANICA, Cinetel, OBS



Top 20 films by admissions in Italy | 2021

Original title	Country of origin	Director(s)	Distributor	Admissions
1 Spider-Man: No Way Home	US	Jon Watts	Warner Bros.	2 576 591
2 Eternals	US	Chloé Zhao	Disney	1 156 365
3 No Time to Die	GB INC/US	Cary Joji Fukunaga	Universal	1 103 418
4 Dune	US/CA	Denis Villeneuve	Warner Bros.	1 019 390
5 Venom: Let There Be Carnage	US	Andy Serkis	Warner Bros.	989 701
6 Me contro te - Il mistero della...	IT	Gianluca Leuzzi	Warner Bros.	805 559
7 Encanto	US	Jared Bush, ... ⁽¹⁾	Disney	685 033
8 Black Widow	US	Cate Shortland	Disney	673 857
9 F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Universal	668 510
10 Shang-Chi and the Legend of the...	US	D. Daniel Cretton	Disney	550 871
11 House of Gucci	US/CA/GB	Ridley Scott	Eagle Pictures	509 145
12 Come un gatto in tangenziale - ...	IT	Riccardo Milani	Universal/Vision Distr.	472 493
13 Space Jam: A New Legacy	US	Malcolm D. Lee	Warner Bros.	452 951
14 The Addams Family 2	US/CA	Greg Tiernan, ... ⁽²⁾	Eagle Pictures	428 630
15 Freaks Out	IT/BE	Gabriele Mainetti	01 Distribution	392 782
16 Madres paralelas (Parallel Mothers)	ES	Pedro Almodóvar	Warner Bros.	362 939
17 Ghostbusters: Afterlife	US/CA	Jason Reitman	Warner Bros.	359 525
18 Cruella	US	Craig Gillespie	Disney	357 100
19 Tre piani (Three Floors)	IT/FR	Nanni Moretti	01 Distribution	314 693
20 The French Dispatch	US/DE	Wes Anderson	Disney	309 173

(1) Byron Howard, Charise Castro Smith.

(2) Conrad Vernon, Laura Brousseau, Kevin Pavlovic.

Source: Cinetel

Distribution and exhibition

Italy was one of only ten European markets, and the only major market, where cinema attendance declined in comparison to 2020. Cinema attendance dropped 12.2% from 30.3 million in 2020 to 26.6 million admissions in 2021. Reflecting a 6.3% increase in the average ticket price, GBO decreased by “only” 6.7% to EUR 176.9 million. Hence, Italian 2021 box office results, both in terms of admissions as well as GBO, was about 75% below its pre-pandemic level of 2019. A total of 353 new films were released theatrically, 107 more than in 2020 but 142 less than in 2019. These bleak results are evidently closely linked to the pandemic related closing of cinemas with only a few cinemas – mostly art-houses – reopening from the end of April, but only about 55% of Italian cinemas open in early July. Given the country’s lack of recovery signals and seeming decrease in the importance of the theatrical window for local film productions, local exhibitor organisation ANEC is warning that as many as 500 cinema screens could be at risk of closing permanently.

While reaching a record high of 55.6% in 2020, the market share of Italian films dropped in 2021 to 22.5% which is well within its standard range. A total of four Italian productions featured among the top 20 films, compared to nine in 2020. Cumulative admissions to Italian films plunged by 64% to about 6 million, a historically low level. *Spider-Man: No Way Home* (US) became the most successful film but sold “only” 2.6 mil-

lion tickets, becoming one of only four films which managed to sell more than one million tickets: *Eternals* (US), *No Time To Die* (GB INC/US) and *Dune* (US/CA). The 60-minute film adaptation of web comedy series *Me contro te - Il mistero della scuola incantata* (IT) became the most successful local release (0.8 million admissions), ahead of the comedy sequel *Come un gatto in tangenziale - Ritorno a Coccia di Morto* (0.5 million).

Production and funding

As elsewhere in Europe film production activity picked up again in 2021, growing from 252 feature films produced in 2020 to 313 films in 2021, coming close to 2019’s record high of 325 films rated.

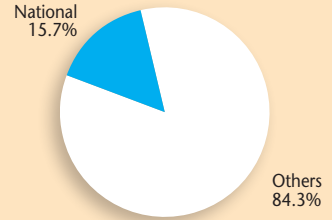
In January 2021 the Italian government decided to allocate EUR 640 million to the film and TV industry with EUR 110 million going to movie theatres, EUR 25 million earmarked for distributors, EUR 35 million going to state film entity Istituto Luce Cinecittà and a refinancing of the 40% tax rebate for production. In April 2022 the Italian government announced that it would extend the existing 90-day theatrical window for Italian films benefitting from state support to now include all films (Italian and non-Italian), overturning a relaxation of window rules brought in during the pandemic.

Sources: DG Cinema-MIC, ANICA, Cinetel, ANEC, UNIC, *Variety*, *Screen International*, OBS

Spain

Population 2021 ^e	47.4 million
GDP per capita 2021 ^e	30 537 USD
Gross box office 2021 ^e	250.2 M EUR (295.9 M USD)
Admissions 2021 ^e	41.4 million
Average ticket price 2021 ^e	6.0 EUR (7.1 USD)
Average admissions per capita 2021 ^e	0.9
Screens 2020 2021	3 701 3 631

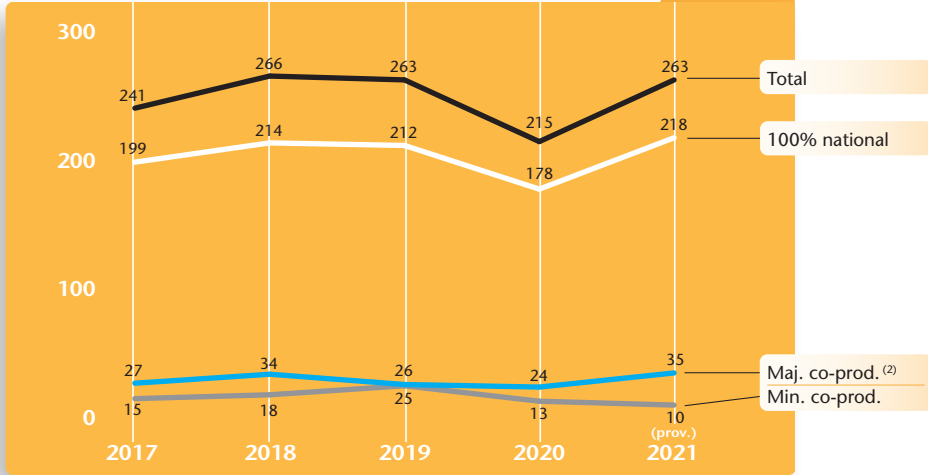
Market shares 2021 ^e



Number of Spanish feature films produced ⁽¹⁾ | 2017-2021

In units.

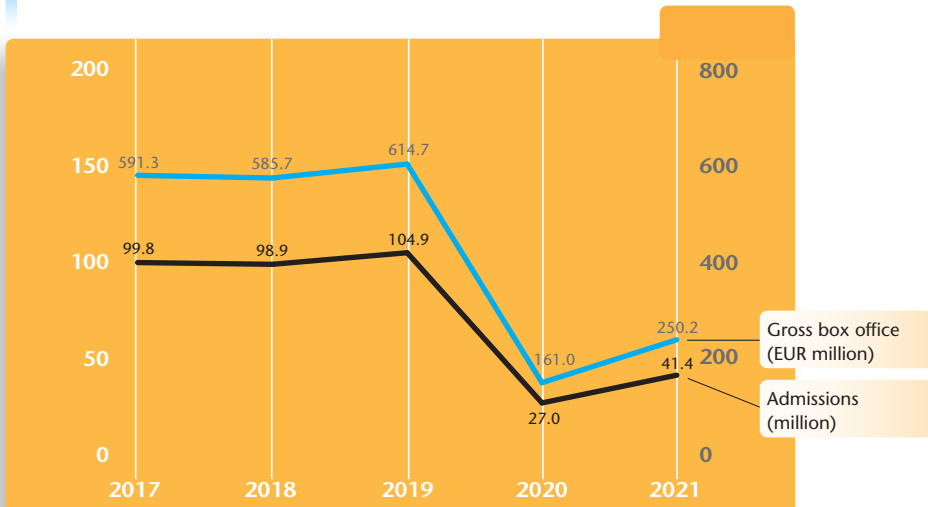
Source: ICAA



(1) Films certified.

(2) Including parity co-productions.

Admissions and gross box office in Spain | 2017-2021 *prov.*



Top 20 films by admissions in Spain | 2021 *prov.*

Original title	Country of origin	Director(s)	Distributor	Admissions
1 Spider-Man: No Way Home	US	Jon Watts	Sony	2 867 133
2 F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Universal	1 461 669
3 ¡A todo tren! Destino Asturias	ES	Santiago Segura	Warner Bros.	1 439 108
4 Dune	US/CA	Denis Villeneuve	Warner Bros.	1 354 536
5 Venom: Let There Be Carnage	US	Andy Serkis	Sony	1 319 768
6 No Time to Die	GB INC/US	Cary Joji Fukunaga	Universal	1 138 942
7 Eternals	US	Chloé Zhao	Disney	1 133 077
8 Encanto	US	Jared Bush, ... ⁽¹⁾	Disney	961 259
9 Shang-Chi and the Legend of the...	US	Destin Daniel Cretton	Disney	956 785
10 The Conjuring: The Devil Made Me...	US	Michael Chaves	Warner Bros.	934 704
11 Black Widow	US	Cate Shortland	Disney	933 949
12 Godzilla vs. Kong	US	Adam Wingard	Warner Bros.	888 679
13 Way Down	ES/FR	Jaume Balagueró	Sony	841 643
14 Old	US/JP	M. Night Shyamalan	Universal	769 181
15 The Boss Baby: Family Business	US	Tom McGrath	Universal	749 313
16 Space Jam: A New Legacy	US	Malcolm D. Lee	Warner Bros.	730 131
17 Cruella	US	Craig Gillespie	Disney	717 320
18 The Suicide Squad	US	James Gunn	Warner Bros.	715 003
19 The Addams Family 2	US/CA	Greg Tiernan, ... ⁽²⁾	Universal	690 502
20 Operación Camarón	ES	Carlos Therón	Disney	574 681

(1) Byron Howard, Charise Castro Smith.

(2) Conrad Vernon, Laura Brousseau, Kevin Pavlovic

Sources: ICAA, Comscore

Distribution and exhibition

With a 53% year-on-year increase in cinema attendance, Spain ranked among the top third of European markets in terms of annual growth in 2021. Thanks to comparatively short cinema closures with approximately 80% of cinemas operating in early April and the regained strength of US blockbusters, admissions rose from 27.0 million in 2020 to 41.4 million in 2021. GBO increased from EUR 161 million to EUR 250 million. Although showing welcome signs of recovery, Spanish 2021 box office results were still far below pre-pandemic levels, representing 40% of 2019 box office results, which corresponds to the pan-European average. The number of cinema screen declined slightly, from 3 701 in 2020 to 3 631 in 2021.

After reaching an exceptional 25% market share in 2020, national market share for local productions dropped to 15.7% as US blockbusters returned to Spanish cinemas and drove box office growth. A total of seven films managed to sell more than one million tickets in 2021, led by *Spider-Man: No Way Home* (US) which topped the charts with 2.9 million admissions, ahead of *Fast & Furious 9* (US; 1.5 million) and the top performing local production, family comedy *¡A todo tren! Destino Asturias* (ES) with 1.4 million tickets sold. Two other Spanish productions made it into the top 20, action thriller *Way Down* (ES/FR; 0.8 million) and police comedy *Operación Camarón* (ES; 0.6 million).

Production and funding

In 2021 Spanish film production was back to pre-pandemic levels with a total of 263 films certified. This is 48 films more than in 2020 and well in line with the high production levels registered in 2018 and 2019. 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 in other markets which measure film production in terms of film releases.

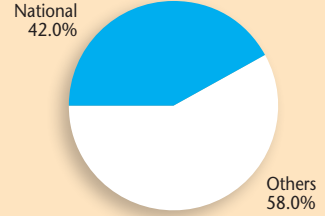
In February 2022 the Spanish government presented the future law on Cinema and Audiovisual Culture which opens public funding previously only accessible to film also to TV shows. The law also foresees to lower the quota for EU and Latin American films from currently 25% to 20% of theatrical screenings per year. Spain plans to boost film and TV production in the country with a EUR 1.6 billion investment plan over the next three years, and create a 30% increase in audiovisual productions. The plan aims to better attract international investment, support local companies and talent, increase presence in international markets and boost gender parity. The government is also working on a new law which would foresee a language quote for content broadcast by streaming firms and would oblige them to invest 3.5% of their revenue in Spanish content.

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

United Kingdom

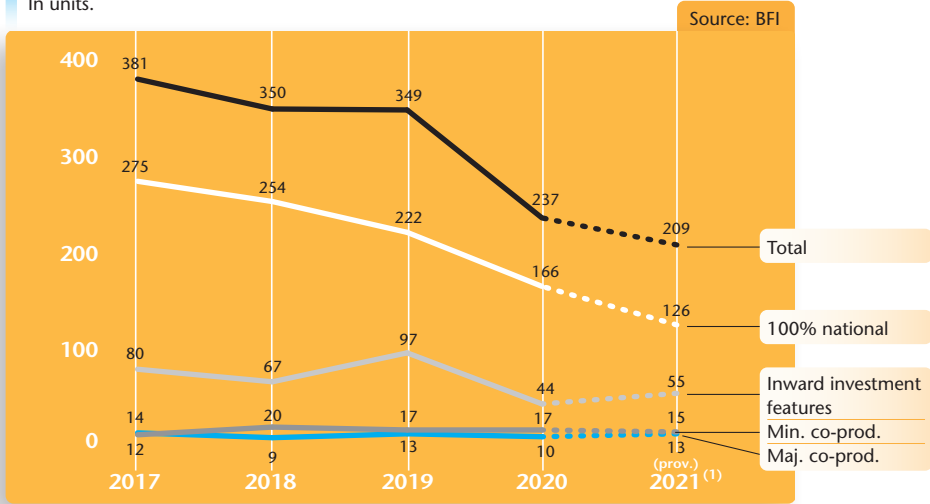
Population 2021 ^e	67.0 million
GDP per capita 2021 ^e	46 200 USD
Gross box office 2021 ^e	541.87 M GBP (745.11 M USD)
Admissions 2021 ^e	74.0 million
Average ticket price 2021 ^e	7.3 GBP (10.1 USD)
Average admissions per capita 2021 ^e	1.1
Screens 2020 2021	4 682 4 610

Market shares 2021 ^e



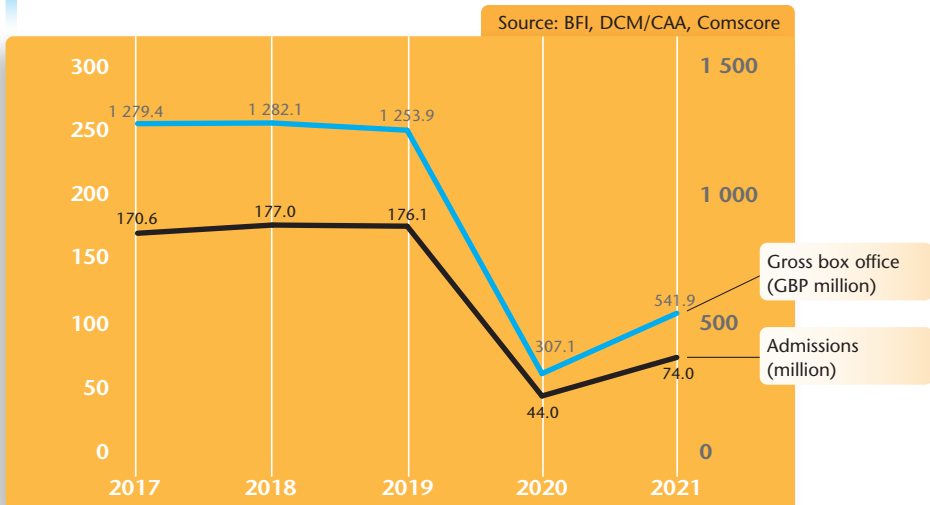
Number of films produced in the United Kingdom | 2017-2021 *prov.* ⁽¹⁾

In units.



(1) The apparent decline of film productions in 2021 may be linked to a time lag in identifying film productions with budgets below GBP 500 000.

Admissions and gross box office in the United Kingdom | 2017-2021



Top 20 films by admissions in the United Kingdom & Ireland | 2021^e

Estimated admissions based on average ticket price of GBP 7.32.

	Original title	Country of origin	Director(s)	Distributor	Admissions ^e
1	No Time to Die	GB INC/US	Cary Joji Fukunaga	Universal	13 206 938
2	Spider-Man: No Way Home	US	Jon Watts	Sony	9 076 708
3	Dune	US/CA	Denis Villeneuve	Warner Bros.	2 986 365
4	Shang-Chi and the Legend of the Ten...	US	Destin Daniel Cretton	Disney	2 912 536
5	Peter Rabbit 2: The Runaway	AU/US/IN/GB/CA	Will Gluck	Sony	2 778 352
6	Black Widow	US	Cate Shortland	Disney	2 577 232
7	Venom: Let There Be Carnage	US	Andy Serkis	Sony	2 469 349
8	Free Guy	US	Shawn Levy	Disney	2 307 870
9	F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Universal	2 250 760
10	Eternals	US	Chloé Zhao	Disney	2 034 631
11	The Suicide Squad	US	James Gunn	Warner Bros.	1 951 641
12	Space Jam: A New Legacy	US	Malcolm D. Lee	Disney	1 769 877
13	Jungle Cruise	US	Jaume Collet-Serra	Warner Bros.	1 714 389
14	A Quiet Place Part II	US	John Krasinski	Paramount	1 605 960
15	Ghostbusters: Afterlife	US/CA	Jason Reitman	Sony	1 504 845
16	The Addams Family 2	US/CA	Greg Tiernan, ... ⁽¹⁾	Universal	1 400 884
17	The Croods: A New Age	US	Joel Crawford	Disney	1 369 064
18	The Conjuring: The Devil Made Me Do It	US	Michael Chaves	Universal	1 308 781
19	Cruella	US	Craig Gillespie	Warner Bros.	1 297 635
20	PAW Patrol: The Movie	CA/US	Cal Brunker	Universal	1 189 013

(1) Conrad Vernon, Laura Brousseau, Kevin Pavlovic.

Sources: BFI, Comscore

Distribution and exhibition

Admissions in the UK increased from 44.0 million to 74.0 million and GBO grew from GBP 307.1 million to GBP 541.9 million, up 68.3% and 76.4% on 2020 respectively. Despite this comparatively high year-on-year growth, UK cinema attendance remained 58% below its pre-pandemic level. In total, UK cinemas were closed for over four months in 2021, compared to about six months in 2020. The number of film releases, including event releases, increased from 441 in 2020 to 498 first releases, but remained well below the 2019 level of 884 releases as many distributors continued to respond to the pandemic restrictions by postponing release dates or moving theatrical releases to digital platform releases. The number of cinema screens continued to decline slightly, decreasing from 4 782 screens in 2019, to 4 682 screens in 2020 and 4 610 screens in 2021.

In 2021, the market share for UK qualifying films dropped from 46.4% to 42.0%, as the market share of UK independent productions plummeted from 14.1% to 5.6%, the lowest level since 2006. In contrast, the market share of US studio-backed UK-made films increased from 32.3% in 2020 to a record high of 36.4%. James Bond's latest adventure *No Time To Die* (GB INC/US) topped the charts selling 13.2 million tickets in the UK and Ireland, followed by *Spider-Man: No Way Home* (US; 9.1 million).

Production and funding

According to BFI interim figures, a total of 209 of UK feature film productions – including inward investment films – started principal photography in 2021. Considering the time lag in measuring production⁽¹⁾, these figures indicate a significant uptake in film production in the UK, compared to 134 films initially reported for 2020. The total UK spend of these films was GBP 1.55 billion, 15% higher than the GBP 1.36 billion reported for 2020. Compared to feature film production spend prior to the pandemic, 2021 is lagging behind 2019 by a 28% decrease. 82% of total UK film spend can be attributed to 55 inward investment films.

The British Film Institute (BFI), the UK's largest public fund to support film production and filmmakers with a budget of approximately GBP 30 million, is currently developing a new 10-year strategy with a final draft plan to be published in autumn 2022.

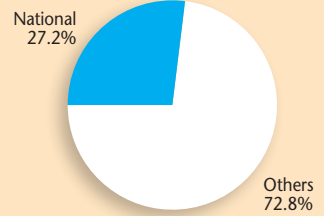
Sources: British Film Institute (BFI), DCM, Comscore, *Screen International*, OBS

(1) The decline in 2021 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. When looking at data from previous years we see approximately a 56% increase in the number of films from when it is first published to when it is fully consolidated, approximately 18 months later.

Russian Federation

Population 2021 °	146.1 million
GDP per capita 2021 °	11 273 USD
Gross box office 2021 °	40.70 bn RUB (552 M USD)
Admissions 2021 °	145.7 million
Average ticket price 2021 °	279.3 RUB (3.8 USD)
Average admissions per capita 2021 °	1.0
Screens 2020 2021	5 337 5 751

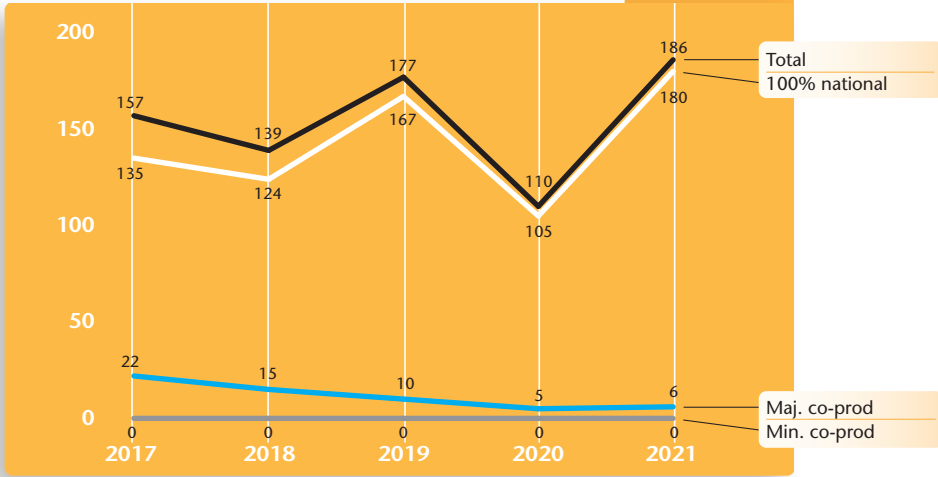
Market shares 2021 °



Number of Russian feature films produced | 2017-2021

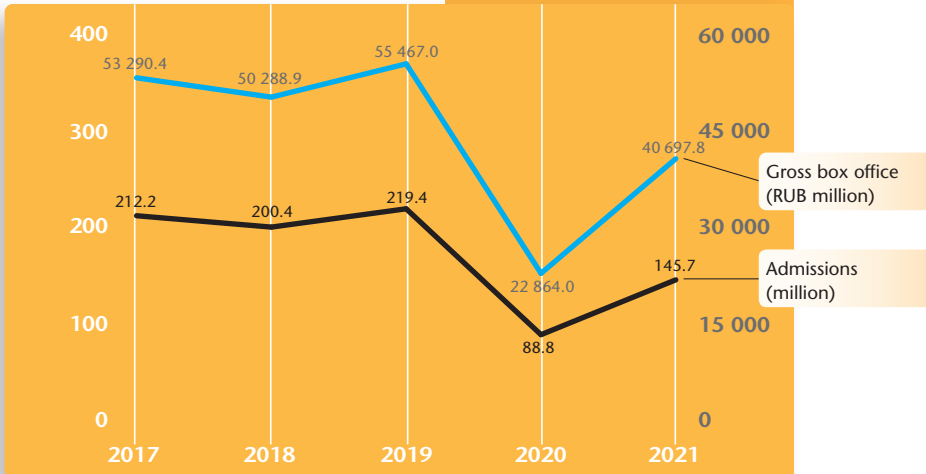
In units.

Source: Nevafilm



Admissions and gross box office in Russia | 2017-2021 ⁽¹⁾

Source: Russian Cinema Fund Analytics



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

Top 20 films by admissions in the Russian Federation | 2021

	Original title	Country of origin	Director(s)	Distributor	Admissions [€]
1	Posledniy bogatyr. Koren' Zla (The...)	RU	Dmitriy Dyachenko	Disney	7 147 254
2	Venom: Let There Be Carnage	US	Andy Serkis	Sony	6 697 234
3	Spider-Man: No Way Home	US	Jon Watts	Sony	6 065 966
4	Soul	US	P. Docter, K. Powers	Disney	4 819 181
5	Konyok-gorbunok (Upon the Magic...)	RU	Oleg Pogodin	Sony	4 812 970
6	Dune	US/CA	Denis Villeneuve	Universal	4 679 528
7	F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Universal	4 039 790
8	The Boss Baby: Family Business	US	Tom McGrath	Universal	3 995 226
9	Raya and the Last Dragon	US	Don Hall, ... ⁽¹⁾	Disney	3 410 029
10	Godzilla vs. Kong	US	Adam Wingard	Universal	3 125 282
11	Mortal Kombat	US	Simon McQuoid	Universal	2 929 984
12	Ogon (No Escapes)	RU	Alexey Nuzhny	Central Partnership	2 812 199
13	Cruella	US	Craig Gillespie	Disney	2 804 354
14	Wrath of Man	US/GB	Guy Ritchie	Volga	2 729 471
15	Luca	US	Enrico Casarosa	Disney	2 578 280
16	Free Guy	US	Shawn Levy	Disney	2 515 278
17	Tom & Jerry	US/GB/FR/DE	Tim Story	Caro Premier	2 411 729
18	The Suicide Squad	US	James Gunn	Universal	2 262 072
19	No Time to Die	GB INC/US	Cary Joji Fukunaga	Universal	2 235 032
20	Jungle Cruise	US	Jaume Collet-Serra	Disney	2 197 744

(1) Carlos López Estrada, Paul Briggs, John Ripa.

Source: Russian Cinema Fund Analytics

Distribution and exhibition

In contrast to almost all other European markets there was no national lockdown which required cinemas to close across the country in 2021. Apart from selected local closures Russian cinemas were allowed to operate throughout the year, albeit with certain restrictions which resulted in limited operations. As a result, the Russian cinema market was among those markets which registered the highest recovery rate across Europe with admissions climbing back to 66% of pre-pandemic levels registered in 2019. Compared to 2020, admissions increased by 64% from 88.8 million to 145.7 million in 2021. Driven by an increase in the average ticket price GBO even increased by 78% from RUB 22.9 billion in 2020 to RUB 40.7 billion. This represents 73% of the GBO registered in 2019 (RUB 55.5 billion). It can be expected that Russia's aggression against Ukraine will hamper a continuation of this recovery trend. According to UNIC several cinemas have closed since the outbreak of the war and US majors like Warner Bros., Disney, Sony, Paramount and Universal have halted the release of their films in reaction to Russia's invasion. Following Hollywood Netflix also announced in early March that they would suspend their service in Russia.

Like elsewhere in Europe box office growth was primarily driven by the return of US blockbuster releases, as admissions to Russian films declined from 42.5 million in 2020 to 39.6 mil-

lion. National market share consequently dropped from its exceptional record high of 47.9% registered in 2020 to 27.2%, which is well in line with pre-pandemic levels. A total of three Russian films made it into the top 20, compared to five films in 2020. Local adventure comedy sequel *The Last Warrior: Root of Evil* (RU) topped the charts selling 7.1 million tickets, ahead of *Venom: Let There Be Carnage* (US; 6.7 million) and *Spider-Man: No Way Home* (US; 6.1 million).

Production and funding

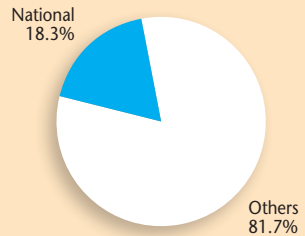
Russian film production jumped back spectacularly and reached a new record high of 186 feature films released in 2021, compared to 110 in 2020 and 177 in 2019. In June 2021 Russia announced plans to sign a bilateral co-production agreement with Israel. While Russia had become increasingly active in international co-productions since it joined Eurimages, it ceased to be a member following a resolution of the Council of Europe in reaction to Russia's military attack against Ukraine. It will remain to be seen how the war will affect Russia's film industry in the short and mid-term as sales of Russian titles are partly suspended and obtaining financing from outside Russia has become increasingly difficult.

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

Poland

Population 2021 ^e	37.8 million
GDP per capita 2021 ^e	17 318 USD
Gross box office 2021 ^e	451.4 M PLN (117.0 M USD)
Admissions 2021 ^e	26.4 million
Average ticket price 2021 ^e	17.1 PLN (4.4 USD)
Average admissions per capita 2021 ^e	0.7
Screens 2020 2021 ^e	1 513 1 512
National films produced 2020 2021	24 90

Market shares 2021 ^e



Top 10 films by admissions in Poland | 2021

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	No Time to Die	GB INC/US	Cary Joji Fukunaga	Forum Film Poland	1 604 058
2	PAW Patrol: The Movie	CA/US	Cal Brunner	United International Pictures	1 082 179
3	Dune	US/CA	Denis Villeneuve	Lionsgate	1 002 312
4	Spider-Man: No Way Home	US	Jon Watts	United International Pictures	989 485
5	Dziewczyny z Dubaju (Girls to Buy)	PL	Maria Sadowska	Kino Swiat	942 518
6	Venom: Let There Be Carnage	US	Andy Serkis	United International Pictures	702 639
7	Luca	US	Enrico Casarosa	Disney	671 900
8	House of Gucci	US/CA/GB	Ridley Scott	Forum Film Poland	613 416
9	F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	United International Pictures	572 299
10	Black Widow	US	Cate Shortland	Disney	559 250

Source: Polish Film Institute (PISF)

Distribution and exhibition

Polish cinemas mostly remained closed until the end of May 2021 when the nationwide lockdown was lifted. In spite of this annual cinema attendance grew by 55% – well above the EU average – from 17.1 million in 2020 to 26.4 million. This represents about 44% of the 60.6 million registered in 2019. Due to a decrease in the average ticket price, GBO increased by only 44% from PLN 313 million in 2020 to PLN 451 million, representing 39% of its pre-pandemic level. A total of 270 titles were released in cinemas, 86 more than in 2020 but still well below the 335 releases registered in 2019. Thanks to public support measures, the number of cinema screens remained stable at pre-pandemic level.

In contrast to 2020, when seven Polish films featured among the top 10 films, only one local film – erotic drama *Dziewczyny z Dubaju* (*Girls to Buy*) selling 0.9 million tickets – ranked among the top 10 titles in 2021 as US blockbusters took back the lead. According to official figures, national films took 18.3% of total admissions in 2021, slightly up on 2020's 17.9% but well below pre-pandemic levels which ranged between 23% and 33%. Just as in 2020 three films surpassed one million ticket sales: *No Time To Die* (GB INC/US; 1.6 million), *PAW*

Patrol: The Movie (CA/US; 1.1 million) and *Dune* (US/CA; 1.0 million).

Production and funding

While the number of Polish feature films produced dropped from a record 93 films in 2019 to only 24 films in 2020, it bounced back to 90 feature films completed in 2021. Traditionally many Polish films benefit from support granted by the Polish Film Institute (PISF). It remains to be seen to what extent the temporary collapse of the cinema markets will affect public support in the upcoming years. One can observe growing involvement of streaming platforms commissioning local content and Netflix announced in March 2022 that it would open a new office in Warsaw to serve as a central hub for its Central and Eastern European productions.

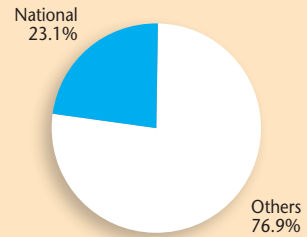
Poland is reported to be working on an amendment of the rules for its 30% cash rebate scheme which would envisage a positive *expert opinion* as a new condition for receiving support. Polish producers associations expressed scepticism about the considered changes.

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

Turkey

Population 2021 °	84.6 million
GDP per capita 2021 °	9 407 USD
Gross box office 2021 °	285.5 M TRY (33.1 M USD)
Admissions 2021 °	12.5 million
Average ticket price 2021 °	22.9 TRY (2.6 USD)
Average admissions per capita 2021 °	0.1
Screens 2020 2021 °	3 206 3 283
National films released 2020 2021	60 83

Market shares 2021 °



Top 10 films by admissions in Turkey | 2021

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Spider-Man: No Way Home	US	Jon Watts	Warner Bros.	1 849 954
2	F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	United International Pictures	958 983
3	Aykut Eniste 2 (Brother in Love 2)	TR	Onur Bilgetay	CJET	676 376
4	Venom: Let There Be Carnage	US	Andy Serkis	Warner Bros.	668 752
5	Akif	TR	Selahattin Sancakli	CGV Mars Dağıtım	653 664
6	Dune	US/CA	Denis Villeneuve	Warner Bros.	610 601
7	Dayi: Bir Adamin Hikayesi	TR	Ugur Bayraktar	CGV Mars Dağıtım	381 993
8	Eternals	US	Chloé Zhao	United International Pictures	379 265
9	Black Widow	US	Cate Shortland	United International Pictures	363 589
10	The Boss Baby: Family Business	US	Tom McGrath	United International Pictures	331 306

Source: Antrakt - Deniz Yavuz

Distribution and exhibition

In contrast to the majority of European markets, Turkey registered one of the highest year-on-year drops in admissions in 2021 as cinemas re-opened only from July onwards. After collapsing from 59 million admissions in 2019 to 17.4 million admissions in 2020, cinema attendance consequently continued to plunge by 28% to a mere 12.5 million tickets sold in 2021, almost 80% below its 2019 level. Due to a 33% increase in the average ticket price, GBO declined by only 5% from TRY 299.7 million (USD 43 million) in 2020 to TRY 285 million (USD 33 million) in 2021, about 70% below its pre-pandemic level in 2019. A total of 207 new films were released in Turkish cinemas in 2021, 31 more than in 2020 but about half of the number of films released in 2019. The number of cinema screens continued to increase from 3 206 to 3 283 screens.

After reaching – thanks to the rescheduling of US blockbusters – an incredible record market share of 80%, Turkish films captured only 23% of total admissions in 2021. This is the lowest national market share in recent history. While Turkish films accounted for nine out of the top 10 performing films of 2020, only three local films featured among the top 10 films in 2021 as

US blockbusters claimed dominance of the Turkish box office for the first time in over a decade. *Spider-Man: No Way Home* (US) topped the charts selling 1.8 million tickets and became the only film generating more than 1 million admissions in 2021. It was followed by *Fast & Furious 9* (US; 1 million admissions) and local comedy sequel *Aykut Eniste 2 (Brother in Love 2)* which sold 0.7 million tickets.

Production and funding

A total of 166 Turkish feature films were produced in 2021 but only 83 of them were released in cinemas. This compares to 201 and 190 feature films produced and 60 and 148 films released in 2020 and 2019, respectively. According to some experts Turkish producers are increasingly resorting to international co-productions as the Turkish Lira hitting all-time lows against Western currencies and government support by the Culture and Tourism Ministry often is no longer sufficient to finance productions in a pandemic plagued market.

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

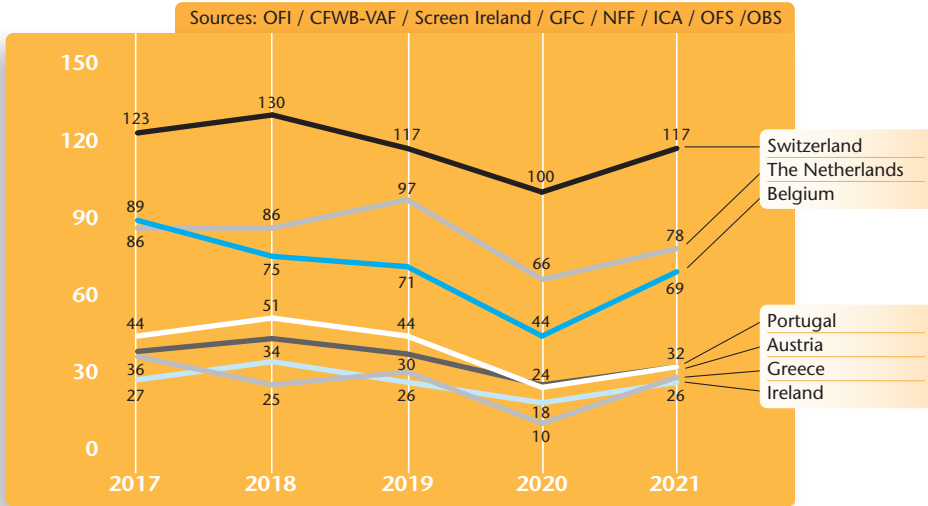
Other Western Europe

	Austria	Belgium	Greece	Ireland	Netherlands	Portugal	Switzerland
Population 2021 ^e (million)	8.9	11.6	10.7	5.0	17.5	10.3	8.7
GDP per capita 2021 ^e (USD)	53 793	50 413	19 827	102 394	57 715	24 457	93 515
Gross box office 2021 (M USD)	62.5	86.3	23.0	57.6	169.4	36.2	93.2
Admissions 2021 (million)	5.2	7.5	3.1	5.8	14.3	5.5	5.4
Average ticket price 2021 (USD)	11.9	11.5	7.5	9.9	11.8	6.6	17.3
Average admissions per capita 2021	0.6	0.6	0.3	1.2	0.8	0.5	0.6
Screens 2021 ^e	565	476	547 ⁽¹⁾	537	1 027	543	603
National market shares 2021 ^e	6.8%	6.0%	17.3%	1.8%	23.1%	3.0%	4.9%

(1) 2020

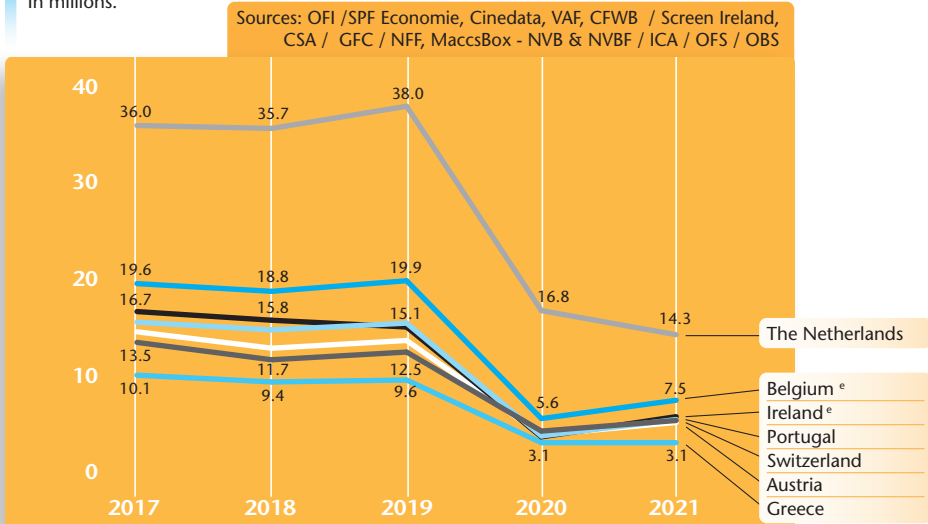
Number of feature films produced by selected Western European countries | 2017-2021

In units. Including minority co-productions and feature documentaries.



Admissions in selected Western European countries | 2017-2021

In millions.



Top 10 films by admissions in the Netherlands | 2021

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	No Time to Die	GB INC/US	Cary Joji Fukunaga	Universal	1 708 804
2	F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Universal	532 076
3	The Forgotten Battle	NL	M. van Heijningen Jr.	September Film Distr.	507 512
4	Dune	US/CA	Denis Villeneuve	Warner Bros.	492 019
5	Luizenmoeder - De film	NL	J. de Weerd, I. Warringa	Dutch Film Works	470 114
6	Black Widow	US	Cate Shortland	Disney	341 482
7	PAW Patrol: The Movie	CA/US	Cal Brunker	Universal	330 627
8	Jungle Cruise	US	Jaume Collet-Serra	Disney	307 151
9	Shang-Chi and the Legend of...	US	Destin Daniel Cretton	Disney	306 099
10	Bon Bini: Judeska in da House	NL	Jonathan Herman	WW Entertainment	279 070

Sources: MaccsBox - NVB & NVF

Top 10 films by admissions in Belgium | 2021

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	No Time to Die	GB INC/US	Cary Joji Fukunaga	Sony	580 024
2	Spider-Man: No Way Home	US	Jon Watts	Sony	385 353
3	Dune	US/CA	Denis Villeneuve	Warner Bros.	356 341
4	F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Sony	274 723
5	Venom: Let There Be Carnage	US	Andy Serkis	Sony	173 663
6	The Conjuring: The Devil Made ...	US	Michael Chaves	Warner Bros.	172 578
7	Shang-Chi and the Legend of...	US	Destin Daniel Cretton	Disney	148 069
8	The Boss Baby: Family Business	US	Tom McGrath	Sony	140 857
9	Black Widow	US	Cate Shortland	Disney	134 780
10	PAW Patrol: The Movie	CA/US	Cal Brunker	Paramount/Sony	129 132

Sources: CFWB, VAF, Cinedata

Top 10 films by admissions in Portugal | 2021

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	No Time to Die	GB INC/US	Cary Joji Fukunaga	NOS Luso. Audio.	435 929
2	Spider-Man: No Way Home	US	Jon Watts	Big Picture 2 Films	420 163
3	F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Cinemundo	377 011
4	Dune	US/CA	Denis Villeneuve	Cinemundo	205 112
5	Venom: Let There Be Carnage	US	Andy Serkis	Big Picture 2 Films	195 918
6	Shang-Chi and the Legend of...	US	Destin Daniel Cretton	NOS Luso. Audio.	175 664
7	Eternals	US	Chloé Zhao	NOS Luso. Audio.	173 574
8	The Suicide Squad	US	James Gunn	Cinemundo	162 170
9	Encanto	US	Jared Bush, ... ⁽¹⁾	NOS Luso. Audio.	129 589
10	Black Widow	US	Cate Shortland	NOS Luso. Audio.	127 361

(1) Byron Howard, Charise Castro Smith.

Source: ICA

Top 10 films by admissions in Switzerland | 2021

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	No Time to Die	GB INC/US	Cary Joji Fukunaga	Universal	825 365
2	Spider-Man: No Way Home	US	Jon Watts	Sony	292 047
3	F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Universal	235 199
4	Dune	US/CA	Denis Villeneuve	Warner Bros.	195 769
5	The Croods: A New Age	US	Joel Crawford	Universal	136 958
6	House of Gucci	US/CA/GB	Ridley Scott	Universal	132 655
7	PAW Patrol: The Movie	CA/US	Cal Brunker	Warner Bros.	114 633
8	Tom & Jerry	US/GB/FR/DE	Tim Story	Warner Bros.	93 137
9	Black Widow	US	Cate Shortland	Disney	88 840
10	Shang-Chi and the Legend of...	US	Destin Daniel Cretton	Disney	87 906

Source: Swiss Federal Statistical Office

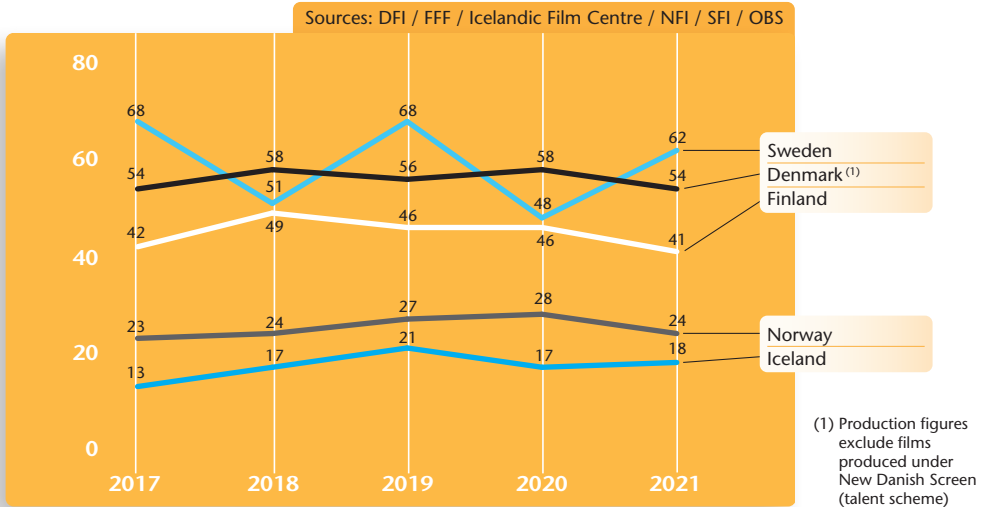
Nordic countries

	Denmark	Finland	Iceland	Norway	Sweden
Population 2021 ^e (million)	5.8	5.5	0.4	5.4	10.4
GDP per capita 2021 ^e (USD)	67 920	53 523	68 844	82 244	58 639
Gross box office 2021 (M USD)	104.1	51.5	8.5	79.0	73.7 ⁽²⁾
Admissions 2021 (million)	6.8	3.4	0.8	5.7	6.0
Average ticket price 2021 (USD)	15.2	15.0	11.2	13.9	13.0 ⁽²⁾
Average admissions per capita 2021	1.2	0.6	2.1	1.1	0.6
Screens 2021 ^e	476	357	44	478	~
National market shares 2021 ^e	41% ⁽¹⁾	25.2%	11.1%	30.1% ⁽¹⁾	12.6% ⁽¹⁾

(1) Excluding minority co-productions. (2) 2020

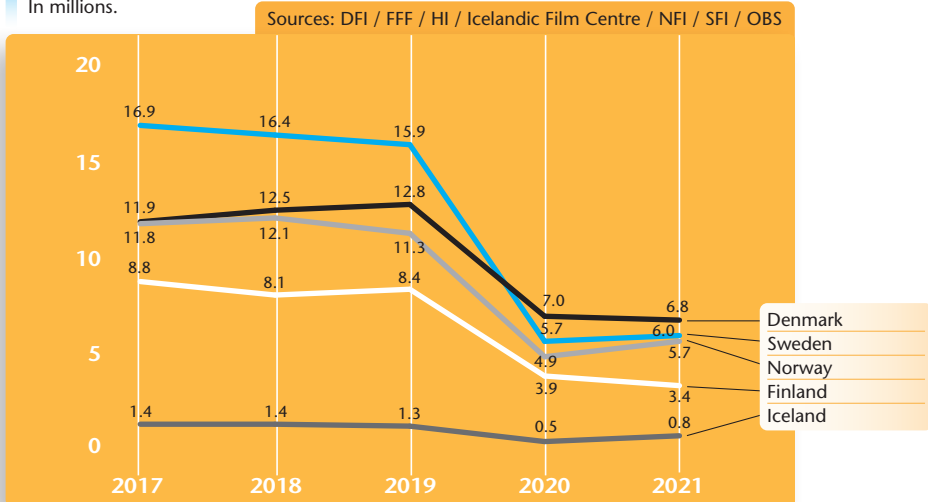
Number of feature films produced by Nordic countries | 2017-2021

In units. Including minority co-productions and feature documentaries.



Admissions in Nordic countries | 2017-2021

In millions.



Top 10 films by admissions in Sweden | 2021

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	No Time to Die	GB INC/US	Cary Joji Fukunaga	Svensk Filmindustri	574 453
2	Spider-Man: No Way Home	US	Jon Watts	Sony	442 090
3	Dune	US/CA	Denis Villeneuve	Svensk Filmindustri	289 489
4	Sune - Uppdrag: Midsommar (Sune...)	SE	Erland Beskow	Nordisk Film	206 959
5	The Croods: A New Age	US	Joel Crawford	Universal	186 791
6	F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Universal	158 520
7	Black Widow	US	Cate Shortland	Disney	147 989
8	Venom: Let There Be Carnage	US	Andy Serkis	Sony	146 987
9	PAW Patrol: The Movie	CA/US	Cal Brunker	Paramount	146 036
10	Sagan om Karl-Bertil Jonssons julafton...	SE	Hannes Holm	Svensk Filmindustri	143 821

Source: Swedish Film Institute

Top 10 films by admissions in Denmark | 2021

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	No Time to Die	GB INC/US	Cary Joji Fukunaga	SF Bio	1 058 159
2	Ternet Ninja 2 (Checkeded Ninja 2)	DK/US	T. Christoffersen, ... ⁽¹⁾	Nordisk Film	930 321
3	Margrete den første (Margrete: ...)	DK/SE/... ⁽²⁾	Charlotte Sieling	SF Bio	372 030
4	Pagten (The Pact)	DK	Bille August	SF Bio	244 811
5	Dune	US/CA	Denis Villeneuve	SF Bio	239 027
6	Skyggen i mit øje (The Shadow in...)	DK	Ole Bornedal	SF Bio	228 039
7	Marco effekten (The Marco Effect)	DK/DE/CZ	Martin Zandvliet	Nordisk Film	225 243
8	F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	United Intl Pict.	181 395
9	Spider-Man: No Way Home	US	Jon Watts	SF Bio	162 429
10	PAW Patrol: The Movie	CA/US	Cal Brunker	United Intl Pict.	161 034

(1) Anders Matthesen.

(2) NO/IS/CZ/PL

Sources: Danmark Statistics / DFI

Top 10 films by admissions in Norway | 2021

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	No Time to Die	GB INC/US	Cary Joji Fukunaga	SF Bio	666 143
2	Tre nøtter til Askepott (Three Wishes...)	NO	Cecilie A. Mosli	Nordisk Film	571 182
3	Nordsjøen (The Burning Sea)	NO	John A. Andersen	Nordisk Film	221 608
4	Dune	US/CA	Denis Villeneuve	SF Bio	217 107
5	Verdens verste menneske (The Worst...)	NO/FR/SE	Joachim Trier	SF Bio	214 043
6	F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	United Intl Pict.	195 423
7	The Croods: A New Age	US	Joel Crawford	United Intl Pict.	184 128
8	PAW Patrol: The Movie	CA/US	Cal Brunker	United Intl Pict.	167 411
9	The Boss Baby: Family Business	US	Tom McGrath	United Intl Pict.	123 488
10	Shang-Chi and the Legend of the Ten...	US	Destin D. Cretton	Disney	94 615

Source: Norwegian Film Institute

Top 10 films by admissions in Finland | 2021

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	No Time to Die	GB INC/US	Cary Joji Fukunaga	SF Bio	621 475
2	Dune	US/CA	Denis Villeneuve	SF Bio	172 088
3	Luokkakokous 3 (Class Reunion 3)	FI	Renny Harlin	Nordisk Film	165 922
4	Spider-Man: No Way Home	US	Jon Watts	SF Bio	138 390
5	Hytti nro 6 (Compartment Number 6)	FI/RU/EE/DE	Juho Kuosmanen	B-Plan	129 125
6	Syke: Hätätätilä	FI	Tony Laine	SF Bio	119 175
7	PAW Patrol: The Movie	CA/US	Cal Brunker	Finnkino	114 730
8	F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Finnkino	106 338
9	The Father	GB/FR	Florian Zeller	Atlantic Film	99 556
10	Pertsä & Kilu (Finders of The Lost Yacht)	FI	Taavi Vartia	Finnkino	86 959

Source: Finnish Film Foundation

Baltics and Central Europe

	Czech Republic	Estonia	Hungary	Latvia	Lithuania	Slovenia	Slovakia
Population 2021 ^e (million)	10.7	1.3	9.7	1.9	2.8	2.1	5.5
GDP per capita 2021 ^e (USD)	25 806	27 101	18 528	19 539	22 412	28 939	21 383
Gross box office 2021 (M USD)	50.2	9.7	32.0	3.7	9.2	4.8	14.6
Admissions 2021 (million)	7.1	1.4	6.2	0.5	1.3	0.7	2.0
Average ticket price 2021 (USD)	7.0	7.0	5.1	7.3	6.9	6.6	7.2
Average admissions per capita 2021	0.7	1.0	0.6	0.3	0.5	0.3	0.4
Screens 2021 ^e	778	114	415	78	77	103	263 ⁽¹⁾
Films produced 2021	90	23	26	12	12	24	26
National market shares 2021 ^e	41.9%	14.2%	10.4%	15.8%	6.2%	2.4%	10.0%

(1) 2020

Top 10 films by admissions in the Czech Republic | 2021

Original title	Country of origin	Director(s)	Distributor	Admissions
1 Prvok, Sampon, Tecka a Karel (Bet...)	CZ	Patrik Hartl	Bontonfilm	600 192
2 Spider-Man: No Way Home	US	Jon Watts	Falcon	404 224
3 Zátopek	CZ/SK	David Ondříček	Falcon	393 678
4 Karel	CZ	Olga Spátová	Bontonfilm	390 783
5 No Time to Die	GB INC/US	Cary Joji Fukunaga	Forum Film	362 970
6 Venom: Let There Be Carnage	US	Andy Serkis	Falcon	317 016
7 Matky (Mothers)	CZ	Vojtěch Moravec	Bontonfilm	296 031
8 Dune	US/CA	Denis Villeneuve	Vertical Entertainment	269 622
9 Black Widow	US	Cate Shortland	Falcon	233 044
10 Gump - pes, který naučil lidi zít	CZ	F.A. Brabec	Bioscop	211 223

Sources: Czech Film Fund / Unie Filmových Distributorů

Top 10 films by admissions in Hungary | 2021

Original title	Country of origin	Director(s)	Distributor	Admissions
1 Spider-Man: No Way Home	US	Jon Watts	Intercomfilm	436 209
2 No Time to Die	GB INC/US	Cary Joji Fukunaga	Forum-Hungary	304 822
3 Venom: Let There Be Carnage	US	Andy Serkis	Intercomfilm	277 870
4 Dune	US/CA	Denis Villeneuve	Intercomfilm	267 651
5 Black Widow	US	Cate Shortland	Forum-Hungary	265 027
6 Free Guy	US	Shawn Levy	Forum-Hungary	249 497
7 Jungle Cruise	US	Jaume Collet-Serra	Forum-Hungary	210 767
8 F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	DunaFilm/UIP	204 845
9 Eternals	US	Chloé Zhao	Forum-Hungary	171 525
10 Shang-Chi and the Legend of the...	US	Destin Daniel Cretton	Forum-Hungary	167 869

Source: National Film Office

Top 10 films by admissions in Slovakia | 2021

Original title	Country of origin	Director(s)	Distributor	Admissions
1 PAW Patrol: The Movie	CA/US	Cal Brunker	CinemArt	107 306
2 Známi neznámi	SK/CZ	Zuzana Marianková	Itafilm	106 252
3 No Time to Die	GB INC/US	Cary Joji Fukunaga	Forum Film	104 292
4 The Croods: A New Age	US	Joel Crawford	CinemArt	104 004
5 Venom: Let There Be Carnage	US	Andy Serkis	Itafilm	83 700
6 Dune	US/CA	Denis Villeneuve	Continental Film	81 197
7 F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	CinemArt	76 463
8 Black Widow	US	Cate Shortland	CinemArt	66 600
9 Matky (Mothers)	CZ	Vojtěch Moravec	Bontonfilm	65 264
10 The Conjuring: The Devil Made Me...	US	Michael Chaves	Continental Film	55 596

Sources: Slovak Film Institute / UFD

South-Eastern Europe

	BA ⁽¹⁾	Bulgaria	Croatia	Cyprus	North Macedonia	Romania	Ukraine
Population 2021 ^e (million)	3.5	6.9	4.0	0.9	2.1	19.2	41.4
GDP per capita 2021 ^e (USD)	6 648	11 332	15 808	29 486	6 712	14 864	4 384
Gross box office 2021 (M USD)	3.9	14.3	13.3	2.6	0.5	23.3	64.0
Admissions 2021 (million)	1.1	2.6	2.5	0.3	0.2	4.7	15.8
Average ticket price 2021 (USD)	3.5	5.6	5.4	9.7	3.6	5.0	4.0
Average admissions per capita 2021	0.3	0.4	0.6	0.3	0.1	0.2	0.4
Screens 2021 ^e	70	211	200	40	23 ⁽²⁾	443	663
Films produced 2021 ^e	10	21	23	8	7	65	21
National market shares 2021 ^e	3.3%	14.2%	7.1%	~	2.1%	5.8%	4.2%

(1) Bosnia-Herzegovina (2) 2020 data

Top 10 films by admissions in Romania | 2021

Original title	Country of origin	Director(s)	Distributor	Admissions
1 F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Ro-Image 2000	377 279
2 Spider-Man: No Way Home	US	Jon Watts	Intercomfilm	319 809
3 Luca	US	Enrico Casarosa	Forum Film	225 622
4 Dune	US/CA	Denis Villeneuve	Vertical Entert.	168 857
5 House of Gucci	US/CA/GB	Ridley Scott	Forum Film	159 423
6 Venom: Let There Be Carnage	US	Andy Serkis	Intercomfilm	154 089
7 No Time to Die	GB INC/US	Cary Joji Fukunaga	Forum Film	147 340
8 Jungle Cruise	US	Jaume Collet-Serra	Forum Film	130 581
9 Black Widow	US	Cate Shortland	Forum Film	116 976
10 Shang-Chi and the Legend of the...	US	Destin Daniel Cretton	Forum Film	114 702

Source: Centrul National al Cinematografiei

Top 10 films by admissions in Bulgaria | 2021

Original title	Country of origin	Director(s)	Distributor	Admissions
1 F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Forum Film	183 243
2 Golata istina za grupa Zhiguli (The...)	BG	Victor Bojinov	Concept Studio	153 688
3 Spider-Man: No Way Home	US	Jon Watts	Aleksandra	130 771
4 PAW Patrol: The Movie	CA/US	Cal Brunker	Forum Film/SPI	111 653
5 Bai Ivan - The Movie	BG	Nikolai Pavlov	Aleksandra	102 918
6 No Time to Die	GB INC/US	Cary Joji Fukunaga	Forum Film/SPI	87 006
7 The Boss Baby: Family Business	US	Tom McGrath	Forum Film/SPI	80 855
8 House of Gucci	US/CA/GB	Ridley Scott	Forum Film/SPI	70 673
9 Venom: Let There Be Carnage	US	Andy Serkis	Aleksandra	70 028
10 Jungle Cruise	US	Jaume Collet-Serra	Forum Film/SPI	65 379

Source: Bulgarian National Film Center

Top 10 films by admissions in Croatia | 2021

Original title	Country of origin	Director(s)	Distributor	Admissions
1 No Time to Die	GB INC/US	Cary Joji Fukunaga	Editus	125 183
2 Juzni vetar 2: Ubrzanje (South Wind...)	RS	Milos Avramovic	Blitz Film	114 216
3 Spider-Man: No Way Home	US	Jon Watts	Continental Film	107 571
4 Dune	US/CA	Denis Villeneuve	Blitz Film	70 429
5 Venom: Let There Be Carnage	US	Andy Serkis	Continental Film	67 169
6 F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Editus	65 569
7 Luca	US	Enrico Casarosa	Blitz Film	61 654
8 Toma	RS	D. Bjelogrić, Z. Lisinac	Continental Film	60 744
9 PAW Patrol: The Movie	CA/US	Cal Brunker	Blitz Film	58 808
10 House of Gucci	US/CA/GB	Ridley Scott	Editus	53 778

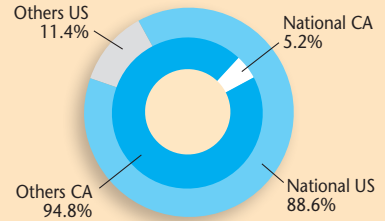
Source: HAVCR (Croatian Audiovisual Centre)

North America

	North America	US	Canada
Population 2021 ^e (million)	368.8	330.7	38.2
GDP per capita 2021 ^e (USD)	67 658.4	69 375	52 791
Gross box office 2021 ^e (m USD)	4 543.7	4 204.8 ⁽¹⁾	338.9 ⁽¹⁾⁽²⁾
Admissions 2021 ^e (million)	474.6	439.2 ⁽¹⁾	35.4 ⁽¹⁾
Average ticket price 2021 ^e (USD) ⁽³⁾	9.6	9.6 ⁽¹⁾	9.6 ⁽¹⁾
Average admissions per capita 2021 ^e	1.3	1.3 ⁽¹⁾	0.9 ⁽¹⁾
Screens 2021 ^e	43 646	40 578	3 068

(1) Estimated. (2) CAD 343 million in 2021 (USD 274 million) according to the MTAC.
 (3) Arithmetic mean. (4) By GBO.

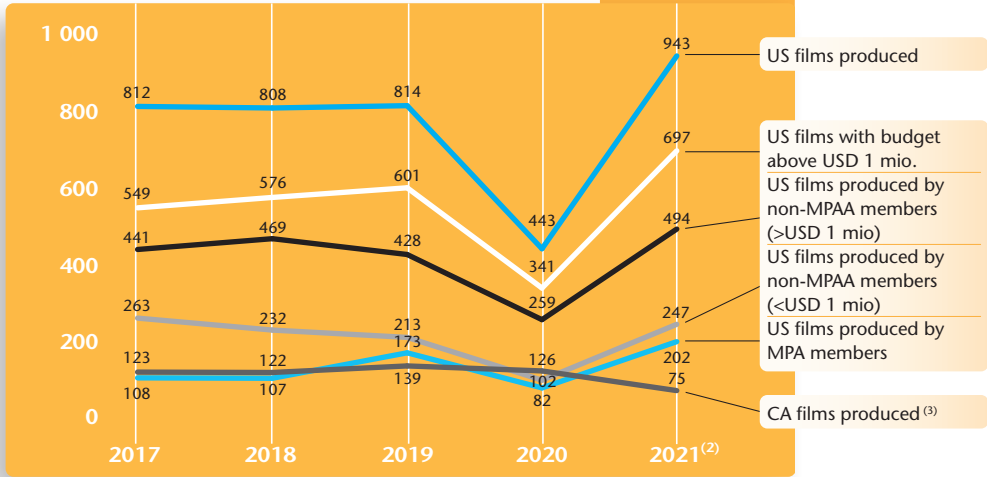
Market shares 2021^{(4)e}



Number of US⁽¹⁾ and Canadian feature films produced | 2017-2021

In units

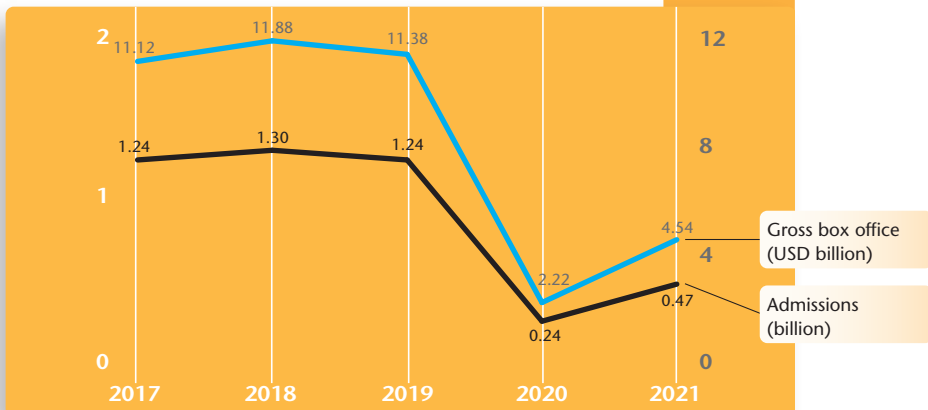
Sources: MPA, CMPA



- (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. Budgets are estimated from publicly available information. The number of lower-budget films is variable and more difficult to track.
- (2) US data are provisional as of February 2022. 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 | 2017-2021

Source: MPA



Top 20 films by admissions in North America | 2021

Original title	Country of origin	Director(s)	Distributor	Admissions
1 Spider-Man: No Way Home	US	Jon Watts	Sony	60 870 860
2 Shang-Chi and the Legend of the...	US	Destin D. Cretton	Disney	24 513 460
3 Venom: Let There Be Carnage	US	Andy Serkis	Sony	23 209 527
4 Black Widow	US	Cate Shortland	Disney	20 049 307
5 F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Universal	18 887 112
6 Eternals	US	Chloé Zhao	Disney	17 968 328
7 No Time to Die	GB INC/US	Cary Joji Fukunaga	United Artists Releasing	17 551 529
8 A Quiet Place Part II	US	John Krasinski	Paramount	17 501 735
9 Ghostbusters: Afterlife	US/CA	Jason Reitman	Sony	13 312 602
10 Free Guy	US	Shawn Levy	20th Century Fox	13 278 013
11 Jungle Cruise	US	Jaume Collet-Serra	Disney	12 770 690
12 Dune	US/CA	Denis Villeneuve	Warner Bros.	11 698 596
13 Godzilla vs. Kong	US	Adam Wingard	Warner Bros.	11 017 041
14 Halloween Kills	US	David Gordon Green	Universal	10 043 903
15 Encanto	US	Jared Bush, ... ⁽¹⁾	Disney	9 858 361
16 Cruella	US	Craig Gillespie	Disney	9 399 916
17 Space Jam: A New Legacy	US	Malcolm D. Lee	Warner Bros.	7 706 575
18 Sing 2	US	Garth Jennings	Universal	7 650 740
19 The Conjuring: The Devil Made...	US	Michael Chaves	Warner Bros.	7 164 962
20 Candyman	US/CA	Nia DaCosta	Universal	6 679 756

(1) Byron Howard, Charise Castro Smith.

Sources: LUMIERE/OBS, Comscore

Distribution and exhibition

After a catastrophic decline in 2020, North American box office revenues rebounded by 105% to USD 4.54 billion in 2021, fuelled by the success of several franchise releases delayed due to the pandemic. Ticket sales similarly jumped to 474.6 admissions, about twice the number registered in 2020. These results are still a far cry from pre-COVID levels representing slightly less than 40% of 2019 results. Figures suggest that the recovery was mainly driven by younger moviegoers while the share of admissions sold to audiences aged 50+ decreased compared to previous years. The number of theatrically released films in the US and Canada increased from 338 to 387 titles in 2021, versus 987 in 2019. A total of 14 films sold more than 10 million tickets at the North American box office, compared to only five in 2020 while 32 films reached this benchmark in 2019. Like in 2020, the box office showed a high level of concentration at the top end, as the first 20 films generated 68% of admissions. The top film for the year, superhero sequel *Spider-Man: No Way Home*, accounted alone for 13% of ticket sales with a total of 60.9 admissions, a stunning result in pandemic times. Still grossing in 2022, the movie is set out to become one of the top-earning movies of all time in North America. Other high-grossing films for the year include franchise superhero movies *Shang-Chi and the Legend of the*

Ten Rings (24.5 million admissions), *Venom: Let There Be Carnage* (23.2 million) and *Black Widow* (20.0 million). The coronavirus crisis took a heavy toll on cinema operators, forcing several screens to close permanently and reducing the estimated total screen number to a total of 43 646 screens in 2021 (-465 less than in 2020).

Production and funding

After slowing down in 2020 production activity picked up again in the US. According to the MPA, a total of 943 films entered production in 2021, 500 more than in the previous year and beyond the pre-pandemic average of about 800 films per year. Among these titles, 202 were produced by a major film studio, compared to 82 in 2020 and 173 in 2019.

In Canada, the total number of films produced decreased to 75 titles in the fiscal year ending in March 2021, down from 126 in the previous 12 months, as shoots were put on hold due the pandemic. Total film production investment also declined by 7.4% to CAD 268 million (USD 214 million). In 2022 the Canadian government announced a further CAD 150 million (USD 120 million) added to its emergency relief scheme for the audiovisual sector, in an effort to support productions halted by the pandemic.

Sources MPA, CMPA, Telefilm Canada, Comscore, *Variety*, *Screen International*

Latin America

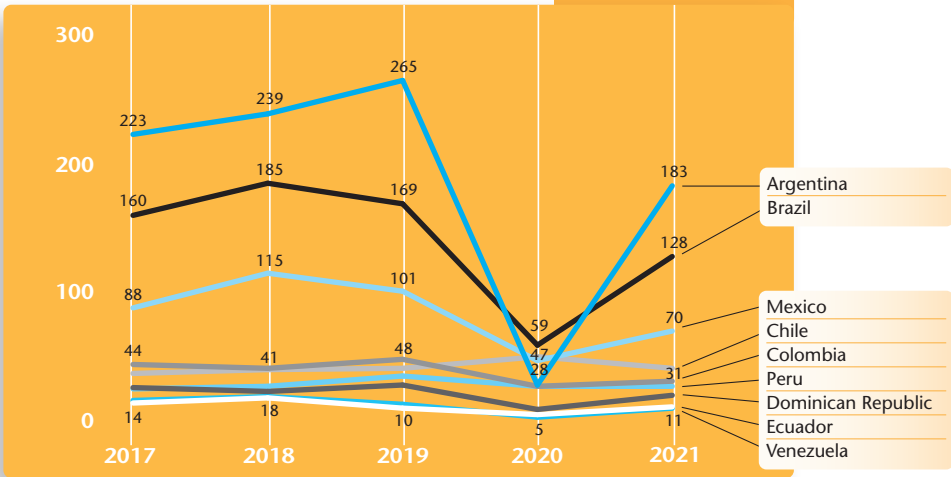
	Argentina	Brazil	Chile ^e	Colombia	Costa Rica ^e
Population 2020 ^e (million)	45.8	212.6	19.7	51.0	5.2
GDP per capita 2020 (USD)	9 929	7 741	16 799	5 892	11 860
Gross box office 2020 ^e (M USD)	58.8	163.7	30.5	76.5	15.9
Admissions 2020 (million)	14.0	50.7	5.9	27.9	3.2
Average ticket price 2020 (USD)	4.2	3.2	5.1	2.7	5.0
Average admissions per capita 2020 ^e	0.3	0.2	0.3	0.5	0.6
Screens 2020	855	3 249	518 ⁽¹⁾	1 244	167 ⁽¹⁾
National market shares 2020	2.1%	1.8%	0.1%	2.9%	1.7%

(1) 2020

Number of national feature films released in Latin America | 2017-2021

In units.

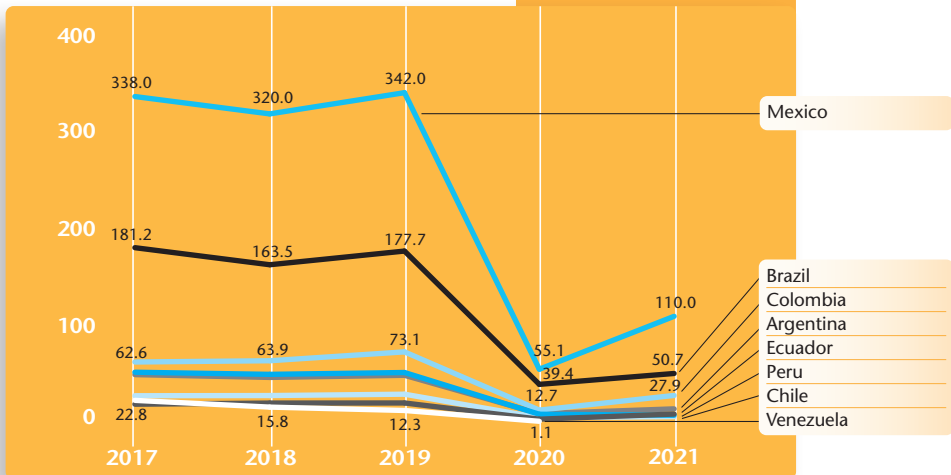
Sources: OIA^(*), OBS/IMDb



Admissions in Latin America | 2017-2021

In millions.

Sources: OIA^(*), Comscore, OBS



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

	Dominican Republic	Ecuador	Mexico	Peru ^e	Venezuela
Population 2020 ^e (million)	0.1	17.8	129.0	33.8	27.6
GDP per capita 2020 (USD)	7 777	5 884	9 967	6 677	1 627
Gross box office 2020 ^e (M USD)	0.7	40.6	360.1	24.1	~
Admissions 2020 (million)	0.2	3.3	110.0	7.4	1.1 ⁽¹⁾
Average ticket price 2020 (USD)	4.7	12.3	3.3	3.3	~
Average admissions per capita 2020 ^e	2.2	0.2	0.9	0.2	0.04 ⁽¹⁾
Screens 2020	183	326	7 361	663 ⁽¹⁾	124 ^e
National market shares 2020	10.0%	1.0%	4.0%	1.9%	0.1% ⁽¹⁾

Mexico

Ticket sales almost doubled in 2021 to a total of 110.0 million admissions, a figure which is less than a third of the attendance registered in 2019. As the average ticket price increased, theatrical revenues recovered at a higher rate than admissions reaching MXN 7.30 billion in 2021 (USD 360.1 million), representing 39.1% of 2019 box office receipts. The market share captured by domestic films dwindled from 12.0% to 4.0% as the box office was dominated by Hollywood releases, led by *Spider-Man: No Way Home* (17.9 million admissions). Not one local film appeared among the 10 top-grossing titles for the year. Mexican comedy *El Mesero (The Waiter)* was the highest-ranking local film, with 1.0 million admissions.

Production volume picked up again with a total of 259 Mexican films produced in 2021, up from 111 titles in 2020. The number of domestic releases also bounced back to 70 titles in 2021 compared to 47 in 2020 and 101 in 2019. As the crisis put a major strain on cinema operators, 133 screens closed in 2021, bringing the total count to 7 361 screens.

Brazil

As the country grappled with new surges of the virus, cinema attendance only grew by 28.4% to 50.7 million admissions in 2021, which corresponds to barely 28.5% of 2019 ticket sales. Theatrical revenues increased by 40.3% to BRL 882.0 million (USD 163.7 million), about one third of the 2019 receipts. As several delayed US studio hits were released in cinemas in 2021, the market share taken by national productions dropped from 21.7% to 1.8%. *Spider-Man: No Way Home* was the box office leader for the year with 11.9 million tickets sold, followed at a distance by *Fast & Furious 9*.

Overall, 128 local films were theatrically released in 2021, compared to 59 in 2020 and 169 in 2019. The highest-earning Brazilian movie for the year was political biopic *Marighella*, taking a total of 324 461 admissions. While the crisis had almost halved the number of operating screens in 2020, the count jumped back to a total of 3 249 screens at the end of 2021, 268 less than 2019. In 2021 Brazilian VOD aggregator Sofa Digital announced plans for the creation of a film investment fund to produce Latin American films and support local distributors in acquiring attractive content.

Argentina

Cinema attendance rose by 55.5% year-on-year to a total of 14.0 million tickets sold in 2021, which is still well below the 48.8 admissions recorded in 2019. In turn, box office revenues almost trebled compared to 2020, to ARS 5.59 billion (USD 58.8 million), corresponding to nearly two thirds of 2019 takings. The recovery was driven by several US hits, led by superhero blockbuster *Spider-Man: No Way Home* which took 2.4 million admissions. The national market share plunged from an unusually high 24.3% in 2020 to 2.1% in 2021, as many long-awaited Hollywood films were finally released in cinemas. Musical drama *Cato* was the highest grossing local film for the year with about 65 000 tickets sold, ahead of *Yo nena, yo princesa (I'm A Girl, I'm A Princess)* and *La noche mágica (Bad Christmas)*.

After slowing down in 2020, production activity increased again, with a total of 183 domestic films released in 2021, 155 more than in the previous year but still far from the 265 features in 2019.

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

Top 10 films by admissions in Argentina | 2021

Original title	Country of origin	Director(s)	Admissions
1 Spider-Man: No Way Home	US	Jon Watts	2 441 320
2 F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	947 488
3 Venom: Let There Be Carnage	US	Andy Serkis	850 867
4 Eternals	US	Chloé Zhao	679 407
5 Space Jam: A New Legacy	US	Malcolm D. Lee	637 832
6 Godzilla vs. Kong	US	Adam Wingard	632 830
7 Encanto	US	J. Bush, B. Howard, C. Castro Smith	545 609
8 Black Widow	US	Cate Shortland	448 539
9 The Conjuring: The Devil Made Me Do It	US	Michael Chaves	430 705
10 Shang-Chi and the Legend of the Ten Rings	US	Destin Daniel Cretton	383 659

Sources: OIA, INCAA

Top 10 films by admissions in Brazil | 2021

Original title	Country of origin	Director(s)	Admissions
1 Spider-Man: No Way Home	US	Jon Watts	11 866 771
2 F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	3 965 563
3 Eternals	US	Chloé Zhao	3 938 603
4 Venom: Let There Be Carnage	US	Andy Serkis	3 870 470
5 Shang-Chi and the Legend of the Ten Rings	US	Destin Daniel Cretton	2 108 802
6 Black Widow	US	Cate Shortland	1 878 561
7 The Conjuring: The Devil Made Me Do It	US	Michael Chaves	1 663 908
8 The Suicide Squad	US	James Gunn	1 314 774
9 Encanto	US	J. Bush, B. Howard, C. Castro Smith	1 221 658
10 No Time to Die	GB INC/US	Cary Joji Fukunaga	1 038 356

Sources: OIA, ANCINE

Top 10 films by admissions in Chile | 2021

Original title	Country of origin	Director(s)	Admissions
1 Spider-Man: No Way Home	US	Jon Watts	1 275 848
2 Venom: Let There Be Carnage	US	Andy Serkis	704 952
3 Eternals	US	Chloé Zhao	487 856
4 Shang-Chi and the Legend of the Ten Rings	US	Destin Daniel Cretton	385 097
5 F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	327 933
6 Encanto	US	J. Bush, B. Howard, C. Castro Smith	319 544
7 Dune	US/CA	Denis Villeneuve	189 877
8 Space Jam: A New Legacy	US	Malcolm D. Lee	166 812
9 PAW Patrol: The Movie	CA/US	Cal Bruner	144 796
10 The Suicide Squad	US	James Gunn	115 335

Sources: OBS/LUMIERE, Comscore

Top 10 films by admissions in Colombia | 2021

Original title	Country of origin	Director(s)	Admissions
1 Encanto	US	J. Bush, B. Howard, C. Castro Smith	3 588 987
2 Spider-Man: No Way Home	US	Jon Watts	2 798 164
3 Venom: Let There Be Carnage	US	Andy Serkis	1 566 724
4 The Conjuring: The Devil Made Me Do It	US	Michael Chaves	1 268 579
5 Eternals	US	Chloé Zhao	1 219 035
6 F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	2 362 346
7 Space Jam: A New Legacy	US	Malcolm D. Lee	1 016 783
8 Shang-Chi and the Legend of the Ten Rings	US	Destin Daniel Cretton	844 678
9 Godzilla vs. Kong	US	Adam Wingard	790 520
10 Black Widow	US	Cate Shortland	670 445

Sources: OIA, Colombian Ministry of Culture

Top 10 films by admissions in Costa Rica | 2021

Original title	Country of origin	Director(s)	Admissions
1 Spider-Man: No Way Home	US	Jon Watts	517 144
2 Venom: Let There Be Carnage	US	Andy Serkis	182 278
3 F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	169 835
4 Eternals	US	Chloé Zhao	162 313
5 Godzilla vs. Kong	US	Adam Wingard	154 916
6 Encanto	US	J. Bush, B. Howard, C. Castro Smith	120 622
7 Shang-Chi and the Legend of the Ten Rings	US	Destin Daniel Cretton	110 478
8 Space Jam: A New Legacy	US	Malcolm D. Lee	102 716
9 The Conjuring: The Devil Made Me Do It	US	Michael Chaves	94 822
10 Cruella	US	Craig Gillespie	87 752

Source: Comscore

Top 10 films by admissions in the Dominican Republic | 2021

Original title	Country of origin	Director(s)	Admissions
1 Spider-Man: No Way Home	US	Jon Watts	182 357
2 F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	155 173
3 Encanto	US	J. Bush, B. Howard, C. Castro Smith	103 531
4 Venom: Let There Be Carnage	US	Andy Serkis	91 790
5 Eternals	US	Chloé Zhao	82 370
6 Shang-Chi and the Legend of the Ten Rings	US	Destin Daniel Cretton	71 592
7 La vida de los Reyes	DO	Frank Perozo	63 401
8 No Time to Die	GB INC/US	Cary Joji Fukunaga	45 022
9 No es lo que parece	DO	David Maler	49 508
10 Space Jam: A New Legacy	US	Malcolm D. Lee	51 453

Sources: OIA, DGCINE

Top 10 films by admissions in Ecuador | 2021

Original title	Country of origin	Director(s)	Admissions
1 Spider-Man: No Way Home	US	Jon Watts	1 569 202
2 Venom: Let There Be Carnage	US	Andy Serkis	515 629
3 F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	505 779
4 Eternals	US	Cholé Zhao	341 701
5 The Conjuring: The Devil Made Me Do It	US	Michael Chaves	280 407
6 Godzilla vs. Kong	US	Adam Wingard	280 055
7 Shang-Chi and the Legend of the Ten Rings	US	Destin Daniel Cretton	243 463
8 Wonder Woman 1984	US	Patty Jenkins	231 404
9 Encanto	US	J. Bush, B. Howard, C. Castro Smith	216 348
10 Cruella	US	Craig Gillespie	203 478

Sources: OIA, ICCA

Top 10 films by admissions in Mexico | 2021

Original title	Country of origin	Director(s)	Admissions
1 Spider-Man: No Way Home	US	Jon Watts	17 912 771
2 F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	8 054 350
3 Venom: Let There Be Carnage	US	Andy Serkis	7 776 021
4 Godzilla vs. Kong	US	Adam Wingard	6 371 967
5 The Conjuring: The Devil Made Me Do It	US	Michael Chaves	5 315 873
6 Eternals	US	Chloé Zhao	4 642 968
7 Cruella	US	Craig Gillespie	3 472 100
8 Black Widow	US	Cate Shortland	2 797 498
9 Space Jam: A New Legacy	US	Malcolm D. Lee	2 657 175
10 Shang-Chi and the Legend of the Ten Rings	US	Destin Daniel Cretton	2 354 848

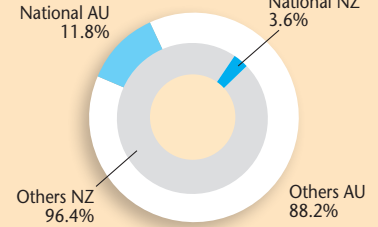
Sources: OIA, IMCINE

Australia and New Zealand

	Australia	New Zealand
Population 2021 * (million)	25.7	5.1
GDP per capita 2021 * (USD)	62 619	48 349
Gross box office 2021 (M USD)	454.7	72.9
Admissions 2021 (million)	39.7	7.5
Average ticket price 2021 (USD)	11.5	9.7
Average admissions per capita 2021	1.5	1.5
Screens 2021	2 290	493

(1) By GBO

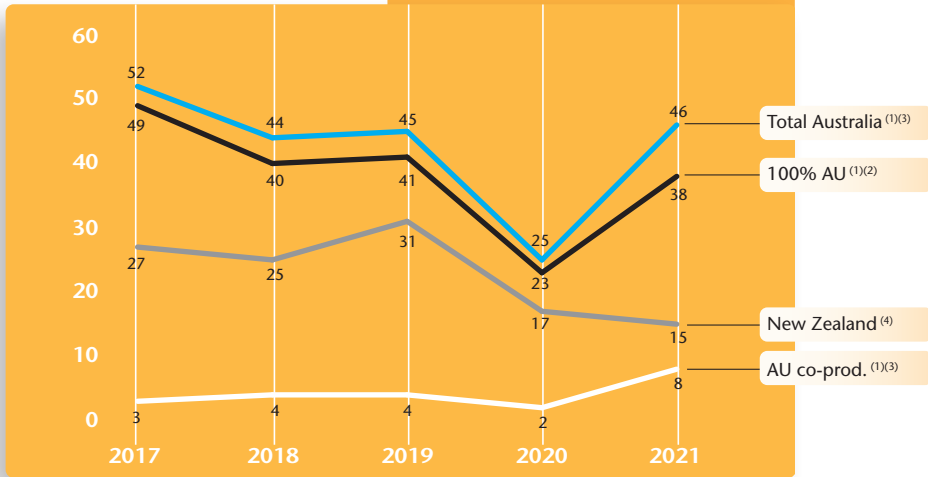
Market shares 2021 ^{(1) e}



Number of Australian and New Zealand feature films produced | 2017-2021

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.

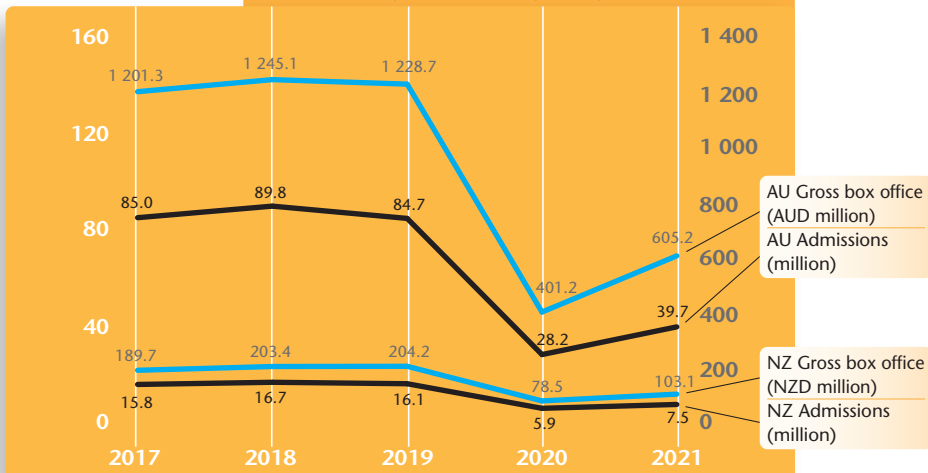
(2) Includes films under Australian creative control that were 100% foreign financed.

(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 | 2017-2021

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



Top 10 films by admissions in Australia | 2021^e

Estimated admissions based on average ticket price of AUD 15.2.

Original title	Country of origin	Director(s)	Distributor	Admissions ^e
1 Spider-Man: No Way Home	US	Jon Watts	Sony	3 625 623
2 No Time to Die	GB INC/US	Cary Joji Fukunaga	Universal	2 250 257
3 Godzilla vs. Kong	US	Adam Wingard	Warner Bros.	1 828 439
4 Peter Rabbit 2 : The Runaway	AU/US/IN/GB/CA	Will Gluck	Sony	1 441 003
5 F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Universal	1 382 200
6 The Dry	AU/US/GB	Robert Connolly	Roadshow	1 319 840
7 Shang-Chi and the Legend of the Ten...	US	Destin D. Cretton	Disney	1 125 845
8 Eternals	US	Chloé Zhao	Disney	982 710
9 Venom: Let There Be Carnage	US	Andy Serkis	Sony	975 256
10 The Croods: A New Age	US	Joel Crawford	Universal	940 081

Source: MPDAA

Top 10 films by admissions in New Zealand | 2021^e

Estimated admissions based on average ticket price of NZD 13.7.

Original title	Country of origin	Director(s)	Distributor	Admissions ^e
1 Spider-Man: No Way Home	US	Jon Watts	Sony	530 031
2 No Time to Die	GB INC/US	Cary Joji Fukunaga	Universal	383 119
3 F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Universal	350 002
4 Godzilla vs. Kong	US	Adam Wingard	Universal	339 574
5 Peter Rabbit 2: The Runaway	AU/US/IN/GB/CA	Will Gluck	Sony	296 687
6 Black Widow	US	Cate Shortland	Disney	285 271
7 Space Jam: A New Legacy	US	Malcolm D. Lee	Universal	244 729
8 A Quiet Place Part II	US	John Krasinski	Paramount	193 806
9 Cruella	US	Craig Gillespie	Disney	150 516
10 Dune	US/CA	Denis Villeneuve	Universal	144 159

Source: MPDAA

Distribution and exhibition

Australian cinema attendance grew by 41% to 39.7 million tickets sold in 2021, less than half the admissions level recorded in 2019. Due to an increase in the average ticket price, box office takings recovered at a higher rate than cinema entries, reaching AUD 605.2 million (USD 454.7 million), up 51% on the previous year. In New Zealand, admissions increased by 27% to a total of 7.5 million tickets sold, corresponding to less than half the 16.1 million ticket sales registered in 2019. GBO similarly increased by 31% to NZD 103.1 million (USD 72.9 million).

With US titles still held back for release, in Australia the market share garnered by local productions rose from 5.6% to an unprecedented 11.8%, driven by the performance of AU/US co-production *Peter Rabbit 2*, the highest-grossing local film for the year. In New Zealand the box office share captured by local films decreased from 4.5% to 3.6%, with the drama *Cousins* becoming the top local title in terms of revenue. After dropping 2020, the number of Australian screens bounced back unveiling 61 new screens to reach a total of 2 290, in line with 2019 levels. The screen count

also increased in New Zealand, resulting in a total of 493 screens in 2021.

Production and funding

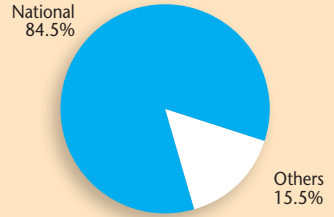
After slowing down in 2020, Australian production activity picked up again with a total of 46 films shot in the country in 2021, 21 more than in the previous year. In the financial year 2020/2021, the overall Australian drama production peaked at a record high of AUD 1.9 billion (USD 1.4 billion) nearly twice as much as in the previous year. A total of AUD 500 million (USD 376 million) were spent on Australian feature films, far above the 5-year average. In 2022, the Australian government announced the extension of a dedicated support package aimed at local productions halted by the coronavirus crisis. In New Zealand, production volume was still below pre-pandemic levels as the number of domestic productions decreased to 15 titles in 2021, 2 less than in 2020. In 2021 the country launched its first regional incentive scheme, aimed at boosting international film and TV productions shooting in the Canterbury region.

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

People's Republic of China

Population 2021 ^e	1 418.1 million
GDP per capita 2021 ^e	11 891 USD
Gross box office 2021 ^e	47.26 bn CNY (7.33 bn USD)
Admissions 2021 ^e	1.17 billion
Average ticket price 2021 ^e	40.5 CNY (6.3 USD)
Average admissions per capita 2021 ^e	0.8
Screens 2020 2021 ^e	75 581 82 248

Market shares 2021⁽¹⁾

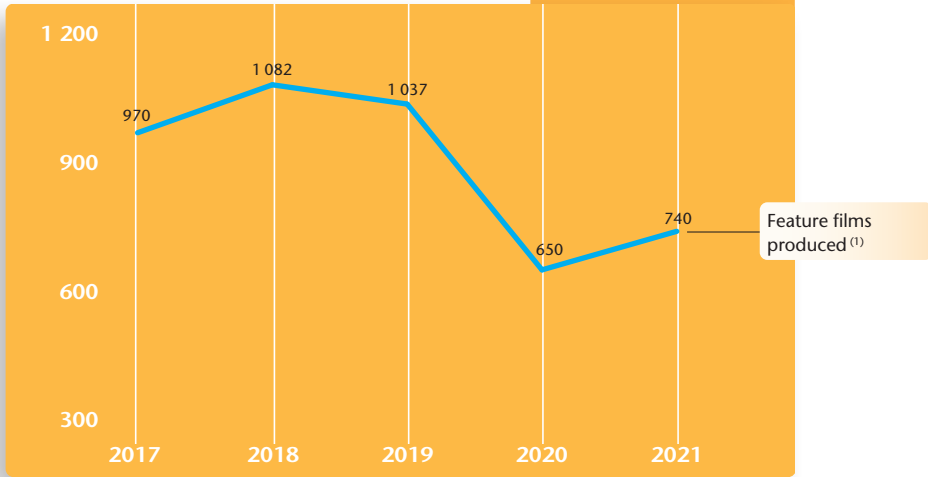


(1) By GBO.

Number of feature films produced in China | 2017-2021^e

In units.

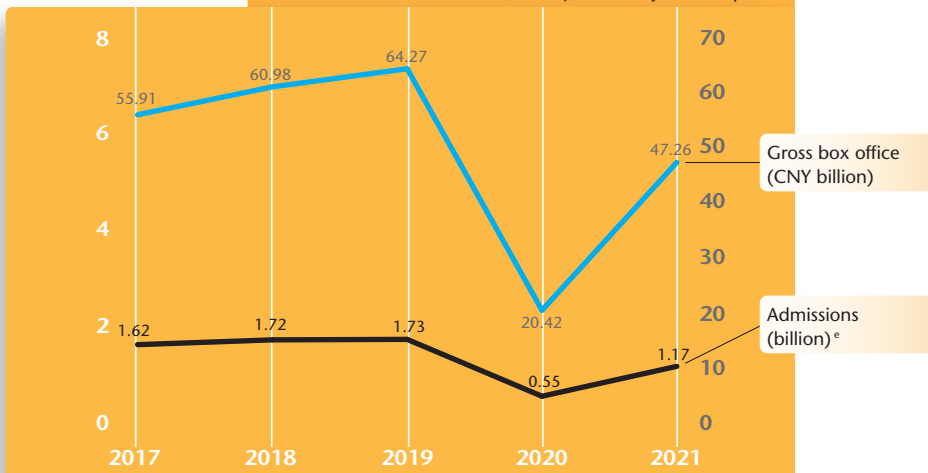
Source: National Film Bureau



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

Admissions and gross box office in China | 2017-2021^e

Sources: National Film Bureau, *Variety*, The Hollywood Reporter



Top 20 films by admissions in China | 2021

English Title	Country of origin	Director(s)	Admissions
1 The Battle at Lake Changjin	CN	Hark Tsui, Dante Lam, Kaige Chen	123 630 941
2 Hi, Mom	CN	Ling Jia	120 396 750
3 Detective Chinatown 3	CN	Chen Sicheng	94 283 665
4 Chinese Doctors	CN	Andrew Lau	36 238 895
5 F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	35 160 047
6 Raging Fire	CN/HK	Benny Chan	34 066 386
7 My Country, My Parents	CN	Wu Jing, Xu Zheng, Shen Teng, Zhang Zi-yi	33 766 174
8 Godzilla vs. Kong	US	Adam Wingard	32 666 799
9 A Little Red Flower	CN	Han Yan	31 829 292
10 Cliff Walkers	CN/HK	Yimou Zhang	30 721 208
11 Be Somebody	CN	Liu Xunzimo	24 047 788
12 Sister	CN	Ruoxin Yin	23 166 615
13 A Writer's Odyssey	CN	Yang Lu	21 830 291
14 My Love	CN	Tian Han	20 917 135
15 Fireflies in the Sun	CN	Mo Dai	20 545 432
16 Endgame	CN/HK	Xiaozhi Rao	18 381 802
17 Shock Wave 2	HK/CN	Herman Yau	18 073 860
18 Warm Hug	CN	Yuan Chang	17 858 626
19 Free Guy	US	Shawn Levy	15 661 647
20 Green Snake	CN	Amp Wong	14 759 090

Sources: LUMIERE/OBS, Comscore

Distribution and exhibition

In 2021 China confirmed its position of largest theatrical market worldwide in terms of box office revenues, overtaking North America for the second year in a row. After plummeting during the first year of the pandemic, attendance soared to a total of 1.17 billion tickets sold in 2021, more than twice 2020 admissions and only 32.4% down compared to 2019. Due to a rise in the average ticket price, box office takings recovered to an even higher rate reaching CNY 47.3 billion (USD 7.33 billion) in 2021, corresponding to almost 74% of the 2019 record high. The rebound was clearly driven by the domestic films accounting for 84.5% of box office revenues in 2021, compared to 64.1% in 2019. More than 470 Chinese films were released in 2021, up from 428 in 2019, generating a total of CNY 39.93 billion (USD 6.2 million), a figure in line with the earnings taken by domestic titles in 2019. Amid protectionist regulatory policies and diplomatic friction, only 21 US films were released in the country in 2021, compared to 31 in 2019 and well below the 34-title quota set by the US-China Agreement signed in 2012. Several Hollywood features were denied a release permit, including anticipated franchises such as *Black Widow*, *Eternals* and *Spider-Man: No Way Home*. Chinese war movie *The Battle at Lake Changjin* topped the box office chart logging 123.6 million admissions, an extraordinary result in pandemic times, ahead

of the comedies *Hi, Mom* (120.4 million) and *Detective Chinatown 3* (94.3 million). Only three US films appear among the top 20 films for the year: *Fast & Furious 9* (ranking 5th with 35.2 million admissions), *Godzilla vs. Kong* (32.7 million) and action-comedy *Free Guy* (15.7 million). Despite the coronavirus crisis, China's theatrical infrastructure continued to develop steadily, especially in under-screened rural areas, adding nearly 6 700 new screens in 2021 and bringing its tally up to a total of 82 248 screens.

Production and funding

The number of Chinese films produced reached 740 in 2021, 90 more than in the previous year but still fewer than the 1 037 titles produced in 2019. In 2021 the National Film Bureau announced a new five-year film strategy, in a bid to reinforce the country's "cultural power" and keep its leadership position at the global box office. The strategy includes plans to consolidate China's screen estate, improve the industry's high-tech capability and boost the dissemination of patriotically themed content. In the same year, the government also passed a new Copyright Law, introducing stricter fines for film piracy.

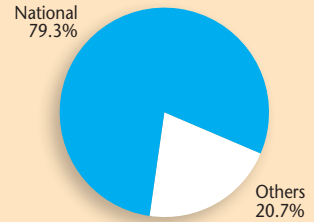
Sources: National Film Bureau, *The Hollywood Report*, *Variety*

Japan

Population 2021 ^e	125.4 million
GDP per capita 2021 ^e	40 704 USD
Gross box office 2021	161.9 bn JPY (1.5 bn USD)
Admissions 2021	114.8 million
Average ticket price 2021	1 410 JPY (12.8 USD)
Average admissions per capita 2021	0.9
Screens 2020 2021	3 616 3 648

(1) By GBO

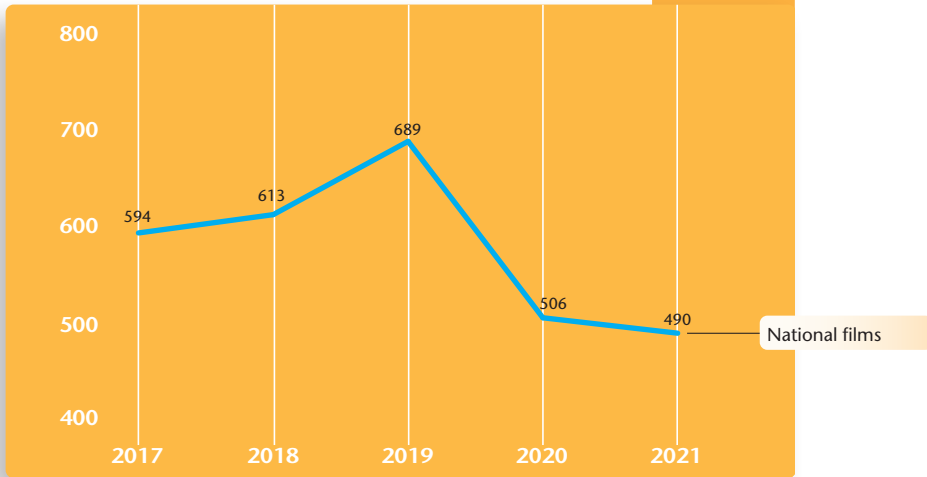
Market shares 2021 ^{e (1)}



Number of Japanese feature films released | 2017-2021

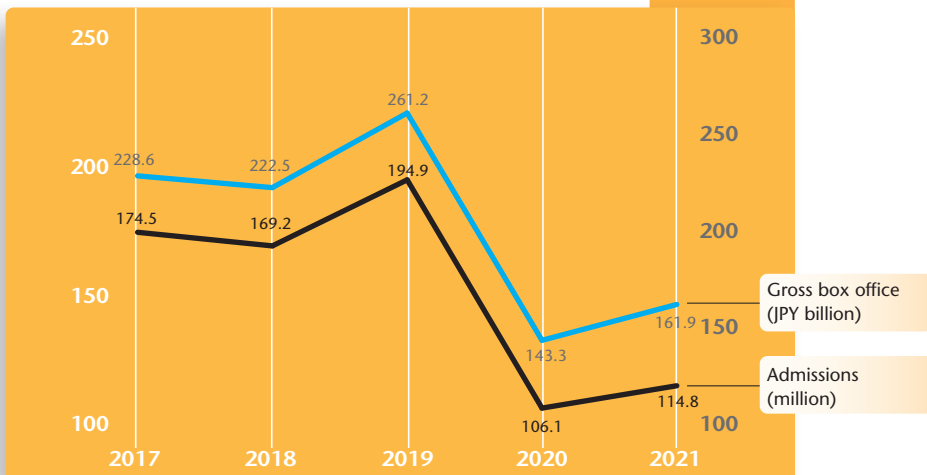
In units.

Source: EIREN



Admissions and gross box office in Japan | 2017-2021

Source: EIREN



Top 20 films by admissions in Japan | 2021

Estimated admissions based on average ticket price of JPY 1 410.

English Title	Country of origin	Director(s)	Distributor	Admissions [©]
1 Evangelion: 3.0+1.01 Thrice Upon a Time	JP	H. Anno, ... ⁽¹⁾	Toho/Toei/Khara	7 290 797
2 Detective Conan: The Scarlet Bullet	JP	Tomoka Nagaoka	Toho	5 425 545
3 Belle: The Dragon and the Freckled...	JP	Mamoru Hosoda	Toho	4 680 862
4 Arashi Anniversary Tour 5 x 20 Film: ...	JP	Yukihiko Tsutsumi	Shochiku	3 226 958
5 Tokyo Revengers	JP	Tsutomu Hanabusa	Warner Bros.	3 191 497
6 Rurouni Kenshin: Final Chapter Part I - ...	JP	Keishi Ohtomo	Warner Bros.	3 085 114
7 New Interpretation Records of the Three...	JP	Yûichi Fukuda	Toho	2 858 163
8 I Fell in Love Like a Flower Bouquet	JP	Nobuhiro Doi	Tokyo Theatres... ⁽²⁾	2 702 134
9 Masquerade Night	JP	Masayuki Suzuki	Toho	2 702 134
10 F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Toho/Towa	2 602 843
11 My Hero Academia Movie 3	JP	Kenji Nagasaki	Toho	2 404 261
12 Stand By Me Doraemon 2	JP	R. Yagi, T. Yamazaki	Toho	1 971 636
13 No Time to Die	GB INC/US	Cary Joji Fukunaga	Toho/Towa	1 929 083
14 Poupelle of Chimney Town	JP	Yusuke Hirota	Toho... ⁽³⁾	1 914 898
15 Rurouni Kenshin: The Beginning	JP	Keishi Ohtomo	Warner Bros.	1 773 054
16 Mobile Suit Gundam: Hathaway	JP	Shûkô Murase	Shochiku	1 581 564
17 Takizawa Kabuki ZERO 2020 the Movie	JP	Hideaki Takizawa	Shochiku	1 517 734
18 The Promised Neverland	JP	Yûichiro Hirakawa	Toho	1 439 720
19 Pokémon the Movie: Secrets of the Jungle	JP	Tetsuo Yajima	Toho	1 432 627
20 Gintama: The Final	JP	Chizuru Miyawaki	Warner Bros.	1 347 521

(1) K. Tsurumaki, M. Maeda, K. Nakayama.

(2) /Little more.

(3) /Yoshimoto Kogyo.

Sources: EIREN, OBS

Distribution and exhibition

Box office revenues climbed by 13.0% to JPY 161.9 billion (USD 1.5 billion) in 2021, confirming Japan's position as the world's third largest film market by GBO. Ticket sales also climbed by 8.2%, to reach 114.8 million admissions, up from 106.1 million in 2020. Despite this recovery, these figures still represent a far cry from the levels registered in pre-pandemic times: compared to the record year 2019, cinema attendance and GBO were down by 41.1% and 38.0% respectively.

Local titles dominated the box office, as 9 out of the 10 top titles were Japanese productions (compared to 7 in 2020 and 4 in 2019). Three Japanese animated features topped the chart, led by the sci-fi franchise feature *Evangelion: 3.0+1.0 Thrice Upon a Time*, selling 7.3 million tickets. A new chapter of the *Detective Conan* series, *The Scarlet Bullet*, followed suit (5.4 million admissions), ahead of fantasy feature *Belle: The Dragon and the Freckled Princess* (4.7 million). The only foreign entry among the top 10 chart was the latest instalment of the US *Fast & Furious* saga, with 2.6 million admissions. By comparison, two Hollywood releases had made it into the top 10 list in 2020, and five in 2019. According to the industry experts, the declining interest in US hits could be attributed to their releases on streaming services simultaneously or shortly after their theatrical release, which provided audiences with

a wider range of options during the pandemic. Domestic films accounted for as much as 79.3% of the box office takings, an even higher share than in 2020 (76.3%), and 2019 (54.4%). Despite the hardships brought about by the pandemic, the total number of screens slightly increased to a total of 3 648 screens in 2021, 32 more than in the previous year.

In a bid to curb the spread of the virus, cinemas were closed in several prefectures in April 2021, before reopening in June, amid capacity restrictions and reduced business hours. As the number of infections ebbed in 2022, the government announced that quasi-emergency restrictions would be lifted as of the 21st of March.

Production and funding

The number of theatrically released local films continued to decline to a total of 490 titles in 2021, compared to 506 in 2020 and 689 in 2019.

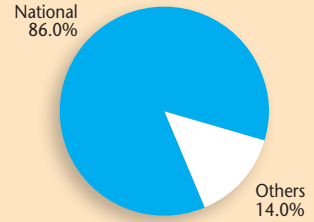
After being cancelled in 2020, a new edition of the Tokyo International Film Festival took place in October 2021, the first large-scale film event since the start of the pandemic. However, due to the country's travel ban on foreign visitors, the festival only featured a limited number of international guests.

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

India

Population 2021 ^e	1.39 billion
GDP per capita 2021 ^e	2 116 USD
Gross box office 2021 ^e	39.00 bn INR (527.5 M USD)
Admissions 2021 ^e	418.0 million
Average ticket price 2021 ^e	93.3 INR (1.3 USD)
Average admissions per capita 2021 ^e	0.3
Screens 2020 2021 ^e	9 473 9 423

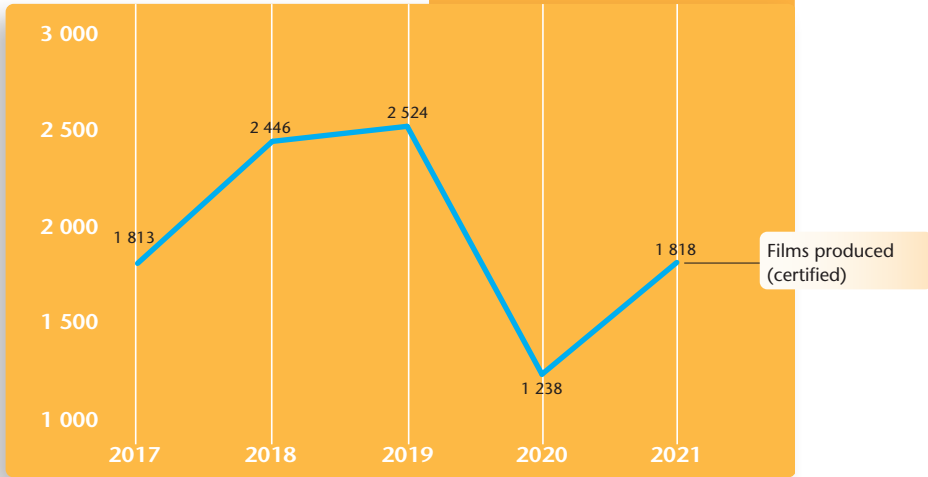
Market shares 2021^e



Number of Indian feature films certified⁽¹⁾ | 2017-2021

In units.

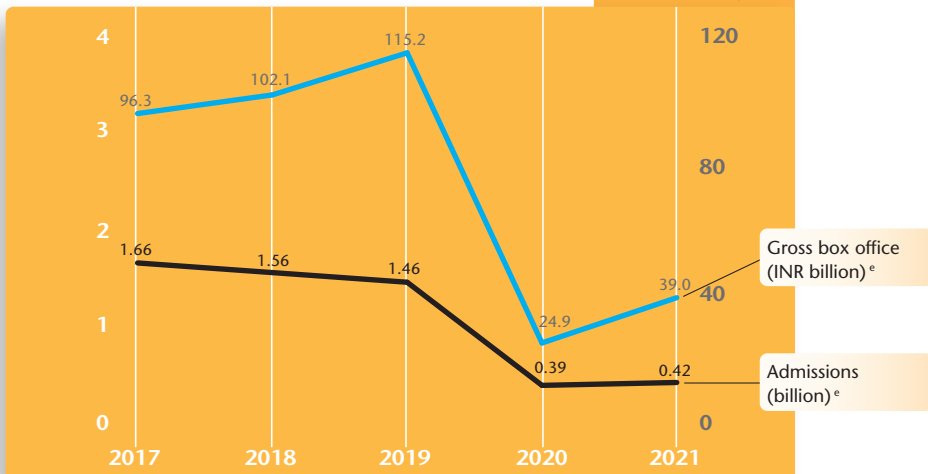
Source: Central Board of Film Certification



(1) Restated series. Figures until 2018 are based on fiscal year beginning in April of the stated year and ending in March of the following year. Figures from 2019 onwards are based on calendar years.

Admissions and gross box office in India | 2017-2021

Source: FICCI-EY, OBS



Top 10 Bollywood films by gross box office in India | 2021

GBO calculated using an average exchange rate of 1 USD = 73.9 INR.

English Title	Country of origin	Director(s)	Gross box office (in USD)
1 Sooryavanshi	IN	Rohit Shetty	32 034 978
2 83	IN	Kabir Khan	16 723 546
3 Antim - The Final Truth	IN	Mahesh Manjrekar	6 194 908
4 Bell Bottom	IN	Ranjit Tiwari	5 285 961
5 Tadap	IN	Milan Luthria	4 084 852
6 Roohi	IN	Hardik Mehta	3 712 887
7 Chandigarh Kare Aashiqui	IN	Abhishek Kapoor	3 589 800
8 Mumbai Saga	IN	Sanjay Gupta	2 787 709
9 Satyameva Jayate 2	IN	Milap Zaveri	2 120 877
10 Bunty Aur Babli 2	IN	Varun V. Sharma	1 920 692
11 Chehre	IN	Rumi Jaffery	802 092
12 Thailavii	IN	A.L. Vijay	300 277
13 Saina	IN	Amol Gupte	202 890
14 Velle	IN	Deven Munjal	79 803
15 Madam Chief Minister	IN	Subhash Kapoor	78 451
16 Bhavai	IN	Hardik Mehta	77 098
17 Koi Jaane Na	IN	Amin Hajee	70 335
18 Sandeep Aur Pinky Faraar	IN	Dibakar Banerjee	54 104
19 Faactory	IN	Faisal Khan	4 734
20 Shrimad Rajchandra	IN	Bharat Kothari	~

Source: Box Office India

Distribution and exhibition

As India was hit by new coronavirus surges, cinemas closed again in March 2021. In Mumbai, India's entertainment capital, theatres were only allowed to reopen in October whereas they resumed operations earlier in other regions. Despite the prolonged lockdowns, the Indian box office showed signs of recovery, as revenues grew by 57% to INR 39.0 billion (USD 527.5 million) in 2021. This figure is still below pre-pandemic levels, representing only one third of the takings registered in 2019. Once again, national films dominated the box office in 2021 with an 86% market share. The pandemic particularly ravaged the Bollywood sector, as domestic productions in Hindi, traditionally the mainstay of the Indian box office, only accounted for 18% of theatrical revenues for the year, compared with 46% in 2019. Only two titles shot in Hindi grossed one billion rupees or more, compared to 32 in 2019: action movie *Sooryavanshi* (totalling USD 32.0 million) followed by sports drama *83* (17.5 USD million). In turn, films in other Indian languages (including Telegu, Tamil and Kannda) cumulatively generated as much as 67% of box office grosses, up from 41% in 2019. Hollywood movies took 14% of theatrical revenues, driven by the superhero franchise film *Spider-Man: No Way Home*.

The country's screen count experienced a marginal decline to an estimated total of 9 423 screens in 2021, 50 fewer than in the previous year.

Production and funding

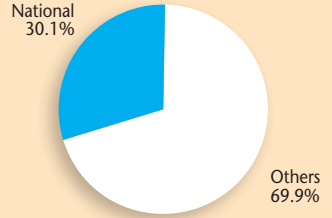
The number of Indian films certified for release rose to from 1 238 to 1 818 in 2021, slightly below the pre-pandemic average. However, with the cinemas closed, many films saw their release postponed, with severe repercussions on the industry funding ecosystem. According to the annual EY/FICCI report, only 757 Indian films were theatrically released in 2021. While this is 315 films more than in 2020, it represents a 59% decline compared to 1 833 films released in 2019.

Sources: CBFC, Ormax Media, FICCI, Ernst & Young (EY), *Variety*, Box Office India, *Fortune*

South Korea

Population 2021 ^e	51.8 million
GDP per capita 2021 ^e	35 196 USD
Gross box office 2021	584.0 bn KRW (511.6 M USD)
Admissions 2021	60.5 million
Average ticket price 2021	9 652.9 KRW (8.5 USD)
Average admissions per capita 2021	1.2
Screens 2019 2021	3 015 3 254

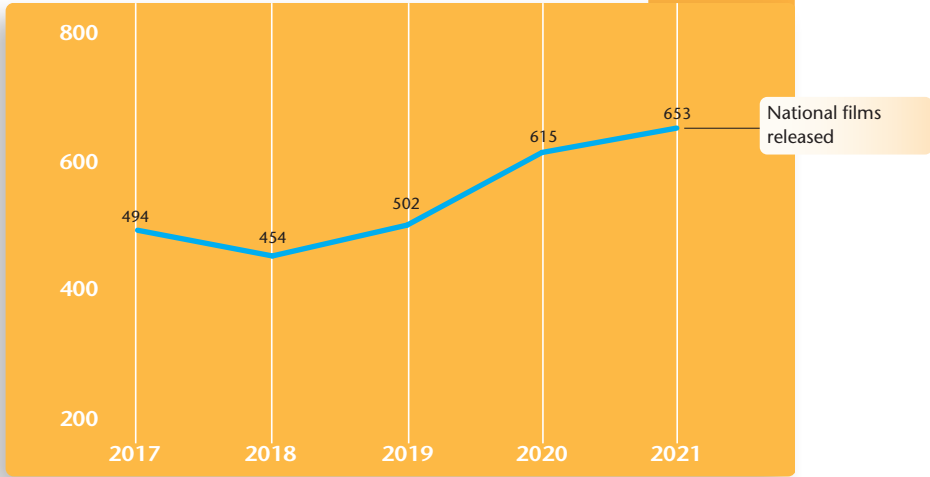
Market shares 2021 ^e



Number of Korean feature films released | 2017-2021

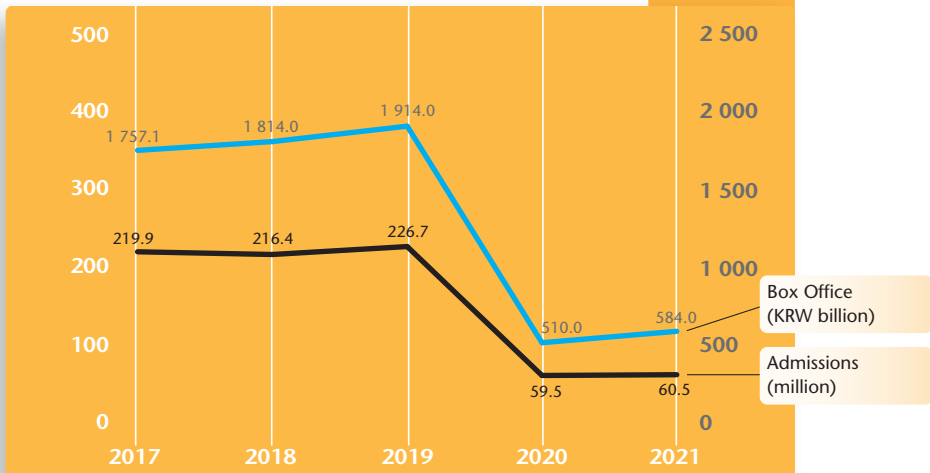
In units.

Source: KOFIC



Admissions and gross box office in South Korea | 2017-2021

Source: KOFIC



Top 20 films by admissions in South Korea | 2021

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Spider-Man: No Way Home	US	Jon Watts	Sony	5 559 768
2	Escape from Mogadishu	KR	Ryoo Seung-wan	Lotte	3 613 981
3	Eternals	US	Chloé Zhao	Disney	3 050 017
4	Black Widow	US	Cate Shortland	Disney	2 962 088
5	F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Universal	2 292 413
6	Sinkhole	KR	Ji-hoon Kim	Showbox	2 195 683
7	Venom: Let There Be Carnage	US	Andy Serkis	Sony	2 123 573
8	Demon Slayer the Movie: Mugen Train	JP	Haruo Sotozaki	Waterhole Comp.	2 151 861
9	Cruella	US	Craig Gillespie	Disney	1 983 396
10	Soul	US	P. Docter, K. Powers	Disney	2 048 228
11	Shang-Chi and the Legend of the Ten Rings	US	Destin Daniel Cretton	Disney	1 740 871
12	Dune	US/CA	Denis Villeneuve	Warner Bros.	1 549 348
13	Hostage: Missing Celebrity	KR	Pil Gam-seong	Next Entert. World	1 638 437
14	On the Line	KR	Kim Gok, Kim Sun	CJ Entertainment	1 426 357
15	No Time to Die	US	Cary Joji Fukunaga	Universal	1 229 971
16	Minari	US	Lee Isaac Chung	Pancinema Corp.	1 134 177
17	Hard Hit	KR	Kim Chang-ju	CJ Entertainment	955 809
18	The Medium	TH/KR	B. Pisanthanakun	Showbox	834 338
19	A Quiet Place: Part II	US	John Krasinski	Lotte	863 339
20	Boss Baby: Family Business	US	Tom McGrath	Universal	925 237

Source: KOFIC

Distribution and exhibition

The South Korean exhibition sector struggled to recover from the crushing impact of the pandemic, as a total of 60.5 million tickets were sold in 2021, an increase of only 1.7% on 2020. This figure barely corresponds to 27% of the record-breaking attendance registered in 2019. Due to an increase in the average ticket price, box office takings grew to a higher rate than admissions, rising by 14.5% to a total of KRW 584.0 million (USD 511.6 million), still less than one third of the 2019 GBO. This poor recovery can be ascribed to audiences' reluctance as well as to the delay of many anticipated local releases. Domestic titles, accounting on average for half the tickets sold in between 2017 and 2019, only generated 30% of ticket sales in 2021, marking a historical low. Even in 2020 national films had taken 68% of admissions, due to the lack of US blockbusters. Only 2 out of the 10 top-grossing films were Korean titles in 2021 (compared to 8 in 2020). US productions dominated the box office chart, topped by superhero franchise feature *Spider-Man: No Way Home*, totalling 5.6 million entries. Korean political thriller *Escape From Mogadishu* was the highest-grossing local title for the year, taking 3.6 million admissions, followed at some distance by disaster movie *Sinkhole*, ranking sixth with 2.2 million admissions. The postponement of release dates of Korean films also impacted

film exports, which dropped by 20.5% to USD 43 million in 2021. As diplomatic relations with China improved after a period of political tension, the comedy *Oh! My Gran* became the first Korean film to be released in China in six years. After losing 64 screens in 2020, the country's theatrical infrastructure grew again to a total of 3 254 screens in 2021, topping the 2019 number.

In an effort to curb a new surge of the pandemic, South Korea introduced new restrictions in December 2021 including limitations in cinemas' business hours. In April 2022, the lifting of pandemic-related restrictions, coupled with a new slate of US releases, raised hopes of winning back audiences to the cinema.

Production and funding

A total of 653 domestic titles were released in 2021, 38 more than in 2020. However, only 224 of these films received more than 40 theatrical screenings and ran for more than seven days.

In 2022 the Busan International Film Festival (BIFF), resumed its Asian Cinema Fund, which had been put on hold with the outbreak of the pandemic. The grant is aimed at providing post-production and script-development support to film projects by directors of Asian nationality.

Sources: KOFIC, *Screen International*, *Variety*

Other Asia

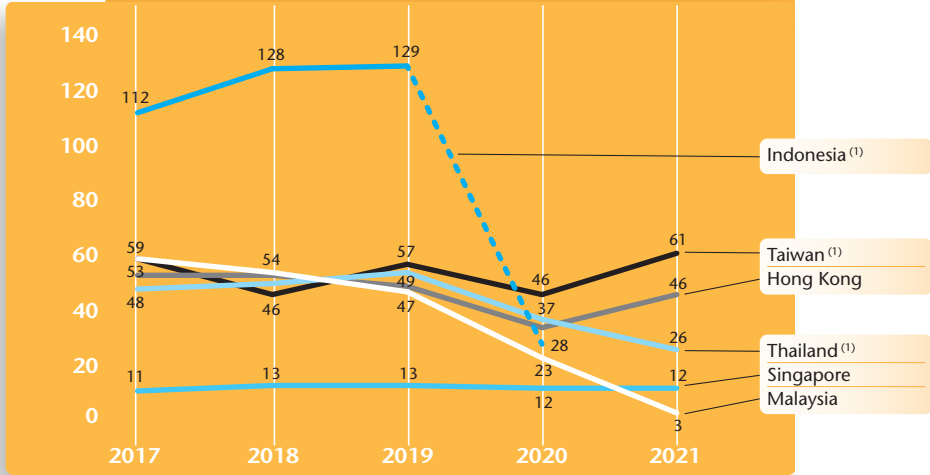
	Hong Kong	Indonesia	Malaysia	Singapore	Taiwan	Thailand
Population 2021 ^e (million)	7.5	272.2	33.4	5.7	23.5	70.0
GDP per capita 2021 ^e (USD)	49 485	4 225	11 125	66 263	33 402	7 809
Gross box office 2021 ^e (M USD)	155.5	61.3 ⁽¹⁾	5.6	59.6	177.7	35.7 ⁽¹⁾
Admissions 2021 ^e (million)	16.42	20.4 ⁽¹⁾	1.50	7.63	20.11	7.8 ⁽¹⁾
Average ticket price 2021 ^e (USD)	9.5	3.0 ⁽¹⁾	3.7	7.8	8.8	4.6 ⁽¹⁾
Average admissions per capita 2021 ^e	2.2	0.1 ⁽¹⁾	0.04 ⁽¹⁾	1.3	0.9	0.1 ⁽¹⁾
Screens 2021 ^e	323 ⁽¹⁾	2 149 ⁽¹⁾	1 185	271	945	1 321 ⁽¹⁾
National market shares 2021 ^e	21.3%	61.2% ⁽¹⁾	4.9% ⁽²⁾	2.3% ⁽²⁾	24.5%	26.7% ⁽¹⁾⁽²⁾

(1) As per March 2020 (2) 2019 (3) By GBO

Number of national films released in selected Asian countries | 2017-2021^e

In units.

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

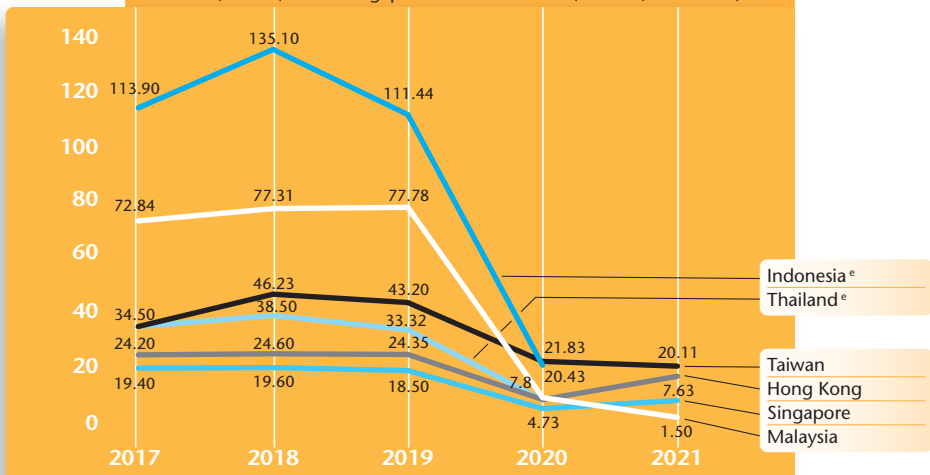


(1) Restated series (2) Includes films released until March 2020.

Admissions in selected Asian countries | 2017-2021^e

In million.

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



Top 10 films by admissions in Hong Kong | 2021

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Spider-Man: No Way Home	US	Jon Watts	Sony	1 139 654
2	Anita	HK	Lok Man Leung	Edko	908 538
3	Shang-Chi and the Legend of the...	US	Destin Daniel Cretton	Disney	867 797
4	Black Widow	US	Cate Shortland	Disney	624 814
5	No Time to Die	GB INC/US	Cary Joji Fukunaga	Universal	580 781
6	Eternals	US	Chloé Zhao	Disney	548 042
7	Godzilla vs. Kong	US	Adam Wingard	Warner Bros.	475 026
8	Soul	US	P. Docter, K. Powers	Disney	456 553
9	Zero to Hero	HK	C. Wan, J. Wan	Edko	444 985
10	Nou fo	HK/CN	Benny Chan	Emperor Motion Pict.	417 480

Sources: OBS/LUMIERE, Comscore

Top 10 films by admissions in Singapore | 2021

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Spider-Man: No Way Home	US	Jon Watts	Sony	826 590
2	Shang-Chi and the Legend of the...	US	Destin Daniel Cretton	Disney	591 004
3	Godzilla vs. Kong	US	Adam Wingard	Warner Bros.	450 267
4	Eternals	US	Chloé Zhao	Disney	310 750
5	No Time to Die	GB INC/US	Cary Joji Fukunaga	Universal	298 834
6	F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Universal	295 188
7	Venom: Let There Be Carnage	US	Andy Serkis	Sony	276 972
8	Black Widow	US	Cate Shortland	Disney	232 164
9	Dune	US/CA	Denis Villeneuve	Warner Bros.	172 312
10	Raya and the Last Dragon	US	Don Hall, ... ⁽¹⁾	Disney	162 356

(1) Carlos López Estrada, Paul Briggs, John Ripa.

Sources: OBS/LUMIERE, Comscore

Distribution and exhibition

As new pandemic waves broke out, theatrical exhibition followed varying fortunes across the region, with lockdowns and restrictive measures adopted intermittently in each territory. Admissions recovered considerably in Hong Kong, jumping by 106% to 16.4 million entries in 2021. Despite restrictions in seating capacity, annual ticket sales also rebounded in Singapore, growing by 61% to 7.6 million admissions. In contrast, attendance plummeted further in Malaysia (-83% to 1.5 million tickets sold) as theatres were only allowed to reopen in September after nearly a year of closures. After registering one of the lowest declines in worldwide ticket sales in 2020, Taiwan closed Taipei cinemas for the first time in May 2021. As the number of coronavirus cases in the country climbed, admissions further dropped by 8% to a total of 20.1 million tickets sold in 2021.

US titles went back to dominating the charts in 2021, while more diverse content could be observed among the top ranks in 2020, due to the postponement of Hollywood releases. In Hong Kong, 7 US films featured among the top-grossing titles (up from 4 films in 2020), led by superhero franchise *Spider-Man: No Way Home*. Musical drama *Anita* was the highest-earning local title for the

year, ahead of sport-themed feature *Zero to Hero*. In Singapore, no Asian film appeared among the 10 top-grossing films for the year, compared to 4 in the previous year.

After two years of cancellations and amid uncertainties due to the rise of new variants of the virus, several festivals and industry conventions are scheduling their in-person comeback in 2022.

Production and funding

Production activity took different turns across countries, as the number of films produced increased in Taiwan (+15) and in Hong Kong (+12) while decreasing in Malaysia (-20) and Thailand (-11). In a bid to support local films and promote international coproductions, Taiwan's national creative agency (TAICC) introduced a co-development programme and extended its co-funding incentive scheme to films that are not shooting in the country. In 2022 the TAICC also signed a memorandum of understanding with Netflix to boost the international exposure of high-end Taiwanese content.

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

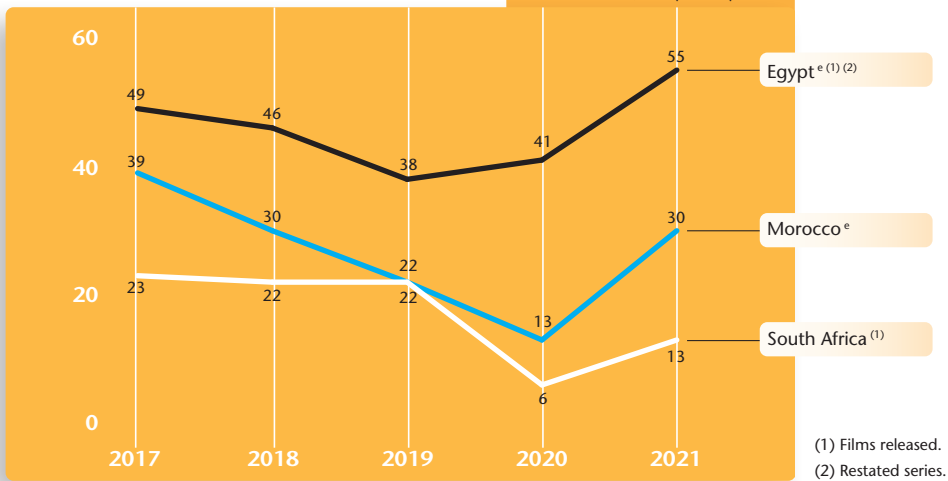
	Egypt	Morocco	South Africa
Population 2021 ^e (million)	102.9	36.0	60.5
GDP per capita 2021 ^e (USD)	3 852	3 158	6 861
Gross box office 2021 ^e (in M USD)	37.4	3.7	21.4
Admissions 2021 ^e (million)	6.4	0.7	3.7
Admissions per capita 2021 ^e	0.06	0.02	0.06
Average ticket price 2021 ^e (in USD)	5.8	5.6	5.7
Screens 2021 ^e	289 ⁽¹⁾	78	857
National market shares 2021 ^e	56.8% ⁽¹⁾⁽²⁾	19.7%	0.8% ⁽²⁾

(1) 2019 (2) By GBO.

Number of feature films produced in selected African countries | 2017-2021

In units.

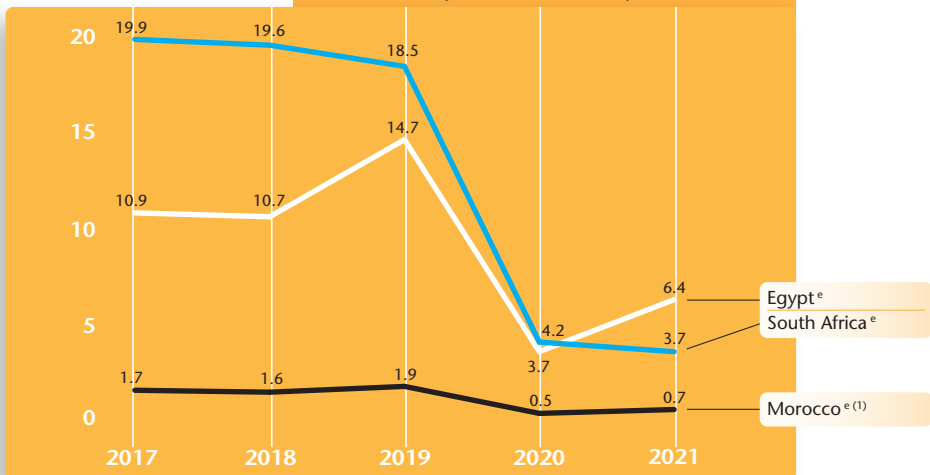
Sources: IMDb/OBS, CCM, NFVF



Admissions in selected African countries | 2017-2021

In USD million.

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



(1) Includes admissions from open-air screenings.

Top 10 films by gross box office in South Africa | 2021

	Original title	Country of origin	Director(s)	Gross box office (in USD)
1	Spider-Man: No Way Home	US	Jon Watts	5 823 831
2	No Time to Die	GB INC/US	Cary Joji Fukunaga	1 744 986
3	Sing 2	US	Garth Jennings	1 329 271
4	F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	1 083 658
5	The Eternals	US	Chloé Zhao	859 392
6	Encanto	US	J. Bush, B. Howard, C. Castro Smith	851 211
7	Shang-Chi and the Legend of the Ten...	US	Destin Daniel Cretton	847 366
8	Godzilla vs. Kong	US	Adam Wingard	834 327
9	Venom: Let There Be Carnage	US	Andy Serkis	802 365
10	Dune	US/CA	Denis Villeneuve	526 461

Sources: NFVF, Filmfinity

Top 20 films by admissions in Morocco | 2021

	Original title	Country of origin	Director(s)	Admissions
1	Spider-Man: No Way Home	US	Jon Watts	83 284
2	Trente Melyoun	MA	Rabii Chajid	60 959
3	No Time to Die	GB INC/US	Cary Joji Fukunaga	37 538
4	The Conjuring: The Devil Made Me Do It	US	Michael Chaves	22 365
5	Venom: Let There Be Carnage	US	Andy Serkis	22 079
6	F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	20 721
7	Al Kanz	MA	Omar Ghofran	18 839
8	Shang-Chi and the Legend of the Ten...	US	Destin Daniel Cretton	16 656
9	Black Widow	US	Cate Shortland	16 341
10	Dune	US/CA	Denis Villeneuve	15 244

Source: Centre Cinématographique Marocain (CCM)

South Africa

New lockdown restrictions continued to deal a hard blow to the South African exhibition circuit in 2021. Ster-Kinekor, the country's largest cinema chain, filed for business rescue due to economic losses related to the pandemic. After plunging to 4.2 million admissions in 2020, cinema attendance further dropped to 3.7 million entries in 2021, around one fifth of the tickets sold in 2019. In turn, as the average ticket prices increased, annual box office takings grew slightly to ZAR 315.8 million (USD 21.4 million), up 1.7% on the previous year. A total of 13 domestic films were theatrically released in 2021, accounting for less than 1% of the returns, compared to 3.6% in 2020. The box office chart for the year was dominated by US titles, led by *Spider-Man: No Way Home*, which clocked up a total of ZAR 86.0 million (USD 5.8 million). In 2021, South Africa partnered up with the Netherlands to launch the Thuthuka Fund, a joint initiative aimed at providing script and development support to film projects with content related to the two countries.

Morocco

After 14 months of closure due to the pandemic, Moroccan theatres were finally allowed to reopen with capacity restrictions in June 2021. Attendance grew by 30.1% to about 664 000 tickets sold in 2021, which corresponds to about one third of 2019 ticket sales. Theatrical revenues similarly recovered by 37.4% to MAD 33.5 million (USD 3.7 million). Domestic films generated 19.7% of admissions, compared to an exceptional 57.0% recorded in 2020. US blockbusters dominated the box office chart, with only two local productions among the 10 highest grossing films for the year, including the comedy *Trente Melyoun*. The country, still severely under screened for its 36.0 million inhabitants, counted a total of 78 screens in 2021, 4 more than in the previous year. Production volume got back on track with a total of 30 domestic films produced, up from 13 in 2020. The number of foreign productions also rebounded to 22 titles in 2021, 8 more than in the previous year. In 2022 Morocco announced a strategy to strengthen its cultural industry, including plans to build 150 new theatres by the end of the year and taking its tax rebate scheme for foreign productions up from 20% to 30% of eligible spend.

Sources: Filmfinity, NFVF, *Variety*, *Reuters*, CCM

Middle East

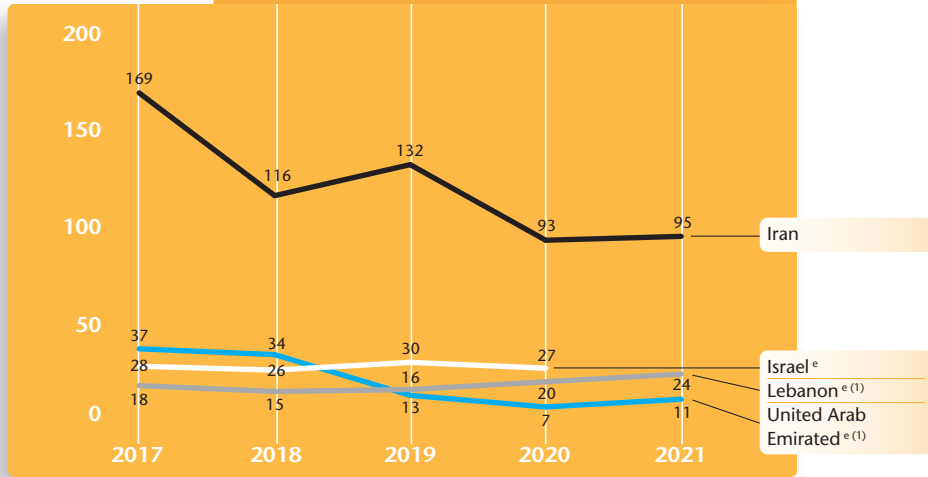
	Iran	Israel	Kuwait	Lebanon	Qatar	Saudi Arabia	United Arab Emirates
Population 2021 ^e (million)	85.0	9.4	4.7	6.825 ⁽¹⁾	2.7	35.5	9.4
GDP per capita 2021 ^e (USD)	12 725	49 840	27 927	2 785 ⁽¹⁾	61 791	23 762	43 538
Gross box office 2021 ^e (in M USD)	38.6	85.5	29.1	20.1	18.8	233.2	131.9
Admissions 2021 ^e (million)	7.1	8.4	2.3	0.5	1.3	13.1	9.9
Admissions per capita 2021 ^e	0.1	0.9	0.5	0.1	0.5	0.4	1.1
Average ticket price 2021 ^e (USD)	5.4	10.2	12.6	43.1	14.5	17.8	13.3
Screens 2021 ^e	679	411	115 ⁽²⁾	154 ⁽²⁾	139 ⁽²⁾	430	618 ⁽²⁾
National market shares 2021 ^e	98.7%	20.6%	~	~	~	~	~

(1) 2020 (2) As per March 2021

Number of films produced in selected Middle East countries | 2017-2021^e

In units.

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

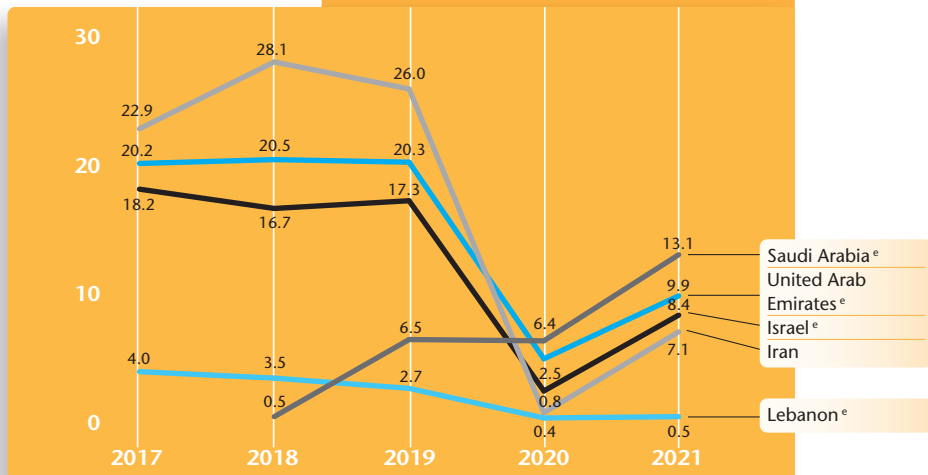


(1) Films released.

Admissions in selected Middle Eastern countries | 2017-2021^e

In millions.

Sources: UNIC, Empire Cinemas, Iranian Independents



Top 10 films by admissions in the United Arab Emirates | 2021

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Spider-Man: No Way Home ⁽¹⁾	US	Jon Watts	Columbia	633 617
2	F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Universal/Fox Star	441 821
3	No Time to Die ⁽¹⁾	GB INC/US	Cary Joji Fukunaga	Phars Film	420 174
4	Al Kameen	AE	Pierre Morel	Vox	355 341
5	Godzilla vs. Kong	US	Adam Wingard	Warner Bros./Shooting Star	338 071
6	Venom: Let There Be Carnage	US	Andy Serkis	Columbia/Empire	315 424
7	Shang-Chi and the Legend...	US	Destin Daniel Cretton	Disney/Italia Film	247 188
8	Jungle Cruise	US	Jaume Collet-Serra	Disney/Italia Film	233 844
9	Cruella	US	Craig Gillespie	Disney/Italia Film	226 567
10	Black Widow	US	Cate Shortland	Disney/Italia Film	222627

(1) Still grossing in 2022.

Source: Empire Cinemas

Top 10 films by admissions in Saudi Arabia | 2021

	Original title	Country of origin	Director(s)	Distributor	Admissions
1	Wa'fet Regala	EG	Ahmed El Gendy	Orient/Empire	859 397
2	Cruella	US	Craig Gillespie	WDSMP/IF	542 674
3	Spider-Man: No Way Home ⁽¹⁾	US	Jon Watts	Columbia	513 208
4	Wrath of Man	US/GB	Guy Ritchie	Eagle Films	485 973
5	Not me (Mesh Ana)	EG	Sarah Wafiq	N STARS	474 503
6	F9: The Fast Saga (Fast & Furious 9)	US	Justin Lin	Universal	425 594
7	No Time to Die ⁽¹⁾	GB INC/US	Cary Joji Fukunaga	Universal	423 277
8	Mom is Pregnant (Mama...	EG	Mahmoud Karim	Orient/Empire	363 221
9	Venom: Let There Be Carnage ⁽¹⁾	US	Andy Serkis	Columbia/Empire	353 519
10	A Quiet Place Part II	US	John Krasinski	Paramount	334205

(1) Still grossing in 2022.

Source: Empire Cinemas

Iran

The pandemic, coupled with unprecedented inflation rates, continued to take a hard toll on the Iranian exhibition sector as cinemas were forced to close for four months in 2021. After plummeting in 2020, GBO rose to IRR 1.6 million (USD 38.6 million) in 2021 while cinema attendance climbed to a total of 7.1 million entries. Despite a considerable year-on-year recovery, this figure represents less than one third of 2019 ticket sales. Domestic productions, traditionally the keystone of the Iranian box office, accounted for 98.7% of annual revenues, compared to 94.6 % in 2020. Excluding documentaries, the number of national productions marginally increased to 95 titles in 2021, still far behind 132 titles in 2019.

Israel

Israeli cinema attendance picked up again in 2021, rising from 2.5 million to 8.4 million tickets sold as GBO jumped to ILS 275.9 million (USD 85.5 million). While this figure is over three times the revenues registered in 2020, it only represents half the 2019 returns. One of the first countries to introduce a vaccine pass for cinemas, Israel reopened its theatres in May 2021. In February 2022, as the pandemic slowed down, the country

started to roll back the green pass requirement for several public venues, including movie theatres. In a bid to attract foreign film and TV shoots, Israel also launched a 2-year rebate scheme for an initial budget of ILS 45 million (USD 13.6 million).

Saudi Arabia

Following the removal of a 35-year ban on cinemas in 2018, Saudi Arabia saw a surge in cinema-going, supported by the rapid expansion of multiplexes. Admissions skyrocketed to an estimated 13.1 million in 2021, more than twice the figure of 2019. Annual GBO rose to SAR 874.6 (USD 233.2 million), confirming the kingdom's position of top market in the region in terms of box office returns, ahead of the United Arab Emirates. A total of 340 new titles were released in 2021, up from 222 in 2020. Egyptian comedy *Wa'fet Regala (A Stand Worthy of Men)* was the box office winner for the year, racking up more than USD 15 million and becoming the top-grossing title since cinemas were allowed to exist again. In December 2021, Saudi Arabia counted a total of 430 screens, a figure which is expected to grow to 2 600 screens by 2030.

Sources: Iranian Independents, UNIC, Variety, Screen International, Empire Cinemas

Sources (ranked by country)

FOCUS 2022 was prepared by the European Audiovisual Observatory. We would like to thank the following sources:

INCAA	AR	www.incaa.gov.ar	ANICA	IT	www.anica.it
Österreichisches Filminstitut (ÖFI)	AT	www.filminstitut.at	Cinetel	IT	www.cinetel.it
MPDAA	AU	www.mpdAA.org.au	DG Cinema e Audiovisivo – Ministero della Cultura (MiC)	IT	www.cinema.beniculturali.it
Screen Australia	AU	www.screenaustralia.gov.au	SIAE	IT	www.siae.it
Sarajevo Film Festival (SFF)	BA	www.sff.ba	Motion Picture Association of Japan (EIREN)	JP	www.eiren.org
Centre du cinéma et de l'audiovisuel (CFWB)	BE	www.audiovisuel.cfwb.be	The Association of Japanese Animation (AJA)	JP	aja.gr.jp
Cinedata	BE		Korean Film Council (KOFIC)	KR	www.koreanfilm.or.kr
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ANCINE	BR	www.ancine.gov.br	Centre national de l'audiovisuel (CNA)	LU	www.cna.public.lu
Canadian Media Prod. Assoc. (CMPA)	CA	www.cmpa.ca	Film Fund Luxembourg	LU	www.filmfund.lu
Telefilm Canada	CA	www.telefilm.ca	National Film Centre of Latvia (NFC)	LV	www.nfc.lv
Office fédéral de la statistique (OFS)	CH	www.admin.ch/bfs	Centre Cinématographique Marocain (CCM)	MA	www.ccm.ma
Ministerio de las Culturas, las Artes y el Patrimonio	CL	www.cultura.gob.cl	Film Centre of Montenegro	ME	www.mku.gov.me
National Film Bureau	CN	www.chinafilm.gov.cn	North Macedonian Film Agency	MK	www.filmfund.gov.mk
Ministerio de Cultura de Colombia	CO	www.mincultura.gov.co	IMCINE	MX	www.imcine.gob.mx
Centro Costarricense de Producción Cinematográfica (CCPC)	CR	www.centrodecine.go.cr	National Film Development Corp. of Malaysia (FINAS)	MY	www.finas.gov.my
Dept. of Cultural Services (MOECYS)	CY	www.moec.gov.cy	Netherlands Association of Film Distributors (NVF)	NL	www.filmdistributeurs.nl
Czech Film Fund	CZ	www.fondkinematografie.cz	Dutch Exhibitors Association (NVBF)	NL	www.denvbf.nl
Unie Filmovych Distributoru (UFD)	CZ	www.ufd.cz	MaccsBox	NL	www.maccsbox.nl
FFA	DE	www.ffa.de	Nederlands Filmfonds (NFF)	NL	www.filmfund.nl
SPIO	DE	www.spio.de	Film og Kino	NO	www.filmweb.no/filmogkino
Danish Film Institute (DFI)	DK	www.dfi.dk	Norsk Filminstitutt (NFI)	NO	www.nfi.no
Statistics Denmark	DK	www.dst.dk	MPDA	NZ	www.mpda.org.nz
Dirección General de Cine República Dominicana (DGCINE)	DO	dgcine.gob.do	New Zealand Film Commission	NZ	www.nzfilm.co.nz
Instituto de Cine y Creación Audiovisual (ICCA)	EC	cineaudiovisual.gob.ec	Ministerio de Cultura del Perú	PE	cultura.gob.pe
Estonian Film Institute	EE	www.filmi.ee	Film New Europe	PL	www.filmneweurope.com
Egyptian Center for Economic Studies	EG	www.eces.org.eg	Polish Film Institute (PISF)	PL	www.pisf.pl
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ICAA	ES	www.culturaydeporte.gob.es/cultura/areas/cine	Centrul National al Cinematografiei (CNC)	RO	www.cncinema.abt.ro
Europa Cinemas	EU	www.europa-cinemas.org	Russian Cinema Fund Analytics	RU	ekinobilet.fond-kino.ru
Eurostat	EU	ec.europa.eu/eurostat	Swedish Film Institute (SFI)	SE	www.sfi.se
MEDIA Salles	EU	www.mediasalles.it	Singapore Film Commission / IMDA	SG	www.imda.gov.sg
UNIC	EU	unic-cinemas.org	Slovenski Filmski Center (SFC)	SI	www.film-center.si
Finnish Film Foundation (FFF)	FI	www.ses.fi	Slovak Film Institute (SKFI)	SK	www.sfu.sk
Centre national du cinéma et de l'image animée (CNC)	FR	www.cnc.fr	NAFF BIFAN	TH	www.bifan.kr
Le film français	FR	www.lefilmfrançais.com	Antrak	TR	www.antraksinema.com
British Film Institute (BFI)	GB	www.bfi.org.uk	DG Sinema	TR	www.sinema.gov.tr
Greek Film Center	GR	www.gfc.gr	Taiwan Cinema	TW	www.taiwancinema.com
Hong Kong Box Office Ltd	HK	www.hkbo.com.hk	MPA	US	www.motionpictures.org
Croatian Audiovisual Centre (HAVCR)	HR	www.havc.hr	Dirección del Cine y Audiovisual Nacional (ICAU)	UY	icau.mec.gub.uy
National Film Office (NFO)	HU	www.nemzetifilmiroda.hu	Centro Nacional Autónomo de Cinematografía (CNAC)	VE	www.cnac.gob.ve
Film Indonesia	ID	filmindonesia.or.id	Filmfinty	ZA	
Indonesian Film Board (Badan Perfilman Indonesia/BPI)	ID	www.bpi.or.id	National Film and Video Fund (NFVF)	ZA	www.nfvf.co.za
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Statistics Iceland (HI)	IS	www.statice.is	The Hollywood Reporter		www.hollywoodreporter.com
Icelandic Film Centre	IS	www.icelandicfilmcentre.is	Variety		www.variety.com

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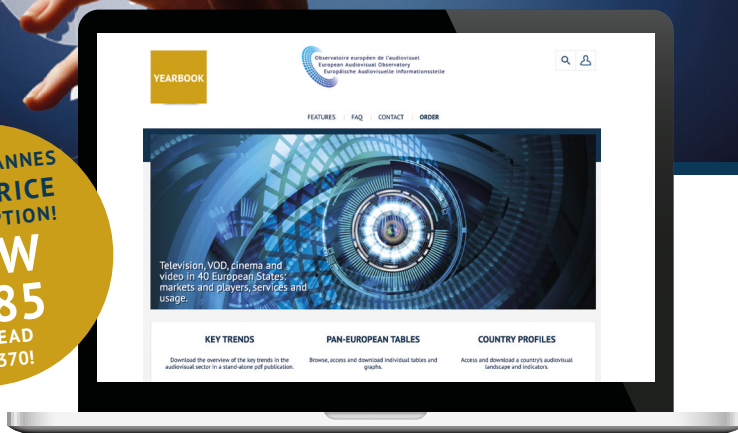
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