

CROATIA

(Pop: 4.29 million; GDP: \$100.2 billion)

(1) CROATIA: THEATRICAL MARKET OVERVIEW, 2010-17

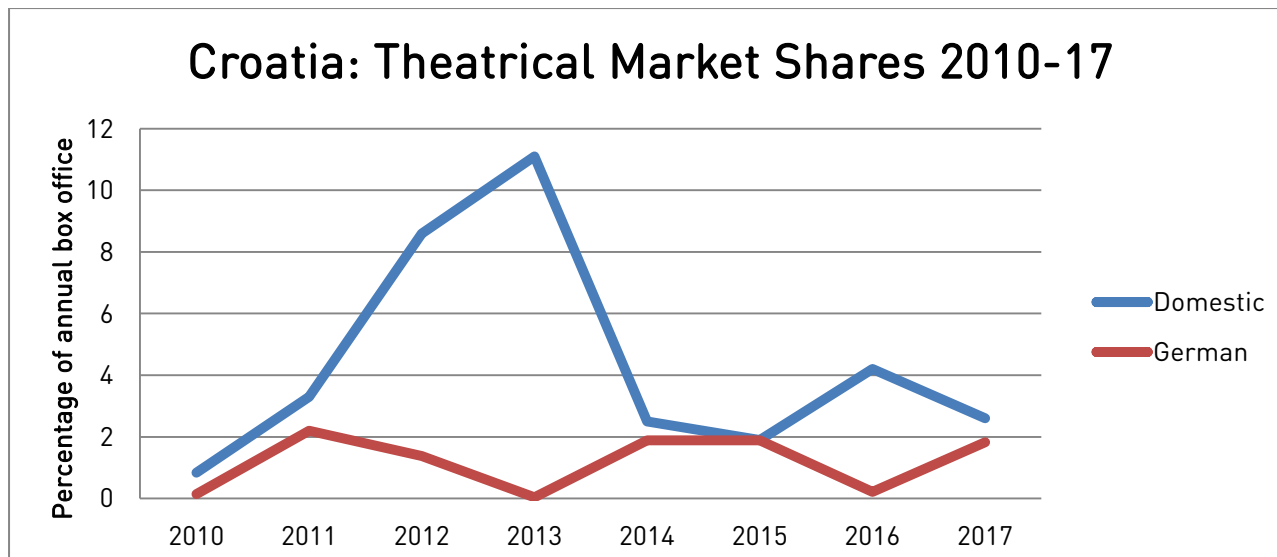
	2010	2011	2012	2013	2014	2015	2016	2017
Screens	118	136	146	153	154	152	173	179
Theatrical admissions (millions)	3.6	3.3	4.1	4.0	3.8	3.9	4.3	4.5
Per capita attendance	0.8	0.8	0.9	0.9	0.9	0.9	1.0	1.1
Box office (EUR millions*)	11.9	14.2	14.5	15.4	16.0	15.3	17.7	17.0
Average ticket price (EUR*)	3.60	4.20	3.71	3.71	4.21	3.85	4.10	3.78
Releases	163	188	185	203	168	201	217	210
Domestic releases	11	11	11	11	6	6	9	11
US releases	105	117	98	127	112	112	121	135 ***
European releases**	21	17	29	22	31	41	44	34 ***
German releases	1	2	3	1	4	9	4	5
Domestic market share	0.8%	3,3%	8.6%	11.1%	2.5%	1.9%	4.2%	2.6%
German market share	0.14%	2.20%	1.38%	0.04%	1.89%	1.89%	0.22%	1.82%

*EUR equivalents are calculated throughout at the exchange rate for December 31 of the year in question.

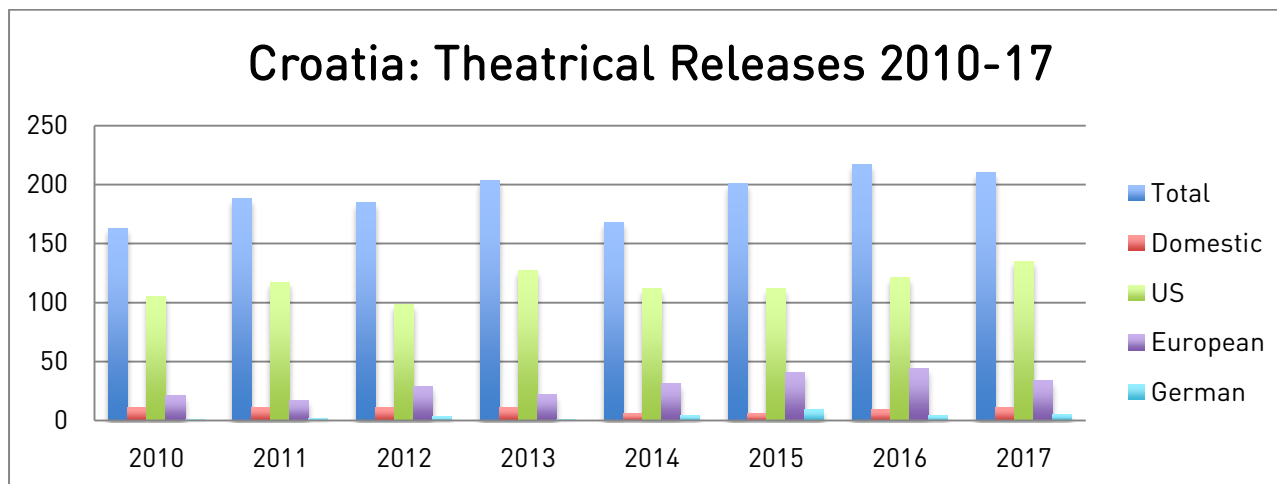
**Excluding German majority films

***Estimates

Croatia: Theatrical Market Shares 2010-17



Croatia: Theatrical Releases 2010-17



[2] CROATIA: THEATRICAL RELEASES OF GERMAN FILMS, 2010-17

Title	Distributor	Release date	Box office \$US
2010 German films (100% or majority co-productions)			
WICKIE UND DIE STARKEN MÄNNER (Ger)	n/a	23.09.10	22,954
2010 German minority co-productions			
STREETDANCE 3D (UK/Ger/US)	Blitz Film & Video Distribution	24.06.10	188,507
RESIDENT EVIL: AFTERLIFE (UK/Ger/US)	Sony Pictures Releasing	10.09.10	126,609
THE GHOST (Fr/Ger/UK)	Continental Film	26.08.10	4,401
2011 German films (100% or majority co-productions)			
THE THREE MUSKETEERS (Ger/Fr/UK/US)	Blitz Film & Video Distribution	20.10.11	275,656
KONFERENZ DER TIERE (Ger)	Blitz Film & Video Distribution	30.06.11	129,850
2011 German minority co-productions			
UNKNOWN (US/Ger/UK/Fr)	Warner Bros.	17.02.11	153,806
HANNA (US/Fr/UK/Ger)	Sony Pictures Releasing	07.07.11	42,176
MR. NOBODY (Bel/Fr/Can/Ger)	Discovery Film and Video Distribution	09.06.11	1,028

2012 German films (100% or majority co-productions)

RESIDENT EVIL: RETRIBUTION (Ger/Can)	Sony Pictures Releasing	13.09.12	134,562
CLOUD ATLAS (Ger/US)	Discovery Film and Video Distribution	29.11.12	111,848
A DANGEROUS METHOD (Ger/Can/UK/Swz)	Discovery Film and Video Distribution	01.03.12	18,293

2012 German minority co-productions

THE VOW (US/Brz/Fr/Aus/UK/Ger)	Sony Pictures Releasing	09.02.12	103,599
TINKER TAILOR SOLDIER SPY (UK/Fr/Ger)	Blitz Film & Video Distribution	02.02.12	78,818
STREETDANCE 2 (UK/Ger/It)	Blitz Film & Video Distribution	03.05.12	44,481
IRON SKY (Fin/Ger/Aus)	Discovery Film and Video Distribution	19.04.12	30,754
AMOUR (Fr/Ger/Aut)	Continental Film	25.10.12	12,338
CARNAGE (Fr/Ger/Pol)	Pa-Dora	15.03.12	8,789
ELLES (Fr/Pol/Ger)	Continental Film	08.11.12	2,580
HOLY MOTORS (Fr/Ger)	Continental Film	01.11.12	2,560

2013 German films (100% or majority co-productions)

3096 TAGE (Ger)	Blitz Film & Video Distribution	06.06.13	9,260
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2013 German minority co-productions

RUSH (US/UK/Ger)	Blitz Film & Video Distribution	03.10.13	250,466
NIKO 2 – LENTÄJÄVELJEKSET (Fin/Den/Ire/Ger)	MG Film	21.11.13	144,715
HANSEL & GRETEL: WITCH HUNTERS (US/Ger)	Universal Pictures International	31.01.13	78,086
THE MORTAL INSTRUMENTS: CITY OF BONES (US/Ger/Can)	Blitz Film & Video Distribution	22.08.13	63,415
ONLY LOVERS LEFT ALIVE (UK/Ger/Fr/Cyp)	Discovery Film and Video Distribution	12.12.13	11,188
DEN SKALDEDE FRISØR (Den/Fr/It/Swe/Ger)	Discovery Film and Video Distribution	14.02.13	10,767

2014 German films (100% or majority co-productions)

DIE BIENE MAJA - DER KINOFILM (Ger/Aus)	Editus	23.10.14	203,099
TARZAN 3D (Ger)	Blitz Film & Video Distribution	20.03.14	78,510
DER MEDICUS (Ger)	Blitz Film & Video Distribution	03.04.14	46,189
LOVE, ROSIE (Ger/UK)	Blitz Film & Video Distribution	06.11.14	38,229

2014 German minority co-productions

POMPEII (Can/Ger)	Blitz Film & Video Distribution	20.02.14	224,234
THE MONUMENTS MEN (US/Ger)	20th Century Fox	20.02.14	100,239
THE GRAND BUDAPEST HOTEL (US/Ger)	20th Century Fox	20.03.14	185,884
THE BOOK THIEF (US/Ger)	20th Century Fox	03.07.14	76,260
A LONG WAY DOWN (UK/Ger)	Discovery Film and Video Distribution	03.04.14	26,689
LA BELLE ET LA BÊTE (Fr/Ger)	Pa-Dora	27.02.14	17,472
KVINDEN I BURET (Den/Ger/Swe)	Discovery Film and Video Distribution	06.02.14	6,003
A MOST WANTED MAN (UK/US/Ger)	Duplicato Media	13.11.14	4,813

2015 German films (100% or majority co-productions)

OOOPS! DIE ARCHE IST WEG (Ger/Ire/Bel/Lux)	2i Film	08.10.15	161,749
DER KLEINE DRACHE KOKOSNUSS (Ger)	Blitz Film & Video Distribution	25.05.15	43,385
DER 7BTE ZWERG (Ger)	Editus	07.05.15	31,881
COMING IN (Ger)	Blitz Film & Video Distribution	30.07.15	8,983
CITIZENFOUR (Ger/US)	Restart	16.04.15	5,540
FACK JU GÖHTE (Ger)	2i Film	20.08.15	5,482
LAUF JUNGE LAUF (Ger)	Discovery Film and Video Distribution	27.01.15	5,135
VICTORIA (Ger)	Discovery Film and Video Distribution	29.10.15	2,519
KREUZWEG (Ger)	Discovery Film and Video Distribution	02.04.15	1,915

2015 German minority co-productions

THE HUNGER GAMES: MOCKINGJAY - PART 2 (US/Ger)	Duplicato Media	19.11.15	302,776
POINT BREAK (US/Ger)	Blitz Film & Video Distribution	31.12.15	156,837
BRIDGE OF SPIES (US/Ger)	20th Century Fox	25.11.15	116,421
HITMAN: AGENT 47 (US/Ger)	20th Century Fox	27.08.15	71,656
DOKTOR PROKTORS PROMPEPULVER (Nor/Ger)	Zi Film	14.05.15	48,803
SHE'S FUNNY THAT WAY (US/Ger)	Duplicato Media	21.05.15	22,089
LE MERAIGLIE (It/Ger)	Discovery Film and Video Distribution	01.06.15	2,344
FEHÉR ISTEN (Hun/Ger/Swe)	Discovery Film and Video Distribution	26.03.15	2,283

2016 German films (100% or majority co-productions)

GESPENSTERJÄGER (Ger/Aut/Ire)	Blitz Film & Video Distribution	07.04.16	25,373
IM LABYRINTH DES SCHWEIGENS (Ger)	Blitz Film & Video Distribution	04.02.16	9,164
TONI ERDMANN (Ger/Aut/ Rom)	Discovery Film and Video Distribution	27.10.16	3,759
ELSER - ER HÄTTE DIE WELT VERÄNDERT (Ger)	Blitz Film & Video Distribution	02.06.16	3,316

2016 German minority co-productions

THE DANISH GIRL (UK/Bel/Ger/Den/US)	Universal Pictures International	21.01.16	37,009
RACE (Can/Fr/Ger)	Blitz Film & Video Distribution	25.02.16	26,000
EDDIE THE EAGLE (UK/US/Ger)	20th Century Fox	14.04.16	12,680
ELLE (Fr/Ger/Bel)	Sony Pictures Releasing	29.12.16	11,836

2017 German films (100% or majority co-productions)

HAPPY FAMILY (Ger/Geo)	Duplicato Media	26.10.17	262,403
RICHARD DER STORCH (Ger/Bel/Lux/Nor/US)	Editus	20.07.17	73,516

RESIDENT EVIL: THE FINAL CHAPTER (Ger/Aus/Can)	Continental Film	26.01.17	39,006
VIER GEGEN DIE BANK (Ger)	Blitz Film & Video Distribution	12.10.17	18,015
MEIN BLIND DATE MIT DEM LEBEN (Ger)	2i Film	13.04.17	7,047

2017 German minority co-productions

A CURE FOR WELLNESS (US/Ger)	Blitz Film & Video Distribution	16.02.17	41,255
THE HUNTER'S PRAYER (US/Sp/Ger)	Blitz Film & Video Distribution	22.06.17	13,450
THE SQUARE (Swe/Ger/Fr/Den)	Independent	14.12.17	11,911
L'AVENIR (Fr/Ger)	Festival Mediteranskog Filma Split	10.03.17	7,783

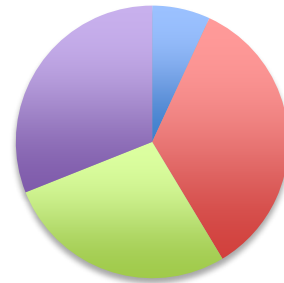
(3) CROATIA: TOP 10 GERMAN FILMS (THEATRICAL), 2010-2017

	Admissions	Box office (EUR)
HAPPY FAMILY (2017)	54,764	220,507
THE THREE MUSKETEERS (2011)	45,117	212,043
OOOPS! DIE ARCHE IST WEG (2015)	44,530	148,394
DIE BIENE MAJA - DER KINOFILM (2014)	30,283	167,850
KONFERENZ DER TIERE (2011)	24,201	99,895
CLOUD ATLAS (2012)	20,480	84,733
RESIDENT EVIL: RETRIBUTION (2012)	16,182	101,941
TARZAN 3D (2014)	14,672	64,884
RICHARD DER STORCH (2017)	16,328	61,718
DER KLEINE DRACHE KOKOSNUSS (2015)	12,762	39,803

(4) CROATIA: DISTRIBUTORS OF GERMAN FILMS, 2010-17

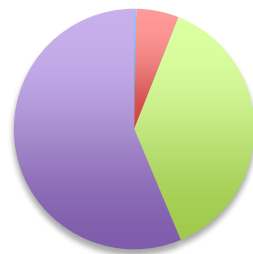
	2010	2011	2012	2013	2014	2015	2016	2017	Total
Blitz Film & Video Distribution	-	2	-	1	3	2	3	1	12
Discovery Film & Video Distribution	-	-	2	-	-	3	1	-	6
2i Film	-	-	-	-	-	2	-	1	3
Editus	-	-	-	-	1	1	-	1	3
Continental Film	-	-	-	-	-	-	-	1	1
Duplicato Media	-	-	-	-	-	-	-	1	1
Restart	-	-	-	-	-	1	-	-	1
Sony Pictures Releasing	-	-	1	-	-	-	-	-	1

Croatia: German Releases by Genre, 2010-17



- Arthouse
- German Stories
- English Language
- Animation & Children's Films
- Local Interest

Croatia: German Films Box Office by Genre, 2010-17



- Arthouse
- German Stories
- English Language
- Animation & Children's Films
- Local Interest

(6) GERMAN FILMS IN CROATIA, 2010-17: AN ANALYSIS

The data in this survey, especially that for the number of films released annually in Croatia, is collected from a variety of sources, some of which are clearly estimates, some of which we have ourselves estimated. It is, for example, likely that more films were released in the early years of the period surveyed than we have been able to account for. But we are confident that the result is comprehensive enough to draw conclusions.

The wealthiest and most industrially developed of the countries of the former Yugoslavia with a GDP per inhabitant of just under \$12,000 - comparable with, say, Poland - Croatia was probably the most cinematically developed of them all under the old regime, with a world-leading animation studio in Zagreb and the annual Yugoslav film festival in Pula. Croatia is nonetheless a small territory in real terms, with a population of just over 4 million; and a tiny one in terms of its theatrical market: its annual box-office total of EUR 17 million in 2017 is the equivalent of a satisfactory but not stellar single film's opening weekend in North America.

According to the figures available, Croatian box office has increased by 43% since 2010, although the trend is not always upwards: in the eight years surveyed, the figures peaked in 2016 at EUR 17.7 million. The number of screens has likewise increased by 47%, and most other indicators show an upward trend: admissions (by 25%); per capita attendance (by 38%, albeit on a very low base); ticket prices (by a modest 5%); and number of films released annually, although the latter is less certain, and may be due more to lack of information than lack of films. Due allowance must also be made here for exchange-rate fluctuations, since some sources are recorded in US dollars, some in Euros and others in Croatian kunas.

But one thing that has not increased on a year-by-year basis is the market share of domestic films, which ranges from a high of 11.1% in 2013 - the year of local hit SVECENIKOVA DJECA (THE PRIEST'S CHILDREN) - to 0.8% in 2010. In 2015, which was a good year for German films in Croatia, the chart lines on the second page of this survey come within 0.01% of touching one another.

But, for German films, 'a good year' is a strictly relative term. In the period surveyed, only 29 German titles were released, the highest grossing of which was last year's animated comedy HAPPY FAMILY, which sold just under 55,000 tickets. The rest of the Top 10, meanwhile, was dominated by children's films (seven) and English-language films (three). Only the top five sold more than 20,000 tickets, and the highest grossing German-language film was FACK JU GÖHTE, which took \$5,000 at the Croatian box office in 2015. Traditional arthouse titles are almost entirely absent: TONI ERDMANN, for instance, sold less than 1,000 tickets at the Croatian box office.

This can largely be accounted for by the absence of a well-established arthouse distributor. Most of the German films released in Croatia between 2010 and 2017 were handled by Blitz Film. The largest in the former Yugoslavia (it also releases films in Slovenia, Bosnia & Herzegovina, Macedonia and Albania, and is the local agent in several of these territories for US majors Warner Bros. and 20th Century Fox)., Blitz is also an exhibitor, opening its 14th Croatian multiplex in 2017. Almost all Croatian independent distributors are part of a network of distributors covering several territories of the former Yugoslavia.

What works in Croatia? Children's films to the exclusion of almost all else, accounting for nine of the 29 German films and majority co-productions released in Croatia but for 56% of box-office revenue. Other titles released were the usual array of English-language German films, with the notable addition of German commercial titles such as FACK JU GÖHTE and VIER GEGEN DIE BANK, the latter selling just over 4,000 tickets.

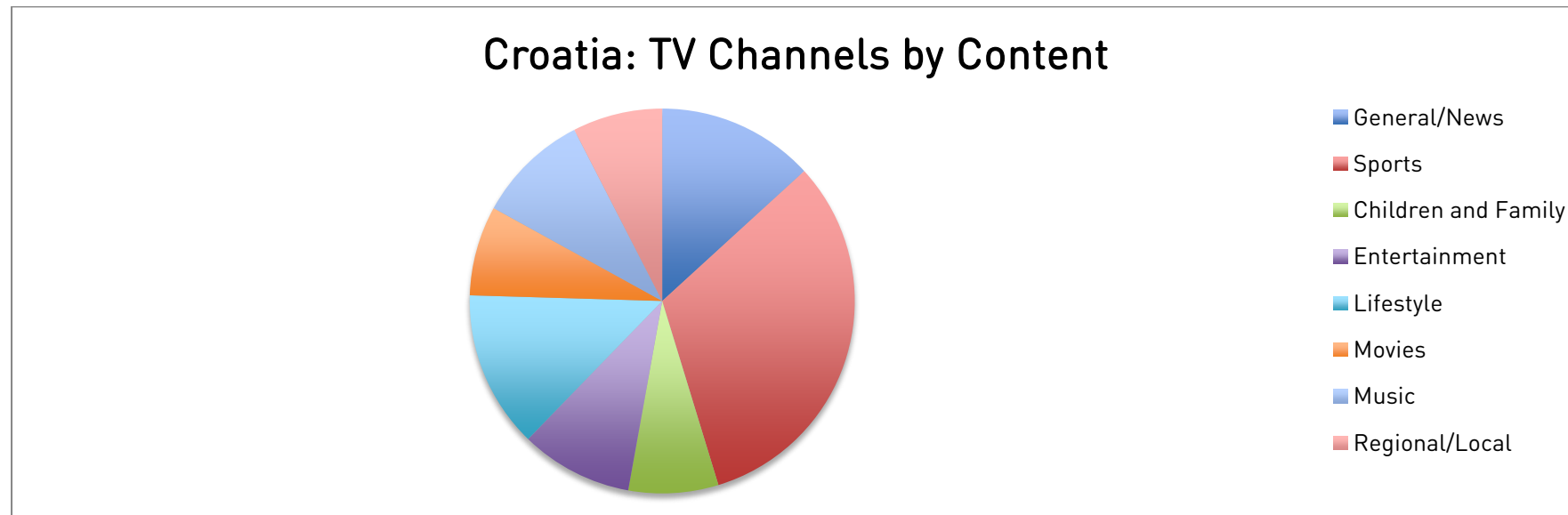
What doesn't work in Croatia? Arthouse, whether local (see the slender market share for local films on page 2 of this report) or imported: the only German arthouse titles released over the eight-year period were TONI ERDMANN and KREUZWEG, which sold 1,620 tickets between them.

What else might appeal? The market is too small for any targeted effort beyond perhaps a shared-revenue German film festival.

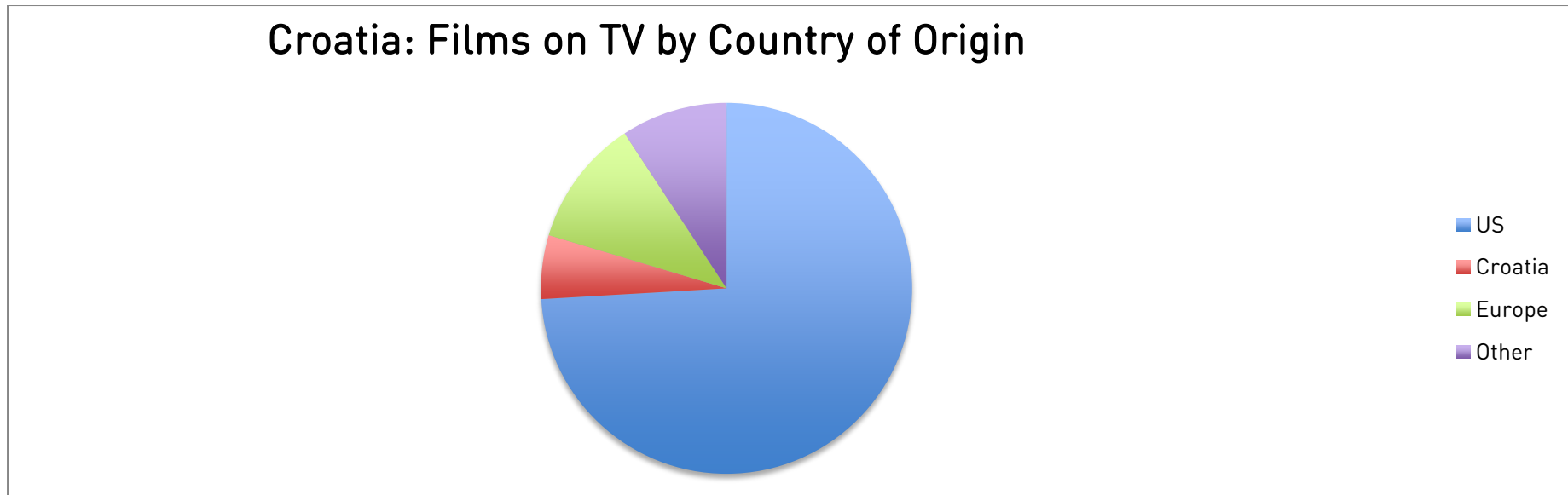
(7) GERMAN FILMS IN CROATIA, 2010-17: TV AND VOD

The collapse of communism having more or less coincided with the emergence of multi-channel television, Central and Eastern Europe were seized upon as a major opportunity by privately owned (and generally US-based) television package providers, with a campaign of competing satellite, cable and IPTV channels quickly becoming available.

Croatia is no exception, although it comes at the more conservative end of the spectrum when it comes to choice. The list of options in the following chart represent what is available by one of the three above-mentioned delivery methods to anyone living in Zagreb or another Croatian city. Movies, it will be noticed, are not a major part of the offer, this form of entertainment being more likely to be supplied by VOD.



The second chart (below) is not restricted to a single channel but indicates the films screened on Croatian television over a one-week period. It is, as one would expect, dominated by US titles, mostly old, with a few Croatian titles, some others - and no German ones.



For details of on-line VOD platforms available in Croatia, see the appropriate appendix.

- **Discovery Film & Video Distribution** has its own streaming platform with some 24 titles available.

(7) CROATIA: SOURCES AND ACKNOWLEDGMENTS

CIA Factbook, XE.com, European Audiovisual Observatory, Hrvatski Audiovizualni Centar (Croatian Audiovisual Centre), Film New Europe, Culture.si, BoxOffice Mojo, Rentrak, xe.com, Moj TV.