



MARCHÉ DU FILM
FESTIVAL DE CANNES



SPAIN
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OF HONOUR
2023

Marché du Film

focus

WORLD FILM MARKET TRENDS
TENDANCES DU MARCHÉ MONDIAL DU FILM

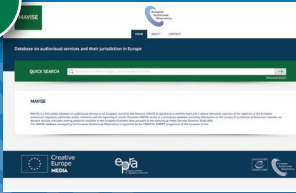


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1



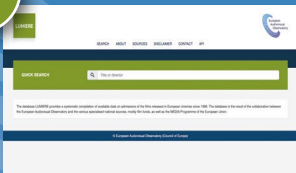
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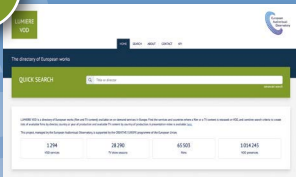
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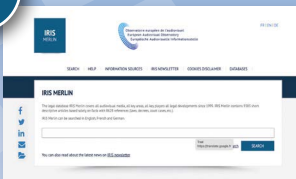
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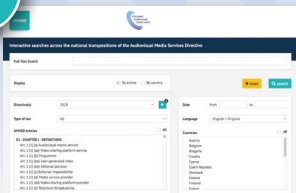
IRIS MERLIN

Database on legal issues of the audiovisual industry in Europe

IRIS Merlin legal database covers all audiovisual media, all key areas, all key players and all legal developments since 1995. It contains over 9 300 articles and references to more than 8 600 source documents.

<https://merlin.obs.coe.int>

5



AVMSDatabase

Database on the transposition of the AVMS Directive into national legislation

Primary and secondary legislation (where existing) in the 27 EU member states.

<https://avmsd.obs.coe.int>

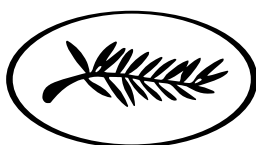
focus 2023

World Film Market Trends

Tendances du marché mondial du film



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



MARCHÉ DU FILM
FESTIVAL DE CANNES



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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

Throughout the years, the *FOCUS* has become the 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 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.

Guillaume Esmiol

Executive Director
Marché du Film

To some, predictability and continuity are values that appear old-fashioned in a rapidly changing world. But what if both were to experience some renaissance exactly because the world changes rapidly? This *FOCUS* is proudly old-fashioned and predictable in the best sense of the word because once a year it gives the professionals of the film industry some orientation as to where the journey is heading. And it has done so continuously for more than a quarter of a century.

In addition to predictability and continuity, *FOCUS* strives for reliability by offering solid comparable data, gained and made available thanks to the wonderfully reliable EFARN network and the Observatory's long-lasting trusted partnership with the Cannes Marché du Film.

This edition carries an Iberian breeze because it comes in the year of the Observatory's Portuguese Presidency and because we brought Spain, the Country of Honour of this year's Market, to the stage for the launch event.

Susanne Nikoltchev

Executive Director
European Audiovisual Observatory

Au fil des ans, le *FOCUS* 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 à Cannes pour fournir ces 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.

Guillaume Esmiol

Directeur Délégué
Marché du Film

Pour certains, la prévisibilité et la continuité sont des valeurs qui semblent désuètes dans un monde qui évolue rapidement. Et si ces deux valeurs connaissent un regain précisément parce que le monde change rapidement ? Ce *FOCUS* se targue d'être classique et prévisible dans le meilleur sens du terme, car une fois par an, il donne aux professionnels de l'industrie cinématographique des indications sur la direction dans laquelle ils s'engagent. Et il en est ainsi sans discontinuer depuis plus d'un quart de siècle.

Outre la prévisibilité et la continuité, *FOCUS* s'efforce d'être un outil de référence en offrant des données sérieuses et comparables. Ces données sont obtenues et mises à disposition grâce au réseau extrêmement fiable de l'EFARN et au partenariat de confiance de longue date de l'Observatoire avec le Marché du Film de Cannes.

Enfin, une brise ibérique souffle sur cette édition, marquée par l'année de la présidence portugaise de l'Observatoire et par l'Espagne, pays d'honneur du Marché cette année, qui sera sur le devant de la scène à l'occasion de la conférence de lancement de cette nouvelle édition.

Susanne Nikoltchev

Directrice exécutive
Observatoire européen de l'audiovisuel

focus 2023

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Diverging paths?

It is a challenge to distinguish the lasting impacts of the COVID-19 crisis on the European film industry from more structural trends. It seems indeed that, to an extent, the pandemic has accelerated or at least revealed pre-existing weaknesses. In any case, signs of diverging paths for the industry are more visible: the decrease of admissions but stable production levels, at least in Europe; cinemas focusing on art-house films and others evolving towards high-end entertainment facilities; theatrical and non-theatrical films; new commissioning business models challenging the traditional “deficit financing”. In this context, can film policies still reconcile diversity and competitiveness?

Rebound, up to where?

In 2022, about 657 million movie tickets were sold in the European Union and the United Kingdom, a remarkable recovery from the 2021 figure of 403 million admissions. Although the pre-COVID figures have not been reached yet, there are specific circumstances that can explain the gap, such as the remaining health restrictions and the impact of the Russian invasion of Ukraine. The first figures for 2023 indicate that the recovery is continuing, with box-office numbers up by 50% in Italy and 28% in Spain during the first quarter of 2023, and admissions up by 24% in France. Consulting firm Gower Street Analytics forecasts that the 2023 worldwide box office will increase by 23% compared to 2022 but will still remain 20% below the 2017-2019 average.

Where are the studios' mid-tier films?

The shortage of a certain category of Hollywood studios is likely to be one of the reasons explaining why the impact of the health crisis has not been fully offset. While the “tentpole movies” (mostly franchises) made their way to cinemas, fewer mid-tier films, notably genre films, were released. During the COVID crisis, Hollywood studios indeed directed part of their production to streaming services, including their own services, and this trend continued in 2022 as a way to attract more SVOD subscribers.

The lack of films may have impacted admissions as illustrated by US statistics: there were 37% fewer films that benefited from a wide release in 2022 compared to 2019, but on average, each of these films reached a similar box-office to 2019 levels⁽¹⁾. In any case, by the beginning of 2023, some

(1) The Cinema Foundation: State of the Cinema Industry, March 2023. Wide release: 2 000+ screens.

studios are rebalancing their strategies, but it is unclear yet what will be the final trade-off between cinema release and direct-to-SVOD.

How many European films can cinemas support?

The comparatively small number of studio films released logically resulted in a higher market share for European films in Europe but not enough to reach pre-COVID admission levels. Meanwhile, the number of European films produced remained quite stable. The crisis hence complicated an already tense situation, with only a minority of European films gaining significant admissions in cinemas – or even a proper large commercial release. On average, the top 200 European films indeed accounted for about 75% of annual admissions to European films between 2017 and 2019. The exploitation of films is obviously not limited to cinemas, but the analysis of a large sample of the financing plans of European films shows that a significant part of other exploitation rights is already sold at the financing stage⁽²⁾.

A business model for non-theatrical films?

It seems that no one questions any more the key role of cinemas for the exploitation of high-budget films, both in terms of revenues and of exposure that will benefit later exploitation windows.

But what about films with lower budgets that lack the marketing resources to significantly enter the cinema market? The business model of such films relies much more on financing than on actual exploitation. Therefore, waiving cinema exploitation to get financing from a streaming service in a direct-to-SVOD perspective can be seen as an alternative. The various schemes seem to be in flux, with some streaming services seeming to envisage to some extent more classical exploitation schemes with some level of theatrical exploitation.

However, it should be recalled that streamers only invest in a comparatively modest number of European films (in the range of 60 to 70 per year, compared to over 1 800 films produced in the EU and UK). Needless to say, streaming cannot be seen as the future dominant financing scheme for the majority of European films. The impact of streaming on film financing could be also indirect, as cinemas, distributors, and broadcasters may be weakened by the competition with SVOD services and be driven to reducing their investments in films.

So what about public support?

Public support accounted for 43% of the financing of European films in 2020⁽²⁾. It takes many forms, mainly direct, selective or automatic funding and production incentives. The variety

(2) European Audiovisual Observatory: Fiction film financing in Europe: A sample analysis of films released in 2020, February 2023.

of tools in place should serve the main goal assigned to film policies, namely fostering cultural diversity on the one hand, and improving the competitiveness of the European film industry on the other hand. But production incentives seem to be following an upward trend, considering the multiple announcements in the past months, whereas there is not such a clear trend for direct public funding. Moreover, most production incentives are open to TV series, whereas direct funding schemes are, in most countries, reserved for theatrical films. Therefore, one might ask if the balance between diversity and competitiveness is changing or even if pursuing the two goals at the same time remains compatible.

Gilles Fontaine
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Film Analyst

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Film Analyst



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heart

of the

film industry

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2023



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- **The Spanish Night**, 22 May. By invitation only



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Top 10 markets worldwide by gross box office | 2018-2022^e

In USD billion. Converted at average annual exchange rates. Ranked by 2022 values.

Sources: OBS, MPA, Omdia, Gower Street Analytics, National data sources

| Rank | Market | 2018 | 2019 | 2020 | 2021 | 2022 | Year-over-year change 2022/2021 | Comparison 2022/avg 2017-2019 |
|---|----------------------|-------------|--------------|---------------|--------------|--------------|---------------------------------|-------------------------------|
| 1 | US & Canada | 11.88 | 11.38 | 2.22 | 4.54 | 7.53 | 65.7% | 65.7% |
| 2 | China | 9.24 | 9.30 | 2.96 | 7.33 | 4.47 | -39.0% | 50.1% |
| 3 | Japan | 2.02 | 2.40 | 1.34 | 1.48 | 1.63 | 10.6% | 75.9% |
| 4 | India ⁽¹⁾ | 1.51 | 1.60 | 0.27 | 0.50 | 1.35 | 170.6% | 88.5% |
| 5 | France | 1.58 | 1.62 | 0.49 | 0.80 | 1.15 | 44.9% | 72.6% |
| 6 | United Kingdom | 1.71 | 1.60 | 0.39 | 0.75 | 1.12 | 50.0% | 67.6% |
| 7 | South Korea | 1.65 | 1.64 | 0.43 | 0.51 | 0.90 | 76.0% | 55.7% |
| 8 | Germany | 1.06 | 1.15 | 0.36 | 0.44 | 0.76 | 72.3% | 67.1% |
| 9 | Australia | 0.93 | 0.85 | 0.28 | 0.45 | 0.70 | 54.6% | 78.0% |
| 10 | Mexico | 0.85 | 0.97 | 0.15 | 0.36 | 0.57 | 58.7% | 64.2% |
| World total | | 41.8 | 42.39 | 11.8 | 21.3 | 25.9 | 21.8% | 62.1% |
| Growth rate - World | | 2.2% | 1.4% | -72.2% | 80.6% | 21.8% | 21.8% | 62.1% |
| Growth rate - Top 10 | | 5.8% | 0.3% | -72.6% | 92.8% | 17.7% | 17.7% | 63.4% |
| Growth rate - Top 10 without China | | 3.7% | 0.1% | -74.4% | 65.5% | 60.0% | 60.0% | 68.6% |

(1) Restated series.

Top 10 markets worldwide by admissions⁽¹⁾⁽²⁾ | 2018-2022^e

In million. Ranked by 2022 admissions.

Sources: OBS, Omdia, national data sources

| Rank | Market | 2018 | 2019 | 2020 | 2021 | 2022 | Year-over-year change 2022/2021 | Comparison 2022/avg 2017-2019 |
|---|----------------------------|--------------|--------------|---------------|--------------|--------------|---------------------------------|-------------------------------|
| 1 | India ⁽¹⁾ | 945 | 1 030 | 225 | 427 | 892 | 108.9% | 89.6% |
| 2 | US & Canada ⁽¹⁾ | 1 297 | 1 242 | 242 | 447 | 715 | 60.1% | 56.8% |
| 3 | China | 1 720 | 1 727 | 548 | 1 167 | 712 | -39.0% | 42.2% |
| 4 | Mexico | 320 | 342 | 55 | 110 | 173 | 57.3% | 51.9% |
| 5 | France | 201 | 213 | 65 | 96 | 152 | 59.2% | 73.1% |
| 6 | Japan | 169 | 195 | 106 | 114 | 152 | 33.2% | 84.7% |
| 7 | United Kingdom | 177 | 176 | 44 | 74 | 117 | 58.5% | 67.2% |
| 8 | South Korea | 216 | 227 | 60 | 61 | 113 | 86.4% | 51.0% |
| 9 | Brazil | 163 | 178 | 39 | 52 | 95 | 82.0% | 54.6% |
| 10 | Russian Federation | 200 | 219 | 89 | 146 | 83 | -42.9% | 39.5% |
| World total^{(1) e} | | 7 400 | 7 563 | 2 011 | 3 409 | 4 310 | 26.4% | 58.0% |
| Growth rate - World^e | | 0.7% | 2.2% | -73.4% | 69.5% | 26.4% | 26.4% | 58.0% |
| Growth rate - Top 10^e | | 0.6% | 2.6% | -73.5% | 82.8% | 19.0% | 19.0% | 58.9% |
| Growth rate - Top 10^e without China | | -1.8% | 3.6% | -75.8% | 65.0% | 63.3% | 63.3% | 66.4% |

(1) Restated series.

Top 10 markets worldwide by number of screens ⁽¹⁾ | 2018-2022^e

In units. Ranked by 2022 values.

Sources: OBS, MPA, Omdia, National data sources

| Rank | Market | 2018 | 2019 | 2020 | 2021 | 2022 | Year-over-year change 2022/2021 | Comparison 2022/avg 2017-2019 |
|---|----------------------|----------------|----------------|----------------|----------------|----------------|---------------------------------|-------------------------------|
| 1 | China | 60 079 | 69 787 | 75 581 | 82 248 | ~ | ~ | ~ |
| 2 | US & CA | 43 459 | 43 679 | 44 111 | 43 646 | 42 063 | -3.6% | 96.8% |
| 3 | India ⁽¹⁾ | 9 601 | 9 527 | 9 473 | 9 423 | ~ | ~ | ~ |
| 4 | Mexico | 7 024 | 7 493 | 7 494 | 7 361 | 7 410 | 0.7% | 105.1% |
| 5 | France | 5 983 | 6 114 | 6 127 | 6 191 | 6 298 | 1.7% | 104.9% |
| 6 | Russian Federation | 5 341 | 5 597 | 5 337 | 5 751 | 5 300 | -7.8% | 101.0% |
| 7 | Germany | 4 849 | 4 961 | 4 926 | 4 931 | 4 911 | -0.4% | 100.8% |
| 8 | UK | 4 640 | 4 782 | 4 682 | 4 610 | 4 720 | 2.4% | 101.6% |
| 9 | Japan | 3 561 | 3 583 | 3 616 | 3 648 | 3 634 | -0.4% | 102.2% |
| 10 | Spain | 3 589 | 3 695 | 3 701 | 3 631 | 3 634 | 0.1% | 100.0% |
| World total | | 186 859 | 200 954 | 207 650 | 215 337 | 212 590 | -1.3% | 114.0% |
| Growth rate - World^e | | 8.8% | 7.5% | 3.3% | 3.7% | -1.3% | -1.3% | 114.0% |
| Growth rate - Top 10^e | | 7.9% | 7.5% | -0.2% | 7.9% | -1.0% | -1.0% | 114.4% |
| Growth rate - Top 10^e without China and India | | 1.8% | 1.9% | -7.6% | 8.0% | -2.3% | -2.3% | 99.4% |

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

Top 10 markets worldwide by feature film production ⁽¹⁾ | 2018-2022^e

In units. Ranked by 2022 values.

Sources: OBS, National data sources

| Rank | Market | 2018 | 2019 | 2020 | 2021 | prov. 2022 | Year-over-year change 2022/2021 | Comparison 2022/avg 2017-2019 |
|---|-------------------------------|--------------|--------------|---------------|--------------|--------------|---------------------------------|-------------------------------|
| 1 | India ⁽²⁾ | 2 446 | 2 524 | 1 238 | 1 818 | 1 367 | -24.8% | 60.5% |
| 2 | United States ⁽³⁾ | 808 | 814 | 443 | 943 | ~ | ~ | ~ |
| 3 | China ⁽⁴⁾ | 1 082 | 1 037 | 650 | 740 | ~ | ~ | ~ |
| 4 | South Korea ⁽⁵⁾ | 454 | 502 | 615 | 653 | 703 | 7.7% | 145.4% |
| 5 | Japan | 613 | 689 | 506 | 490 | 634 | 29.4% | 100.3% |
| 6 | Italy | 273 | 325 | 252 | 313 | 357 | 14.1% | 128.6% |
| 7 | Spain ⁽⁶⁾ | 266 | 263 | 215 | 263 | 313 | 19.0% | 121.9% |
| 8 | United Kingdom ⁽⁷⁾ | 363 | 378 | 274 | 292 | 220 | ~ | ~ |
| 9 | France | 300 | 301 | 237 | 340 | 287 | -15.6% | 95.6% |
| 10 | Mexico | 186 | 216 | 111 | 259 | 258 | -0.4% | 133.9% |
| World total^e | | 9 536 | 9 871 | 6 087 | 8 263 | 8 636 | 4.5% | 92.4% |
| Growth rate - World^e | | 10.7% | 3.5% | -38.3% | 35.7% | 4.5% | 4.5% | 92.4% |
| Growth rate - Top 10^e | | 12.9% | 3.8% | -35.6% | 34.6% | -3.6% | -3.6% | 89.1% |
| Growth rate - Top 10^e without China and India | | 0.9% | 6.9% | -23.9% | 33.9% | 6.6% | 6.6% | 113.8% |

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

(2) Films certified.

(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 2022 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 50 films by gross box office worldwide | 2022⁽¹⁾

In USD million.

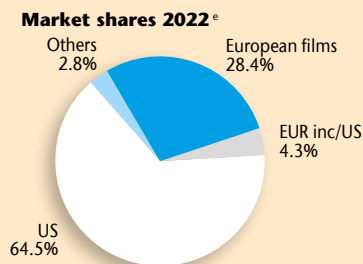
| Original title | Country of origin | Studio | North American box office | Rest of the world box office | Global box office |
|---|-------------------|--------------------------|---------------------------|------------------------------|-------------------|
| 1 Avatar: The Way of Water | US | Disney | 683.7 | 1 634.7 | 2 318.4 |
| 2 Top Gun: Maverick | US | Paramount | 718.7 | 774.8 | 1 493.5 |
| 3 Jurassic World: Dominion | US/CN | Universal | 376.9 | 625.1 | 1 002.0 |
| 4 Doctor Strange in the Multiverse of Madness | US | Disney | 411.3 | 544.4 | 955.8 |
| 5 Minions: The Rise of Gru | US | Universal | 369.7 | 569.9 | 939.6 |
| 6 Black Panther: Wakanda Forever | US | Disney | 453.8 | 405.4 | 859.2 |
| 7 The Batman | US | Warner Bros. | 369.3 | 401.6 | 770.9 |
| 8 Thor: Love and Thunder | US | Disney | 343.3 | 417.7 | 760.9 |
| 9 Chang jin hu zhi shui men qiao (Water Gate Bridge) | CN | Multiple distributors | 0.1 | 626.5 | 626.6 |
| 10 Puss in Boots: The Last Wish | US | Universal | 185.5 | 294.4 | 480.0 |
| 11 Du xing yue qiu (Moon Man) | CN | Multiple distributors | ~ | 460.2 | 460.2 |
| 12 Fantastic Beasts: The Secrets of Dumbledore | GB inc/US | Warner Bros. | 95.9 | 311.3 | 407.2 |
| 13 Sonic the Hedgehog 2 | US/JP | Paramount | 190.9 | 214.5 | 405.4 |
| 14 Uncharted | US/DE | Sony | 148.6 | 253.1 | 401.7 |
| 15 Black Adam | US/CA/NZ/HU | Warner Bros. | 168.2 | 225.1 | 393.3 |
| 16 Elvis | US/AU | Warner Bros. | 151.0 | 136.7 | 287.7 |
| 17 The Bad Guys | US | Universal | 97.2 | 152.9 | 250.2 |
| 18 Bullet Train | US/JP | Sony | 103.4 | 135.9 | 239.3 |
| 19 Lightyear | US | Disney | 118.3 | 108.1 | 226.4 |
| 20 Smile | US | Paramount | 105.9 | 111.5 | 217.4 |
| 21 Zhe ge sha shou bu tai leng jing (To Cool to Kill) | CN | Multiple distributors | 0.2 | 217.1 | 217.3 |
| 22 Qi ji · Ben xiao hai (Nice View) | CN | Multiple distributors | ~ | 211.0 | 211.0 |
| 23 DC League of Super-Pets | US | Warner Bros. | 93.7 | 113.8 | 207.5 |
| 24 The Lost City | US | Paramount | 105.3 | 87.6 | 192.9 |
| 25 One Piece Film: Red | JP | Toei | 12.8 | 174.4 | 187.2 |
| 26 M3GAN | US/NZ | Universal | 95.0 | 81.1 | 176.1 |
| 27 Nope | US/JP/CA | Universal | 123.3 | 48.0 | 171.2 |
| 28 Ticket to Paradise | US/GB | Universal | 68.3 | 100.2 | 168.4 |
| 29 Morbius | US | Sony | 73.9 | 93.6 | 167.5 |
| 30 The Black Phone | US | Universal | 90.1 | 71.3 | 161.4 |
| 31 RRR | IN | Multiple distributors | 14.5 | 146.4 | 160.9 |
| 32 Suzume | JP | Toho | 8.6 | 151.7 | 160.3 |
| 33 Where the Crawdads Sing | US | Sony | 90.2 | 50.0 | 140.2 |
| 34 The First Slam Dunk | JP | Toei | ~ | 138.9 | 138.9 |
| 35 Everything Everywhere All at Once | US | A24 | 77.2 | 61.5 | 138.7 |
| 36 Scream | US | Paramount | 81.6 | 56.1 | 137.7 |
| 37 Death on the Nile | US/GB | Disney | 45.6 | 91.7 | 137.3 |
| 38 A Man Called Otto | US/SE | Sony | 64.3 | 44.8 | 109.1 |
| 39 Halloween Ends | US | Universal | 64.1 | 40.2 | 104.3 |
| 40 Lyle, Lyle, Crocodile | US | Multiple distributors | 46.9 | 57.2 | 104.1 |
| 41 Beomjodosi 2 (The Roundup) | KR | Sony | 0.8 | 100.3 | 101.2 |
| 42 The Woman King | US/CA | Sony | 67.3 | 29.9 | 97.3 |
| 43 Downton Abbey: A New Era | GB inc/US | Universal | 44.1 | 48.5 | 92.6 |
| 44 K.G.F: Chapter 2 | IN | Multiple distributors | 2.9 | 86.2 | 89.1 |
| 45 Don't Worry Darling | US | Warner Bros. | 45.3 | 42.3 | 87.6 |
| 46 Dragon Ball Super: Super Hero | JP | Toei | 38.1 | 48.5 | 86.6 |
| 47 Dog | US | United Artists Releasing | 61.8 | 23.0 | 84.8 |
| 48 Jackass Forever | US | Paramount | 57.7 | 22.8 | 80.6 |
| 49 The Menu | US | Disney | 38.5 | 41.1 | 79.6 |
| 50 Avatar (2022 Re-release) | US | 20th Century Fox | 24.7 | 51.3 | 76.0 |

(1) Refers to cumulative GBO as of April 2023.

Sources: Box Office Mojo/OBS

Europe 28⁽¹⁾

| | |
|---|---------------------------|
| Population 2022 ^e | 514.4 million |
| GDP per capita 2022 ^e | 53 566 USD |
| Gross box office 2022 ^e | 5.07 bn EUR (5.34 bn USD) |
| Admissions 2022 ^e | 656.9 million |
| Average ticket price 2022 ^e | 7.7 EUR (8.1 USD) |
| Average admissions per capita 2022 ^e | 1.3 |
| Screens 2021 2022 | 32 485 32 564 |



Cinema markets in the EU and the UK in 2022 one third lower than pre-pandemic average

While most sanctions were lifted early on in the year, 2022 was still characterised by many of the challenges observed during the preceding pandemic years, including hesitance among audiences to return to cinemas, a lower number of US titles releases, a weak summer slate and some remaining restrictions during the first half of the year in some countries. As a result, cinema attendance in the EU and the UK increased by 63% from 403 million in 2021 to an estimated 657 million in 2022, representing 67% of the average pre-pandemic admission level registered between 2017 and 2019. Similarly, GBO grew by an estimated 70% from EUR 2.99 billion to an estimated EUR 5.07 billion, accounting for 72% of the average pre-pandemic box office level. Thanks to public crisis support, screen figures continued to remain comparatively stable at cumulative level, decreasing by less than 300 screens from 32 833 screens in 2019, to 32 564 screens operational in the EU and the UK in 2022.

While admissions increased in all EU member states and the UK, there were significant differences with regard to the year-on-year growth which ranged from a 241% increase in Latvia to a 19% increase in Poland. The same is true for recovery rates, where Denmark and the Czech Republic were the leading European markets with admissions reaching 82% and 81% of the pre-pandemic average, respectively. At the other end of the spectrum, cinema attendance in Italy and Greece represented only 49% and 57% of their pre-pandemic averages.

Admissions growth in 2022 was primarily driven by the return of US blockbusters and a strong performance of European films. US films are esti-

mated to have sold around 421 million tickets in 2022, 173 million more than in 2021, generating about 66% of their average pre-pandemic admissions. European films sold an estimated 185 million tickets, 77 million more than in 2021 and about 69% of their pre-pandemic average. The estimated market share of European films hence increased from 26.8% in 2021 to 28.4% in 2022, which is at the higher end of its normal range. US market share grew from 61.8% in 2021 to an estimated 64.5%, which is practically at pre-pandemic levels, while EUR inc films and films from the rest of the world captured above average market shares of 4.3% and 2.8%, respectively.

Production levels in the EU and the UK reach second highest level

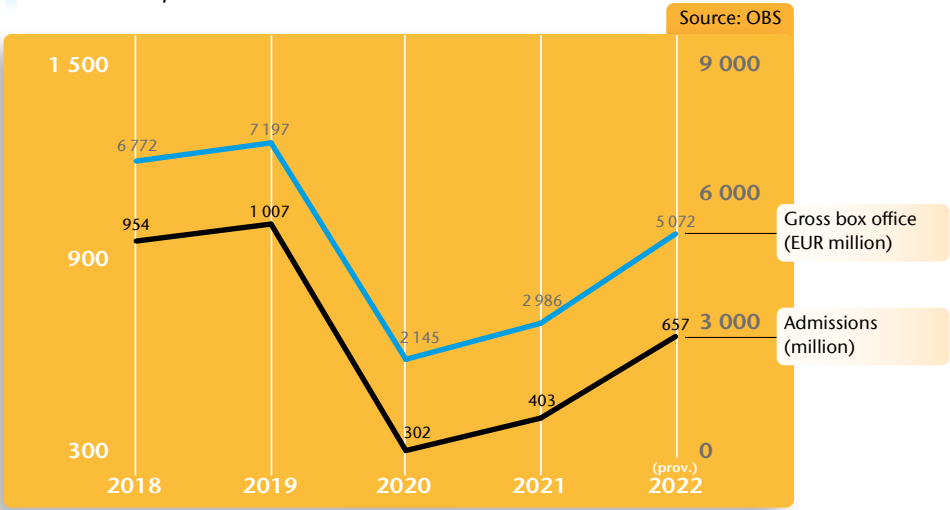
European film production seems to be fully back on its pre-pandemic growth track. An estimated total of 1 960 feature films were produced in the EU and the UK in 2022. This is 194 films more than in 2021 and represents the second highest production level registered after the record high of 2 037 feature film productions in 2019. This growth was primarily driven by an increased production of feature documentaries, which increased by 116 films to a total of 771 feature documentaries, as fiction films increased by “only” 78 films to a total of 1 189 films.

Trends differ between countries also due to different methodologies in counting productions: in those markets where film production is measured as films actually released 2022 figures almost matched pre-pandemic figures. Whereas in markets where film production is measured e.g. in terms of films starting principal photographs or being certified, the 2022 production activity often exceeded its pre-pandemic levels.

Source: European Audiovisual Observatory (OBS)

(1) Europe 28 refers to the 27 EU member states and the UK. Please note that all 2022 figures for Europe 28 are provisional estimates. “EUR inc” refers to films produced in Europe with US studio incoming investment.

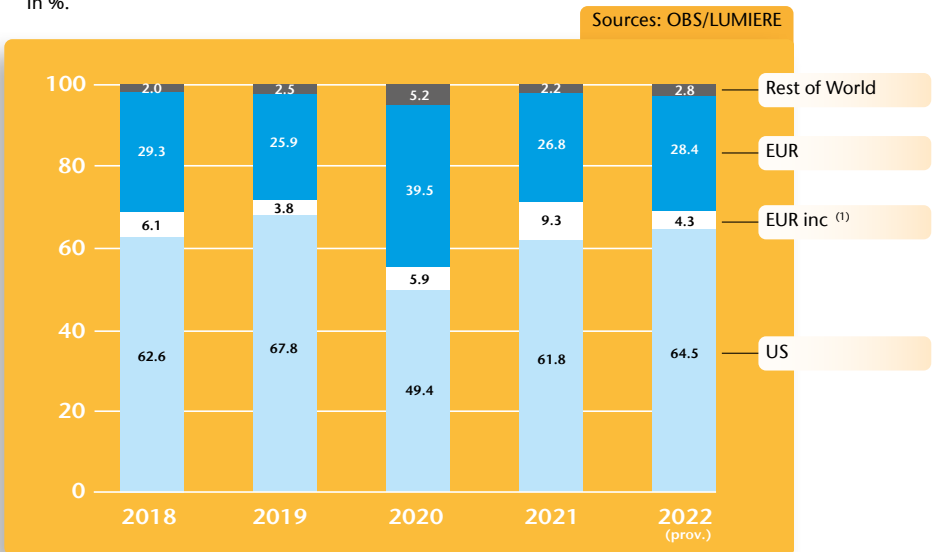
Admissions and GBO in the European Union & GB ⁽¹⁾
2018-2022 prov.



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

Breakdown of EU & GB admissions by nationality of films | 2018-2022^e

In %.



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

Number of feature films produced in the European Union & GB | 2018-2022 *prov.*

In units.

| Country | | 2018 | 2019 | 2020 | 2021 | prov. 2022 | Sources |
|------------------------------|------------------------|------|------|------|------|---------------|-------------------------------|
| Austria | 100% national fiction | 12 | 14 | 4 | 9 | 11 | Austrian Film Institute |
| | maj. co-prod. fiction | 5 | 1 | 1 | 3 | 8 | Austrian Film Institute |
| | min. co-prod. fiction | 9 | 3 | 3 | 6 | 4 | Austrian Film Institute |
| | Feature documentaries | 25 | 26 | 16 | 14 | 18 | Austrian Film Institute |
| Belgium⁽¹⁾ | 100% national fiction | 14 | 9 | 1 | 12 | 3 | CFWB / VAF |
| | maj. co-prod. fiction | 13 | 20 | 12 | 16 | 16 | CFWB / VAF |
| | min. co-prod. fiction | 31 | 28 | 25 | 33 | 23 | CFWB / VAF |
| | Feature documentaries | 17 | 14 | 6 | 8 | 20 | CFWB / VAF |
| Bulgaria | 100% national fiction | 5 | 9 | 12 | 9 | 8 | National Film Center |
| | maj. co-prod. fiction | 1 | 2 | 2 | 2 | 2 | National Film Center |
| | min. co-prod. fiction | 5 | 1 | 4 | 4 | 6 | National Film Center |
| | Feature documentaries | 10 | 12 | 7 | 6 | 8 | National Film Center |
| Cyprus^e | 100 % national fiction | 2 | 2 | 2 | 1 | 1 | Dept. of Cult Services/MOECYS |
| | maj. co-prod. Fiction | 1 | 0 | 0 | 3 | 3 | Dept. of Cult Services/MOECYS |
| | min. co-prod. Fiction | 0 | 0 | 1 | 1 | 4 | Dept. of Cult Services/MOECYS |
| | Feature documentaries | 0 | 1 | 1 | 1 | 1 | Dept. of Cult Services/MOECYS |
| Croatia | 100% national fiction | 10 | 6 | 2 | 3 | 8 | Croatian Audiovisual Centre |
| | maj. co-prod. fiction | 4 | 6 | 1 | 4 | 8 | Croatian Audiovisual Centre |
| | min. co-prod. fiction | 8 | 15 | 3 | 5 | 11 | Croatian Audiovisual Centre |
| | Feature documentaries | 14 | 13 | 11 | 11 | 12 | Croatian Audiovisual Centre |
| Czech Rep. | 100% national fiction | 23 | 21 | 16 | 21 | 24 | State Cinematography Fund |
| | maj. co-prod. fiction | 13 | 16 | 7 | 14 | 15 | State Cinematography Fund |
| | min. co-prod. fiction | 11 | 12 | 7 | 14 | 18 | State Cinematography Fund |
| | Feature documentaries | 30 | 39 | 30 | 35 | 39 | State Cinematography Fund |
| Denmark⁽²⁾ | 100% national fiction | 13 | 10 | 14 | 17 | 7 | Danish Film Institute |
| | maj. co-prod. fiction | 9 | 9 | 6 | 4 | 12 | Danish Film Institute |
| | min. co-prod. fiction | 10 | 9 | 8 | 9 | 8 | Danish Film Institute |
| | Feature documentaries | 26 | 28 | 30 | 24 | 27 | Danish Film Institute |
| Estonia⁽²⁾ | 100% national fiction | 6 | 9 | 5 | 6 | 5 | Estonian Film Institute |
| | maj. co-prod. fiction | 1 | 3 | 4 | 1 | 5 | Estonian Film Institute |
| | min. co-prod. fiction | 3 | 2 | 5 | 2 | 2 | Estonian Film Institute |
| | Feature documentaries | 11 | 12 | 9 | 14 | 12 | Estonian Film Institute |
| Finland⁽³⁾ | 100% national fiction | 18 | 17 | 17 | 12 | 13 | Finnish Film Foundation |
| | maj. co-prod. fiction | 0 | 2 | 4 | 4 | 4 | Finnish Film Foundation |
| | min. co-prod. fiction | 7 | 4 | 4 | 6 | 6 | Finnish Film Foundation |
| | Feature documentaries | 24 | 23 | 21 | 18 | 17 | Finnish Film Foundation |
| France | 100% national fiction | 141 | 138 | 115 | 169 | 114 | CNC |
| | maj. co-prod. fiction | 48 | 46 | 25 | 52 | 51 | CNC |
| | min. co-prod. fiction | 56 | 52 | 45 | 69 | 68 | CNC |
| | Feature documentaries | 55 | 65 | 52 | 50 | 54 | CNC |
| Germany⁽²⁾ | 100% national fiction | 78 | 96 | 44 | 57 | 65 | SPIO |
| | maj. co-prod. fiction | 35 | 38 | 24 | 22 | 32 | SPIO |
| | min. co-prod. fiction | 40 | 23 | 23 | 28 | 30 | SPIO |
| | Feature documentaries | 94 | 108 | 61 | 78 | 71 | SPIO |
| Greece^{(2)e} | 100% national fiction | 9 | 12 | 6 | 12 | 10 | GFC / OBS |
| | maj. co-prod. fiction | 2 | 5 | 2 | 8 | 5 | GFC / OBS |
| | min. co-prod. fiction | 4 | 4 | 0 | 1 | 6 | GFC / OBS |
| | Feature documentaries | 10 | 9 | 2 | 7 | 3 | GFC / OBS |
| Hungary | 100% national fiction | 15 | 11 | 13 | 16 | 13 | National Film Office (NMHH) |
| | maj. co-prod. fiction | 2 | 4 | 3 | 2 | 1 | National Film Office (NMHH) |
| | min. co-prod. fiction | 1 | 3 | 2 | 8 | 6 | National Film Office (NMHH) |
| | Feature documentaries | 0 | 1 | 3 | 0 | 3 | National Film Office (NMHH) |
| Ireland | 100% national fiction | 3 | 6 | 5 | 4 | 3 | Screen Ireland |
| | maj. co-prod. fiction | 11 | 4 | 3 | 7 | 9 | Screen Ireland |
| | min. co-prod. fiction | 6 | 6 | 3 | 3 | 4 | Screen Ireland |
| | Feature documentaries | 14 | 10 | 7 | 12 | 7 | Screen Ireland |
| Italy | 100% national fiction | 147 | 160 | 124 | 127 | 168 | MiBACT |
| | maj. co-prod. fiction | 23 | 32 | 27 | 45 | 29 | MiBACT |
| | min. co-prod. fiction | 10 | 11 | 12 | 14 | 13 | MiBACT |
| | Feature documentaries | 93 | 122 | 89 | 127 | 147 | MiBACT |

Continued

Number of feature films produced in the European Union & GB | 2018-2022 *prov.*

In units.

| Country | | 2018 | 2019 | 2020 | 2021 | prov. 2022 | Sources |
|--|--------------------------------|--------------|--------------|--------------|--------------|---------------|-------------------------------------|
| Latvia ⁽²⁾ | 100% national fiction | 6 | 10 | 5 | 4 | 9 | National Film Centre of Latvia |
| | maj. co-prod. fiction | 3 | 2 | 2 | 3 | 8 | National Film Centre of Latvia |
| | min. co-prod. fiction | 1 | 5 | 2 | 0 | 4 | National Film Centre of Latvia |
| | Feature documentaries | 17 | 20 | 6 | 5 | 20 | National Film Centre of Latvia |
| Lithuania ⁽²⁾ | 100% national fiction | 9 | 10 | 8 | 6 | 12 | Lithuanian Film Centre |
| | maj. co-prod. fiction | 2 | 4 | 0 | 0 | 2 | Lithuanian Film Centre |
| | min. co-prod. fiction | 3 | 2 | 2 | 3 | 4 | Lithuanian Film Centre |
| | Feature documentaries | 9 | 9 | 2 | 3 | 8 | Lithuanian Film Centre |
| Luxembourg ^{(2) e} | 100% national fiction | 0 | 1 | 0 | 0 | 0 | OBS/LFF |
| | maj. co-prod. fiction | 3 | 2 | 1 | 2 | 3 | OBS/LFF |
| | min. co-prod. fiction | 8 | 14 | 10 | 9 | 15 | OBS/LFF |
| | Feature documentaries | 4 | 3 | 4 | 3 | 3 | OBS/LFF |
| Malta ^e | Total | 11 | 4 | 2 | 5 | 4 | IMDB/OBS |
| The Netherlands | 100% national fiction | 23 | 26 | 25 | 30 | 29 | NFF |
| | maj. co-prod. fiction | 11 | 16 | 6 | 9 | 18 | NFF |
| | min. co-prod. fiction | 21 | 15 | 16 | 24 | 20 | NFF |
| | Feature documentaries | 31 | 40 | 19 | 18 | 32 | NFF |
| Poland | 100% national fiction | 25 | 27 | 15 | 26 | 38 | Polish Film Institute |
| | maj. co-prod. fiction | 4 | 13 | 3 | 12 | 6 | Polish Film Institute |
| | min. co-prod. fiction | 5 | 14 | 1 | 14 | 15 | Polish Film Institute |
| | Feature documentaries | 8 | 39 | 5 | 38 | 26 | Polish Film Institute |
| Portugal | 100% national fiction | 13 | 12 | 7 | 8 | 14 | ICA |
| | maj. co-prod. fiction | 8 | 4 | 2 | 3 | 7 | ICA |
| | min. co-prod. fiction | 2 | 6 | 3 | 4 | 9 | ICA |
| | Feature documentaries | 20 | 15 | 13 | 20 | 26 | ICA |
| Romania | 100% national fiction | 32 | 38 | 23 | 32 | ~ | Centrul National al Cinematografiei |
| | maj. co-prod. fiction | 10 | 3 | 5 | 6 | ~ | Centrul National al Cinematografiei |
| | min. co-prod. fiction | 1 | 2 | 5 | 6 | ~ | Centrul National al Cinematografiei |
| | Feature documentaries | 7 | 11 | 8 | 11 | ~ | Centrul National al Cinematografiei |
| Slovakia | 100% national fiction | 1 | 8 | 0 | 1 | 5 | Slovak Film Institute |
| | maj. co-prod. fiction | 6 | 7 | 4 | 3 | 13 | Slovak Film Institute |
| | min. co-prod. fiction | 12 | 13 | 7 | 12 | 12 | Slovak Film Institute |
| | Feature documentaries | 14 | 16 | 17 | 10 | 19 | Slovak Film Institute |
| Slovenia ⁽²⁾ | 100% national fiction | 2 | 6 | 0 | 5 | 2 | Slovenian Film Center |
| | maj. co-prod. fiction | 4 | 5 | 1 | 2 | 5 | Slovenian Film Center |
| | min. co-prod. fiction | 3 | 8 | 5 | 7 | 6 | Slovenian Film Center |
| | Feature documentaries | 12 | 12 | 7 | 10 | 23 | Slovenian Film Center |
| Spain ⁽⁷⁾ | 100% national fiction | 95 | 85 | 76 | 92 | 99 | ICAA |
| | maj. co-prod. fiction | 26 | 22 | 17 | 28 | 40 | ICAA |
| | min. co-prod. fiction | 14 | 21 | 9 | 7 | 18 | ICAA |
| | Feature documentaries | 131 | 135 | 113 | 136 | 156 | ICAA |
| Sweden ⁽²⁾ | 100% national fiction | 22 | 20 | 15 | 12 | 22 | SFI |
| | maj. co-prod. fiction | 9 | 9 | 6 | 5 | 8 | SFI |
| | min. co-prod. fiction | 0 | 14 | 5 | 10 | 9 | SFI |
| | Feature documentaries | 20 | 25 | 22 | 22 | 27 | SFI |
| United Kingdom ⁽⁴⁾ | 100% national fiction | 179 | 171 | 151 | 146 | 76 | BFI |
| | maj. co-prod. fiction | 9 | 9 | 12 | 10 | 7 | BFI |
| | min. co-prod. fiction | 16 | 18 | 10 | 18 | 18 | BFI |
| | Feature documentaries | 89 | 78 | 53 | 52 | 29 | BFI |
| | Inward features ⁽⁵⁾ | 70 | 102 | 48 | 66 | 90 | BFI |
| Total fiction films EU 27 & GB ^{(6) e} | | 1 171 | 1 221 | 887 | 1 111 | 1 189 | OBS |
| Total feature docs. EU 27 & GB ^{(6) e} | | 717 | 816 | 554 | 655 | 771 | OBS |
| Total feature films EU 27 & GB ^{(6) e} | | 1 888 | 2 037 | 1 441 | 1 766 | 1 960 | OBS |

(1) CFWB counts films certified. VAF counts only feature films released which received public support.

(2) Films on first release

(3) Films receiving national support.

(4) The decline of film productions in 2022 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 10 theatrical experimental feature films in 2022, 12 in 2021, 6 in 2020 and 2 in 2019.

Admissions in the European Union & GB | 2018-2022 prov.

In millions. Provisional data.

| ISO | Country | 2018 | 2019 | 2020 | 2021 | prov. 2022 | 2022/21 | Sources |
|--|--------------------------------|------------|--------------|------------|------------|---------------|---------------|--|
| AT | Austria ^e | 12.9 | 13.7 | 3.9 | 5.2 | 10.0 | 91.3% | Austrian Film Institute |
| BE | Belgium ^e | 18.8 | 19.9 | 5.6 | 7.5 | 14.1 | 88.1% | VAF/CFWB/Cinedata/SPF Economie/FCB |
| BG | Bulgaria | 4.9 | 5.0 | 1.3 | 2.6 | 4.0 | 55.0% | National Film Center |
| CY | Cyprus ^e | 0.8 | 0.8 | 0.2 | 0.3 | 0.5 | 70.6% | Dept. of Cultural Services/MOECYS |
| CZ | Czech Republic | 16.3 | 18.3 | 6.4 | 7.1 | 13.5 | 89.0% | Czech Film Fund |
| DE | Germany | 105.4 | 118.6 | 38.1 | 42.1 | 78.0 | 85.4% | FFA |
| DK | Denmark | 12.5 | 12.8 | 7.0 | 6.6 | 10.2 | 54.5% | Statistics Denmark/ Danish Film Institute |
| EE | Estonia | 3.6 | 3.7 | 1.8 | 1.4 | 2.3 | 68.0% | Estonian Film Institute |
| ES | Spain ^e | 98.9 | 104.9 | 27.0 | 41.7 | 61.7 | 47.8% | ICAA/OBS |
| FI | Finland ^e | 8.1 | 8.4 | 3.9 | 3.4 | 5.8 | 70.2% | Finnish Film Foundation |
| FR | France | 201.2 | 213.2 | 65.3 | 95.5 | 152.0 | 59.2% | CNC |
| GB | United Kingdom | 177.0 | 176.1 | 44.0 | 74.0 | 117.3 | 58.5% | BFI/DCM |
| GR | Greece ^e | 9.4 | 9.6 | 3.1 | 3.1 | 5.5 | 79.2% | Greek Film Center |
| HR | Croatia | 4.6 | 4.9 | 1.4 | 2.5 | 3.2 | 32.1% | Croatian Audiovisual Centre |
| HU | Hungary ^e | 15.5 | 15.2 | 4.3 | 6.2 | 10.2 | 64.1% | National Film Office |
| IE | Ireland ^e | 15.8 | 15.1 | 3.7 | 5.8 | 10.5 | 81.2% | Screen Ireland |
| IT | Italy ^e | 91.7 | 104.4 | 30.3 | 26.8 | 47.9 | 78.7% | SIAE/Cinetel/ANICA |
| LT | Lithuania | 4.3 | 4.2 | 1.5 | 1.3 | 3.0 | 123.8% | Lithuanian Film Centre |
| LU | Luxembourg ^e | 1.1 | 1.1 | 0.3 | 0.5 | 0.8 | 53.0% | CNA |
| LV | Latvia | 2.5 | 2.7 | 0.9 | 0.5 | 1.7 | 240.8% | National Film Centre of Latvia |
| MT | Malta | 0.8 | 0.7 | 0.2 | 0.3 | ~ | ~ | National Statistics Office Malta |
| NL | Netherlands | 35.7 | 38.0 | 16.8 | 14.3 | 25.0 | 75.0% | NFF/MaccsBox - NVB & NVF |
| PL | Poland | 59.7 | 60.6 | 19.7 | 35.2 | 41.8 | 18.7% | Polish Film Institute |
| PT | Portugal | 14.8 | 15.5 | 3.8 | 5.5 | 9.6 | 75.1% | Instituto do Cinema e do Audiovisual |
| RO | Romania | 13.3 | 14.3 | 3.1 | 4.7 | ~ | ~ | Centrul National al Cinematografiei |
| SE | Sweden | 16.4 | 15.9 | 5.7 | 6.0 | 10.4 | 72.8% | Swedish Film Institute |
| SI | Slovenia | 2.5 | 2.4 | 0.6 | 0.7 | 1.8 | 154.2% | Slovenian Film Centre |
| SK | Slovak Republic | 6.0 | 6.5 | 2.4 | 2.0 | 4.3 | 112.7% | Slovak Film Institute/ UFD |
| EU 27 & GB - Total ^e | | 954 | 1 007 | 302 | 403 | 657 | 63.1% | European Audiovisual Observatory |

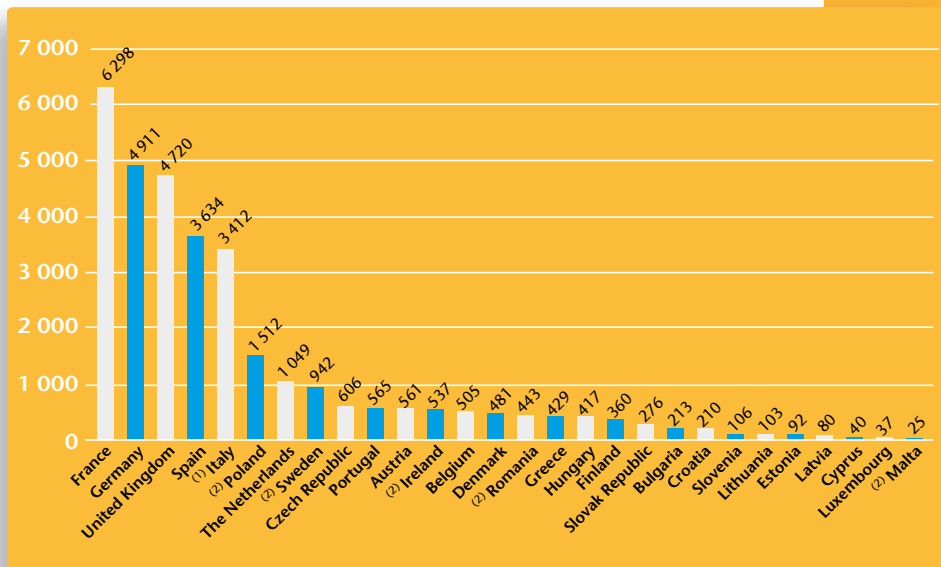
Source: OBS

Number of screens in the EU & GB by country

December 2022^e

In units.

Source: OBS



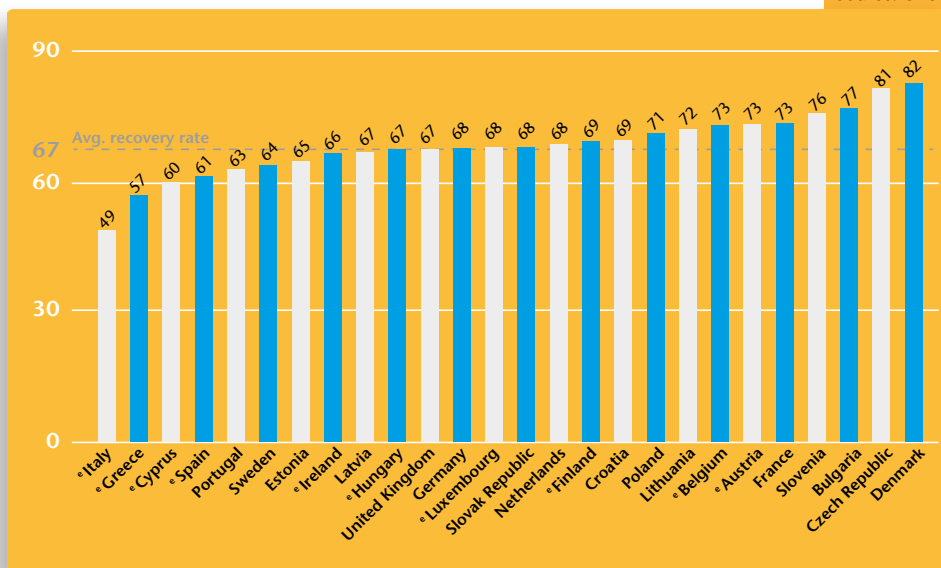
(1) Commercial screens covered by Cinetel, excluding open air cinemas.
 (2) Estimated as of December 2021.

Relative recovery rates of admissions in the EU & GB by country

2022 in relation to average 2017 to 2019

In %.

Source: OBS



The tables below offer provisional rankings based on the analysis of partially fragmentary data for 26 EU member states and the UK representing 95% of all admissions in the EU and the UK.

Top 25 films by admissions in the European Union and GB | 2022 prov.

| Original title | Country of origin | Director(s) | Release markets | Admissions ^{prov.} |
|---|-------------------|--|-----------------|-----------------------------|
| 1 Top Gun: Maverick | US | Joseph Kosinski | 27 | 34 448 555 |
| 2 Avatar: The Way of Water | US | James Cameron | 27 | 30 616 827 |
| 3 Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | 27 | 30 224 524 |
| 4 Doctor Strange in the Multiverse of... | US | Sam Raimi | 27 | 19 997 651 |
| 5 Jurassic World: Dominion | US/CN | Colin Trevorrow | 26 | 18 122 320 |
| 6 Thor: Love and Thunder | US | Taika Waititi | 27 | 17 977 694 |
| 7 The Batman | US | Matt Reeves | 27 | 17 573 872 |
| 8 Fantastic Beasts: The Secrets of... | GB Inc/US | David Yates | 27 | 14 974 458 |
| 9 Black Panther: Wakanda Forever | US | Ryan Coogler | 27 | 14 935 168 |
| 10 Uncharted | US/DE | Ruben Fleischer | 27 | 13 768 468 |
| 11 Sonic the Hedgehog 2 | US/JP | Jeff Fowler | 27 | 12 634 129 |
| 12 Spider-Man: No Way Home ⁽²⁾ | US | Jon Watts | 25 | 12 500 847 |
| 13 Sing 2 ⁽³⁾ | US | Garth Jennings | 26 | 10 588 630 |
| 14 Black Adam | US/CA/NZ/HU | Jaume Collet-Serra | 27 | 9 880 005 |
| 15 Elvis | US/AU | Baz Luhrmann | 27 | 8 981 174 |
| 16 DC League of Super-Pets | US | Jared Stern, Sam Levine | 27 | 7 626 901 |
| 17 Smile | US | Parker Finn | 27 | 7 527 678 |
| 18 Bullet Train | US/JP | David Leitch | 27 | 7 095 505 |
| 19 Ticket to Paradise | US/GB | Ol Parker | 27 | 6 772 541 |
| 20 The Bad Guys | US | Pierre Perifel | 25 | 6 259 200 |
| 21 The Lost City | US | Adam Nee, Aaron Nee | 27 | 5 218 720 |
| 22 Death on the Nile | US/GB | Kenneth Branagh | 27 | 5 209 175 |
| 23 Lightyear | US | Angus MacLane | 27 | 4 945 583 |
| 24 Puss in Boots: The Last Wish | US | J. Crawford, J. Mercado | 24 | 4 843 613 |
| 25 Morbius | US | Daniel Espinosa | 27 | 4 334 368 |

(1) J. del Val.

(3) 2 547 695 admissions in the EU and GB in 2021.

Source: OBS/LUMIERE

(2) 26 720 934 admissions in the EU and GB in 2021.

Top 25 European films (including EUR inc) by admissions in the European Union and GB | 2022 prov.

| Original title | Country of origin | Director(s) | Release markets | Admissions ^{prov.} |
|--|-----------------------------|-------------------------|-----------------|-----------------------------|
| 1 Fantastic Beasts: The Secrets of... | GB inc/US | David Yates | 27 | 14 974 458 |
| 2 Downton Abbey: A New Era | GB inc/US | Simon Curtis | 26 | 4 069 478 |
| 3 Qu'est-ce qu'on a tous fait au bon Dieu? | FR/BE | Philippe de Chauveron | 12 | 3 840 981 |
| 4 Belfast | GB | Kenneth Branagh | 24 | 3 668 958 |
| 5 The King's Man ⁽¹⁾ | GB inc/US | Matthew Vaughn | 27 | 3 277 387 |
| 6 Tad the Lost Explorer and the Emerald... | ES | Enrique Gato | 15 | 3 245 285 |
| 7 Roald Dahl's Matilda the Musical | GB inc/US | Matthew Warchus | 2 | 2 656 504 |
| 8 Die Schule der magischen Tiere 2 | DE | Sven Unterwaldt Jr. | 3 | 2 621 213 |
| 9 Padre no hay más que uno 3 | ES | Santiago Segura | 1 | 2 432 276 |
| 10 Novembre (November) | FR | Cédric Jimenez | 4 | 2 408 882 |
| 11 Simone, le voyage du siècle | FR | Olivier Dahan | 4 | 2 349 514 |
| 12 Ooops! The Adventure Continues ⁽²⁾ | DE/IE/LU | T. Genkel, S. McCormack | 12 | 2 287 910 |
| 13 Maison de retraite (The Villa) | FR/CH | Thomas Gilou | 6 | 2 102 673 |
| 14 Triangle of Sadness | SE/DE/FR/... ⁽⁵⁾ | Ruben Östlund | 25 | 2 043 732 |
| 15 Super-héros malgré lui (Superwho?) ⁽³⁾ | FR | Philippe Lacheau | 10 | 1 964 933 |
| 16 Wunderschön | DE | Karoline Herfurth | 4 | 1 758 781 |
| 17 Guglhupfgeschwader | DE | Ed Herzog | 3 | 1 671 172 |
| 18 En corps (Rise) | FR/BE/NL | Cédric Klapisch | 7 | 1 541 208 |
| 19 Listy do M. 5 (Letters to Santa 5) | PL | Lukasz Jaworski | 5 | 1 461 065 |
| 20 Hopper et le hamster des ténèbres | BE/FR | B. Stassen, B. Mousquet | 22 | 1 315 279 |
| 21 Ducobu Président ! | FR/BE | Elie Semoun | 3 | 1 217 883 |
| 22 The Duke ⁽⁴⁾ | GB | Roger Michell | 9 | 1 216 422 |
| 23 The Banshees of Inisherin | IE inc/US/GB | Martin McDonagh | 2 | 1 193 567 |
| 24 Mrs. Harris Goes to Paris | GB/FR/HU/... ⁽⁶⁾ | Anthony Fabian | 22 | 1 178 833 |
| 25 Rheingold | DE/IT/NL | Fatih Akin | 3 | 1 026 740 |

(1) 534 004 admissions in the EU and GB in 2021.

(4) 2 271 admissions in the EU and GB in 2021.

Source: OBS/LUMIERE

(2) 418 300 and 407 575 admissions in the EU and GB in 2020 and 2021, respectively.

(5) ...GB/MX/TR/GR/US/DK/CH

(6) ...CA/US/BE

(3) 37 273 admissions in the EU and GB in 2021.

Top 25 European films by admissions in the Europa Cinemas Network ⁽¹⁾ | 2022

| Original title | Country of origin ⁽²⁾ | Director(s) | Release markets | Admissions ^{prov.} |
|---|----------------------------------|-------------------------------------|-----------------|-----------------------------|
| 1 Triangle of Sadness | SE/DE/FR/... ⁽³⁾ | Ruben Östlund | 32 | 1 133 774 |
| 2 Verdens verste menneske (The Worst...) | NO/FR/SE | Joachim Trier | 31 | 445 941 |
| 3 En corps (Rise) | FR/BE | Cédric Klapisch | 12 | 416 340 |
| 4 Madres paralelas (Parallel Mothers) | ES | Pedro Almodóvar | 32 | 413 619 |
| 5 El buen patrón (The Good Boss) | ES | F. León de Aranoa | 29 | 314 407 |
| 6 As bestas (The Beasts) | ES/FR | Rodrigo Sorogoyen | 8 | 312 168 |
| 7 Close | BE/NL/FR | Lukas Dhont | 23 | 286 887 |
| 8 Competencia oficial (Official...) | ES/AR | M. Cohn, G. Duprat | 29 | 277 995 |
| 9 Qu'est-ce qu'on a tous fait au Bon Dieu ? | FR | Philippe de Chauveron | 14 | 269 141 |
| 10 Ennio (Ennio: The Maestro) | IT/BE/NL/JP | Giuseppe Tornatore | 25 | 261 200 |
| 11 La Panthère des neiges (The Velvet...) | FR | M. Amiguet, V. Munier | 23 | 254 673 |
| 12 Alcarràs | ES/IT | Carla Simon | 29 | 247 389 |
| 13 L'Innocent (The Innocent) | FR | Louis Garrel | 10 | 240 378 |
| 14 Ouistreham (Between Two Worlds) | FR | Emmanuel Carrère | 21 | 235 327 |
| 15 Boy From Heaven (Walad Min Al Janna) | SE/FR/FI/DK | Tarik Saleh | 15 | 227 451 |
| 16 Wunderschön | DE | Karoline Herfurth | 7 | 217 216 |
| 17 Un autre monde (Another World) | FR | Stéphane Brizé | 11 | 207 534 |
| 18 Corsage | AT/LU/DE/FR | Marie Kreutzer | 26 | 206 753 |
| 19 La Nuit du 12 (The Night of the 12th) | FR/BE | Dominik Moll | 8 | 203 869 |
| 20 Le otto montagne (The Eight Mountains) | IT/BE/FR | C. Vandermersch, ... ⁽⁴⁾ | 18 | 179 597 |
| 21 Simone, le voyage du siècle (Simone...) | FR | Olivier Dahan | 4 | 178 537 |
| 22 Hytti nro 6 (Compartment No. 6) | FI/RU/EE/DE | Juho Kuosmanen | 19 | 174 095 |
| 23 Mittagsstunde | DE | Lars Jessen | 2 | 165 572 |
| 24 Illusions perdues (Lost Illusions) | FR/BE | Xavier Giannoli | 24 | 157 825 |
| 25 La Stranezza (Strangeness) | IT | Roberto Andò | 2 | 155 883 |

(1) Data based on Europa Cinemas members in 33 MEDIA countries, 707 cities, 1 168 cinemas, 2 782 screens.

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

(3) ...GB/MX/TR/GR/US/DK/CH

(4) F. van Groeningen

Sources: Europa Cinemas, OBS

Top 25 European films (including EUR inc) by admissions in the US & Canada | 2022^e

Admissions estimated based on the average ticket price of USD 9.57 as communicated by Comscore.

| Original title | Country of origin | Director(s) | Distributor (US) | Admissions ^e |
|------------------------------------|--------------------------------|----------------------------------|-----------------------|-------------------------|
| 1 Fantastic Beasts: The Secrets... | GB inc/US | David Yates | Warner Bros. | 10 015 762 |
| 2 Downton Abbey: A New Era | GB inc/US | Simon Curtis | Focus Features | 4 612 492 |
| 3 The King's Man | GB inc/US | Matthew Vaughn | 20th Century Fox | 1 604 738 |
| 4 Mrs. Harris Goes to Paris | GB/FR/HU/... ⁽¹⁾ | Anthony Fabian | Focus Features | 1 090 273 |
| 5 The Banshees of Inisherin | IE inc/GB/US | Martin McDonagh | Fox Searchlight Pict. | 938 554 |
| 6 Bones and All | IT/US | Luca Guadagnino | United Artists Rel. | 818 695 |
| 7 Men | GB | Alex Garland | A24 Films | 792 879 |
| 8 Fall | GB/US | Scott Mann | Lionsgate | 756 585 |
| 9 Eight for Silver | GB/FR/US | Sean Ellis | Neon Rated | 479 456 |
| 10 Triangle of Sadness | SE/DE/FR/GB/... ⁽¹⁾ | Ruben Östlund | Neon Rated | 429 047 |
| 11 Cyrano | GB/CA/US | Joe Wright | United Artists Rel. | 404 715 |
| 12 The Outfit | GB/US | Graham Moore | Focus Features | 349 429 |
| 13 Verdens verste menneske | NO/FR/SE | Joachim Trier | Neon Rated | 317 114 |
| 14 Belfast | GB | Kenneth Branagh | Focus Features | 243 016 |
| 15 Gigi & Nate | CH/GB/US | Nick Hamm | Roadside Attractions | 238 330 |
| 16 Madres paralelas | ES | Pedro Almodóvar | Sony | 225 447 |
| 17 Le loup et le lion | FR/CA | Gilles de Maistre | Blue Fox Entertain. | 216 528 |
| 18 Infinite Storm | GB/PL/AU | M. Szumowska, ... ⁽³⁾ | Bleecker Street | 167 246 |
| 19 The Duke | GB | Roger Michell | Sony | 159 558 |
| 20 Medieval | CZ | Petr Ják | Variance Films | 143 608 |
| 21 Aftersun | GB/US | Charlotte Wells | A24 Films | 109 652 |
| 22 Man of God | GR | Yelena Popovic | Fathom Events | 98 116 |
| 23 Empire of Light | GB/US | Sam Mendes | Fox Searchlight Pict. | 87 207 |
| 24 Petite maman (Little Mom) | FR | Céline Sciamma | Neon Rated | 86 631 |
| 25 The Phantom of the Open | GB | Craig Roberts | Sony | 78 245 |

Note: A total of 169 European films (including 4 EUR inc films) were identified among the top 858 films on release in the US and Canada in 2022, generating cumulative admissions of 25.6 million (3.6% market share)

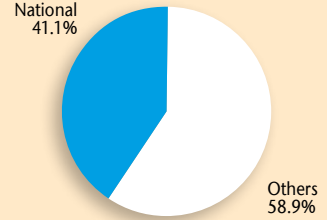
(1) ...CA/US/BE (2) ...MX/TR/GR/US/DK/CH (3) Michal Englert, Michael Engler

Sources: Comscore, OBS/LUMIERE

France

| | |
|---|---------------------------|
| Population 2022 ^e | 67.8 million |
| GDP per capita 2022 ^e | 42 330 USD |
| Gross box office 2022 ^e | 1.09 bn EUR (1.15 bn USD) |
| Admissions 2022 ^e | 152.0 million |
| Average ticket price 2022 ^e | 7.2 EUR (7.6 USD) |
| Average admissions per capita 2022 ^e | 2.2 |
| Screens 2021 2022 | 6 191 6 298 |

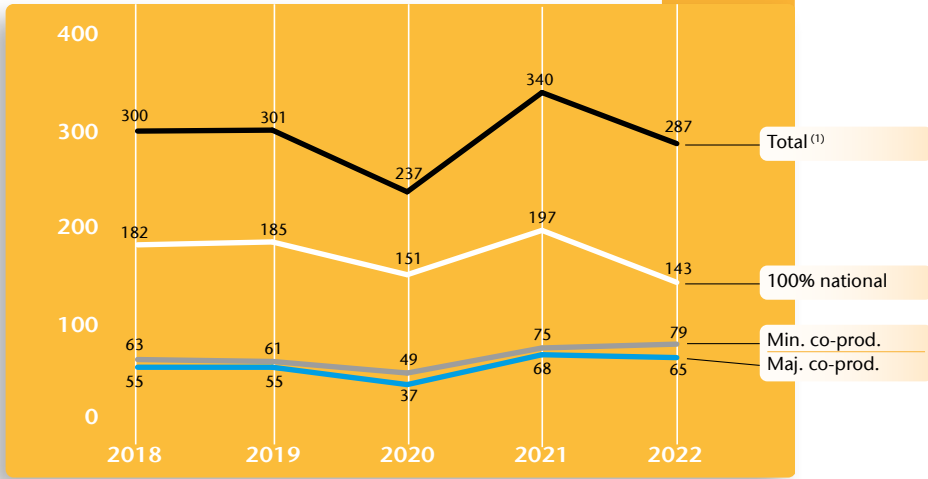
Market shares 2022^e



Number of French feature films produced | 2018-2022

In units.

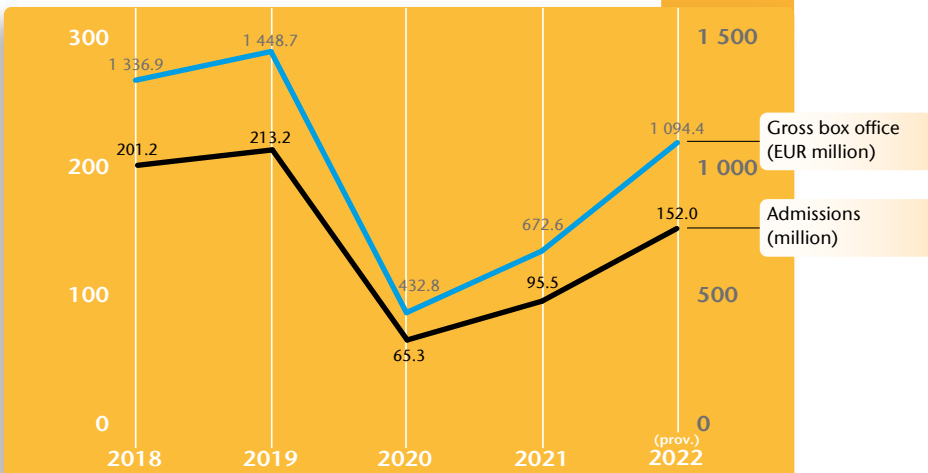
Source: CNC



(1) Officially recognised films.

Admissions and gross box office in France | 2018-2022

Source: CNC



Top 20 films by admissions in France | 2022

| | Original title | Country of origin | Director(s) | Distributor | Admissions |
|----|--|-------------------|--|--------------------------|------------|
| 1 | Top Gun: Maverick | US | Joseph Kosinski | Paramount | 6 695 326 |
| 2 | Avatar: The Way of Water | US | James Cameron | Disney | 5 871 743 |
| 3 | Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | Universal | 3 962 359 |
| 4 | Black Panther: Wakanda Forever | US | Ryan Coogler | Disney | 3 563 317 |
| 5 | Jurassic World: Dominion | US/CN | Colin Trevorrow | Universal | 3 552 448 |
| 6 | Doctor Strange in the Multiverse... | US | Sam Raimi | Disney | 3 473 682 |
| 7 | The Batman | US | Matt Reeves | Warner Bros. | 3 042 031 |
| 8 | Thor: Love and Thunder | US | Taika Waititi | Disney | 3 036 509 |
| 9 | Fantastic Beasts: The Secrets of... | GB inc/US | David Yates | Warner Bros. | 2 774 045 |
| 10 | Uncharted | US/DE | Ruben Fleischer | Sony | 2 512 268 |
| 11 | Qu'est-ce qu'on a tous fait au bon Dieu? | FR/BE | Philippe de Chauveron | UGC | 2 450 513 |
| 12 | Novembre (November) | FR | Cédric Jimenez | StudioCanal | 2 371 646 |
| 13 | Simone, le voyage du siècle | FR | Olivier Dahan | Warner Bros. | 2 270 976 |
| 14 | Sonic the Hedgehog 2 | US/JP | Jeff Fowler | Paramount | 2 247 872 |
| 15 | Black Adam | US/CA/NZ/HU | Jaume Collet-Serra | Warner Bros. | 2 071 991 |
| 16 | Maison de retraite (The Villa) | FR/CH | Thomas Gilou | UGC | 2 043 971 |
| 17 | Puss in Boots: The Last Wish | US | J. Crawford, J. Mercado | Universal | 1 991 611 |
| 18 | Super-héros malgré lui | FR | Philippe Lacheau | Studio... ⁽²⁾ | 1 829 733 |
| 19 | Lightyear | US | Angus MacLane | Disney | 1 564 819 |
| 20 | Bullet Train | US/JP | David Leitch | Sony | 1 539 774 |

(1) J. del Val. (2) Canal/TF1 Studio

Source: CNC

Distribution and exhibition

Cinema attendance in France climbed from 95.5 million in 2021 to 152.0 million in 2022. While this represents an annual increase of 59%, admissions still remained 27% below their pre-pandemic average of 208 million. Driven by an increase in the average ticket price, GBO grew by 63% from EUR 673 million in 2021 to EUR 1.09 billion in 2022, about 21 % lower than the EUR 1.39 billion generated on average between 2017 and 2019. In terms of recovery, the French market was hence among the European markets with the highest recovery rate and well above the EU average of 67%. The number of screens in France actually increased with 6 298 screens operating in 2022, compared to 6 114 in 2019.

The year-on-year growth was driven by a continued strong performance of local titles as well as US studio titles, the latter accounting for all of the top 10 titles in 2022. However, “only” a total of 30 films sold more than 1 million tickets in 2022, compared to an average of 50 films before the pandemic. Led by comedy sequel *Qu'est-ce qu'on a tous fait au bon Dieu?* (FR), a total of five French productions featured among the top 20 films, compared to eight in 2021 and two in 2019. National market share remained above the pre-pandemic average of 37% for the third year in a row, with French films capturing 41.1% of total admissions, as US films took 40.5% of total admissions.

Production and funding

After reaching a record high of 340 feature films officially approved by the country's national funding body, the CNC, in 2021, the number of French feature films approved decreased to 287 in 2022, but remained only slightly below the previous pre-pandemic record levels of 300 films. The drop in production figures was entirely driven by a fall of 100% in national films while the number of international co-productions exceeded pre-pandemic levels and reached a record high of 144 films. The mean production cost of French initiative films increased for the second year in a row and reached EUR 4.4 million, the highest level since 2017 (EUR 4.9 million).

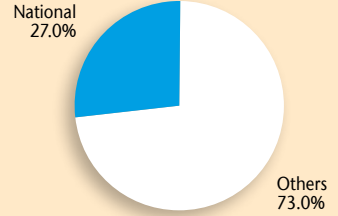
Total investment in film production in France decreased from EUR 1.36 billion in 2021 to EUR 1.18 billion but remained stable in comparison to the pre-pandemic average (EUR 1.19 billion). The majority of French film financing comes from producers (including tax incentives; 39.5%), broadcasters (32%), pre-sales (13.6%) and direct public funding (7.9%). Amidst ongoing discussions as regards the window system, France opened - as of January 2023 - direct public support to French based producers for projects pre-financed by foreign platforms, subject to local investment obligations and a limited duration of rights that can be acquired by streamers.

Sources: CNC, Screen International, OBS

Germany

| | |
|-------------------------------------|---------------------------|
| Population 2022* | 83.2 million |
| GDP per capita 2022* | 48 398 USD |
| Gross box office 2022* | 722.0 M EUR (760.3 M USD) |
| Admissions 2022* | 78.0 million |
| Average ticket price 2022* | 9.3 EUR (9.8 USD) |
| Average admissions per capita 2022* | 0.9 |
| Screens 2021 2022 | 4 931 4 911 |

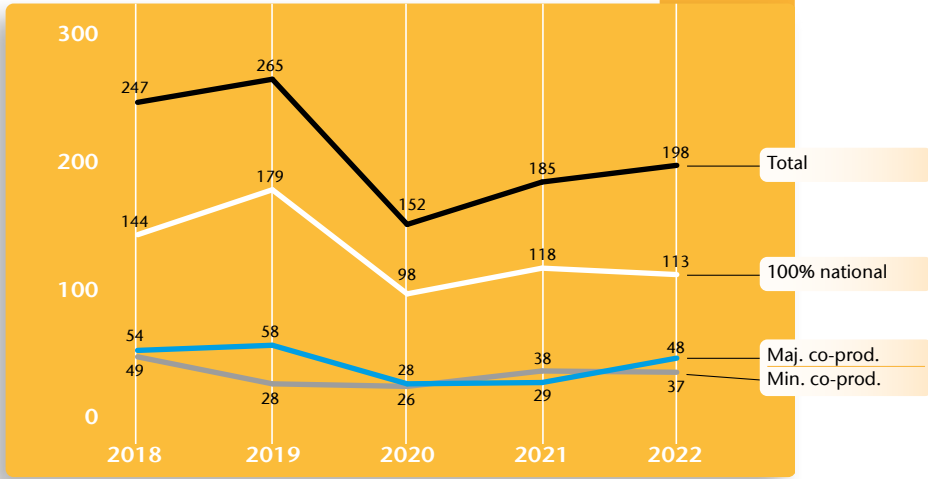
Market shares 2022*



Number of German feature films produced ⁽¹⁾ | 2018-2022

In units.

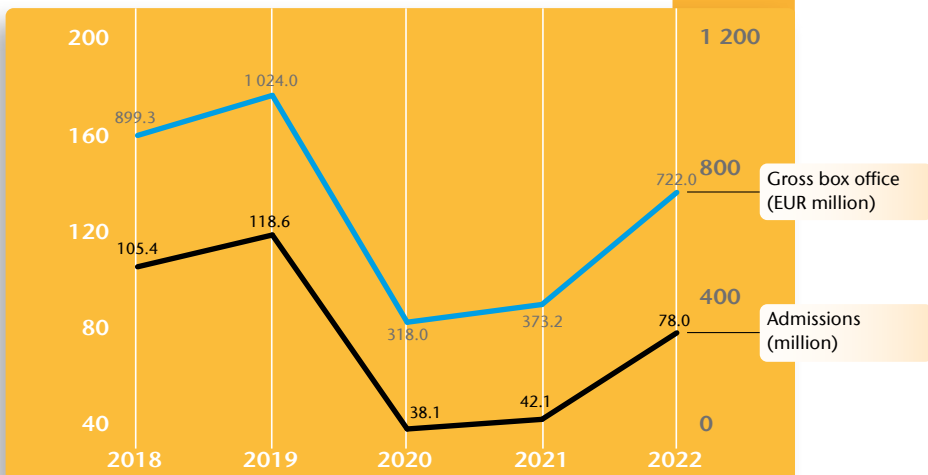
Source: SPIO



(1) Films on first release.

Admissions and gross box office in Germany | 2018-2022

Source: FFA



Top 20 films by admissions in Germany | 2022

| Original title | Country of origin | Director(s) | Distributor | Admissions |
|---------------------------------------|-------------------|----------------------------------|-----------------|------------|
| 1 Avatar: The Way of Water | US | James Cameron | Disney | 4 532 531 |
| 2 Minions: The Rise of Gru | US | K. Balda, B. Ableson, J. del Val | Universal | 4 158 830 |
| 3 Top Gun: Maverick | US | Joseph Kosinski | Paramount | 3 713 883 |
| 4 Fantastic Beasts: The Secrets of... | GB inc/US | David Yates | Warner Bros. | 3 009 440 |
| 5 Die Schule der magischen Tiere 2 | DE | Sven Unterwaldt Jr. | Leonine Distr. | 2 376 607 |
| 6 Doctor Strange in the Multiverse... | US | Sam Raimi | Disney | 2 192 115 |
| 7 Jurassic World Dominion | US/CN | Colin Trevorrow | Universal | 2 165 752 |
| 8 Spider-Man: No Way Home | US | Jon Watts | Sony | 2 069 013 |
| 9 Thor: Love and Thunder | US | Taika Waititi | Disney | 1 892 254 |
| 10 The Batman | US | Matt Reeves | Warner Bros. | 1 745 377 |
| 11 Wunderschön | DE | Karoline Herfurth | Warner Bros. | 1 665 080 |
| 12 Uncharted | US/DE | Ruben Fleischer | Sony | 1 527 929 |
| 13 Black Panther: Wakanda Forever | US | Ryan Coogler | Disney | 1 477 847 |
| 14 Sing 2 | US | Garth Jennings | Universal | 1 460 907 |
| 15 Guglhupfgeschwader | DE | Ed Herzog | Constantin Film | 1 369 017 |
| 16 Smile | US | Parker Finn | Paramount | 1 313 359 |
| 17 Ticket to Paradise | US/GB | Ol Parker | Universal | 1 225 460 |
| 18 Sonic the Hedgehog 2 | US/JP | Jeff Fowler | Paramount | 1 026 546 |
| 19 Black Adam | US/CA/NZ/HU | Jaume Collet-Serra | Warner Bros. | 1 017 970 |
| 20 Rheingold | DE/IT/NL | Fatih Akin | Warner Bros. | 973 731 |

Source: FFA

Distribution and exhibition

Cinema attendance in Germany increased by 85% from 42 million in 2021 to 78 million in 2022. This is 32% lower than the pre-pandemic admissions level of 115 million registered on average between 2017 and 2019. Driven by an increase in ticket prices, GBO grew stronger than the underlying admissions, climbing from EUR 373 million to EUR 722 million, up 93% on 2021 but still 27% below the pre-pandemic average. The year-on-year increase of German box office figures was hence well above the EU average where admissions increased by only 63% and GBO increased by 70%.

With a total of 554 first releases in 2022, the number of film releases in Germany was on its way to creep up to the pre-pandemic average of 590 first releases, and was well above the 422 films released in 2021. As in 2021, German films accounted for 43% of first releases as the release of other European and particularly US films continued to remain well below their pre-pandemic levels. In total, 2 348 films were screened at least once in one of the 1 730 cinemas operational in 2022. So far the pandemic did not lead to a reduction in the German screen base which continued to remain stable at 4 911 screens, compared to 4 961 in 2019.

Despite the comparatively low level of releases, US films dominated the German box office and captured 64% of total admissions. Led by *Avatar: The Way of Water* (US) (4.5 million tickets sold)

and *Minions: The Rise of Gru* (US) (4.2 million), US studio films accounted for 16 out of the top 20 films. A total of 19 films sold more than 1 million tickets in 2022, compared to eight films in 2021 and 25 films in 2019. Among them four German productions: *Die Schule der magischen Tiere 2* (2.4 million), *Wunderschön* (1.7 million), *Guglhupfgeschwader* (1.4 million) and the international co-production *Uncharted* (1.5 million) which was partly shot in Studio Babelsberg. Cumulatively German films captured a market share of 27%, compared to 21.7% in 2021.

Production and funding

German production figures are officially measured in terms of film releases. In line with an increase in the overall number of releases, the number of German feature film releases continued to grow from 185 films in 2021 to 198 films in 2022, still well below the 2019 level of 265 national film releases. Cumulatively the FFA and the Ministry of Culture as well as the nine German regional film funds had a budget of EUR 588 million to support the German film and audiovisual sector in 2022. In March 2022 the German Motion Picture Fund (GMPF) increased its budget from EUR 30 million to EUR 50 million for 2022, among others, to respond to the strong demand from high-end series. A new German Film Law (FFG) had been expected to come into effect in 2023 but has been postponed by one year.

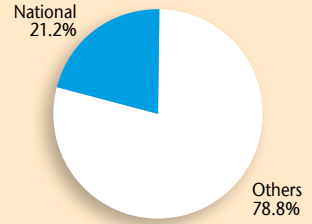
Sources: FFA, SPIO, Medienpolitik.net, OBS

Italy

| | |
|---|-------------------------|
| Population 2022 ^e | 59.0 million |
| GDP per capita 2022 ^e | 33 740 USD |
| Gross box office 2022 ^e | 325.5 M EUR (343 M USD) |
| Admissions 2022 ^e | 47.9 million |
| Average ticket price 2022 ^e | 6.8 EUR (7.2 USD) |
| Average admissions per capita 2022 ^e | 0.8 |
| Screens 2021 2022 ⁽¹⁾ | 3 482 3 412 |

(1) Commercial screens covered by Cinetel excluding open air cinemas.

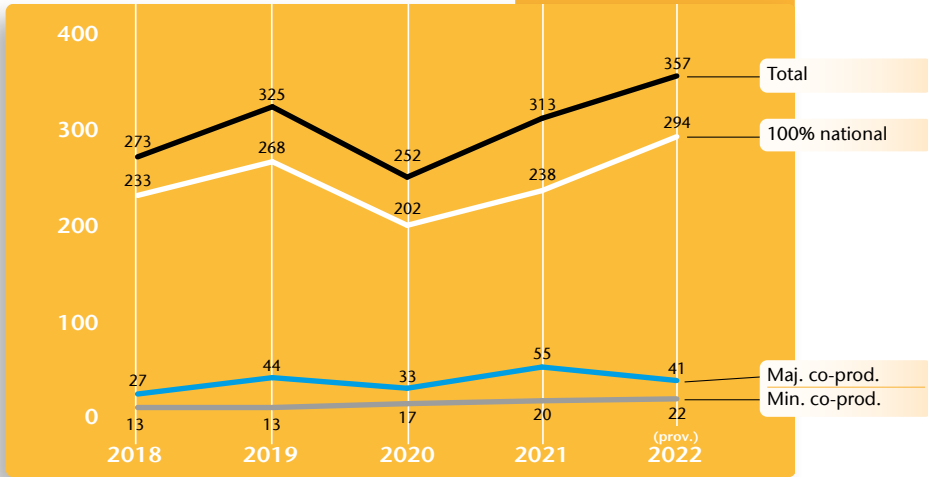
Market shares 2022^e



Number of Italian feature films produced | 2018-2022 prov.

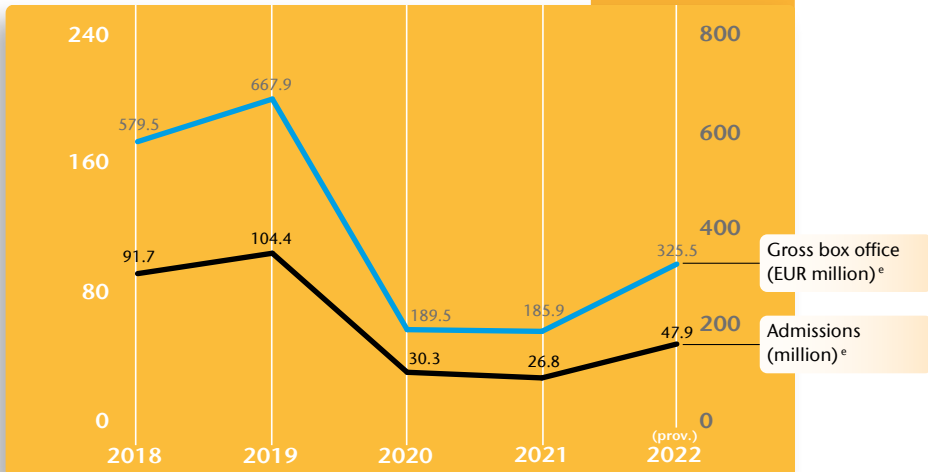
In units.

Sources: DG Cinema - MiBACT



Admissions and gross box office in Italy | 2018-2022^e

Sources: SIAE, Cinetel



Top 20 films by admissions in Italy | 2022

| Original title | Country of origin | Director(s) | Distributor | Admissions |
|---|-------------------|----------------------------------|-----------------|------------|
| 1 Avatar: The Way of Water | US | James Cameron | Disney | 3 143 558 |
| 2 Minions: The Rise of Gru | US | K. Balda, B. Ableson, J. del Val | Universal | 2 187 227 |
| 3 Doctor Strange in the Multiverse... | US | Sam Raimi | Disney | 1 854 490 |
| 4 Top Gun: Maverick | US | Joseph Kosinski | Eagle Pictures | 1 783 621 |
| 5 Thor: Love and Thunder | US | Taika Waititi | Disney | 1 478 680 |
| 6 The Batman | US | Matt Reeves | Warner Bros. | 1 398 671 |
| 7 Fantastic Beasts: The Secrets of... | GB inc/US | David Yates | Warner Bros. | 1 164 262 |
| 8 Black Panther: Wakanda Forever | US | Ryan Coogler | Disney | 1 140 118 |
| 9 Jurassic World Dominion | US/CN | Colin Trevorrow | Universal | 1 119 500 |
| 10 Uncharted | US/DE | Ruben Fleischer | Warner Bros. | 898 407 |
| 11 La stranezza (Strangeness) | IT | Roberto Andò | Medusa | 840 480 |
| 12 Spider-Man: No Way Home | US | Jon Watts | Warner Bros. | 808 067 |
| 13 Death on the Nile | US/GB | Kenneth Branagh | Disney | 803 821 |
| 14 Black Adam | US/CA/NZ/HU | Jaume Collet-Serra | Warner Bros. | 710 402 |
| 15 Sonic the Hedgehog 2 | US/JP | Jeff Fowler | Eagle Pictures | 658 817 |
| 16 Puss in Boots: The Last Wish | US | J. Crawford, J. Mercado | Universal | 608 882 |
| 17 Il grande giorno | IT | Massimo Venier | Medusa | 607 055 |
| 18 Me contro Te - Il film: Persi nel... | IT | Gianluca Leuzzi | Warner Bros. | 531 022 |
| 19 Elvis | US/AU | Baz Luhrmann | Warner Bros. | 484 182 |
| 20 Il colibrì (The Hummingbird) | IT/FR | Francesca Archibugi | 01 Distribution | 452 277 |

Source: Cinetel

Distribution and exhibition

While Italian box office increased above the EU average in 2022, it remains one of the countries struggling hardest to recover from the hit it took during the pandemic. Cinema attendance in Italy increased by 79% from 26.8 million in 2021 to an estimated 47.9 million in 2022, less than half of its pre-pandemic average level of 99 million. Italy hence featured the lowest recovery rate among the major European markets. Estimated GBO grew by 75% from EUR 186 million to EUR 325 million, 48% below its pre-pandemic average. In contrast to most other European markets the average ticket price actually slightly declined after an 11% hike in 2021.

The number of new theatrical releases came close to pre-pandemic levels (541 films) with a total of 498 films released in 2022, 141 more than in 2021. This increase was mostly driven by an increase in Italian films which represented 50% of the total number of first releases, as the number of US film releases remained at only 74 films, compared to an average of 140 films before the pandemic. The number of cinema screens, as tracked by the Italian market data provider Cinetel, decreased by 70 screens to 3 412 and remained below the average for the period 2017 to 2019.

Only nine films, all of them US studio films, managed to sell more than 1 million tickets, compared to 26 films in 2019. *Avatar: The Way of Water* (US) and *Minions: The Rise of Gru* (US) topped

the Italian charts selling 3.1 million and 2.2 million tickets, respectively. Despite the comparatively low level of US releases, US films captured a market share of 52%, only 1% down on 2021. A total of four Italian films featured among the top 20 titles in 2022. Led by *La stranezza* (IT) (0.8 million tickets sold) and *Il grande giorno* (IT) (0.6 million) Italian films cumulatively captured 21% of total admissions.

Production and funding

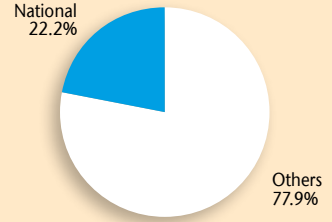
In contrast to box office results, the Italian production sector boomed in 2022 as the number of feature films productions exceeded pre-pandemic levels reaching a record high of 357 films. The production boom in film, TV and streaming content is fueled by Italy's tax credits which have been increased from 30% to 40% of total production costs in 2022. Following the introduction of a mandatory 90-day theatrical window for films receiving state backing, the Italian government is reported to draw up new regulation extending this rule for all films released in Italy. Besides dedicating EUR 78 million in public support to the exhibition sector as well as over EUR 54 million to distributors, Italy also increased in 2022 tax credits for exhibitors from a previous maximum of 20% of total cinema theatre costs to now 40% of all revenue from audiovisual programming.

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

Spain

| | |
|---|---------------------------|
| Population 2022 ^e | 47.4 million |
| GDP per capita 2022 ^e | 29 198 USD |
| Gross box office 2022 ^e | 378.4 M EUR (398.5 M USD) |
| Admissions 2022 ^e | 61.7 million |
| Average ticket price 2022 ^e | 6.1 EUR (6.5 USD) |
| Average admissions per capita 2022 ^e | 1.3 |
| Screens 2021 2022 | 3 631 3 634 |

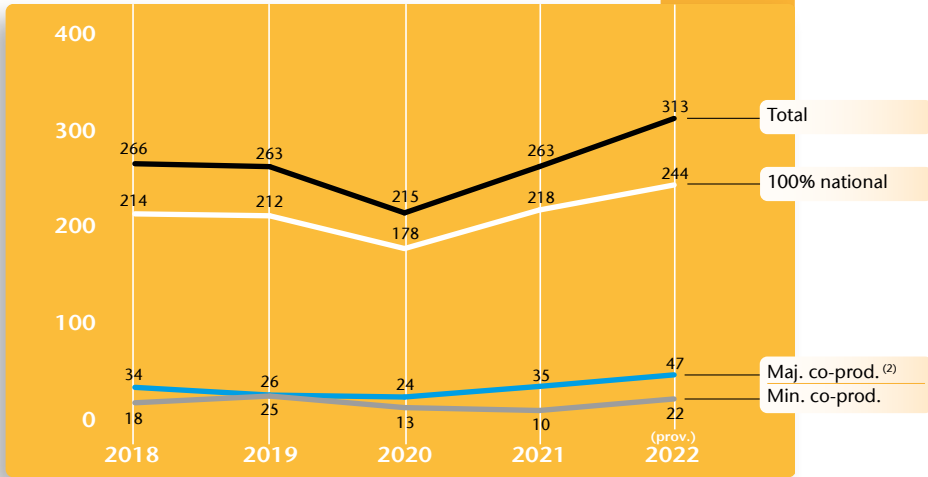
Market shares 2022^e



Number of Spanish feature films produced⁽¹⁾ | 2018-2022

In units.

Source: ICAA

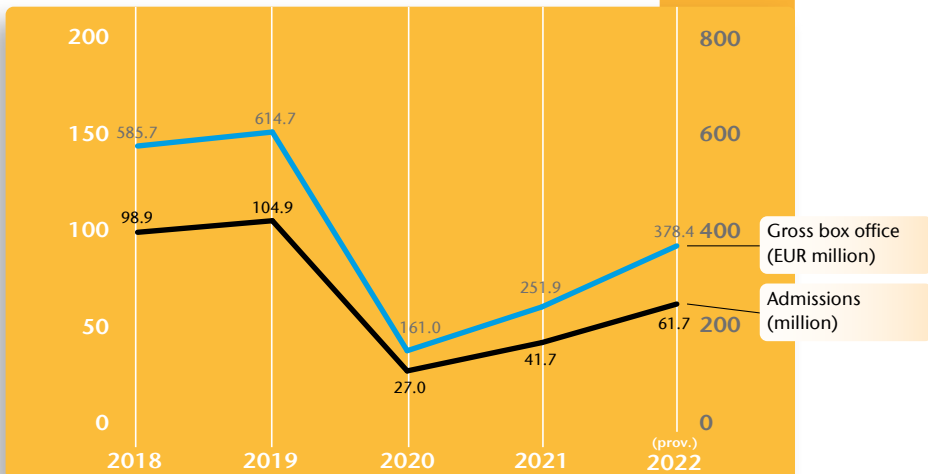


(1) Films certified, excluding experimental features (10 in 2022, 12 in 2021, 6 in 2020, 2 in 2019).

(2) Including parity co-productions.

Admissions and gross box office in Spain | 2018-2022 prov.

Source: ICAA



Top 20 films by admissions in Spain | 2022 prov.

| Original title | Country of origin | Director(s) | Distributor | Admissions ^{prov.} |
|--|-------------------|----------------------------------|--------------|-----------------------------|
| 1 Minions: The Rise of Gru | US | K. Balda, B. Ableson, J. del Val | Universal | 3 256 139 |
| 2 Avatar: The Way of Water | US | James Cameron | Disney | 2 915 140 |
| 3 Jurassic World Dominion | US/CN | Colin Trevorrow | Universal | 2 758 922 |
| 4 Padre no hay más que uno 3 | ES | Santiago Segura | Sony | 2 432 276 |
| 5 Doctor Strange in the Multiverse... | US | Sam Raimi | Disney | 1 944 552 |
| 6 Uncharted | US/DE | Ruben Fleischer | Sony | 1 892 228 |
| 7 Tad the Lost Explorer and the... | ES | Enrique Gato | Paramount | 1 758 510 |
| 8 Thor: Love and Thunder | US | Taika Waititi | Disney | 1 681 700 |
| 9 The Batman | US | Matt Reeves | Warner Bros. | 1 627 115 |
| 10 Spider-Man: No Way Home | US | Jon Watts | Sony | 1 535 169 |
| 11 Top Gun: Maverick | US | Joseph Kosinski | Paramount | 1 478 878 |
| 12 Fantastic Beasts: The Secrets of... | GB inc/US | David Yates | Warner Bros. | 1 333 607 |
| 13 Sonic the Hedgehog 2 | US/JP | Jeff Fowler | Paramount | 1 311 567 |
| 14 The Bad Guys | US | Pierre Perifel | Universal | 1 192 021 |
| 15 Bullet Train | US/JP | David Leitch | Sony | 1 133 530 |
| 16 Sing 2 | US | Garth Jennings | Universal | 1 089 725 |
| 17 Black Panther: Wakanda Forever | US | Ryan Coogler | Disney | 888 010 |
| 18 Black Adam | US/CA/NZ/HU | Jaume Collet-Serra | Warner Bros. | 794 166 |
| 19 Smile | US | Parker Finn | Paramount | 791 991 |
| 20 Los renglones torcidos de Dios | ES | Oriol Paulo | Warner Bros. | 772 768 |

Source: ICAA

Distribution and exhibition

Spanish cinema attendance increased by 48% from 41.7 million to an estimated 61.7 million tickets sold in 2022. Despite this year-on-year growth Spanish 2022 box office results were still far below pre-pandemic levels, representing 61% of the average pre-pandemic 2017-2019 admissions level of 99 million. Driven by a slight increase in the average ticket price, GBO climbed 50% from EUR 252 million in 2021 to EUR 378 million, down by -37% on Spain's pre-pandemic average of EUR 597 million. Along with Italy, Spain hence remained below the EU average in terms of recovery rates. The number of cinema screens remained stable when compared to 2021 and declined only slightly from its recent high point of 3 701 screens in 2020 to 3 634 in 2022.

Based on provisional data, a total of 16 films sold more than one million tickets in 2022, compared to an average of about 30 films in the three years leading up to the pandemic. Spanish films performed comparatively well in 2022, as admissions to local films more than doubled from an estimated 6.7 million in 2021 to 13.7 million, which is only 18% below the pre-pandemic average. Cumulatively Spanish productions captured a market share of 22% of total admissions, the second highest level in recent history, bested only by 2014's 25%. Led by local comedy sequel

Padre no hay más que uno 3 (ES) (2.4 million admissions), a total of three Spanish films featured in the top 20 charts, which were otherwise dominated by US studio titles.

Production and funding

In contrast to theatrical box office, Spanish film production levels reached a new record high with total of 313 films certified in 2022. This is 50 films more than in 2021⁽¹⁾ and well above the production levels registered in 2018 and 2019. Production growth is driven in equal parts by an increase in domestic productions and international co-productions.

In March 2021 the Spanish government launched its Spain Audiovisual Hub plan which aims to increase film and TV production in the country by 30% by 2025 and provides public investment of EUR 1.6 billion. The plan aims to better attract international investment and shoots, improve financial and tax instruments, train talent, with a focus on women, and implement regulatory reforms. A new cinema law, addressing inter alia investment obligations of platforms into Spanish content, has been under discussion for over a year but has not yet come into force, at the time of writing.

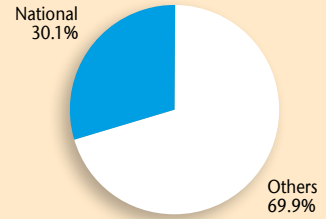
Sources: ICAA, UNIC, FECE, Screen International, Variety, OBS

(1) 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.

United Kingdom

| | |
|---|-----------------------------|
| Population 2022 ^e | 67.6 million |
| GDP per capita 2022 ^e | 47 318 USD |
| Gross box office 2022 ^e | 903.5 M GBP (1 117.8 M USD) |
| Admissions 2022 ^e | 117.3 million |
| Average ticket price 2022 ^e | 7.7 GBP (9.5 USD) |
| Average admissions per capita 2022 ^e | 1.7 |
| Screens 2021 2022 | 4 610 4 720 |

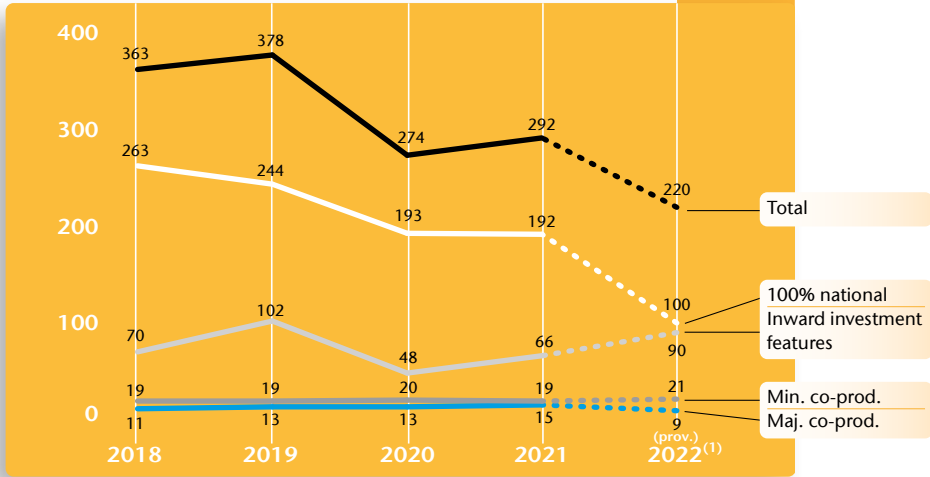
Market shares 2022^e



Number of films produced in the United Kingdom | 2018-2022 *prov.* ⁽¹⁾

In units.

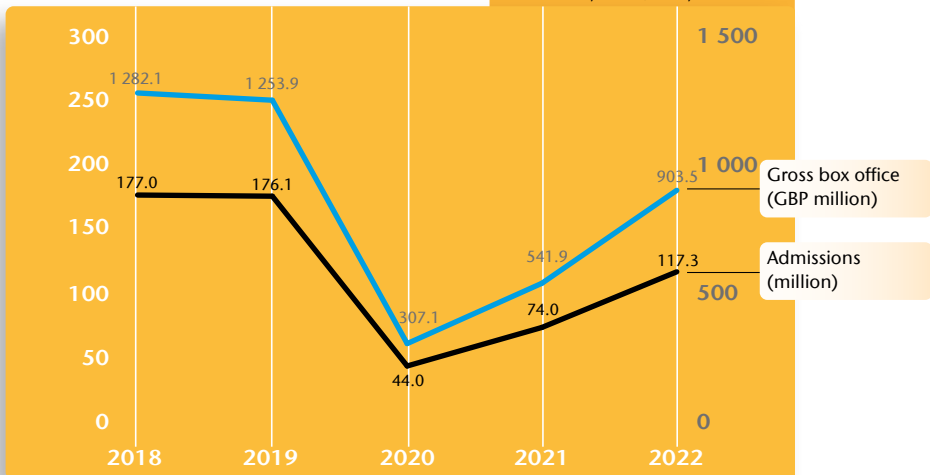
Source: BFI



(1) The apparent decline of film productions in 2022 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 | 2018-2022

Source: BFI, DCM/CAA, Comscore



Top 20 films by admissions in the United Kingdom and Ireland | 2022^e

Estimated admissions based on average ticket price of GBP 7.70.

| | Original title | Country of origin | Director(s) | Distributor | Admissions ^e |
|----|-------------------------------------|-------------------|----------------------------------|--------------|-------------------------|
| 1 | Top Gun: Maverick | US | Joseph Kosinski | Paramount | 10 861 714 |
| 2 | Minions: The Rise of Gru | US | K. Balda, B. Ableson, J. del Val | Universal | 6 111 188 |
| 3 | Avatar: The Way of Water | US | James Cameron | Disney | 5 574 063 |
| 4 | Doctor Strange in the Multiverse... | US | Sam Raimi | Disney | 5 479 870 |
| 5 | The Batman | US | Matt Reeves | Warner Bros. | 5 317 770 |
| 6 | Thor: Love and Thunder | US | Taika Waititi | Disney | 4 882 065 |
| 7 | Jurassic World Dominion | US/CN | Colin Trevorrow | Universal | 4 567 226 |
| 8 | Black Panther: Wakanda Forever | US | Ryan Coogler | Disney | 4 312 588 |
| 9 | Sing 2 | US | Garth Jennings | Universal | 4 296 663 |
| 10 | Spider-Man: No Way Home | US | Jon Watts | Sony | 4 053 171 |
| 11 | Elvis | US/AU | Baz Luhrmann | Warner Bros. | 3 609 408 |
| 12 | Sonic the Hedgehog 2 | US/JP | Jeff Fowler | Paramount | 3 506 575 |
| 13 | Uncharted | US/DE | Ruben Fleischer | Sony | 3 157 312 |
| 14 | Fantastic Beasts: The Secrets of... | GB inc/US | David Yates | Warner Bros. | 2 724 825 |
| 15 | Roald Dahl's Matilda the Musical | GB inc/US | Matthew Warchus | Sony | 2 656 504 |
| 16 | Black Adam | US/CA/NZ/HU | Jaume Collet-Serra | Warner Bros. | 2 596 617 |
| 17 | DC League of Super-Pets | US | Jared Stern/Sam Levine | Warner Bros. | 2 109 725 |
| 18 | Belfast | GB | Kenneth Branagh | Universal | 2 036 192 |
| 19 | Downton Abbey: A New Era | GB inc/US | Simon Curtis | Universal | 1 952 305 |
| 20 | The Bad Guys | US | Pierre Perifel | Universal | 1 791 094 |

Sources: BFI, Screen Ireland, Comscore, Wide Eye Media

Distribution and exhibition

In 2022, UK admissions increased from 74.0 million to 117.3 million tickets sold and GBO grew from GBP 541.9 million to GBP 903.5 million, up 59% and 67% on 2021 respectively. In terms of recovery from the COVID crisis, the UK is more or less in line with the EU average as UK cinema attendance remained -32% below its average pre-pandemic level. As elsewhere in Europe, the number of commercial cinema screens has not dropped significantly since the pandemic, counting 4 720 screens in 2022, compared to 4 782 screens in 2019. Similarly, the number of film releases came close to pre-pandemic levels (744 films) with a total of 703 theatrical first releases in 2022. The number of US releases (122), however, stayed well below its pre-pandemic average (187).

In 2022, a total of 31 films sold more than one million tickets, compared to 47 films in 2019. Led by *Top Gun: Maverick* (US) and *Minions: The Rise of Gru* (US) which sold 10.9 million and 6.1 million, respectively. US films captured a market share of 65.7%, up from 48.9% in 2021. The market share for UK qualifying films dropped from 42.0% to 30.1%, the lowest level since 2014. The market share of UK studio backed titles plummeted from 36% to 22%, while the share of UK independent

titles increased somewhat from its record low of 5.6% in 2021 to 7.8%.

Production and funding

According to BFI interim figures, a total of 220 of UK feature film productions - including 90 inward investment films – started principal photography in 2022. Considering the time lag in measuring production⁽¹⁾, these figures indicate a continued uptake in film production in the UK. The total UK spend of these productions was GBP 1.97 billion (88% of which can be attributed to inward investment films). This is 27% higher than the GBP 1.55 billion reported at the end of 2021.

The BFI, UK's national film body, published its new 10-year strategy called Screen Culture 2033 in September 2022 addressing *inter alia* the need for long-term strategies for education, skills and net zero. In March 2023 the UK government announced a reform of its tax reliefs, transforming them into refundable expenditure credits from January 2024 onwards. Films and high-end TV as well as video games will be eligible for a credit rate of 34%, while animation and children's TV will benefit from a 39% credit rate.

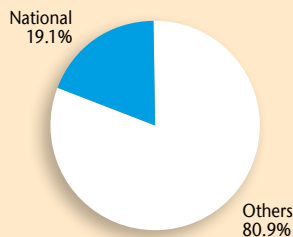
Sources: British Film Institute (BFI), DCM, Comscore, Screen International, OBS

(1) The apparent decline in 2022 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.

Poland

| | |
|---|---------------------------|
| Population 2022 ^e | 37.7 million |
| GDP per capita 2022 ^e | 19 023 USD |
| Gross box office 2022 ^e | 725.5 M PLN (163.3 M USD) |
| Admissions 2022 ^e | 41.8 million |
| Average ticket price 2022 ^e | 17.4 PLN (3.9 USD) |
| Average admissions per capita 2022 ^e | 1.1 |
| Screens 2021 2022 ^e | 1 512 ~ |
| National films produced 2021 2022 | 90 85 |

Market shares 2022^e



Top 10 films by admissions in Poland | 2022

| Original title | Country of origin | Director(s) | Distributor | Admissions |
|--|-------------------|--|--------------|------------|
| 1 Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | UIP | 2 838 625 |
| 2 Ooops! The Adventure Continues | DE/IE/LU | T. Genkel, S. McCormack | Kino Swiat | 2 207 157 |
| 3 Top Gun: Maverick | US | Joseph Kosinski | UIP | 1 715 364 |
| 4 Avatar: The Way of Water | US | James Cameron | Disney | 1 690 087 |
| 5 Listy do M. 5 (Letters to Santa 5) | PL | Lukasz Jaworski | Kino Swiat | 1 421 055 |
| 6 Sing 2 | US | Garth Jennings | UIP | 1 268 497 |
| 7 Sonic the Hedgehog 2 | US/JP | Jeff Fowler | UIP | 1 009 424 |
| 8 Doctor Strange in the Multiverse of... | US | Sam Raimi | Disney | 1 001 345 |
| 9 The Batman | US | Matt Reeves | Warner Bros. | 944 308 |
| 10 Johnny | PL | Daniel Jaroszek | Next Film | 925 834 |

(1) J. del Val.

Source: Polish Film Institute (PISF)

Distribution and exhibition

According to the provisional figures from the Polish Film Institute, Polish cinema attendance increased by 19% from 35.2 million in 2021 to an estimated 41.8 million tickets sold in 2022. This is still 29% below the pre-pandemic average of 59 million admissions registered between 2017 and 2019. Due to a marginal decrease in the average ticket price – which trailed the pre-pandemic average ticket price by – which 16%, GBO increased by 18% from PLN 616 million (USD 160 million) to PLN 726 million (USD 163 million). However, this is -35% lower than the average pre-pandemic GBO level of PLN 1.11 billion (USD 298 million). In terms of recovery rate, the Polish cinema market was hence doing significantly better than the EU average with regard to admissions, but is lagging behind in terms of GBO recovery.

A total of eight films surpassed one million ticket sales, compared to an average of 14 films before the pandemic. Two Polish films – compared to an average of four films before the pandemic – featured among the top 10 films, which was otherwise dominated by US studio titles with the notable exception of the German led children's animation film *Ooops! The Adventure Continues* (DE/IE/LU).

Led by comedy franchise *Listy do M. 5* (PL) and biographical drama *Johnny* (PL), Polish films cumulatively captured a market share of 19%, which remained well below the pre-pandemic average of 28%. In contrast, US films are estimated to account for 57% of total admissions, slightly exceeding their pre-pandemic average.

Production and funding

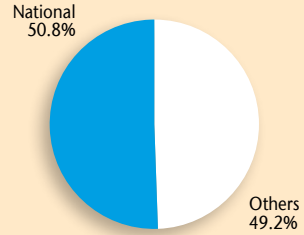
The number of Polish feature films produced decreased from 90 feature films completed in 2021 to 85 feature films completed in 2022, compared to a record high of 93 films registered in 2019. Traditionally many Polish films benefit from support granted by the Polish Film Institute (PISF), which reportedly has PLN 115 million (USD 26 million) allocated for direct production support in 2023, as well as several regional funds. In addition, Poland offers a 30% cash rebate scheme which supported 30 film and audiovisual projects with PLN 112 million (USD 25 million) in 2022. Illustrating growing involvement from streaming platforms commissioning local content, Netflix opened a new office in Warsaw in 2022 to serve as a central hub for its Central and Eastern European productions.

Sources: Polish Film Institute (PISF), Dentons, OBS

Türkiye

| | |
|-------------------------------------|--------------------------|
| Population 2022° | 84.7 million |
| GDP per capita 2022° | 9 961 USD |
| Gross box office 2022° | 1.33 bn TRY (81.5 M USD) |
| Admissions 2022° | 35.6 million |
| Average ticket price 2022° | 37.4 TRY (2.3 USD) |
| Average admissions per capita 2022° | 0.4 |
| Screens 2021 2022° | 2 652 2 719 |
| National films released 2021 2022 | 80 189 |

Market shares 2022°



Top 10 films by admissions in Türkiye | 2022

| Original title | Country of origin | Director(s) | Distributor | Admissions |
|--|-------------------|--|-------------------------------|------------|
| 1 Bergen | TR | C. Alper M. Binay | CJ ENM... ⁽²⁾ | 5 422 384 |
| 2 Kesisme: İyi Ki Varsın Eren (Glad to...) | TR | Ozer Feyzioglu | CGV Mars Dağıtım | 2 309 637 |
| 3 Doctor Strange in the Multiverse of... | US | Sam Raimi | UIP | 1 549 995 |
| 4 Avatar: The Way of Water | US | James Cameron | UIP | 1 297 288 |
| 5 Thor: Love and Thunder | US | Taika Waititi | UIP | 1 216 084 |
| 6 Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | UIP | 1 186 353 |
| 7 Aslan Hürkus Kayıp Elmas | TR | H. Bol H. S. Güngör | CGV Mars Dağıtım | 1 155 268 |
| 8 The Batman | US | Matt Reeves | Derin Film/... ⁽³⁾ | 1 069 620 |
| 9 Spider-Man: No Way Home | US | Jon Watts | Derin Film/... ⁽³⁾ | 1 021 396 |
| 10 Aslan Hürkus: Görevimiz Gökbe | TR | H. Güngör, S. Turali, ... ⁽⁴⁾ | CGV Mars Dağıtım | 890 469 |

(1) J. del Val. (2) MEDYA FILM YAPIM VE DAĞITIM
 (3) Warner Bros. (4) Yunus Emre Çakır

Source: Antrakt - Deniz Yavuz

Distribution and exhibition

While almost tripling in comparison to 2021, Turkish cinema attendance remained among the lowest in Europe when compared to pre-pandemic levels. A total of 35.6 million cinema tickets were sold in 2022, -47% lower than the average of 67 million admissions registered between 2017 and 2019. Driven by high inflation, average ticket prices soared by 63%, increasing from TRY 22.9 to TRY 37.4. GBO consequently jumped from TRY 284 million in 2021 to TRY 1.33 billion. However, measured in USD, Turkish GBO increased less than underlying admissions, growing from USD 27 million to USD 81.5 million. This compares to a pre-pandemic annual average GBO of USD 200 million. A total of 390 new films were released in Turkish cinemas in 2022, almost twice as many as in 2021 and only 5% less than the pre-pandemic average. The number of commercial cinema screens increased slightly from 2 652 to 2 719, compared to 2 877 in 2019.

A total of nine films managed to sell more than 1 million tickets, compared to 13 in 2019. After dropping to 23%, the lowest level in recent history, in 2021, national market share jumped back to over 50%, as Turkish films reclaimed domi-

nance of the local box office. Led by *Bergen* (TR), a biopic about a Turkish Arabesque singer which became the most successful film of 2022, selling 5.4 million tickets, a total of four national films featured among the top 10 films. US films accounted for the other six top 10 films as US films cumulatively captured an estimated market share of 40%.

Production and funding

According to Antrakt, a total of 250 feature films were shot in Türkiye in 2022, but only 189 Turkish films were released in cinemas. This compares to 166 and 190 feature films produced and 80 and 148 films released in 2021 and 2019, respectively. Independent Turkish producers are increasingly struggling with the ongoing depreciation of the Turkish lira and skyrocketing production costs, which are partly driven by streamers investing in Turkish content and paying comparatively high talent fees. Production activity in Türkiye has also been boosted by a 30% cash rebate scheme on local production spend for feature films, documentaries and TV series.

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

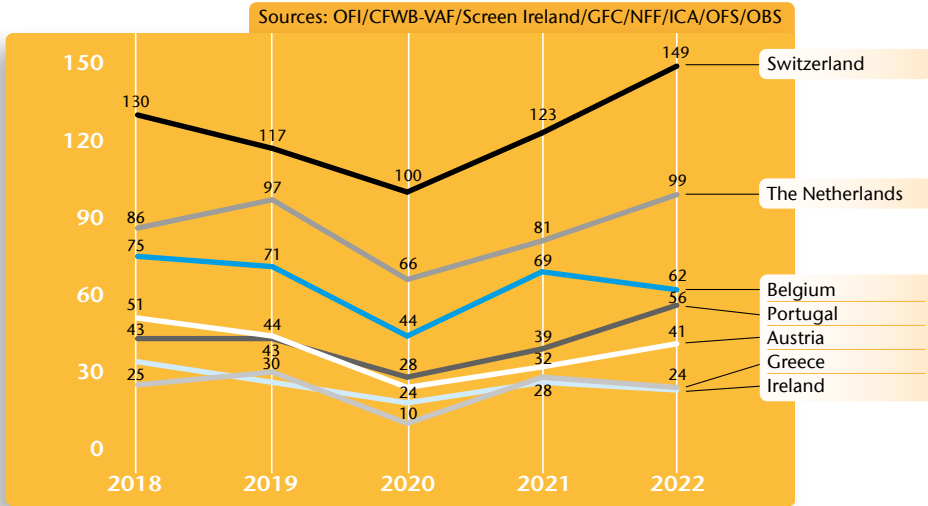
Other Western Europe

| | Austria | Belgium | Greece | Ireland | Netherlands | Portugal | Switzerland |
|------------------------------------|---------|---------------------|--------|--------------------|-------------|----------|-------------|
| Population 2022* (million) | 9.0 | 11.6 | 10.6 | 5.1 | 17.6 | 10.4 | 8.7 |
| GDP per capita 2022* (USD) | 52 062 | 50 598 | 20 876 | 102 217 | 56 298 | 24 910 | 92 434 |
| Gross box office 2022 (M USD) | 108.7 | 140.7 | 39.5 | 96.1 | 272.2 | 58.3 | 144.9 |
| Admissions 2022 (million) | 10.0 | 14.1 | 5.5 | 10.5 | 25.0 | 9.6 | 8.7 |
| Average ticket price 2022 (USD) | 10.8 | 10.0 | 7.2 | 9.1 | 10.9 | 6.1 | 16.6 |
| Average admissions per capita 2022 | 1.1 | 1.2 | 0.5 | 2.1 | 1.4 | 0.9 | 1.0 |
| Screens 2022* | 561 | 505 | 429 | 537 ⁽¹⁾ | 1 049 | 565 | 617 |
| National market shares 2022* | 6.5% | 6.1% ⁽¹⁾ | 5.5% | 5.1% | 16.0% | 3.0% | 7.2% |

(1) 2021

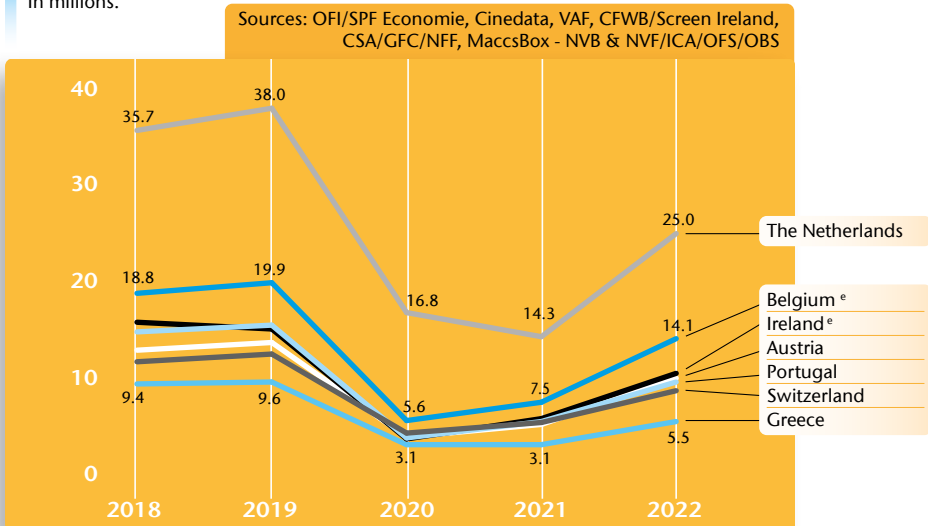
Number of feature films produced by selected Western European countries | 2018-2022

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



Admissions in selected Western European countries | 2018-2022

In millions.



Top 10 films by admissions in the Netherlands | 2022

| | Original title | Country of origin | Director(s) | Distributor | Admissions |
|----|--|-------------------|--|--------------|------------|
| 1 | Top Gun: Maverick | US | Joseph Kosinski | Universal | 1 265 324 |
| 2 | Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | Universal | 1 190 730 |
| 3 | Spider-Man: No Way Home | US | Jon Watts | Universal | 950 844 |
| 4 | Avatar: The Way of Water | US | James Cameron | Disney | 707 157 |
| 5 | Fantastic Beasts: The Secrets of... | GB inc/US | David Yates | Warner Bros. | 648 943 |
| 6 | Jurassic World: Dominion | US/CN | Colin Trevorrow | Universal | 640 818 |
| 7 | Doctor Strange in the Multiverse of... | US | Sam Raimi | Disney | 622 923 |
| 8 | Ticket to Paradise | US/GB | Ol Parker | Universal | 575 870 |
| 9 | Thor: Love and Thunder | US | Taika Waititi | Disney | 564 027 |
| 10 | Black Panther: Wakanda Forever | US | Ryan Coogler | Disney | 554 248 |

(1) J. del Val.

Sources: MaccsBox - NVB & NVF

Top 10 films by admissions in Belgium | 2022

| | Original title | Country of origin | Director(s) | Distributor | Admissions |
|----|--|-------------------|--|-----------------------|------------|
| 1 | Top Gun: Maverick | US | Joseph Kosinski | Paramount/Sony | 781 471 |
| 2 | Zillion | BE/NL | Robin Pront | Kinopolis Film Distr. | 573 771 |
| 3 | Spider-Man: No Way Home | US | Jon Watts | Sony | 550 015 |
| 4 | Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | Sony | 481 918 |
| 5 | Avatar: The Way of Water | US | James Cameron | Disney | 420 484 |
| 6 | Jurassic World: Dominion | US/CN | Colin Trevorrow | Sony | 392 110 |
| 7 | Uncharted | US/DE | Ruben Fleischer | Sony | 314 460 |
| 8 | Doctor Strange in the Multiverse of... | US | Sam Raimi | Disney | 311 576 |
| 9 | Fantastic Beasts: The Secrets of... | GB inc/US | David Yates | Warner Bros. | 288 590 |
| 10 | The Batman | US | Matt Reeves | Warner Bros. | 282 762 |

(1) J. del Val.

Sources: CFWB, VAF, Cinedata

Top 10 films by admissions in Austria | 2022

| | Original title | Country of origin | Director(s) | Distributor | Admissions |
|----|--|-------------------|--|------------------------------|------------|
| 1 | Avatar: The Way of Water | US | James Cameron | Disney | 672 825 |
| 2 | Top Gun: Maverick | US | Joseph Kosinski | Constantin Film/PPI | 602 342 |
| 3 | Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | Universal | 537 082 |
| 4 | Guglhupfgeschwader | DE | Ed Herzog | Constantin Film | 301 741 |
| 5 | Doctor Strange in the Multiverse of... | US | Sam Raimi | Disney | 282 299 |
| 6 | Thor: Love and Thunder | US | Taika Waititi | Disney | 276 217 |
| 7 | Fantastic Beasts: The Secrets of... | GB inc/US | David Yates | Warner Bros. | 271 775 |
| 8 | Jurassic World: Dominion | US/CN | Colin Trevorrow | Universal | 243 076 |
| 9 | Die Schule der magischen Tiere 2 | DE | Sven Unterwaldt Jr. | Constantin... ⁽²⁾ | 236 683 |
| 10 | Uncharted | US/DE | Ruben Fleischer | Sony | 225 190 |

(1) J. del Val.

(2) Film/Leonine Distribution

Sources: Austrian Film Institute (OFI) / Comscore

Top 10 films by admissions in Portugal | 2022

| | Original title | Country of origin | Director(s) | Distributor | Admissions |
|----|--|-------------------|--|-----------------------|------------|
| 1 | Top Gun: Maverick | US | Joseph Kosinski | NOS... ⁽²⁾ | 715 347 |
| 2 | Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | Cinemundo | 602 535 |
| 3 | Avatar: The Way of Water | US | James Cameron | NOS... ⁽²⁾ | 595 629 |
| 4 | Uncharted | US/DE | Ruben Fleischer | Big Picture 2 Films | 332 636 |
| 5 | Thor: Love and Thunder | US | Taika Waititi | NOS... ⁽²⁾ | 330 021 |
| 6 | Doctor Strange in the Multiverse of... | US | Sam Raimi | NOS... ⁽²⁾ | 321 283 |
| 7 | Curral de Moínas - Os Banqueiros... | PT | Miguel Cadilhe | NOS... ⁽²⁾ | 315 883 |
| 8 | Black Panther: Wakanda Forever | US | Ryan Coogler | NOS... ⁽²⁾ | 311 380 |
| 9 | The Batman | US | Matt Reeves | Cinemundo | 274 000 |
| 10 | Ticket to Paradise | US/GB | Ol Parker | Cinemundo | 264 795 |

(1) J. del Val.

(2) Lusomundo Audiovisuais

Source: ICA

Nordic countries

| | Denmark | Finland | Iceland | Norway | Sweden |
|--|--------------------|---------|-------------------|----------------------|----------------------|
| Population 2022 ^e (million) | 5.9 | 5.5 | 0.4 | 5.4 | 10.5 |
| GDP per capita 2022 ^a (USD) | 65 713 | 50 818 | 73 981 | 92 646 | 56 361 |
| Gross box office 2022 (M USD) | 140.9 | 78.1 | 9.0 | 115.0 | 137.8 |
| Admissions 2022 (million) | 10.2 | 5.8 | 0.8 | 8.8 | 10.4 |
| Average ticket price 2022 (USD) | 13.8 | 13.4 | 10.7 | 13.1 | 13.2 |
| Average admissions per capita 2022 | 1.7 | 1.1 | 2.2 | 1.6 | 1.0 |
| Screens 2022 ^e | 481 | 360 | 44 ⁽²⁾ | 479 | 942 |
| National market shares 2022 ^e | 30% ⁽¹⁾ | 26.9% | 9.2% | 24.5% ⁽¹⁾ | 19.4% ⁽¹⁾ |

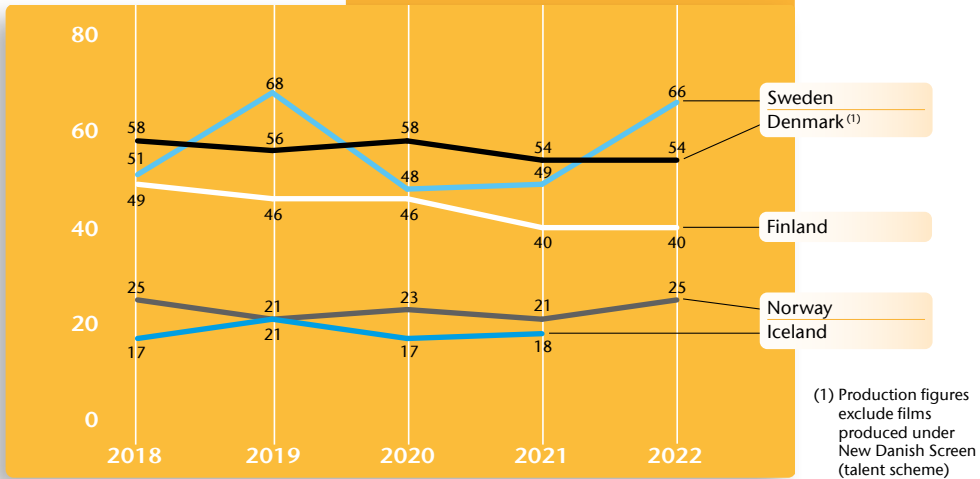
(1) Excluding minority co-productions.

(2) 2021

Number of feature films produced by Nordic countries | 2018-2022

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

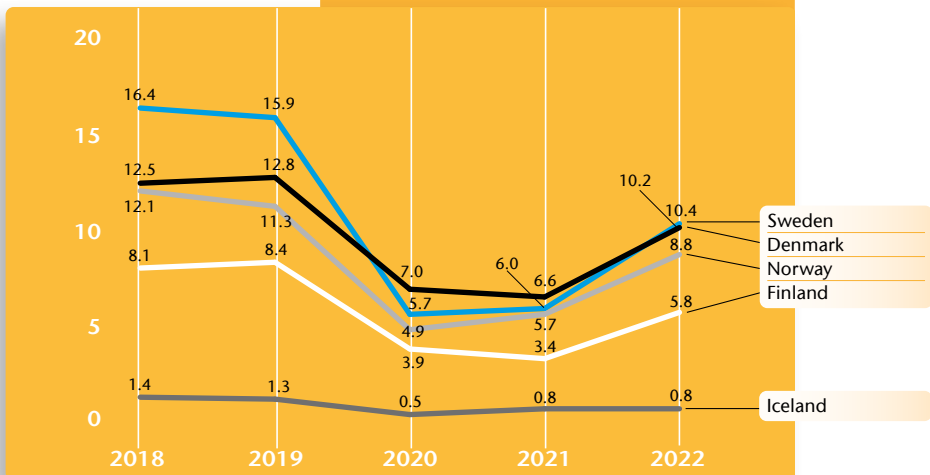
Sources: DFI/FFF/Icelandic Film Centre/NFI/SFI/OBS



Admissions in Nordic countries | 2018-2022

In millions.

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



Top 10 films by admissions in Sweden | 2022

| Original title | Country of origin | Director(s) | Distributor | Admissions |
|--|-------------------|--|---------------------|------------|
| 1 Top Gun: Maverick | US | Joseph Kosinski | Paramount/UIP | 730 828 |
| 2 Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | UIP/Universal | 654 550 |
| 3 Avatar: The Way of Water | US | James Cameron | Disney | 476 979 |
| 4 Where the Crawdads Sing | US | Olivia Newman | Svensk Filmindustri | 373 254 |
| 5 The Batman | US | Matt Reeves | Warner Bros. | 330 607 |
| 6 Spider-Man: No Way Home | US | Jon Watts | Sony | 287 132 |
| 7 Thor: Love and Thunder | US | Taika Waititi | Disney | 284 225 |
| 8 Doctor Strange in the Multiverse of... | US | Sam Raimi | Disney | 275 678 |
| 9 Jurassic World: Dominion | US/CN | Colin Trevorrow | UIP/Universal | 259 140 |
| 10 I Am Zlatan | SE/DK/NL | Jens Sjögren | Nordisk Film | 231 197 |

(1) J. del Val.

Source: Comscore

Top 10 films by admissions in Denmark | 2022

| Original title | Country of origin | Director(s) | Distributor | Admissions |
|---------------------------------------|-------------------|--|--------------|------------|
| 1 Top Gun: Maverick | US | Joseph Kosinski | UIP | 791 102 |
| 2 Avatar: The Way of Water | US | James Cameron | Disney | 480 544 |
| 3 Bamse (A Lucky Man) | DK | Henrik Ruben Genz | Nordisk Film | 479 860 |
| 4 Spider-Man: No Way Home | US | Jon Watts | SF Bio | 409 490 |
| 5 Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | UIP | 399 426 |
| 6 Where the Crawdads Sing | US | Olivia Newman | SF Bio | 379 504 |
| 7 Rose | DK | Niels Arden Oplev | Nordisk Film | 363 689 |
| 8 Fædre & mødre (Fathers and Mothers) | DK | Paprika Steen | Nordisk Film | 346 218 |
| 9 Alle for fire (All for Four) | DK | Rasmus Heide | Nordisk Film | 298 381 |
| 10 Sing 2 | US | Garth Jennings | UIP | 292 321 |

(1) J. del Val.

Sources : Danmark Statistics / DFI

Top 10 films by admissions in Norway | 2022

| Original title | Country of origin | Director(s) | Distributor | Admissions |
|---|-------------------|--|--------------|------------|
| 1 Spider-Man: No Way Home | US | Jon Watts | SF Bio | 571 412 |
| 2 Top Gun: Maverick | US | Joseph Kosinski | UIP | 545 042 |
| 3 Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | UIP | 432 831 |
| 4 Krigsseileren (War Sailor) | NO/DE/MT | Gunnar Vikene | Ymer Media | 403 990 |
| 5 Avatar: The Way of Water | US | James Cameron | Disney | 375 774 |
| 6 Sing 2 | US | Garth Jennings | UIP | 275 489 |
| 7 Teddybjørnens jul (Christmans for...) | NO | Andrea Eckerbom | Nordisk Film | 263 906 |
| 8 Olsenbanden - Siste skrik! | NO | Hallvard Bræin | Nordisk Film | 240 901 |
| 9 Thor: Love and Thunder | US | Taika Waititi | Disney | 223 106 |
| 10 The Batman | US | Matt Reeves | SF Bio | 212 196 |

(1) J. del Val.

Source: Norwegian Film Institute

Top 10 films by admissions in Finland | 2022

| Original title | Country of origin | Director(s) | Distributor | Admissions |
|--|-------------------|--|--------------|------------|
| 1 Top Gun: Maverick | US | Joseph Kosinski | Finnkino | 436 016 |
| 2 Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | Finnkino | 358 005 |
| 3 Mielensäpahoittaja Eskorttia... | FI/DE | Mika Kaurismäki | Nordisk Film | 192 647 |
| 4 The Batman | US | Matt Reeves | SF Bio | 173 996 |
| 5 Avatar: The Way of Water | US | James Cameron | Disney | 158 548 |
| 6 Fantastic Beasts: The Secrets of... | GB inc/US | David Yates | SF Bio | 146 746 |
| 7 Doctor Strange in the Multiverse of... | US | Sam Raimi | Disney | 143 814 |
| 8 Downton Abbey: A New Era | GB inc/US | Simon Curtis | Finnkino | 143 448 |
| 9 Elvis | US/AU | Baz Luhrmann | SF Bio | 139 563 |
| 10 Thor: Love and Thunder | US | Taika Waititi | Disney | 137 874 |

(1) J. del Val.

Source: Finnish Film Foundation

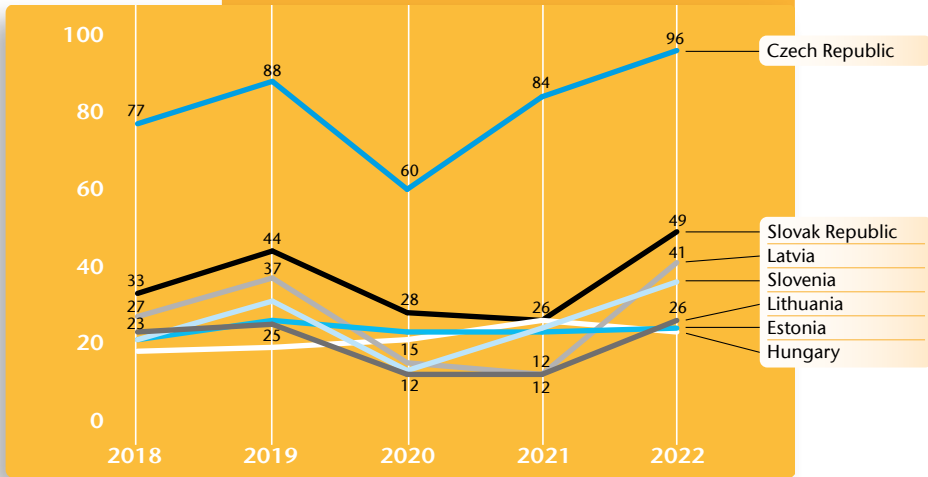
Baltics and Central Europe

| | Czech Republic | Estonia | Hungary | Latvia | Lithuania | Slovenia | Slovak Republic |
|------------------------------------|----------------|---------|---------|--------|-----------|----------|-----------------|
| Population 2022* (million) | 10.5 | 1.3 | 9.7 | 1.9 | 2.8 | 2.1 | 5.4 |
| GDP per capita 2022* (USD) | 28 095 | 29 344 | 18 983 | 21 482 | 24 032 | 29 469 | 20 565 |
| Gross box office 2022 (M USD) | 90.7 | 17.1 | 48.4 | 11.8 | 19.1 | 12.1 | 29.5 |
| Admissions 2022 (million) | 13.5 | 2.3 | 10.2 | 1.7 | 3.0 | 1.8 | 4.3 |
| Average ticket price 2022 (USD) | 6.7 | 7.4 | 4.7 | 6.9 | 6.4 | 6.6 | 6.8 |
| Average admissions per capita 2022 | 1.3 | 1.7 | 1.1 | 0.9 | 1.1 | 0.9 | 0.8 |
| Screens 2022* | 606 | 92 | 417 | 80 | 103 | 106 | 276 |
| National market shares 2022* | 37.5% | 20.7% | 5.9% | 11.0% | 19.3% | 17.1% | 12.7% |

Number of feature films produced by selected Baltic and Central European countries | 2018-2022

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

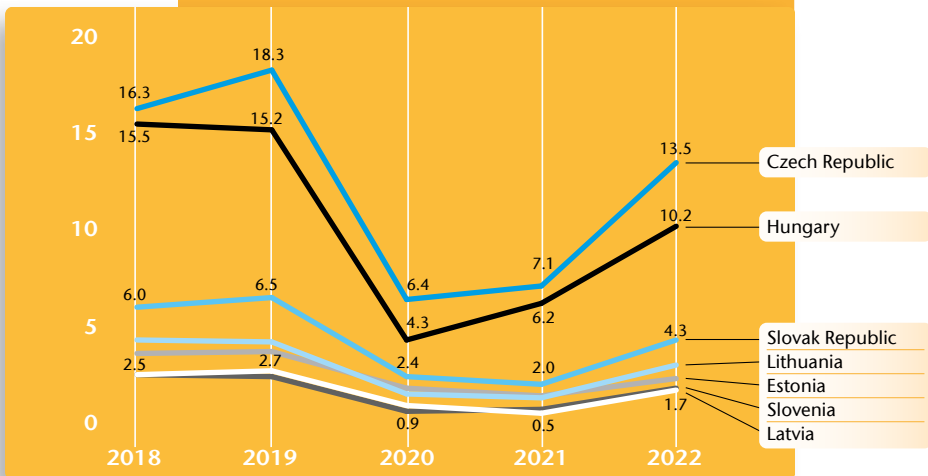
Sources: Czech Film Fund/EFI/NMHH/LFC/NFC/SFC/SKFI-AIC/OBS



Admissions in Baltic and selected Central European countries | 2018-2022

In millions.

Sources: Czech Film Fund / EFI / NMHH / LFC / NFC / SFC / SKFI-AIC / OBS



Top 10 films by admissions in the Czech Republic | 2022

| | Original title | Country of origin | Director(s) | Distributor | Admissions |
|----|--|-------------------|--|-------------|------------|
| 1 | Top Gun: Maverick | US | Joseph Kosinski | CinemArt | 809 977 |
| 2 | Avatar: The Way of Water | US | James Cameron | Falcon | 763 477 |
| 3 | Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | CinemArt | 709 728 |
| 4 | Vysehrad: Fyln | CZ | M. Kopp, J. Stáfek | Bioscop | 692 260 |
| 5 | Tajemství staré bambitky 2 | CZ | Ivo Macharáček | Bioscop | 467 220 |
| 6 | Thor: Love and Thunder | US | Taika Waititi | Falcon | 465 081 |
| 7 | Doctor Strange in the Multiverse of... | US | Sam Raimi | Falcon | 373 061 |
| 8 | Medieval | CZ | Petr Jákl | Bioscop | 351 018 |
| 9 | Sonic the Hedgehog 2 | US/JP | Jeff Fowler | CinemArt | 348 826 |
| 10 | Jurassic World Dominion | US/CN | Colin Trevorrow | CinemArt | 323 686 |

(1) J. del Val.

Sources: Czech Film Fund / Unie Filmových Distributorů

Top 10 films by admissions in Hungary | 2022

| | Original title | Country of origin | Director(s) | Distributor | Admissions |
|----|--|-------------------|--|---------------|------------|
| 1 | Avatar: The Way of Water | US | James Cameron | Forum-Hungary | 556 786 |
| 2 | Top Gun: Maverick | US | Joseph Kosinski | DunaFilm/UIP | 539 969 |
| 3 | Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | DunaFilm/UIP | 520 592 |
| 4 | Thor: Love and Thunder | US | Taika Waititi | Forum-Hungary | 407 946 |
| 5 | Jurassic Domination | US | Brian Nowak | DunaFilm/UIP | 404 731 |
| 6 | Ticket to Paradise | US/GB | OI Parker | DunaFilm/UIP | 397 455 |
| 7 | Doctor Strange in the Multiverse of... | US | Sam Raimi | Forum-Hungary | 358 860 |
| 8 | Uncharted | US/DE | Ruben Fleischer | Intercomfilm | 338 563 |
| 9 | The Lost City | US | Adam Nee/Aaron Nee | DunaFilm/UIP | 284 773 |
| 10 | Sonic the Hedgehog 2 | US/JP | Jeff Fowler | DunaFilm/UIP | 261 005 |

(1) J. del Val.

Source: National Film Office (NMHH)

Top 10 films by admissions in the Slovak Republic | 2022

| | Original title | Country of origin | Director(s) | Distributor | Admissions |
|----|--|-------------------|--|------------------|------------|
| 1 | Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | CinemArt | 293 466 |
| 2 | Avatar: The Way of Water | US | James Cameron | CinemArt | 220 783 |
| 3 | Happy New Year 2 | SK/CZ | Jakub Kroner | Continental Film | 190 516 |
| 4 | Thor: Love and Thunder | US | Taika Waititi | CinemArt | 173 506 |
| 5 | Spider-Man: No Way Home | US | Jon Watts | Itafilm | 150 513 |
| 6 | Sonic the Hedgehog 2 | US/JP | Jeff Fowler | CinemArt | 148 901 |
| 7 | Top Gun: Maverick | US | Joseph Kosinski | CinemArt | 148 750 |
| 8 | Doctor Strange in the Multiverse of... | US | Sam Raimi | CinemArt | 143 553 |
| 9 | V lete ti poviem | SK/CZ/RO | Marta Ferencová | Continental Film | 125 478 |
| 10 | Jurassic World Dominion | US/CN | Colin Trevorrow | CinemArt | 109 942 |

(1) J. del Val.

Sources: Slovak Film Institute / UFD

Top 10 films by admissions in Lithuania | 2022

| | Original title | Country of origin | Director(s) | Distributor | Admissions |
|----|--|-------------------|--|-----------------------------------|------------|
| 1 | Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | Dukine Film... ⁽²⁾ | 248 873 |
| 2 | Avatar: The Way of Water | US | James Cameron | Theatrical Film... ⁽³⁾ | 161 952 |
| 3 | Piktjuju Karta (The Generation Of...) | LT | Emilis Velyvis | Kino kultas | 141 651 |
| 4 | Where the Crawdads Sing | US | Olivia Newman | Acme/Sony | 99 270 |
| 5 | Sonic the Hedgehog 2 | US/JP | Jeff Fowler | Dukine Film... ⁽⁴⁾ | 83 186 |
| 6 | Vyras uz pinigus | LT | Justinas Krasiunas | Dublis LT | 82 080 |
| 7 | Ko nezino vyras | LT | Robertas Kuliunas | Acme | 75 224 |
| 8 | DC League of Super-Pets | US | Jared Stern, Sam Levine | Acme/Warner Bros. | 68 352 |
| 9 | Doctor Strange in the Multiverse of... | US | Sam Raimi | Theatrical Film... ⁽³⁾ | 60 063 |
| 10 | Puss in Boots: The Last Wish | US | J. Crawford, J. Mercado | Dukine Film... ⁽²⁾ | 59 594 |

(1) J. del Val

(2) Distribution/Universal

Source: Lithuanian Film Centre (LFC)

(3) Distribution/WDSMPI

(4) Distribution/Paramount

South-Eastern Europe

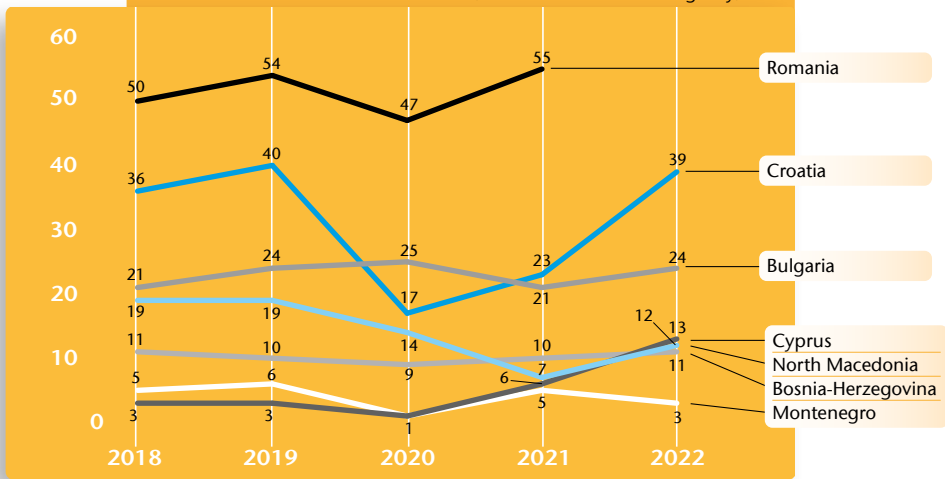
| | BA ⁽¹⁾ | BG ⁽²⁾ | HR ⁽³⁾ | CY ⁽⁴⁾ | ME ⁽⁵⁾ | MK ⁽⁶⁾ | RO ⁽⁷⁾ | UA ⁽⁸⁾ |
|--|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|---------------------|----------------------|
| Population 2022 ^e (million) | 3.5 | 6.8 | 3.9 | 0.9 | 0.6 | 1.8 | 19.0 | 41.0 |
| GDP per capita 2022 ^e (USD) | 6 818 | 12 505 | 17 318 | 29 535 | 9 850 | 6 816 | 15 619 | 4 862 |
| Gross box office 2022 (M USD) | 3.9 | 22.6 | 17.4 | 4.0 | 0.9 | 1.0 | 23.3 ⁽⁹⁾ | 64.0 ⁽⁹⁾ |
| Admissions 2022 (million) | 1.1 | 4.0 | 3.2 | 0.5 | 0.4 | 0.3 | 4.7 ⁽⁹⁾ | 15.84 ⁽⁹⁾ |
| Average ticket price 2022 (USD) | 3.5 | 5.7 | 5.3 | 8.6 | 2.1 | 3.4 | 5.0 ⁽⁹⁾ | 4.0 ⁽⁹⁾ |
| Average admissions per capita 2022 | 0.3 | 0.6 | 0.8 | 0.5 | 0.7 | 0.2 | 0.2 ⁽⁹⁾ | 0.4 ⁽⁹⁾ |
| Screens 2022 ^e | 71 | 213 | 210 | 40 | 12 | 23 | 443 ⁽⁹⁾ | 663 ⁽⁹⁾ |
| National market shares 2022 ^e | 6.1% | 16.3% | 6.8% | 0.0% | 0.0% | 9.6% | 5.8% ⁽⁹⁾ | 4.2% ⁽⁹⁾ |

(1) Bosnia-Herzegovina (2) Bulgaria (3) Croatia (4) Cyprus (5) Montenegro (6) North Macedonia (7) Romania (8) Ukraine (9) 2021 data

Number of feature films produced by selected South-Eastern European countries | 2018-2022

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

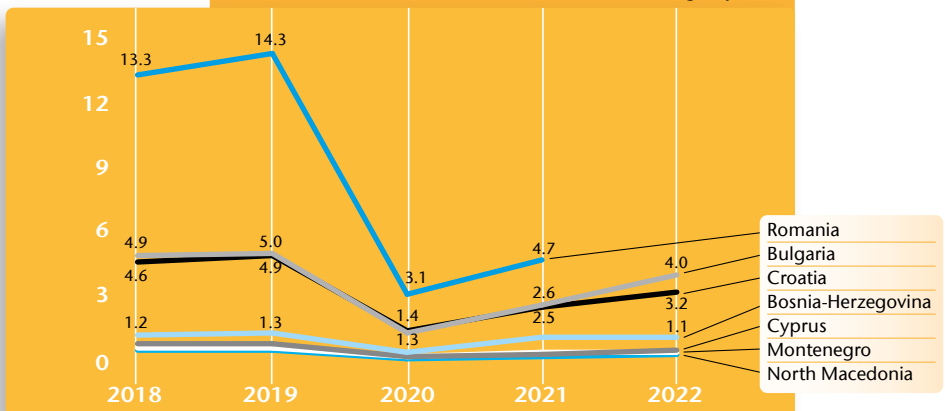
Sources: Sarajevo Film Festival/NFC/HAVC/Dept. of Cultural Services, MOECSY/ME Min. Cult./North Macedonia Film Agency/CNC



Admissions in selected South-Eastern European countries | 2018-2022

In millions.

Sources: Sarajevo Film Festival/NFC/HAVC/Dept. of Cultural Services, MOECSY/ME Min. Cult./North Macedonia Film Agency/CNC



Top 10 films by admissions in Romania | 2022

| | Original title | Country of origin | Director(s) | Distributor | Admissions |
|----|--|-------------------|--|------------------|------------|
| 1 | Teambuilding | RO | A. Cotet, C. Nedelcu, ... ⁽¹⁾ | Vidra Prod. | 988 926 |
| 2 | Avatar: The Way of Water | US | James Cameron | Forum Film | 729 176 |
| 3 | Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽²⁾ | Ro-Image 2000 | 435 854 |
| 4 | Top Gun: Maverick | US | Joseph Kosinski | Ro-Image 2000 | 400 824 |
| 5 | Thor: Love and Thunder | US | Taika Waititi | Forum Film | 353 377 |
| 6 | Doctor Strange in the Multiverse of... | US | Sam Raimi | Forum Film | 339 125 |
| 7 | Mirciulica | RO | Cristian Ilisuan | BRAVO FILMS | 328 453 |
| 8 | Turning Red | US | Domee Shi | Forum Film | 272 857 |
| 9 | The Batman | US | Matt Reeves | Vertical Entert. | 263 334 |
| 10 | Bullet Train | US/JP | David Leitch | Intercomfilm | 255 195 |

(1) M. Dima (2) J. del Val.

Source: Centrul National al Cinematografiei (CNC)

Top 10 films by admissions in Bulgaria | 2022

| | Original title | Country of origin | Director(s) | Distributor | Admissions |
|----|--|-------------------|--|--------------|------------|
| 1 | Avatar: The Way of Water | US | James Cameron | Forum Film | 272 320 |
| 2 | Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | Forum Film | 240 926 |
| 3 | Sonic the Hedgehog 2 | US/JP | Jeff Fowler | Forum Film | 129 324 |
| 4 | Thor: Love and Thunder | US | Taika Waititi | Forum Film | 126 296 |
| 5 | Doctor Strange in the Multiverse of... | US | Sam Raimi | Forum Film | 125 600 |
| 6 | In the Heart of the Machine | BG | Martin Makariev | Silvernoise | 121 010 |
| 7 | Jurassic World: Dominion | US/CN | Colin Trevorrow | Forum Film | 107 886 |
| 8 | Top Gun: Maverick | US | Joseph Kosinski | Forum Film | 100 806 |
| 9 | Ticket to Paradise | US/GB | OI Parker | Forum Film | 96 042 |
| 10 | Petya na moyata Petya | BG | Alexander Kossev | Bof Pictures | 95 620 |

(1) J. del Val.

Source: Bulgarian National Film Center

Top 10 films by admissions in Croatia | 2022

| | Original title | Country of origin | Director(s) | Distributor | Admissions |
|----|--|-------------------|--|------------------|------------|
| 1 | Top Gun: Maverick | US | Joseph Kosinski | Blitz Film | 214 713 |
| 2 | Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | Editus | 173 584 |
| 3 | The Batman | US | Matt Reeves | Blitz Film | 111 921 |
| 4 | Avatar: The Way of Water | US | James Cameron | Blitz Film | 107 753 |
| 5 | Thor: Love and Thunder | US | Taika Waititi | Blitz Film | 100 308 |
| 6 | Spider-Man: No Way Home | US | Jon Watts | Continental Film | 85 277 |
| 7 | Doctor Strange in the Multiverse of... | US | Sam Raimi | Blitz Film | 85 132 |
| 8 | Ticket to Paradise | US/GB | OI Parker | Editus | 73 112 |
| 9 | Sonic the Hedgehog 2 | US/JP | Jeff Fowler | Blitz Film | 70 922 |
| 10 | Turning Red | US/CA | Domee Shi | Blitz Film | 67 040 |

(1) J. del Val.

Source: HAVC (Croatian Audiovisual Centre)

Top 10 films by admissions in Bosnia-Herzegovina | 2022

| | Original title | Country of origin | Director(s) | Distributor | Admissions |
|----|------------------------------|-------------------|--|------------------|------------|
| 1 | Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | Una Film | 47 588 |
| 2 | Avatar: The Way of Water | US | James Cameron | Blitz Film | 39 623 |
| 3 | Top Gun: Maverick | US | Joseph Kosinski | Una Film | 34 932 |
| 4 | The Batman | US | Matt Reeves | Blitz Film | 32 714 |
| 5 | Amanet | RS | Nemanja Cipranic | Una Film | 30 732 |
| 6 | Ticket to Paradise | US/GB | OI Parker | Una Film | 29 838 |
| 7 | Spider-Man: No Way Home | US | Jon Watts | C2 FILM | 29 272 |
| 8 | Turning Red | US/CA | Domee Shi | Blitz Film | 28 959 |
| 9 | Thor: Love and Thunder | US | Taika Waititi | Blitz Film | 28 249 |
| 10 | Praznik rada (May Labor Day) | BA | Pjer Zalica | Obala Art Centar | 23 279 |

(1) J. del Val.

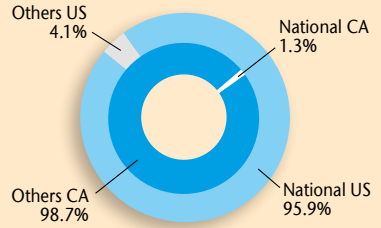
Source: Sarajevo Film Festival

North America

| | North America | US | Canada |
|---|---------------|--------|--------|
| Population 2022 ^e (million) | 371.7 | 333.0 | 38.7 |
| GDP per capita 2022 ^e (USD) | 73 263.5 | 75 180 | 56 794 |
| Gross box office 2022 ^e (bn USD) | 7.53 | 6.85 | 0.68 |
| Admissions 2022 ^e (million) ⁽¹⁾ | 715.1 | 650.3 | 64.8 |
| Average ticket price 2022 ^e (USD) | 10.5 | 10.5 | 10.5 |
| Average admissions per capita 2022 ^e | 1.9 | 2.0 | 1.7 |
| Screens 2022 ^e | 42 063 | 39 007 | 3 056 |

(1) Estimated admissions. (2) By GBO.

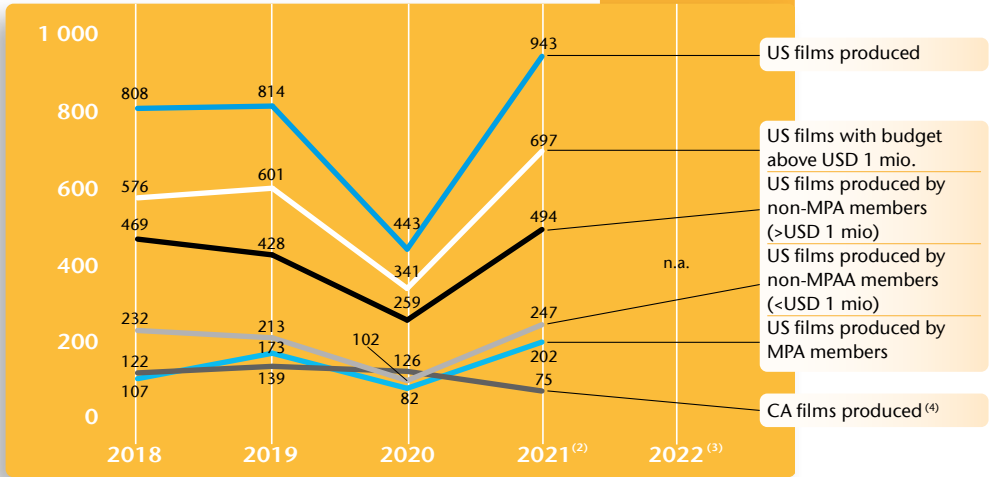
Market shares 2022^{(2) e}



Number of US⁽¹⁾ and Canadian feature films produced | 2018-2022⁽³⁾

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.

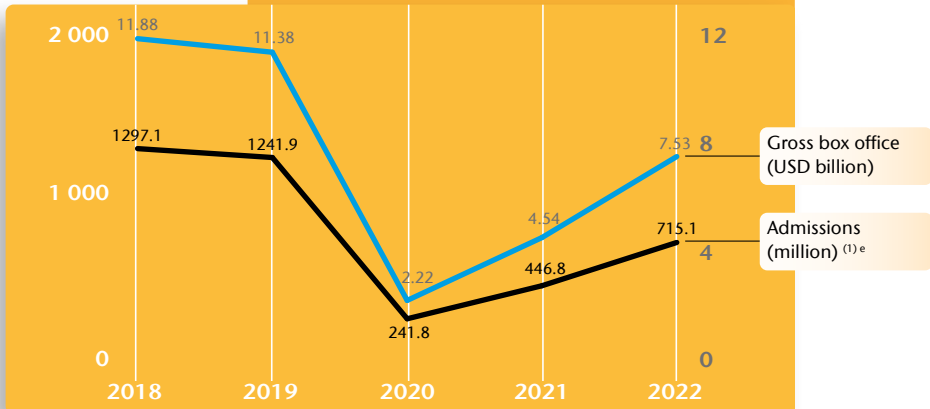
(2) US data are provisional as of February 2022. Netflix was added as a member in 2019, past years include MPA member studios at that time.

(3) 2022 figures not available as of April 2023.

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

Admissions and gross box office in the US & Canada | 2018-2022

Sources: MPA, The Cinema Foundation, Comscore, NATO, OBS



(1) Restated series. Admissions estimated on average ticket price as communicated by NATO.

Top 20 films by admissions in North America | 2022

Admissions estimated based on the average ticket price of USD 9.57 as communicated by Comscore.

| Original title | Country of origin | Director(s) | Distributor | Admissions |
|--|-----------------------|--|------------------|------------|
| 1 Top Gun: Maverick | US | Joseph Kosinski | Paramount | 75 102 698 |
| 2 Black Panther: Wakanda Forever | US | Ryan Coogler | Disney | 45 260 779 |
| 3 Doctor Strange in the Multiverse... | US | Sam Raimi | Disney | 42 981 359 |
| 4 Jurassic World: Dominion | US/CN | Colin Trevorrow | Universal | 39 378 379 |
| 5 Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | Universal | 38 630 639 |
| 6 The Batman | US | Matt Reeves | Warner Bros. | 38 594 105 |
| 7 Avatar: The Way of Water | US | James Cameron | 20th Century Fox | 37 420 889 |
| 8 Thor: Love and Thunder | US | Taika Waititi | Disney | 35 868 007 |
| 9 Sonic the Hedgehog 2 | US/JP | Jeff Fowler | Paramount | 19 944 922 |
| 10 Spider-Man: No Way Home | US | Jon Watts | Sony | 18 639 172 |
| 11 Black Adam | US/... ⁽²⁾ | Jaume Collet-Serra | Warner Bros. | 17 555 993 |
| 12 Elvis | US/AU | Baz Luhrmann | Warner Bros. | 15 782 660 |
| 13 Uncharted | US/DE | Ruben Fleischer | Sony | 15 532 792 |
| 14 Nope | US/JP/CA | Jordan Peele | Universal | 12 881 617 |
| 15 Lightyear | US | Angus MacLane | Disney | 12 362 297 |
| 16 Smile | US | Parker Finn | Paramount | 11 069 493 |
| 17 The Lost City | US | Adam Nee, Aaron Nee | Paramount | 11 007 736 |
| 18 Bullet Train | US/JP | David Leitch | Sony | 10 801 317 |
| 19 The Bad Guys | US | Pierre Perifel | Universal | 10 160 254 |
| 20 Fantastic Beasts: The Secrets of... | GB inc/US | David Yates | Warner Bros. | 10 015 762 |

(1) J. del Val.

(2) ...CA/NZ/HU.

Sources: LUMIERE/OBS, Comscore

Distribution and exhibition

Driven by the strong performance of several franchise hits, the North American box office continued on its path to recovery in 2022, with receipts soaring to a total of USD 7.53 billion. While this represents a year-on-year increase of 65.7%, it is still 34.3% below the average takings seen between 2017 and 2019. Based on the average ticket price of USD 10.53 published by the National Association of Theatre Owners (NATO), attendance rose by 60.1% to an estimated 715.1 million tickets sold in 2022, which is a 43.2% decline compared to pre-pandemic levels.

A significant degree of concentration was observed at the top end of the box office, with the 20 top-performing movies accounting for an estimated 68% of annual ticket sales - a higher share than in 2019 (53%). Tentpole movies performed similarly to pre-pandemic times, with eight titles grossing more than USD 300 million in 2022, compared to 10 in 2019. However, only 18 titles grossed more than USD 100 million, compared to 30 in 2019. The action sequel *Top Gun: Maverick* was the box office winner for the year, selling an estimated total of 75.1 million tickets in 2022 and accounting alone for about 10% of annual admissions. Other high-grossing titles for the year include Marvel superhero hits *Black Panther: Wakanda Forever* (45.3 million admissions) and *Doctor Strange in the Multiverse of Madness* (43.0 million), as well as the latest

instalment of the *Jurassic World* franchise (39.4 million). As the exhibition industry was severely impacted by the coronavirus crisis, the number of active screens continued to decline, reaching an estimated total of 42 063 screens in 2022 – 1 583 less than in 2021.

Production and funding

Despite clear signs of recovery, the sector still faced lingering issues related to the COVID-19 pandemic, such as production delays and a shortage of new releases, especially mid-tier films. As Hollywood studios shifted part of their production slate to streaming services, often in a bid to bolster their own VOD offerings, only 71 new films received a wide theatrical release in 2022, well below the volume observed in 2019, when 112 movies were released on at least 2 000 cinema screens.

Amid growing competition to attract film and TV shoots, several US states have expanded their tax incentive schemes or introduced new industry programs, leading many productions to relocate across the country.

In May 2023, the Writers Guild of America (WGA) called its first strike in 15 years, amid heated negotiations around the residual payments and concerns over the use of AI to generate scripts.

Sources: MPA, Comscore, NATO, The Cinema Foundation, *Variety*, *Screen International*, *The Hollywood Reporter*, *The Guardian*

Latin America

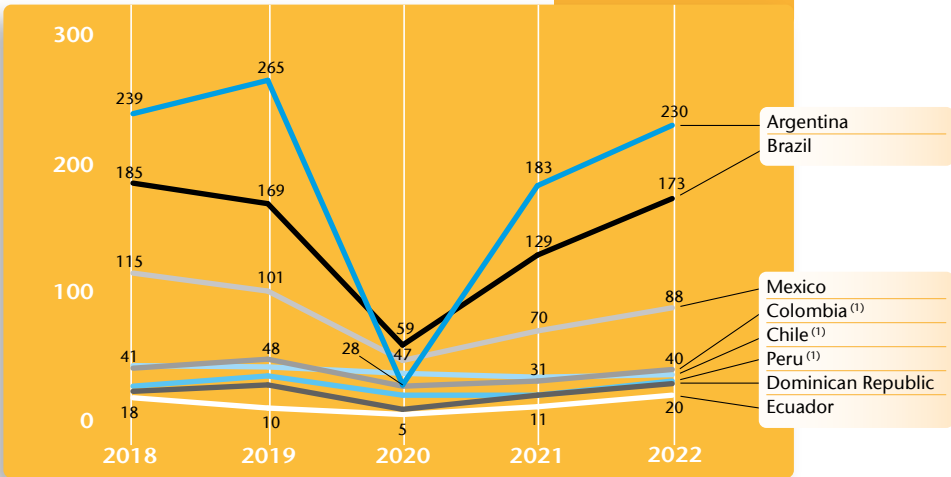
| | Argentina | Brazil | Chile ^e | Colombia | Costa Rica ^e |
|---|-----------|--------|--------------------|----------------------|-------------------------|
| Population 2022 (million) | 46.3 | 213.9 | 19.9 | 51.6 | 5.2 |
| GDP per capita 2022 (M USD) | 13 622 | 8 857 | 15 604 | 6 644 | 13 090 |
| Gross box office 2022 ^e (M USD) | 158.1 | 352.2 | 83.1 | 109.5 | 23.8 |
| Admissions 2022 (million) | 34.5 | 95.1 | 17.9 | 40.7 | 4.6 |
| Average ticket price 2022 (USD) | 4.6 | 3.7 | 4.7 | 2.7 | 5.2 |
| Average admissions per capita 2022 ^e | 0.7 | 0.4 | 0.9 | 0.8 | 0.9 |
| Screens 2022 | 943 | 3 401 | 537 ⁽¹⁾ | 1 244 ⁽¹⁾ | 167 ⁽²⁾ |
| National market shares 2022 | 8.1% | 4.2% | 0.5% | 2.7% | 2.1% |

(1) 2021 (2) 2020

Number of national feature films released in Latin America | 2018-2022

In units.

Sources: OIA^(*), OBS/IMDb

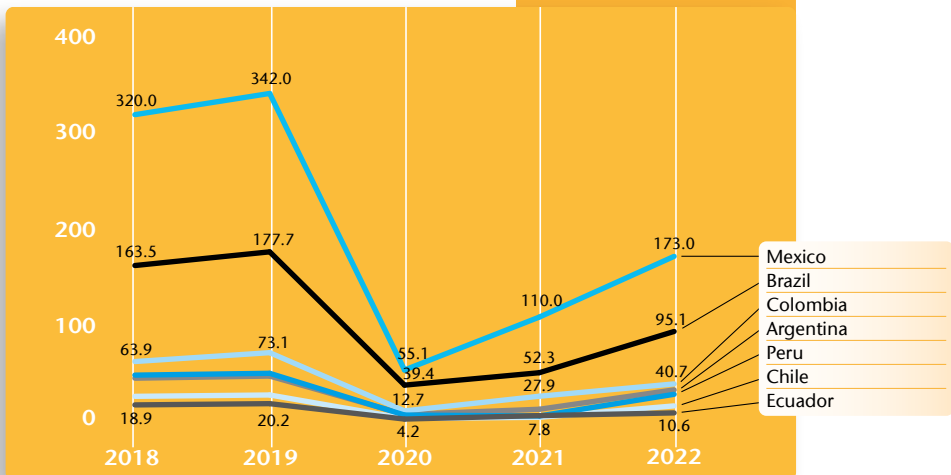


(1) Restated series.

Admissions in Latin America | 2018-2022

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 |
|---|--------------------|---------|--------|--------------------|
| Population 2022 (million) | 10.6 | 18.0 | 130.1 | 34.2 |
| GDP per capita 2022 (M USD) | 10 573 | 6 413 | 10 948 | 7 005 |
| Gross box office 2022 ^e (M USD) | 16.5 | 51.5 | 571.5 | 96.6 |
| Admissions 2022 (million) | 3.1 | 10.6 | 173.0 | 29.9 |
| Average ticket price 2022 (USD) | 5.4 | 4.9 | 3.3 | 3.2 |
| Average admissions per capita 2022 ^e | 0.3 | 0.6 | 1.3 | 0.9 |
| Screens 2022 | 190 | 387 | 7 410 | 663 ⁽²⁾ |
| National market shares 2022 | 14.0% | 1.5% | 3.5% | 3.2% |

Mexico

In the region's largest cinema market, attendance climbed by 53.7% to 173.0 million tickets sold in 2022, corresponding to 52% of pre-pandemic average figures. Box office revenues increased by a similar rate to MPX 11.5 billion (USD 571.5 million), roughly two thirds of the 2017-2019 average. Local productions only generated 3.5% of ticket sales as US hits took the box office by storm, led by animated feature *Minions: The Rise of Gru* (13.2 million admissions). Romantic comedy *¿Y cómo es él?* was the top-grossing local title for the year, racking up more than 1 million tickets over nine weeks. Overall, 258 Mexican films were produced in 2022, well above pre-pandemic levels, confirming the recovery started in 2021. However, only a total of 88 local titles were released in 2022, up from 70 in the previous year. The number of local productions that included Indigenous or Afro-descendant themes grew from 14 in 2019 to 31 in 2021, as national film body's IMCINE intensified its efforts to support diversity and inclusion in the industry. After dropping in 2021, the total number of screens swung back to a total of 7 410 units in 2022, spread across 948 cinema sites.

Brazil

Admissions grew by 82.0% to 95.1 million tickets sold in 2022, accounting for 54.6% of average levels before the pandemic. Box office takings also soared to BRL 1.82 billion (USD 352.2 million), corresponding to 68.4% of the 2017-2019 average. The recovery was largely prompted by the strong performance of US titles, with superhero movie *Doctor Strange in the Multiverse of Madness* leading the way with 8.3 million tickets sold. Domestic productions took 4.2% of admissions, compared to up from 1.7% in 2021. Coming-of-age comedy *Turma da Mônica: Lições (Monica and Friends: Lessons)* was the top-earning Brazilian title for the

year, ahead of comedy sequel *Tô ryca! 2*. A total of 173 Brazilian films were released in 2022, up from 129 in 2021. The number of cinema screens rose to a total of 3 401, 135 more screens than in the previous year. Rio de Janeiro's film agency introduced a new tax incentive providing up to 35% of local expenditure, while São Paulo's film and audiovisual body has extended its existing cash rebate program, offering a 30% rebate to productions filmed in the city.

Argentina

In 2022, the theatrical exhibition sector continued its recovery, as box office receipts soared to ARS 20.14 billion (USD 158.1 million) while attendance reached a total of 34.5 million admissions. This figure is more than double the number of tickets sold in 2021 and represents 71.5% of the average admissions levels registered before the pandemic. Domestic productions generated 8.1% of ticket sales for the year, up from 2.1% in 2021, driven by the historical drama *Argentina, 1985*, which racked up 1.1 million admissions, the only local film among the 10 top-grossing titles. Animated sequel *Minions: The Rise of Gru* topped the box office charts, drawing in 4.6 million viewers, ahead of *Jurassic World: Dominion* (2.4 million). The number of Argentinian releases rebounded to 230 titles, 47 more than in 2021, in line with pre-pandemic years. After many cinemas shut down during the health crisis, the number of screens also rebounded, bringing the total count to 943 units in 2022. In 2022, the city of Buenos Aires launched the country's first production incentive scheme, offering a 20% cash rebates on eligible expenditure to productions filming in the Argentine capital.

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

Top 10 films by admissions in Argentina | 2022

| Original title | Country of origin | Director(s) | Admissions |
|---|-------------------|----------------------------------|------------|
| 1 Minions: The Rise of Gru | US | K. Balda, B. Ableson, J. del Val | 4 624 722 |
| 2 Jurassic World: Dominion | US/CN | Colin Trevorrow | 2 445 318 |
| 3 Thor: Love and Thunder | US | Taika Waititi | 2 114 013 |
| 4 Doctor Strange in the Multiverse of Madness | US | Sam Raimi | 1 992 572 |
| 5 Lightyear | US | Angus MacLane | 1 615 442 |
| 6 Spider-Man: No Way Home | US | Jon Watts | 1 590 724 |
| 7 Sonic the Hedgehog 2 | US/JP | Jeff Fowler | 1 293 720 |
| 8 The Batman | US | Matt Reeves | 1 284 130 |
| 9 Avatar: The Way of Water | US | James Cameron | 1 101 816 |
| 10 Argentina, 1985 | AR/GB/US | Santiago Mitre | 1 089 066 |

Sources: OIA, INCAA

Top 10 films by admissions in Brazil | 2022

| Original title | Country of origin | Director(s) | Admissions |
|---|-------------------|----------------------------------|------------|
| 1 Doctor Strange in the Multiverse of Madness | US | Sam Raimi | 8 330 968 |
| 2 Minions: The Rise of Gru | US | K. Balda, B. Ableson, J. del Val | 6 862 337 |
| 3 Avatar: The Way of Water | US | James Cameron | 6 656 880 |
| 4 Thor: Love and Thunder | US | Taika Waititi | 6 351 326 |
| 5 The Batman | US | Matt Reeves | 5 805 426 |
| 6 Black Panther: Wakanda Forever | US | Ryan Coogler | 5 636 503 |
| 7 Top Gun: Maverick | US | Joseph Kosinski | 5 002 301 |
| 8 Black Adam | US/CA/NZ/HU | Jaume Collet-Serra | 4 293 550 |
| 9 Jurassic World: Dominion | US/CN | Colin Trevorrow | 3 908 459 |
| 10 Spider-Man: No Way Home | US | Jon Watts | 3 763 678 |

Sources: OIA, ANCINE

Top 10 films by admissions in Chile | 2022

| Original title | Country of origin | Director(s) | Admissions |
|---|-------------------|----------------------------------|------------|
| 1 Minions: The Rise of Gru | US | K. Balda, B. Ableson, J. del Val | 2 171 203 |
| 2 Doctor Strange in the Multiverse of Madness | US | Sam Raimi | 1 333 475 |
| 3 Thor: Love and Thunder | US | Taika Waititi | 1 189 238 |
| 4 Jurassic World: Dominion | US/CN | Colin Trevorrow | 1 121 364 |
| 5 Spider-Man: No Way Home | US | Jon Watts | 855 434 |
| 6 Avatar: The Way of Water | US | James Cameron | 844 473 |
| 7 Sonic the Hedgehog 2 | US/JP | Jeff Fowler | 767 201 |
| 8 The Batman | US | Matt Reeves | 745 735 |
| 9 Black Panther: Wakanda Forever | US | Ryan Coogler | 691 716 |
| 10 Lightyear | US | Angus MacLane | 571 917 |

Sources: OBS/LUMIERE, Comscore

Top 10 films by admissions in Colombia | 2022

| Original title | Country of origin | Director(s) | Admissions |
|---|-------------------|----------------------------------|------------|
| 1 Doctor Strange in the Multiverse of Madness | US | Sam Raimi | 2 890 631 |
| 2 Minions: The Rise of Gru | US | K. Balda, B. Ableson, J. del Val | 2 836 640 |
| 3 Thor: Love and Thunder | US | Taika Waititi | 2 571 765 |
| 4 Avatar: The Way of Water | US | James Cameron | 2 387 187 |
| 5 Jurassic World: Dominion | US/CN | Colin Trevorrow | 2 181 342 |
| 6 Black Panther: Wakanda Forever | US | Ryan Coogler | 2 122 690 |
| 7 The Batman | US | Matt Reeves | 1 755 053 |
| 8 Black Adam | US/CA/NZ/HU | Jaume Collet-Serra | 1 689 791 |
| 9 Lightyear | US | Angus MacLane | 1 430 039 |
| 10 Sonic the Hedgehog 2 | US/JP | Jeff Fowler | 1 415 280 |

Sources: OBS/LUMIERE, Comscore

Top 10 films by admissions in the Dominican Republic | 2022

| | Original title | Country of origin | Director(s) | Admissions |
|----|---|-------------------|----------------------------------|------------|
| 1 | Doctor Strange in the Multiverse of Madness | US | Sam Raimi | 222 671 |
| 2 | Thor: Love and Thunder | US | Taika Waititi | 195 331 |
| 3 | Black Panther: Wakanda Forever | US | Ryan Coogler | 190 591 |
| 4 | Minions: The Rise of Gru | US | K. Balda, B. Ableson, J. del Val | 169 685 |
| 5 | Spider-Man: No Way Home | US | Jon Watts | 166 801 |
| 6 | Avatar: The Way of Water | US | James Cameron | 149 619 |
| 7 | The Batman | US | Matt Reeves | 135 034 |
| 8 | Black Adam | US/CA/NZ/HU | Jaume Collet-Serra | 131 363 |
| 9 | La Trampa | DO | Frank Perozo | 128 894 |
| 10 | Flow Calle | DO | Frank Perozo | 116 797 |

Sources: OIA, DGCINE

Top 10 films by admissions in Ecuador | 2022

| | Original title | Country of origin | Director(s) | Admissions |
|----|---|-------------------|----------------------------------|------------|
| 1 | Doctor Strange in the Multiverse of Madness | US | Sam Raimi | 833 999 |
| 2 | Thor: Love and Thunder | US | Taika Waititi | 701 495 |
| 3 | Avatar: The Way of Water | US | James Cameron | 538 923 |
| 4 | Minions: The Rise of Gru | US | K. Balda, B. Ableson, J. del Val | 688 549 |
| 5 | Jurassic World: Dominion | US/CN | Colin Trevorrow | 582 751 |
| 6 | The Batman | US | Matt Reeves | 557 578 |
| 7 | Sonic the Hedgehog 2 | US/JP | Jeff Fowler | 568 023 |
| 8 | Black Panther: Wakanda Forever | US | Ryan Coogler | 457 463 |
| 9 | Black Adam | US/CA/NZ/HU | Jaume Collet-Serra | 317 878 |
| 10 | Top Gun: Maverick | US | Joseph Kosinski | 247 098 |

Sources: OIA, ICCA

Top 10 films by admissions in Mexico | 2022

| | Original title | Country of origin | Director(s) | Admissions |
|----|---|-------------------|----------------------------------|------------|
| 1 | Minions: The Rise of Gru | US | K. Balda, B. Ableson, J. del Val | 13 176 234 |
| 2 | Jurassic World: Dominion | US/CN | Colin Trevorrow | 12 657 424 |
| 3 | Doctor Strange in the Multiverse of Madness | US | Sam Raimi | 11 953 417 |
| 4 | Black Panther: Wakanda Forever | US | Ryan Coogler | 10 342 785 |
| 5 | Avatar: The Way of Water | US | James Cameron | 10 268 041 |
| 6 | Thor: Love and Thunder | US | Taika Waititi | 8 944 578 |
| 7 | The Batman | US | Matt Reeves | 8 935 042 |
| 8 | Sonic the Hedgehog 2 | US/JP | Jeff Fowler | 7 518 849 |
| 9 | The Black Phone | US | Scott Derrickson | 5 185 304 |
| 10 | Lightyear | US | Angus MacLane | 4 977 637 |

Sources: OIA, IMCINE

Top 10 films by admissions in Peru | 2022

| | Original title | Country of origin | Director(s) | Admissions |
|----|---|-------------------|----------------------------------|------------|
| 1 | Minions: The Rise of Gru | US | K. Balda, B. Ableson, J. del Val | 2 101 707 |
| 2 | Doctor Strange in the Multiverse of Madness | US | Sam Raimi | 2 052 181 |
| 3 | Thor: Love and Thunder | US | Taika Waititi | 1 818 305 |
| 4 | Jurassic World: Dominion | US/CN | Colin Trevorrow | 1 434 421 |
| 5 | Avatar: The Way of Water | US | James Cameron | 1 418 399 |
| 6 | Black Panther: Wakanda Forever | US | Ryan Coogler | 1 307 998 |
| 7 | Sonic the Hedgehog 2 | US/JP | Jeff Fowler | 939 540 |
| 8 | Dragon Ball Super: Super Hero | JP | Tetsurô Kodama | 930 964 |
| 9 | Spider-Man: No Way Home | US | Jon Watts | 911 543 |
| 10 | The Batman | US | Matt Reeves | 906 407 |

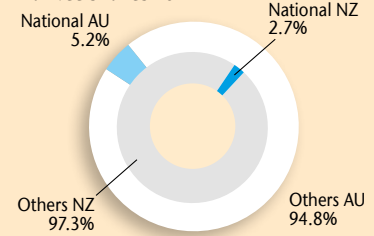
Sources: OIA, IMCINE

Australia and New Zealand

| | Australia | New Zealand |
|------------------------------------|-----------|-------------|
| Population 2022* (million) | 26.0 | 5.1 |
| GDP per capita 2022* (USD) | 66 408 | 47 278 |
| Gross box office 2022 (M USD) | 703.1 | 106.0 |
| Admissions 2022 (million) | 57.9 | 10.0 |
| Average ticket price 2022 (USD) | 12.1 | 10.6 |
| Average admissions per capita 2022 | 2.2 | 1.9 |
| Screens 2022 | 2 278 | 505 |

(1) By GBO

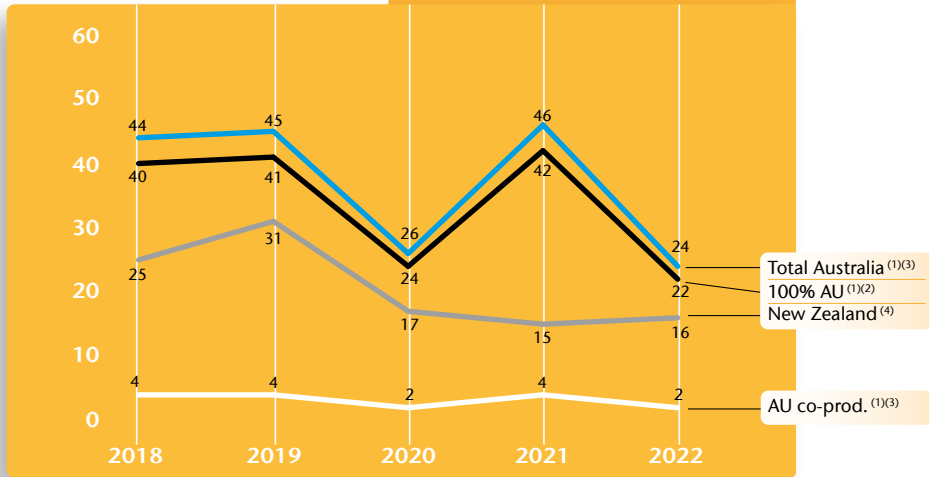
Market shares 2022^{(1) e}



Number of Australian and New Zealand feature films produced | 2018-2022

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.

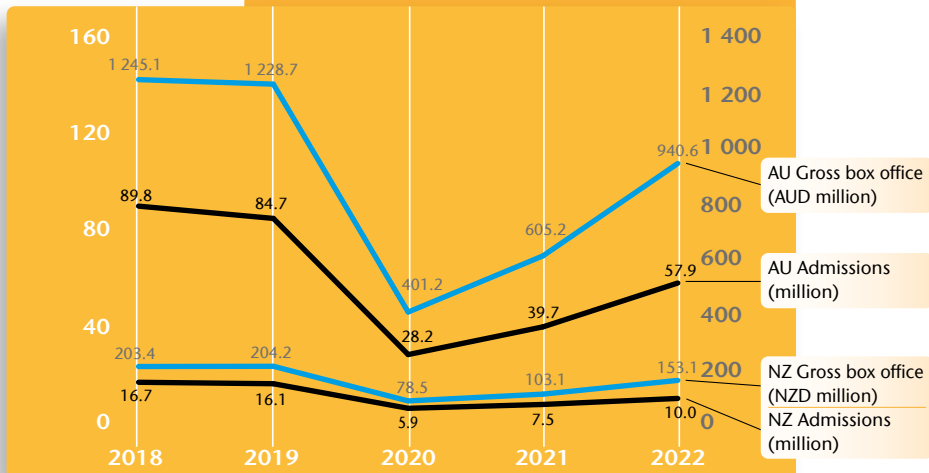
(2) Includes films under Australian creative control that were 100% foreign financed.

(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 | 2018-2022

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



Top 10 films by admissions in Australia | 2022^e

Estimated admissions based on average ticket price of AUD 16.2.

| | Original title | Country of origin | Director(s) | Distributor | Admissions ^e |
|----|--|-------------------|--|--------------|-------------------------|
| 1 | Top Gun: Maverick | US | Joseph Kosinski | Paramount | 5 730 238 |
| 2 | Avatar: The Way of Water | US | James Cameron | Disney | 3 014 309 |
| 3 | Thor: Love and Thunder | US | Taika Waititi | Disney | 2 737 362 |
| 4 | Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | Universal | 2 683 428 |
| 5 | Doctor Strange in the Multiverse of... | US | Sam Raimi | Disney | 2 358 349 |
| 6 | The Batman | US | Matt Reeves | Warner Bros. | 2 355 179 |
| 7 | Jurassic World: Dominion | US/CN | Colin Trevorrow | Universal | 2 203 230 |
| 8 | Elvis | US/AU | Baz Luhrmann | Warner Bros. | 2 061 298 |
| 9 | Black Panther: Wakanda Forever | US | Ryan Coogler | Disney | 1 790 881 |
| 10 | Spider-Man: No Way Home | US | Jon Watts | Sony | 1 629 879 |

(1) J. del Val.

Source: MPDAA

Top 10 films by admissions in New Zealand | 2022^e

Estimated admissions based on average ticket price of NZD 15.3.

| | Original title | Country of origin | Director(s) | Distributor | Admissions ^e |
|----|--|-------------------|--|-------------|-------------------------|
| 1 | Top Gun: Maverick | US | Joseph Kosinski | Paramount | 929 539 |
| 2 | Avatar: The Way of Water | US | James Cameron | Disney | 552 611 |
| 3 | Thor: Love and Thunder | US | Taika Waititi | Disney | 539 814 |
| 4 | Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | Universal | 464 195 |
| 5 | Doctor Strange in the Multiverse of... | US | Sam Raimi | Disney | 411 760 |
| 6 | Black Panther: Wakanda Forever | US | Ryan Coogler | Disney | 384 306 |
| 7 | Elvis | US/AU | Baz Luhrmann | Universal | 318 777 |
| 8 | Spider-Man: No Way Home | US | Jon Watts | Sony | 308 574 |
| 9 | The Batman | US | Matt Reeves | Universal | 292 817 |
| 10 | Jurassic World: Dominion | US/CN | Colin Trevorrow | Universal | 292 561 |

(1) J. del Val.

Source: MPDA

Distribution and exhibition

Australian cinema attendance jumped by 46% to 57.9 million tickets sold in 2022, corresponding to 67% of average levels registered before the pandemic. Because of an increase in the average ticket price, GBO revenues rose to a larger degree than admissions, climbing by 55% to AUD 940.6 million (USD 703.1 million). In New Zealand, attendance grew by 33% to 10.0 million admissions in 2022, accounting for barely 62% of the pre-pandemic average, while box office revenues reached NZD 153.1 million (USD 106.0 million), up 48% on the previous year.

In both markets, as US blockbusters returned to the cinemas, the share captured by domestic productions dwindled compared to the previous two years. Local films generated 5.2% of box office revenues in Australia (down from an unprecedented 11.8% recorded in 2021) and 2.7% in New Zealand (down from 3.6% in the previous year). In Australia, the highest-grossing domestic film was the US/AU co-production *Elvis*, selling an estimated 2.1 million tickets, while in New Zealand the action drama *Muru* was the top

local film in terms of revenues. The number of screens slightly decreased in Australia, to a total of 2 278 screens, while it marginally grew in New Zealand, bringing to total count to 505 units.

Production and funding

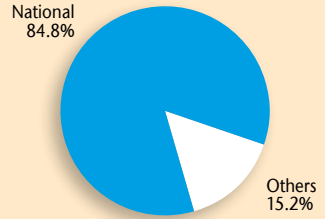
A total of 24 feature films were produced in Australia in the financial year 2021/2022, down from 46 titles in the previous year, which is considerably below the five-year average. In the same period, however, the overall drama expenditure in the country reached a record-breaking AUD 2.29 billion (USD 1.71 million), driven by an exceptional AUD 786 million spend on domestic theatrical features (USD 588 million). A total of 16 feature films were produced in New Zealand in 2022, well below pre-pandemic levels. In 2022, the New Zealand government opened a public consultation within a review of the existing funding system to the screen sector, in a bid to incentivize a steady pipeline of productions and support career development of local crews.

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

People's Republic of China

| | |
|---|----------------------------|
| Population 2022 ^e | 1 412.5 million |
| GDP per capita 2022 ^e | 12 970 USD |
| Gross box office 2022 ^e | 30.07 bn CNY (4.47 bn USD) |
| Admissions 2022 ^e | 712.0 million |
| Average ticket price 2022 ^e | 40.5 CNY (6.3 USD) |
| Average admissions per capita 2022 ^e | 0.5 |
| Screens 2021 2022 ^e | 82 248 ~ |

Market shares 2022⁽¹⁾

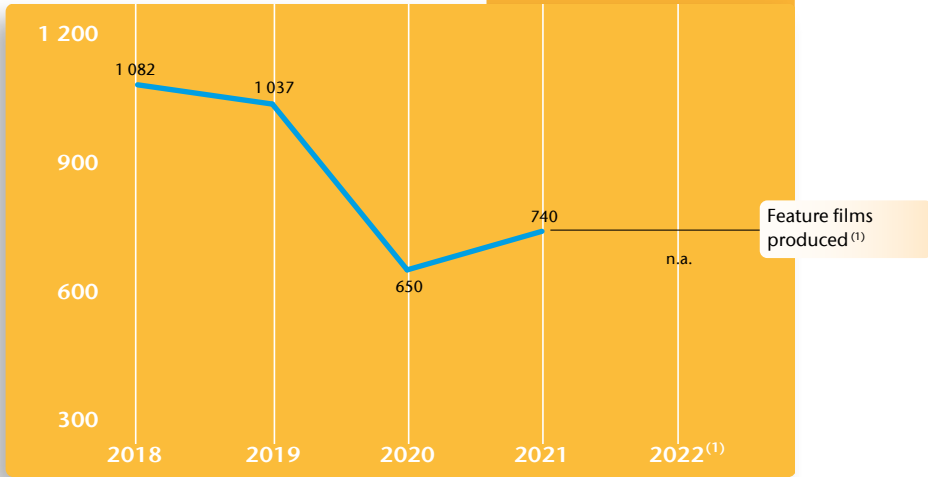


(1) By GBO.

Number of feature films produced in China | 2018-2022^{e(2)}

In units.

Source: China Film Administration

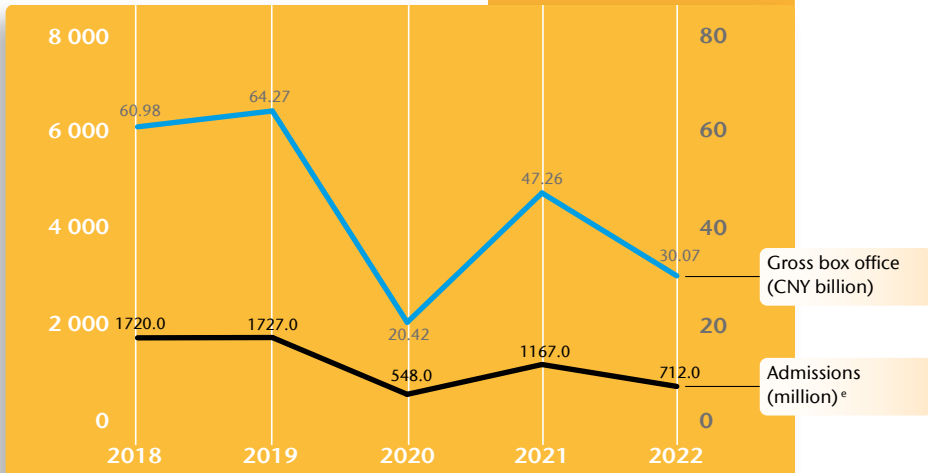


(1) Does not include films produced outside the official system of script and final print approval.

(2) 2022 figures not available as of April 2023.

Admissions and gross box office in China | 2018-2022^e

Source: China Film Administration



Top 20 films by admissions in China | 2022

| English Title | Country of origin | Director(s) | Admissions |
|--|-------------------|---|------------|
| 1 Chang jin hu... (Water Gate Bridge) | CN | H. Tsui, K. Chen, D. Lam, J. Huang, J. Park | 82 164 983 |
| 2 Du xing yue qiu (Moon Man) | CN | Chiyu Zhang | 74 229 476 |
| 3 Zhe ge sha... (Too Cool To Kill) | CN | Wenxiong Xing, Ru Qian | 54 305 360 |
| 4 Ren sheng... (Lighting Up the Stars) | CN | Jiangjiang Liu | 42 321 749 |
| 5 Wan li gui tu (Home Coming) | CN | Xiaozhi Rao | 37 749 473 |
| 6 Qi ji · Ben xiao hai (Nice View) | CN | Muye Wen | 29 686 992 |
| 7 Xiong chu... (Boonie Bears: Back To Earth) | CN | Huida Lin | 20 898 712 |
| 8 San taam daai zin (Detective vs. Sleuths) | HK/CN | Ka-Fai Wai | 18 704 907 |
| 9 Ming yat zin gei (Warriors Of Future) | HK | Yuen Fai Ng | 16 407 621 |
| 10 Avatar: The Way of Water | US | James Cameron | 14 677 904 |
| 11 Jurassic World Dominion ⁽¹⁾ | US/CN | Colin Trevorrow | 13 579 697 |
| 12 Ju ji shou (Sniper) | CN | Mo Zhang, Yimou Zhang | 13 531 375 |
| 13 Xin shen bang: ... (New Gods: Yang Jian) | CN | Ji Zhao | 13 146 678 |
| 14 Ge, ni hao (Give Me Five) | CN | Luan Zhang | 13 064 800 |
| 15 Si hai (Only Fools Rush in) | CN | Han Han | 10 159 303 |
| 16 Bad Guys, The | US | Pierre Perifel | 9 876 830 |
| 17 Embrace Again | CN | Xiaolu Xue | 6 908 768 |
| 18 Minions: The Rise Of Gru | US | K. Balda, B. Ableson, J. del Val | 6 813 574 |
| 19 Duan · Qiao (The Fallen Bridge) | CN | Yu Li | 5 757 491 |
| 20 Wai tai kong de... (Mozart from Space) | CN | Sicheng Chen | 5 506 510 |

(1) Estimated admissions for 2022.

Sources: LUMIERE/OBS, Comscore

Distribution and exhibition

The pandemic continued to take a heavy toll on the Chinese theatrical sector, amid strict containment measures and large-scale cinema closures. According to the country's Film Administration, attendance plummeted by 39.0% to 712 million in 2022, which corresponds to only 42.2% of the pre-pandemic average ticket sales. Box office revenues similarly declined, dropping by 39.0% year-on-year to CNY 30.07 (USD 4.47 billion), less than half the levels recorded before the sanitary crisis. These results stand in stark contrast with the strong rebound registered in 2021, when the Chinese box office had overtaken North America for the second year in a row. Due to the intermittent closure of cinemas across the country, several high-profile domestic features had their release rescheduled, significantly disrupting marketing and promotion activities. In addition, amid a regulation clampdown, only a limited number of US titles were granted a release permit in the Chinese market. As a result, theatres faced a major shortage of content, struggling to fill their screening schedule. National productions dominated the box office, generating as much as 84.8% of GBO takings for the year, in line with the share recorded the two previous years, and well above the 64.1% of 2019. Local war movie *Water Gate Bridge*, a sequel to *The Battle at Lake Changjin*, topped the box office chart, selling a

total of 82.2 million admissions, ahead of science fiction film *Moon Man* (74.2 million) and action comedy *Too Cool to Kill* (54.3 million). Only four Hollywood titles appeared among the 20 highest-grossing films, headed by Disney's sci-fi sequel *Avatar: The Way of Water* which sold a total of 14.7 million tickets.

As China put an end to its stringent zero-COVID strategy, the recovery of film exhibition regained momentum at the beginning of 2023, as cinema-going approached record-levels during the Lunar New Year period, boosted by the local hits *Full River Red* and *The Wandering Earth 2*.

Production and funding

The pandemic also had significant knock-on effects on production levels, as the total number of films produced dropped to 740 films in 2021, compared to 1 037 in 2019. No official production figures were available for 2022 at the time of writing.

In 2022 China appointed a new Head to its Film Administration Bureau. This change has reportedly oriented the department towards a more business-friendly approach, streamlining the censorship process and granting Chinese studios more autonomy over release dates.

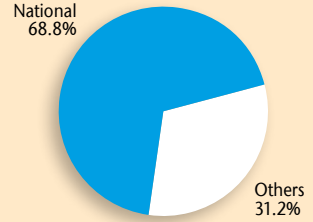
Sources: China National Film Administration, *Deadline*, *The Hollywood Reporter*, *Variety*, Artisan Gateway, Maoyan Research Institute

Japan

| | |
|------------------------------------|-----------------------------|
| Population 2022 ^e | 125.2 million |
| GDP per capita 2022 ^e | 34 358 USD |
| Gross box office 2022 | 213.11 bn JPY (1.63 bn USD) |
| Admissions 2022 | 152.0 million |
| Average ticket price 2022 | 1 402 JPY (10.7 USD) |
| Average admissions per capita 2022 | 1.2 |
| Screens 2021 2022 | 3 648 3 634 |

(1) By GBO

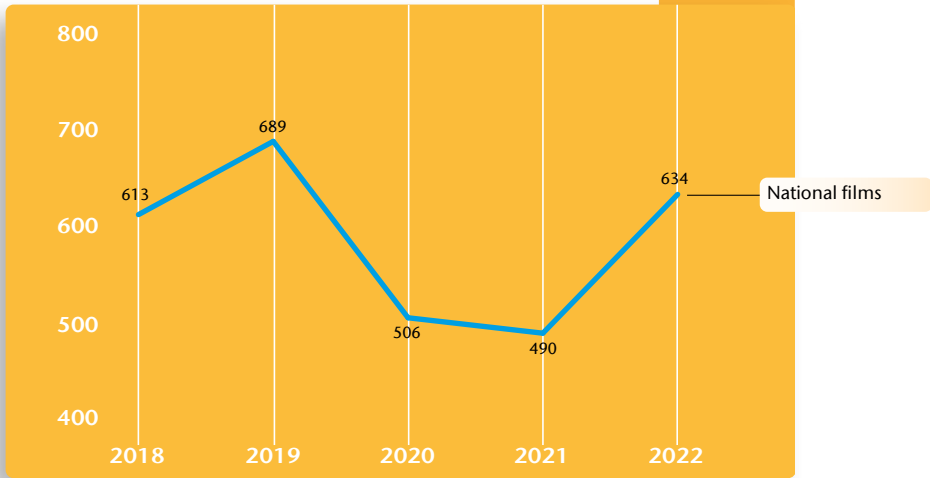
Market shares 2022^{e(1)}



Number of Japanese feature films released | 2018-2022

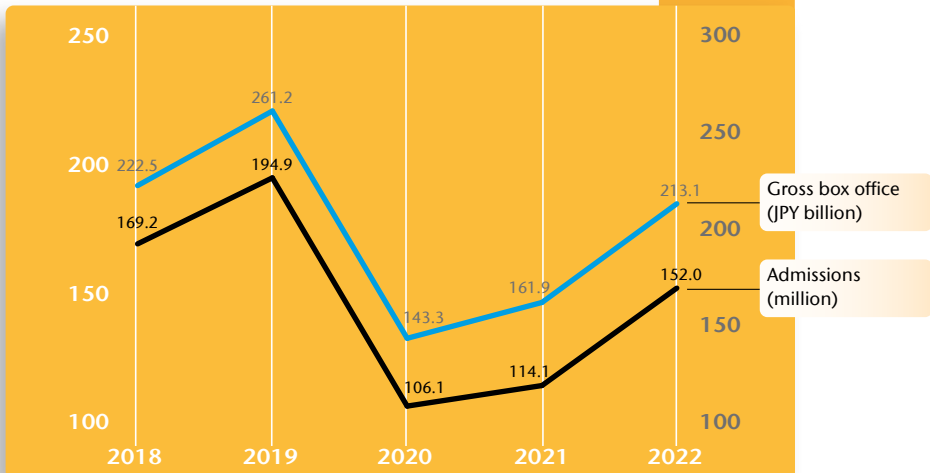
In units.

Source: EIREN



Admissions and gross box office in Japan | 2018-2022

Source: EIREN



Top 20 films by admissions in Japan | 2022

Estimated admissions based on average ticket price of JPY 1 402.

| English Title | Country of origin | Director(s) | Distributor | Admissions* |
|--|-------------------|--|--------------|-------------|
| 1 One Piece Film Red | JP | Gorô Taniguchi | Toei | 14 051 356 |
| 2 Jujutsu Kaisen 0 | JP | Seong-Hu Park | Toho | 9 843 082 |
| 3 Top Gun: Maverick | US | Joseph Kosinski | Towa | 9 679 030 |
| 4 Suzume no tojimari | JP | Makoto Shinkai | Toho | 9 379 458 |
| 5 Detective Conan: The Bride of Halloween | JP | G. Aoyama, S. Mitsunaka | Toho | 6 975 749 |
| 6 Jurassic World: Dominion | US/CN | Colin Trevorrow | Toho/Towa | 4 507 846 |
| 7 Kingdom 2: Far and Away | JP | Shinsuke Sato | TOHO/SPE | 3 680 457 |
| 8 Fantastic Beasts: The Secrets of... | GB inc/US | David Yates | Warner Bros. | 3 281 027 |
| 9 Shin Ultraman | JP | Shinji Higuchi | Toho | 3 166 905 |
| 10 Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | Toho/Towa | 3 166 905 |
| 11 Spider-Man: No Way Home | US | Jon Watts | Sony | 3 031 384 |
| 12 Sing 2 | US | Garth Jennings | Toho/Towa | 2 360 913 |
| 13 99.9 Criminal Lawyer: The Movie | JP | Hisashi Kimura | Shochiku | 2 146 933 |
| 14 The Last 10 Years | JP | Michihito Fujii | Warner Bros. | 2 139 800 |
| 15 Silent Parade | JP | Hiroshi Nishitani | Toho | 2 139 800 |
| 16 The Confidence Man JP: Episode of the... | JP | Ryô Tanaka | Toho | 2 061 341 |
| 17 Doraemon the Movie: Nobita's Little Star... | JP | Shin Yamaguchi | Toho | 1 918 688 |
| 18 Dragon Ball Super: Super Hero | JP | Tetsuro Kodama | Toei | 1 790 300 |
| 19 The Quintessential Quintuplets Movie | JP | Masato Jinbo | Pony Canyon | 1 597 718 |
| 20 Doctor Strange in the Multiverse of... | US | Sam Raimi | Disney | 1 540 656 |

(1) J. del Val.

Sources: EIREN, OBS

Distribution and exhibition

According to official figures, cinema attendance climbed by 33.2% to 152.0 million tickets sold in 2022. Box office revenues similarly increased by 31.6% year-on-year to JPY 213.11 billion (USD 1.63 billion), confirming the country's position of third largest theatrical market worldwide by GBO. While this figure is 18.4% lower than the 2019 record high, it comes very close to pre-pandemic levels, accounting for 89.9% of 2017-2019 average takings.

The rebound in attendance was driven by the performance of several titles, four of which individually crossed the traditional blockbuster benchmark of JPY 10 billion (76.6 USD billion). Domestic productions generated 68.8% of box office revenues, down from the exceptional 79.3% registered in 2021 but well above pre-pandemic levels. Out of the five top-grossing titles for the year, four were local animated features, led by *One Piece Film: Red*, the fifteenth instalment of a franchise based on a popular manga series. The movie sold an estimated total of 14.1 million tickets, ahead of fantasy anime *Jujutsu Kaisen 0* (9.8 million). Other domestic hits included adventure anime *Suzume no tojimari* and a new chapter of the *Detective Conan* franchise. 2022 also saw the return of Hollywood hits after two weak years, with seven US studio titles cracking the top 20, compared to only two films in 2021 and three in 2020. The top-earning US film was *Top Gun*:

Maverick, which took 9.7 million admissions, followed at a distance by *Jurassic World: Dominion* (4.5 million). The total number of screens marginally dropped to a total of 3 634 in 2022, 14 less than in the previous year.

Production and funding

After declining during the pandemic, the number of national films released in theatres bounced back to a total of 634 titles in 2022, marking the second highest level on record. Following a temporary halt in 2020, the country's animation industry significantly rebounded in 2021, with profits reaching a record-breaking JPY 2.74 trillion (USD 20.98 billion). The uptick was mainly driven by streaming, exports and merchandising revenues. Despite its resilience, the sector still grapples with ingrained problems, amid the shortage of skilled staff and low wages for freelance animators.

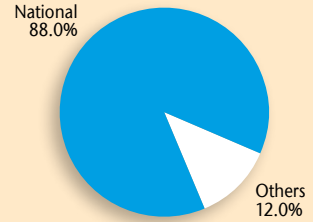
In 2022, a group of high-level film professionals including Cannes Palme d'Or winner Hirokazu Kore-eda formed a coalition advocating for structural reform of the Japanese film sector. The group aims to address deep-rooted issues, pushing for the creation of a central film body based on the model of the French CNC and for the introduction of a levy to support the local industry.

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

India

| | |
|---|-----------------------------|
| Population 2022 ^e | 1.41 billion |
| GDP per capita 2022 ^e | 2 466 USD |
| Gross box office 2022 ^e | 106.37 bn INR (1.35 bn USD) |
| Admissions 2022 ^e | 892.0 million |
| Average ticket price 2022 ^e | 119.2 INR (1.5 USD) |
| Average admissions per capita 2022 ^e | 0.6 |
| Screens 2021 2022 ^e | 9 423 ~ |

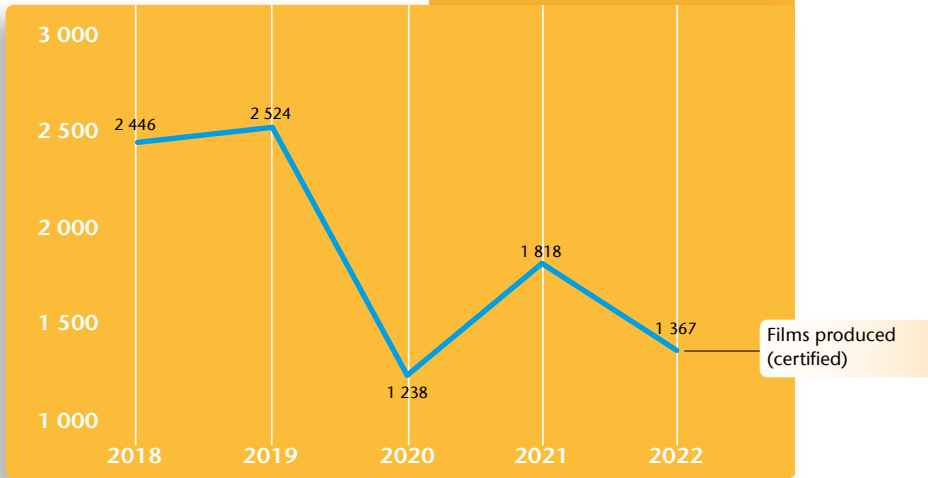
Market shares 2022^e



Number of Indian feature films certified⁽¹⁾ | 2018-2022

In units.

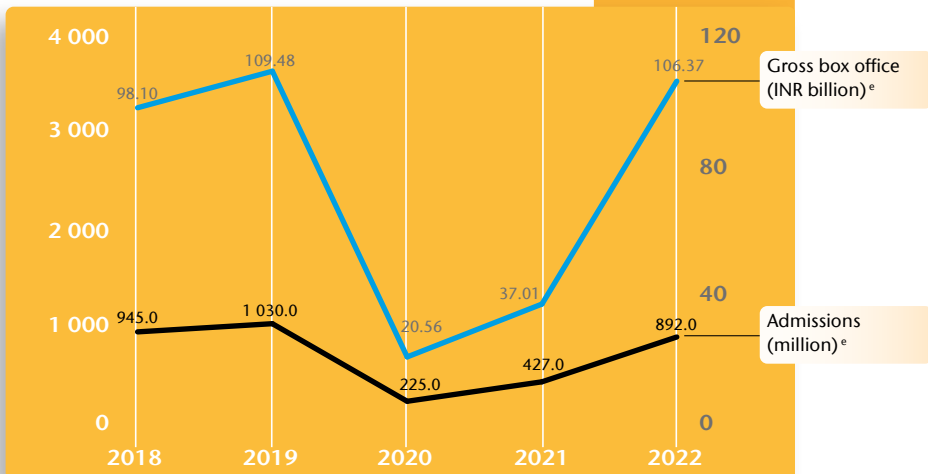
Source: Central Board of Film Certification



(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 2020 onwards are based on calendar years.

Admissions and gross box office in India | 2018-2022

Source: FICCI-EY, OBS



Top 20 films by admissions in India | 2022

GBO calculated using an average exchange rate of 1 USD = 78.6 INR.

| Original title | Country of origin | Director | Gross box office (in USD) |
|--|-------------------|-----------------------|---------------------------|
| 1 K.G.F: Chapter 2 | IN | Prashanth Neel | 123 510 100 |
| 2 RRR | IN | S. S. Rajamouli | 110 649 770 |
| 3 Avatar: The Way Of Water | US | James Cameron | 59 972 430 |
| 4 Kantara | IN | Rishab Shetty | 46 093 460 |
| 5 Ponnin Selvan - PSI | IN | Mani Ratnam | 40 745 600 |
| 6 Brahmastra | IN | Ayan Mukerji | 38 962 980 |
| 7 The Kashmir Files | IN | Vivek Agnihotri | 37 180 360 |
| 8 Drishyam 2 | IN | Abhishek Pathak | 36 289 050 |
| 9 Vikram | IN | Lokesh Kanagaraj | 36 289 050 |
| 10 Bhooh Bhulaiyaa 2 | IN | Anees Bazmee | 27 630 610 |
| 11 Doctor Strange in the Multiverse of Madness | US | Sam Raimi | 21 136 780 |
| 12 Beast | IN | Nelson | 20 754 790 |
| 13 Gangubai Kathiawadi | IN | Sanjay Leela Bhansali | 19 354 160 |
| 14 Sarkaru Vaari Paata | IN | Parasuram | 18 462 850 |
| 15 Thor: Love And Thunder | US | Taika Waititi | 16 807 560 |
| 16 Valimai | IN | H. Vinoth | 15 916 250 |
| 17 Bheemla Nayak | IN | Saagar K Chandra | 15 024 940 |
| 18 Radhe Shyam | IN | Radha Krishna Kumar | 14 006 300 |
| 19 James | IN | Chethan Kumar | 13 878 970 |
| 20 Karthikeya 2 | IN | Chandoo Mondeti | 12 351 010 |

Source: Ormax Media

Distribution and exhibition

After two challenging years, the Indian theatrical sector bounced back in 2022, despite a poor start in January as theatres were closed due to new coronavirus surges. According to a report from Ormax Media, gross box office revenues soared to INR 106.37 billion (USD 1.35 billion) in 2022, bolstered by an increase in the average ticket price. This figure corresponds to nearly three times the receipts registered in 2021, approaching the 2019 all-time record of INR 109.48 billion (USD 1.60 billion). Attendance levels also recovered, albeit to a lesser extent than the GBO, as admissions reached 892.0 million in 2022, more than double the tickets sold in the previous year, but still slightly below the pre-pandemic average.

Once again, national titles dominated the charts, generating as much as 88% of box office revenues for the year, driven by the strong performance of the two top titles: Kannada-language period action film *K.G.F: Chapter 2* and Telegu-language epic drama *RRR*. Domestic productions in Hindi language (commonly known as Bollywood films), traditionally a bedrock of the Indian box office, generated 33% of revenues, down from 44% in 2019. In turn, films shot in other Indian languages, such as Telegu and Tamil, witnessed significant growth since 2019, giving tough competition to the Hindi segment. *Avatar: The Way of Water* was the most successful

foreign film for the year, ranking third place and accounting for a 38% of the box office generated by Hollywood films. With an estimated INR 4.7 billion (USD 60.0 million) at the box office, the film has become the highest-grossing US studio film in India of all times.

Production and funding

According to the Central Film Board of Film Certification, a total of 1 367 domestic films were certified for release in 2022, down from 1 818 in 2021, and still far below the levels registered before the pandemic.

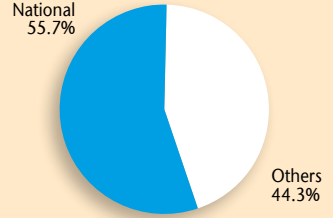
In a bid to establish India as a global content hub, in 2022 the federal government launched a long-awaited reimbursement scheme aimed at international productions shooting in the country. The incentive provides a rebate of up to 30% of qualifying expenditure, capped at INR 20 million (USD 255 000), with an additional rebate of 5% granted to productions employing at least 15% of local manpower. The Indian government has also granted approval to a co-production treaty with Australia, to reinforce ties between the two countries and boost joint production of content.

Sources: CBFC, Ormax Media, *Variety*, *Screen International*

South Korea

| | |
|------------------------------------|------------------------------|
| Population 2022* | 51.6 million |
| GDP per capita 2022* | 33 592 USD |
| Gross box office 2022 | 1 160.0 bn KRW (900.2 M USD) |
| Admissions 2022 | 112.8 million |
| Average ticket price 2022 | 10 283.7 KRW (8.0 USD) |
| Average admissions per capita 2022 | 2.2 |
| Screens 2021 2022 | 3 254 3 322 |

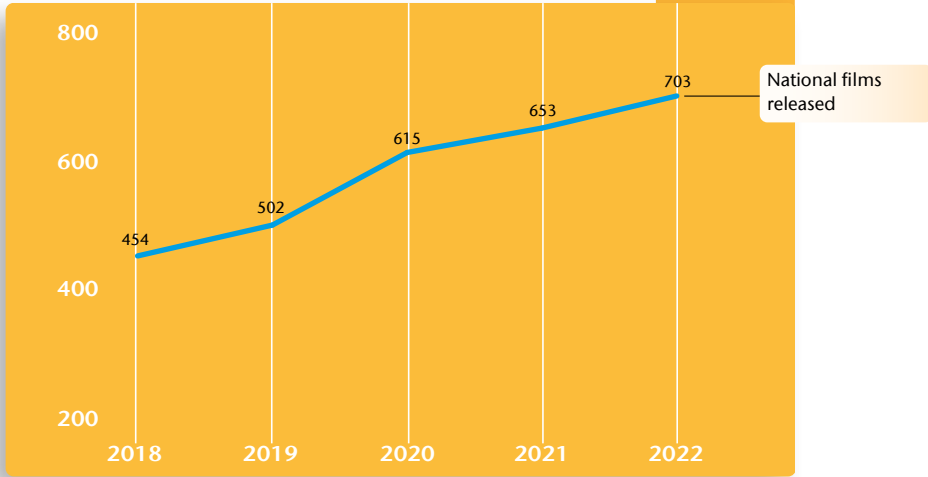
Market shares 2022*



Number of Korean feature films released | 2018-2022

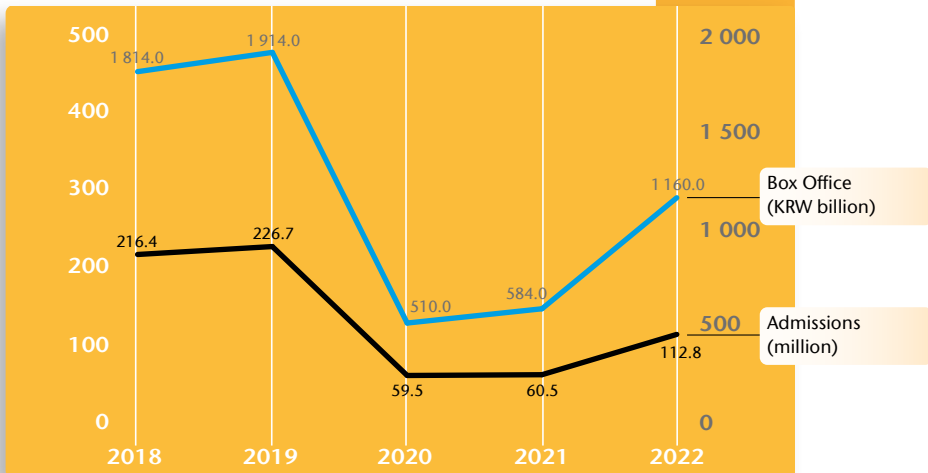
In units.

Source: KOFIC



Admissions and gross box office in South Korea | 2018-2022

Source: KOFIC



Top 20 films by admissions in South Korea | 2022

| | Original title | Country of origin | Director(s) | Distributor | Admissions |
|----|--|-------------------|--|---------------------------------|------------|
| 1 | Beomjoidosi 2 (The Roundup) | KR | Sang-yong Lee | ABO, Plus M | 12 693 302 |
| 2 | Top Gun: Maverick | US | Joseph Kosinski | Lotte | 8 177 446 |
| 3 | Avatar: The Way of Water | US | James Cameron | Disney | 7 313 220 |
| 4 | Hansan: Rising Dragon | KR | Han-min Kim | Lotte | 7 264 934 |
| 5 | Confidential Assignment 2: ... | KR | Seok-hoon Lee | CJ Entertainment | 6 982 840 |
| 6 | Doctor Strange in the Multiverse of... | US | Sam Raimi | Disney | 5 884 587 |
| 7 | Heon-teu (Hunt) | KR | Lee Jung-jae | Plus M | 4 352 390 |
| 8 | Olbbaemi (The Night Owl) | KR | Tae-jin Ahn | Next ... ⁽¹⁾ | 3 222 738 |
| 9 | Jurassic World: Dominion | US/CN | Colin Trevorrow | Universal | 2 837 410 |
| 10 | Manyeo 2: Lo go (The Witch: Part 2) | KR | Hoon-jung Park | Next ... ⁽¹⁾ | 2 806 501 |
| 11 | Thor: Love and Thunder | US | Taika Waititi | Disney | 2 716 306 |
| 12 | Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽²⁾ | Universal | 2 269 024 |
| 13 | Black Panther: Wakanda Forever | US | Ryan Coogler | Disney | 2 105 644 |
| 14 | Bisang seoneon (Emergency...) | KR | Jae-rim Han | Showbox | 2 058 869 |
| 15 | Spider-Man: No Way Home | US | Jon Watts | Sony | 2 024 121 |
| 16 | 6/45 | KR | Gyu-tae Park | Home Choice, ... ⁽³⁾ | 1 980 769 |
| 17 | Heojil kyolshim (Decision to Leave) | KR | Chan-wook Park | CJ Entertainment | 1 893 954 |
| 18 | Alienoid | KR | Dong-hoon Choi | CJ Entertainment | 1 539 362 |
| 19 | Hero | KR | JK Youn | CJ Entertainment | 1 487 686 |
| 20 | Beurokeo (Broker) | KR | Hirokazu Koreeda | CJ Entertainment | 1 261 131 |

(1) Entertainment World

(2) J. del Val.

(3) Sidus

Source: KOFIC

Distribution and exhibition

After two difficult years, the South Korean exhibition sector picked up again as attendance rose to a total of 112.8 million tickets sold in 2022, representing an interannual growth rate of 86.4%. Due to an increase in the average ticket price, box office revenues soared to an even higher rate than admissions to KRW 1.16 trillion (USD 900.2 million), almost twice as much the takings of the previous year. Despite these signs of recovery, 2022 figures still fall short of pre-pandemic levels, accounting for only 60.6 % of ticket sales and less than half of box office receipts registered in the record year 2019. Domestic production regained their pre-pandemic market share in 2022, generating 55.7% of ticket sales, up from 30.1% in 2021, the lowest point in history. Six out of the top 10 titles for the year were Korean films, led by the box office winner for the year, crime action film *The Roundup*. A sequel to the 2017 film *The Outlaws*, the title racked up 12.7 million admissions in 2022, becoming the only production to cross the symbolic benchmark of 10 million tickets sold. Other successful local titles include war action film *Hansan: Rising Dragon*, which ranked fourth place with 7.3 million admissions, ahead of action-comedy sequel *Confidential Assignment 2: International* (7.0 million) and spy thriller *Hunt* (4.4 million). Four Hollywood productions earned a place among the top 10 films, including *Top Gun: Maverick* (ranking second place

with 8.2 million admissions), *Avatar: The Way of Water* (7.3 million) and the superhero franchise film *Doctor Strange in the Multiverse of Madness* (5.9 million).

Following a challenging 2021, South Korea's film export revenues bounced back, rising by 47% in 2022 to a total of USD 71.5 million, an increase driven by the strong sales performance of several Korean sequels at international film markets. After years of diplomatic frictions, China allowed Korean drama *Hotel by the River* to be streamed on VOD platform Tencent. The move has been hailed as a partial lifting of China's de facto ban on Korean cultural content, imposed amid political tensions over the THAAD US missile defence system.

Production and funding

Production volume continued to grow, reaching an unprecedented total of 703 local films released in 2022, 50 more than in the previous year. However, only 226 of these titles ran in theatres for more than seven days and received more than 40 screenings. Government-funded Korean Film Council (KOFIC) raised concerns about the repercussions of the declining cinema attendance on the local public financing system, as in 2022 the national film development fund, which relies on a percentage of ticket sales, decreased to one third of the 2019's levels.

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

Other Asia

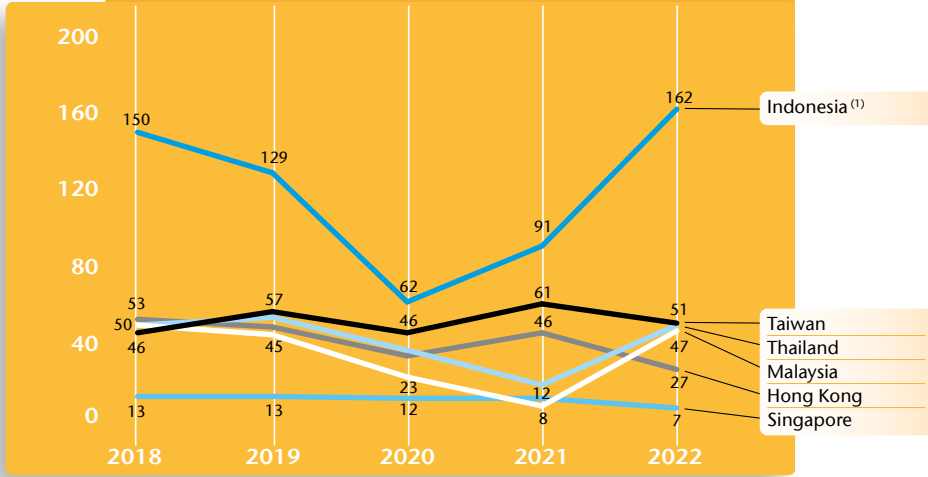
| | Hong Kong | Indonesia | Malaysia | Singapore | Taiwan | Thailand |
|---|----------------------|----------------------|----------------------|---------------------|--------|----------------------|
| Population 2022 ^e (million) | 7.4 | 274.9 | 33.1 | 5.3 | 23.3 | 70.1 |
| GDP per capita 2022 ^e (USD) | 49 700 | 4 691 | 13 108 | 79 426 | 35 513 | 7 631 |
| Gross box office 2022 ^e (M USD) | 146.1 | 326.4 ⁽¹⁾ | 170.7 | 72.2 | 193.3 | 152.8 ⁽¹⁾ |
| Admissions 2022 ^e (million) | 14.2 | 111.4 ⁽¹⁾ | 44.8 | 9.5 | 22.3 | 33.3 ⁽¹⁾ |
| Average ticket price 2022 ^e (USD) | 10.3 | 2.9 ⁽¹⁾ | 3.8 | 7.6 | 8.7 | 4.6 ⁽¹⁾ |
| Average admissions per capita 2022 ^e | 1.9 | 0.4 ⁽¹⁾ | 1.4 | 1.8 | 1.0 | 0.5 ⁽¹⁾ |
| Screens 2022 ^e | 265 | 2 149 ⁽²⁾ | 1 185 ⁽³⁾ | 282 | 947 | 1 321 ⁽²⁾ |
| National market shares 2022 ^e | 29.7% ⁽⁴⁾ | 46.6% ⁽¹⁾ | 24.2% | 3.9% ⁽⁴⁾ | 11.5% | 15.0% ⁽¹⁾ |

(1) 2019 (2) 2020 (3) 2021 (4) By GBO.

Number of national films released in selected Asian countries | 2018-2022^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

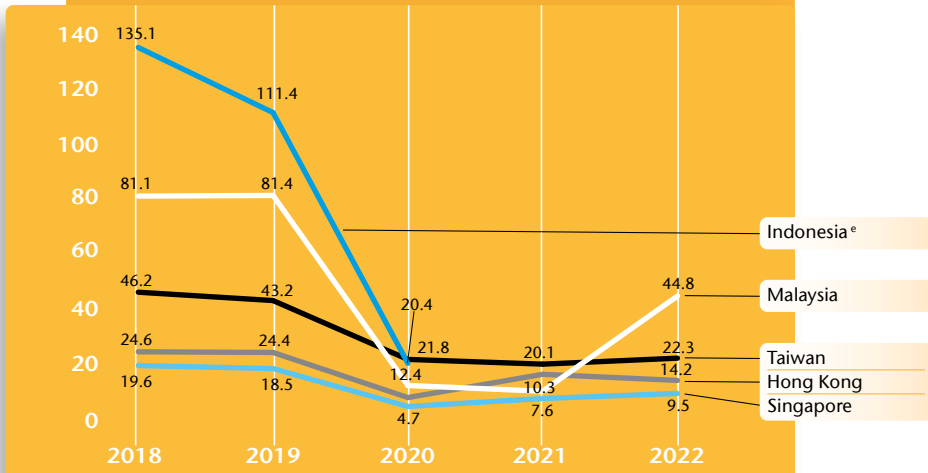


(1) The 2020 figures includes films released on VOD platforms.

Admissions in selected Asian countries | 2018-2022^e

In million.

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



Top 10 films by admissions in Hong Kong | 2022

| Original title | Country of origin | Director(s) | Distributor | Admissions |
|--|-------------------|--|----------------------|------------|
| 1 Faan hei gong sum (Table for Six) | HK | Sunny Chan | Edko | 1 159 725 |
| 2 Top Gun: Maverick | US | Joseph Kosinski | Paramount | 1 144 118 |
| 3 Ming yat zin... (Warriors of Future) | HK | Yuen Fai Ng | Intercontinental | 1 119 071 |
| 4 Doctor Strange in the Multiverse... | US | Sam Raimi | Disney | 818 228 |
| 5 Thor: Love and Thunder | US | Taika Waititi | Disney | 616 488 |
| 6 Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | Universal | 591 155 |
| 7 Mama's Affair | HK | Kearen Pang | Emperor Motion Pict. | 587 473 |
| 8 Jurassic World: Dominion | US/CN | Colin Trevorrow | Universal | 579 692 |
| 9 Avatar: The Way of Water | US | James Cameron | Disney | 534 144 |
| 10 Jing yi wui... (The Sparring Partner) | HK | Ho Cheuk-Tin | Golden Scene | 518 233 |

(1) J. del Val.

Sources: OBS/LUMIERE, Comscore

Top 10 films by admissions in Singapore | 2022

| Original title | Country of origin | Director(s) | Distributor | Admissions |
|---------------------------------------|-----------------------|--|-------------------|------------|
| 1 Doctor Strange in the Multiverse... | US | Sam Raimi | Disney | 779 980 |
| 2 Top Gun: Maverick | US | Joseph Kosinski | Paramount | 668 187 |
| 3 Black Panther: Wakanda Forever | US | Ryan Coogler | Disney | 638 928 |
| 4 Thor: Love and Thunder | US | Taika Waititi | Disney | 607 083 |
| 5 Jurassic World: Dominion | US/CN | Colin Trevorrow | Universal | 588 990 |
| 6 Avatar: The Way of Water | US | James Cameron | Disney | 480 771 |
| 7 Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | Universal | 417 359 |
| 8 The Batman | US | Matt Reeves | Warner Bros. | 384 931 |
| 9 Black Adam | US/... ⁽²⁾ | Jaume Collet-Serra | Warner Bros. | 353 075 |
| 10 Ah Girls Go Army | SG | Jack Neo | MM2 Entertainment | 264 433 |

(1) J. del Val.

(2) ...CA/NZ/HU

Sources: OBS/LUMIERE, Comscore

Distribution and exhibition

Cinema attendance showed differing trends across the Asian markets for which data were available. In Hong Kong, the lasting effects of the pandemic put a damper on the recovery, as cinemas were closed for a total of 104 days in 2022. As a result, GBO takings declined by 5% to HKD 1.24 billion (USD 146.1 million), while attendance dropped by 13.5% to an estimated 14.2 million tickets sold, representing just under 60% of pre-pandemic levels. Conversely, ticket sales witnessed a significant rebound in Malaysia, where attendance more than quadrupled in 2022 to reach 44.8 million admissions, accounting for 57% of the 2017-2019 average. Taiwan also saw a growth in cinemagoing, with ticket sales climbing by 11% to 22.3 million admissions in 2022 (corresponding to 54% of pre-pandemic average), while in Singapore ticket sales increased by 24% year-on-year to a total of 9.5 million admissions (49% of the pre-COVID average). In Hong Kong, despite a decrease in the number of local releases, domestic productions captured a record-breaking 29.7% of box office receipts, far above pre-pandemic levels. Four local titles featured among the 10 top-grossing titles for the year, led by the strong performance of comedy film *Faan hei*

gong sum (Table for Six), which ranked first place with 1.2 million tickets sold. In Singapore, US superhero hit *Doctor Strange in the Multiverse of Madness* topped the box office chart with 0.8 million admissions, while military comedy film *Ah Girls Go Army* was the highest-grossing local production, the only Asian film among the 10 top-earning title for the year.

Production and funding

In 2022 the number of domestic releases increased in Indonesia (+71 films), Malaysia (+39) and Thailand (+31), while waning in Hong Kong (-19), Taiwan (-10) and Singapore (-5).

The Malaysian national film body (FINAS) partnered with film agencies from Singapore, Taiwan, and the Philippines to launch an incubator programme for local filmmakers, aimed at developing film projects targeting regional and global audiences.

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

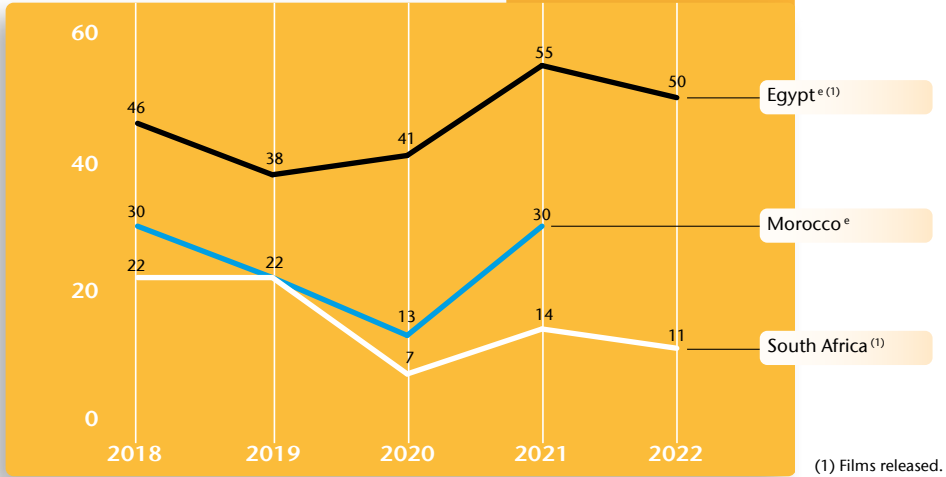
| | Egypt | Morocco | Nigeria | South Africa |
|---|----------------------|----------------------|----------------------|---------------------|
| Population 2022 ^e (million) | 104.1 | 36.7 | 216.7 | 61.1 |
| GDP per capita 2022 ^e (USD) | 4 504 | 3 896 | 2 326 | 6 739 |
| Gross box office 2022 ^e (in M USD) | ~ | 3.7 ⁽¹⁾ | 16.4 | 44.7 |
| Admissions 2022 ^e (million) | 8.5 ⁽¹⁾ | 0.7 ⁽¹⁾ | ~ | 8.5 |
| Admissions per capita 2022 ^e | 0.1 ⁽¹⁾ | 0.02 ⁽¹⁾ | ~ | 0.1 |
| Average ticket price 2022 ^e (in USD) | ~ | 5.6 ⁽¹⁾ | ~ | 5.2 |
| Screens 2022 ^e | 250 ⁽¹⁾ | 78 ⁽¹⁾ | 251 | 728 |
| National market shares 2022 ^e | 66.4% ⁽¹⁾ | 19.7% ⁽¹⁾ | 25.8% ⁽²⁾ | 2.5% ⁽³⁾ |

(1) 2021 (2) As of end of June 2022. (3) By GBO.

Number of feature films produced in selected African countries | 2018-2022

In units.

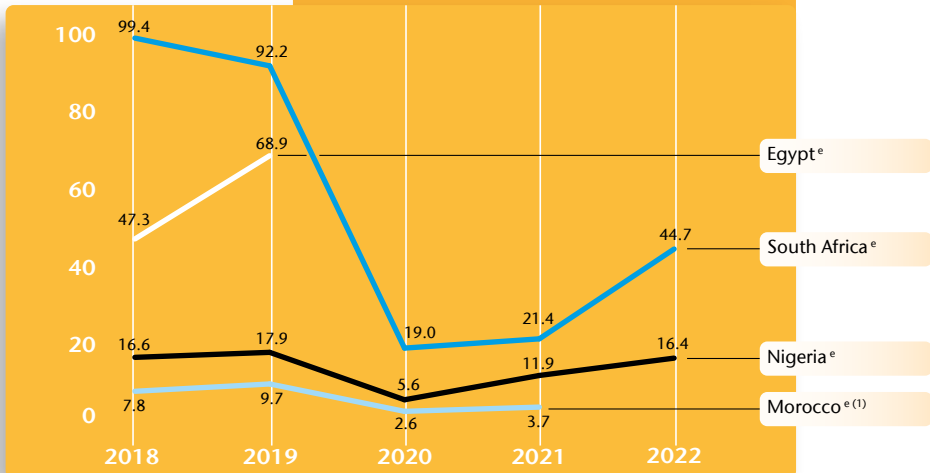
Sources: IMDb/OBS, CCM, NFFW



Gross box office in selected African countries | 2018-2022

In USD million.

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



(1) Includes admissions from open-air screenings.

Top 20 films by admissions in South Africa | 2022

| Original title | Country of origin | Director(s) | Gross box office (in USD) |
|--|-------------------|----------------------------------|---------------------------|
| 1 Top Gun: Maverick | US | Joseph Kosinski | 4 568 324 |
| 2 Avatar: The Way of Water | US | James Cameron | 4 493 166 |
| 3 Black Panther: Wakanda Forever | US | Ryan Coogler | 4 094 806 |
| 4 Minions: The Rise of Gru | US | K. Balda, B. Ableson, J. del Val | 2 471 285 |
| 5 Thor: Love and Thunder | US | Taika Waititi | 1 988 766 |
| 6 Doctor Strange in the Multiverse of Madness | US | Sam Raimi | 1 643 776 |
| 7 Jurassic World: Dominion | US/CN | Colin Trevorrow | 1 364 028 |
| 8 The Batman | US | Matt Reeves | 1 250 961 |
| 9 Uncharted | US/DE | Ruben Fleischer | 1 153 497 |
| 10 Black Adam | US/CA/NZ/HU | Jaume Collet-Serra | 1 094 191 |
| 11 Puss in Boots: The Last Wish | US | J. Crawford, J. Mercado | 1 049 327 |
| 12 Ticket to Paradise | US/GB | Ol Parker | 956 655 |
| 13 The Woman King | US/CA | Gina Prince-Bythewood | 913 649 |
| 14 Sonic the Hedgehog 2 | US/JP | Jeff Fowler | 911 220 |
| 15 The Lost City | US | Adam Nee, Aaron Nee | 757 069 |
| 16 Mr. Bones 3: Son of Bones | ZA | Gray Hofmeyr | 644 163 |
| 17 DC League of Super-Pets | US | Jared Stern, Sam Levine | 585 156 |
| 18 Elvis | US/AU | Baz Luhrmann | 575 055 |
| 19 Shotgun Wedding | US | Jason Moore | 507 795 |
| 20 Fantastic Beasts: The Secrets of Dumbledore | GB inc/US | David Yates | 500 997 |

Source: NFFV, Filmfinito

Nigeria

According to the Cinema Exhibitors Association of Nigeria (CEAN), box office takings climbed by 46.4% in 2022, reaching a total of NGN 6.94 billion (USD 16.4 million) and approaching pre-pandemic levels. The interannual increase in revenues was mainly due to a surge in the average ticket price, as admissions remained reportedly stable compared to 2021. As a slate of Hollywood hits dominated the charts, local films accounted for only 25.8% of box office takings in the first half of 2022, down from 39.3% in the same period of 2021. US superhero hit *Black Panther: Wakanda Forever* was the highest-grossing title for the year, generating a record-breaking NGN 240.0 million (USD 0.6 million) during its first weekend of release and becoming the biggest opening of all time in Nigeria. Crime action movie *Brotherhood* was the top-grossing local title, ahead of thriller *King of Thieves* and comedy drama *Battle on Buka Street*. Although Nigeria is believed to produce a significant number of films each year, there are no official statistics available to confirm the exact figure. The local industry still faces many challenges, including limited funding, a shortage of skilled crews, and a lack of incentives for foreign productions. However, with Hollywood increasing its investment in Nigerian content in recent years, two new studio complexes are being built in Lagos to attract big-budget international shoots.

South Africa

Cinema attendance picked up again as ticket sales more than doubled to a total of 8.5 million admissions in 2022, corresponding to more 44.1% of the pre-pandemic average. GBO increased by a similar rate, reaching ZAR 728.6 million (USD 44.7 million), accounting for 57.0% of pre-pandemic levels. A total 11 local features were theatrically released in 2022, three less than in the previous year and half the number registered in 2019. Domestic productions took 2.5% of box office receipts, compared to 0.8% in 2021 and 5.0% in 2019. US blockbusters dominated the box office, led by *Top Gun: Maverick*, that racked up USD 4.6 million in 2022, ahead of *Avatar: The Way of Water* (USD 4.5 million). The highest-earning South African title for the year was slapstick comedy sequel *Mr. Bones 3: Son of Bones*, generating of 0.6 USD million at the box office, the only local production among the top 20 films. The number of screens marginally increased to a total of 728 in 2022, 14 more than in 2021 but still short of the 776 screens registered in 2019. In 2022 Ster-Kinekor, the largest cinema group in South Africa, emerged from business rescue, after being placed under administration in 2021 due to the economic losses endured during the health crisis.

Sources: Filmfinito, NFFV, CEAN, *Variety*, *Reuters*

Middle East

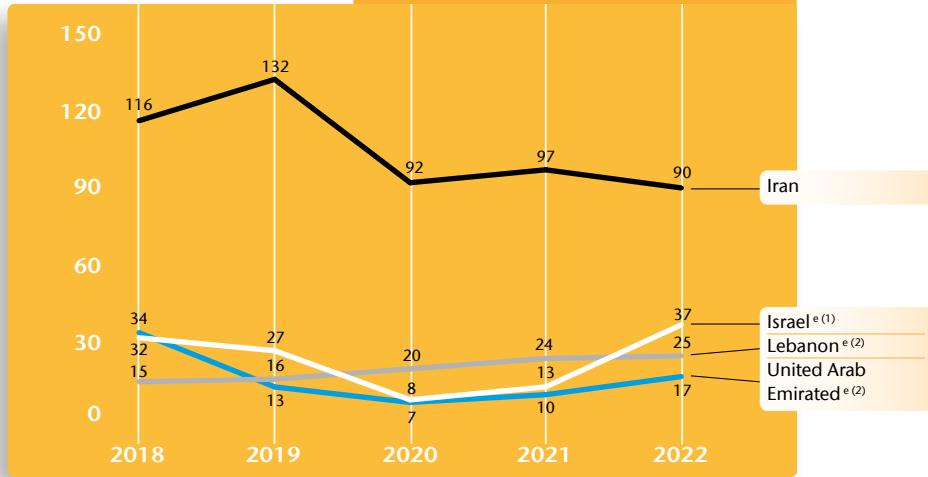
| | Iran | Israel | Kuwait | Lebanon | Qatar | Saudi Arabia | United Arab Emirates |
|---|--------|---------------------|--------------------|----------------------|--------------------|--------------|----------------------|
| Population 2022 ^e (million) | 85.7 | 9.5 | 4.8 | 6.8 ⁽¹⁾ | 2.7 | 36.2 | 10.5 |
| GDP per capita 2022 ^e (USD) | 23 034 | 55 359 | 38 123 | 3 589 ⁽¹⁾ | 82 887 | 27 941 | 47 793 |
| Gross box office 2022 ^e (in M USD) | 100.7 | 115.3 | 57.8 | ~ | 29.2 | 242.2 | 185.4 |
| Admissions 2022 ^e (million) | 13.6 | 12.1 | 4.6 | 1.0 | 2.0 | 14.4 | 14.0 |
| Admissions per capita 2022 ^e | 0.2 | 1.3 | 0.9 | 0.1 | 0.7 | 0.4 | 1.3 |
| Average ticket price 2022 ^e (USD) | 7.4 | 9.5 | 12.6 | ~ | 14.7 | 16.9 | 13.2 |
| Screens 2022 ^e | 710 | 422 | 115 ⁽²⁾ | 154 ⁽²⁾ | 139 ⁽²⁾ | 584 | 618 ⁽²⁾ |
| National market shares 2022 ^e | 97.0% | 8.0% ⁽³⁾ | ~ | ~ | ~ | ~ | ~ |

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

Number of films produced in selected Middle East countries | 2018-2022^e

In units.

Sources: Iranian Independents, Israel Film Fund/ Ministry of Culture and Sports, Omdia, IMDb/OBS

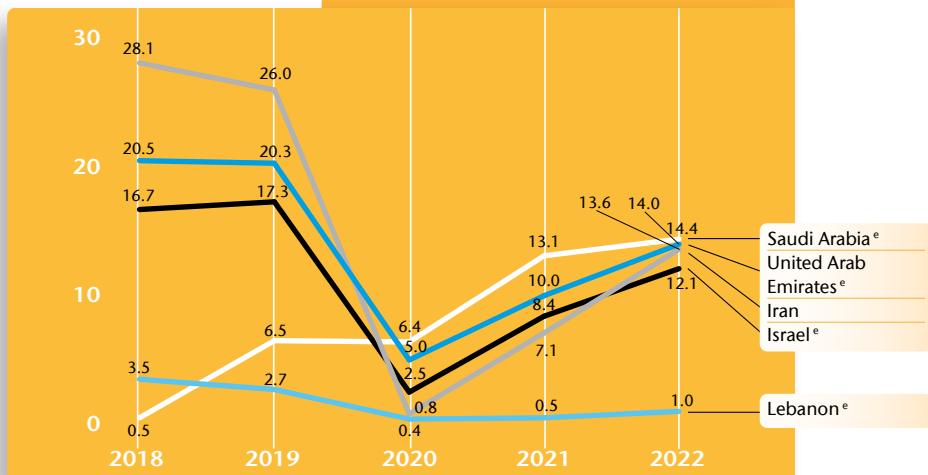


(1) Restated series. Only includes films supported by the Israeli Film Fund. (2) Films released.

Admissions in selected Middle Eastern countries | 2018-2022^e

In millions.

Sources: UNIC, Empire Cinemas, Iranian Independents



Top 10 films by admissions in the United Arab Emirates | 2022⁽¹⁾

| Original title | Country of origin | Director(s) | Distributor | Admissions |
|---|-------------------|--|--------------------|------------|
| 1 Top Gun: Maverick | US | Joseph Kosinski | Paramount | 632 404 |
| 2 K.G.F: Chapter 2 | IN | Prashanth Neel | Vox | 466 268 |
| 3 Doctor Strange in the Multiverse... | US | Sam Raimi | Disney/Italia Film | 464 720 |
| 4 Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽²⁾ | Universal | 463 875 |
| 5 Avatar: The Way of Water ⁽³⁾ | US | James Cameron | Disney/Italia Film | 461 929 |
| 6 Thor: Love and Thunder | US | Taika Waititi | Disney/Italia Film | 394 573 |
| 7 Jurassic World: Dominion | US/CN | Colin Trevorrow | Universal | 380 016 |
| 8 The Batman | US | Matt Reeves | Warner Bros. | 373 615 |
| 9 Black Adam | US/CA/NZ/HU | Jaume Collet-Serra | Warner Bros. | 334 351 |
| 10 Black Panther: Wakanda Forever | US | Ryan Coogler | Disney/Italia Film | 319 906 |

(1) Admissions up to 28 December 2022. (2) J. del Val. (3) Still grossing in 2022.

Source: Empire Cinemas

Top 10 films by admissions in Saudi Arabia | 2022

| Original title | Country of origin | Director(s) | Distributor | Admissions |
|----------------------------|-------------------|--|-----------------|------------|
| 1 Top Gun: Maverick | US | Joseph Kosinski | Paramount | 1 250 059 |
| 2 Bahebek (I Love You) | EG | Tamer Hosny | Italia Film | 935 674 |
| 3 Eamuhum (Their Uncle) | EG | Husain El-Minbawi | Vox | 663 139 |
| 4 For Ziko | EG | Peter Mimi | Empire | 633 587 |
| 5 Minions: The Rise of Gru | US | K. Balda, B. Ableson, ... ⁽¹⁾ | Universal | 544 136 |
| 6 The Batman | US | Matt Reeves | Warner Bros. | 519 416 |
| 7 Wahed Tany (Another One) | EG | M. N. Hamza, M. Shaker | Empire | 466 002 |
| 8 Bullet Train | US/JP | David Leitch | Columbia/Empire | 416 506 |
| 9 Black Adam | US/CA/NZ/HU | Jaume Collet-Serra | Warner Bros. | 352 973 |
| 10 Smile | US | Parker Finn | Paramount | 311 943 |

(1) J. del Val.

Source: Empire Cinemas

Iran

After two difficult years, attendance jumped by 91.7% to a total of 13.6 million admissions in 2022 (-47% the pre-pandemic average), while GBO soared to an unprecedented IRR 4.20 trillion (USD 100.7 million), driven by skyrocketing inflation rates. Iranian movies, traditionally a major source of revenue for the local exhibition industry, accounted for 97.0% of annual admissions, in line with previous years. Amid reinforced restrictions on the approval of filming and screening permits, the number of local releases dropped from 71 in 2021 to 65 in 2022, compared to 124 in 2019. Excluding documentaries, a total of 90 films were produced in 2022, compared to 97 in the previous year and 132 in 2019.

Israel

Admissions increased by 44.0% to 12.1 million tickets sold in 2022, while GBO takings grew by 40.2% to ILS 386.9 million (USD 115.3 million), representing a decline of 30% on the 2017-2019 average. Domestic productions took 8.0% of box office revenues, down from the exceptional 20.6% seen in 2021, and in line with previous years. Production volume also bounced back as the number of films produced rose from 13 in

2021 to 37 in 2022, above pre-pandemic levels (32 titles in 2019). In 2022, Israel launched a new tax incentive scheme targeting international productions shooting in the country, offering a rebate of up to 30% of eligible spend.

Saudi Arabia

Saudi Arabia's exhibition sector continued to grow unabated after the 35-year ban on cinemas was lifted, boosted by significant investment in the screen infrastructure. In 2022, the kingdom was the only market worldwide where attendance increased compared to pre-pandemic levels, as ticket sales grew by 9.6% year-on-year to a record-breaking 14.4 million admissions, more than double the tickets sales registered in 2019. GBO rose by 3.8% to an estimated total of SAR 908.1 million (USD 242.2 million), confirming Saudi's Arabia position of largest market in the region in terms of revenues, ahead of the United Arab Emirates. US action hit *Top Gun: Maverick* topped the charts with an estimated total of 1.25 million admissions in 2022, becoming the highest-grossing film on record since cinemagoing was allowed again.

Sources: Iranian Independents, UNIC, Israel Film Fund, Israeli Ministry of Culture and Sports, *Variety*, *Screen International*, Empire Cinemas

Sources (ranked by country)

FOCUS 2023 was prepared by the European Audiovisual Observatory. We would like to thank the following sources:

| | | | | | |
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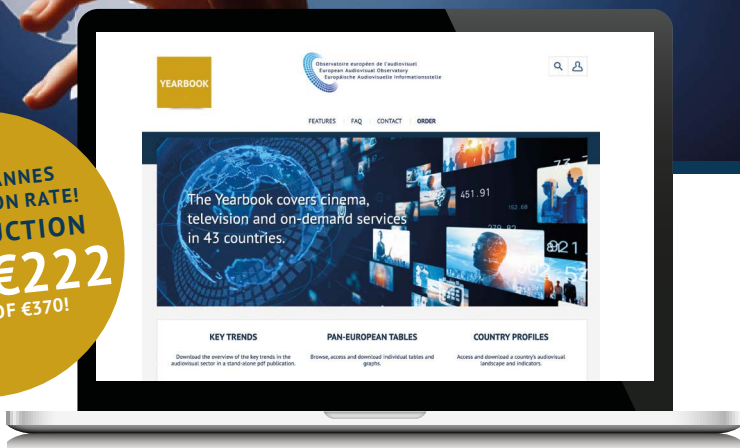
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