

# **2018 THE RESEARCH REPORT ON CHINESE FILM INDUSTRY**

**International Version**

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## International Version

**Notes:** The exchange rate of Chinese Yuan (CNY) to U.S. Dollar (USD) is calculated as 6.554  
UNLESS STATED OTHERWISE, THE FOLLOWING BOX OFFICE NUMBERS  
INCLUDE SERVICE FEES CHARGED BY E-COMMERCE PLATFORMS.

### Overview

#### I . Overview of the International Movie Market

In 2017, the global box office increased by 3 percent year-on-year to USD 39.9 billion. This included the approximately USD 11.1 billion box office generated in the North American market, which was 2.3 percent down from the previous year. Markets outside North America contributed USD 28.8 billion, up 6 percent annually. Of these, the Chinese film market accounted for about USD 8.53 billion, an increase of 13.45 percent from 2016. The Chinese market has returned to a strong growth track, further narrowing the gap with the North American market. In 2017, this market was the engine that drove global box office growth.

Table 1: Box Office Share\* of the North American, Chinese and Global Markets 2013–2017

Annual	North American Market Box Office	Global Market Share %	Chinese Market Box Office	Global Market Share %	Global Market Box Office*	Other Markets %
2013	109	30.61	36	10.11	356	59.28
2014	104	28.36	48	13.08	366.7	58.56
2015	110	28.27	68	17.48	389	54.25
2016	114	29.38	66.7	17.19	388	53.43
2017	111.2	27.85	85.3	21.3	399.2	50.36

\* 100 MILLION USD.

Table 1 shows that the global film market has maintained a rising trend over the past five years. In 2016, affected by the slowdown of the Chinese market, it declined slightly. Fortunately, the Chinese film industry bounced back in 2017 and is picking up steam. The double-digit increase in box office for the Chinese market led to a 2.8 percent increase in the global market. The Chinese film industry not only helped with an overall increase in the global box office but also contributed one movie to the list of global top 10 box office hits.

Table 2: Global Box Office Top 10 in 2017

Ranking	Title of the Movie	Type of Enterprise	Country	Global Box Office*	North American Box Office	Percentage (%)	Overseas Box Office	Chinese Box Office	E-commerce Platform Service Charge	China Percentage (%)
1	<i>Beauty and the Beast</i>	Romance/Fantasy	USA	12.63	5.04	39.9	7.50	0.90	0.04	7.13
2	<i>The Fate of the Furious</i>	Action/Crime	USA	12.35	2.26	18.2	10.10	4.08	0.25	33.04
3	<i>Star Wars: The Last Jedi</i>	Action/Science Fiction	USA	12.05	5.17	42.9	6.32	—	—	—
4	<i>Despicable Me 3</i>	Comedy/Animation	USA	10.33	2.65	25.7	7.68	1.57	0.09	15.20
5	<i>Spider-Man: Homecoming</i>	Action/Science Fiction	USA	8.88	3.34	37.6	5.46	1.18	0.07	13.29
6	<i>Wolf Warrior 2</i>	Action	China	8.70	0.033	0.37	8.67	8.67	0.57	99.66
7	<i>Guardians of the Galaxy Vol. 2</i>	Action/Science Fiction	USA	8.63	3.89	45.1	4.74	1.05	0.06	12.17
8	<i>Thor: Ragnarok</i>	Action/Science Fiction	USA	8.49	3.11	36.6	5.37	1.13	0.08	13.31
9	<i>Wonder Woman</i>	Action/Science Fiction	USA	8.21	4.13	50.2	4.09	0.93	0.06	11.33
10	<i>Pirates of the Caribbean: Dead Men Tell No Tales</i>	Action/Fantasy	USA	7.94	1.73	21.7	6.22	1.80	0.11	22.67

\*100 MILLION USD

DATA AS OF DECEMBER 31, 2017



Among the global top 10 movies, only *The Fate of the Furious*, *Wolf Warrior 2* and *Pirates of the Caribbean: Dead Men Tell No Tales* also appeared in the top 10 Chinese box office hits. *The Fate of the Furious* made it to the list of top 10 movies of 2017 in the North American market. China contributed more than 33 percent to the global box office of *The Fate of the Furious*, helping it replace *Star Wars: The Last Jedi*, which ranked first in the North American market and second in the global market.

*The Pirates of the Caribbean: Dead Men Tell No Tales*, which was excluded from the North American top 10 list, entered the global top 10 in 2017 thanks to a box office of USD 180 million contributed by the Chinese market, which accounted for 22.67 percent of the worldwide total. In addition, the Chinese market also helped *Despicable Me 3* climb to fourth place in the global box office ranking. This movie ranked seventh in the North American market. *Wolf Warrior 2* stood sixth in the global ranking with an annual global box office of USD 870 million, of which 99.66 percent was generated in China, demonstrating once again the huge production capacity and potential of the Chinese market. *Wolf Warrior 2* was the only movie that was not produced by Hollywood in the global top 10 list in 2017, underscoring the progress of China's movie industry.

Table 3: International Box Office Top 10 in 2017

Ranking	Title of the Movie	Production Co.	Global Box Office*
1	<i>The Fate of the Furious</i>	Universal Pictures	10.10
2	<i>Wolf Warrior 2</i>	HC	8.67
3	<i>Despicable Me 3</i>	Universal Pictures	7.70
4	<i>Beauty and the Beast</i>	Buena Vista Pictures	7.595
5	<i>Star Wars: The Last Jedi</i>	Buena Vista Pictures	7.114
6	<i>Pirates of the Caribbean: Dead Men Tell No Tales</i>	Buena Vista Pictures	6.223
7	<i>Spider-Man: Homecoming</i>	Sony Pictures Entertainment	5.46
8	<i>Thor: Ragnarok</i>	Buena Vista Pictures	5.388
9	<i>Jumanji: Welcome to the Jungle</i>	Sony Pictures Entertainment	5.337
10	<i>Coco</i>	Buena Vista Pictures	5.315

\* 100 MILLION USD

## II . Overview of the Chinese Movie Market

The Chinese movie market in 2017 showed robust growth. The annual box office stood at RMB 55.911 billion (approximately USD 8.53 billion), which included approximately RMB 4 billion (approximately USD 610 million) in service fees charged by e-commerce platforms. Based on this, we can say the Chinese box office increased by 13.45 percent in 2017. Given that there was just a 3.5 percent increase in 2016, it appears the Chinese movie industry has now entered its golden phase as the market was active with a huge potential for consumption.

In 2017, China produced 970 movies, of which 798 were features, 32 were animations, 68 were educational movies, 44 were documentaries and 28 were special-interest films.

Of the total annual box office of RMB 55.911 billion, RMB 30.104 billion came from domestic movies, accounting for 53.84 percent of the market. Although this represented the lowest figure of the past five years, a market share of more than 50 percent still reflects a good performance for domestic films, given the dominance of Hollywood movies globally. Owing to the addition of e-commerce service fees in the box office statistics for 2017, the number of movies that raked in more than RMB 100 million for the year rose to 95, of which 54 were domestic (including four that were made in 2016) and 41 were imported. Fifteen movies grossed more than RMB 1 billion each and of these, six were local and nine were imported. Thirty-two movies grossed more than RMB 500 million, and of these 13 were local and 19 were imported.

Table 4: China's Box Office Top 10 in 2017

Ranking	Movie	Genre	Country	Schedule	Mode of Screening	Box Office (RMB 10,000)*	Production Co.
1	<i>Wolf Warrior 2</i>	Action		7.27	3DIMAX	568,300	Beijing Culture Group, United Entertainment Partners, etc.
2	<i>The Fate of the Furious</i>	Action	USA	4.14	3DIMAX	267,013	China Film Huaxia Film
3	<i>Never Say Die</i>	Comedy/ Love		9.30	Digital IMAX	220,700	Sihai, Huaxia Film, Maoyan
4	<i>Kong Fu Yoga</i>	Comedy/ Action		1.28	Digital	174,800	Taihe, Yaolai, Huace
5	<i>Journey to the West: The Demons Strike Back</i>	Fantasy/ Action		1.28	Digital	165,200	China Film, Hehe, Union Pictures

Ranking	Movie	Genre	Country	Schedule	Mode of Screening	Box Office (RMB 10,000)*	Production Co.
6	<i>Transformers: the Last Knight</i>	Action/ Sci-Fi	USA	6.23	3DIMAX	154,722	China Film Huaxia Film
7	<i>Dangal</i>	Comedy	India	5.5	Digital	129,850	Huaxia Film
8	<i>Youth</i>	Drama		12.15	Digital	118,600	H. Brothers
9	<i>Pirates of the Caribbean: Dead Men Tell No Tales</i>	Action	USA	5.26	3DIMAX	117,925	China Film Huaxia Film
10	<i>Kong: Skull Island</i>	Action/ Fantasy	USA	3.24	3DIMAX	115,884	China Film Huaxia Film

\* 10,000 RMB. DATA AS OF DECEMBER 31, 2017

Of the top 10 movies in Chinese market in 2017, five were local and five imported. The market share of local movies was 53.84 percent, which was 7.6 percent higher than that of imported ones. Aside from *Wolf Warriors 2*, which performed unexpectedly well in 2017, local movies continued to see a higher production value than imported ones, as shown by China's top 10 list. This is because, local blockbusters, having become a match for their Hollywood counterparts, regained favor with movie audiences in 2017 for increased market competitiveness and quality.

With a total of RMB 5.683 billion in box office earnings and 160 million views, the action movie *Wolf Warriors 2* became the top blockbuster of the year in China and set a box office record. The Hollywood series *The Fate of the Furious* was second on the list, with a box office of RMB 2.671 billion. It was the only Hollywood movie that grossed more than RMB 2 billion in China in 2017. Indian inspirational sports movie *Dangal* became the top non-American movie in China in 2017, raking in RMB 1.299 billion.

Compared with previous years, one noteworthy change to China's top 10 box office was the Indian movie *Dangal*, marking the first time a non-American movie made it to the list. This shows that competition in the Chinese market is no longer just between Hollywood and Chinese local movies but has extended to include movies made in other countries. In other words, the Chinese market offers equal opportunities for movies from across the world.

### III. Characteristics of China's Film Market in 2017

The *Transformers* series, which had previously been very popular in China, did unexpectedly poorly in 2017, with a mere RMB 1.551 billion at the box office for *Transformers: The Last Knight*, which was far lower than the RMB 1.98 billion (excluding e-commerce fees) that was grossed by *Transformers: Age of Extinction* three years ago. Moreover, in sharp contrast with the performance of superhero movies in the North American market in 2017, movies such as *Guardians of the Galaxy Vol. 2*, *Thor: Ragnarok* and *Wonder Woman*, which grossed more than USD 3 million each and were listed among the top 10 box office hits in the North American market, were all received by Chinese audiences with much less enthusiasm. *Spider-Man: Homecoming* just about made it to the box office top 10 list in China. This suggests that the grip of Hollywood superhero movies on Chinese audiences and the Chinese market is loosening.

On the other hand, more modest Hollywood movies, which showed lackluster performance in the North American market and even the global market, did surprisingly well in China. These include *xXx: Return of Xander Cage* and *Resident Evil: The Final Chapter*, both of which grossed more than RMB 1 billion in China, their biggest market concerning box office.

Meanwhile, 2017 saw a quick rise of non-American movies with high ratings in China. Indian movie *Dangal* grossed a dazzling RMB 1.2 billion, Thai movie *Bad Genius* raked in RMB 241 million, English movie *Paddington 2* earned RMB 198 million and Spanish movie *Contratiempo* (*The Invisible Guest*) brought in RMB 158 million. These movies were well received by mainstream audiences in China, creating new box office records; their sales in China were often more than that in their home countries.

As a force that has been fueling the rapid growth of China's film market, online ticketing platforms continued to expand their influence in 2017. Statistics show that e-commerce service fees in 2017 stood at about RMB 4 billion, accounting for 7.15 percent of the total box office for the year. Online sales of tickets accounted for more than 80 percent of the ticket revenues of China's cinemas.

Online ticketing has changed the way Chinese audiences buy their tickets and has made the pre-sales of tickets for a movie premiere an important indicator of its future sales. In 2017, the proportion of pre-sales on premiere day averaged 32.98 percent of a movie's total box office for that day; while for local movies this was 36.82 percent, for imported ones it was 28.79 percent.

Online ticketing platforms are not just trying to change the way Chinese audiences buy movie

tickets. Maoyan and Taopiaopiao, two major Chinese online platforms that merged in 2017, are becoming deeply involved in the movie distribution business in China. The influence of e-commerce platforms over studios, distribution channels, and even exhibitors and cinemas has become a force to be reckoned with in the movie distribution business. Unlike conventional distribution, e-commerce is a double-edged sword. The in-depth involvement of e-commerce platforms not only causes various parameters of a single movie to soar, but even stirs the whole market.

Looking at the yearly number of views in 2017, we find that in contrast with a 25-year low of 1.239 billion movie views in the North American market, the Chinese market enjoyed a new record of 1.62 billion views. The number of cinema visits in China in 2017 increased by 18.08 percent, from 1.372 billion in 2016. Considering the population base, there is of course still a clear gap between the market in China and North America, mainly reflected in the per capita frequency of movie watching. Although the strength of movie audiences in North America slumped a bit in 2017, the per capita frequency of cinema visits was still as high as 3.5. In Chinese cities and towns, however, the per capita frequency of movie watching was 1.93, almost half of that in North America.

Undoubtedly, the increase in the number of people going to the movies could not happen without the exploding growth of cinemas in China. By the end of 2017, the number of movie screens in China had surpassed 50,000. The number of cinemas in China stood at 9,504 by December 31, 2017, with an addition of 9,597 screens, which pushed the total number of screens to 50,776, the highest in the world.

However, there is still an imbalance between the demand for and supply of screens in China. This means that while some regions enjoy an adequate number of screens, others are sorely lacking in cinemas and screens. Regional market saturation has led to a worsening operational environment in these regions and over-competition. The market dividends stemming from the growth caused by the rapid development of cinemas have meant some misallocation of market resources. Once such dividends are exhausted in the process of scaling up, the actual scale of operations of the cinemas, together with the misallocation of resources will become apparent.

Another phenomenon worth noting is that literary movies and documentaries, dubbed "art films," gained a fair share of the market in China in 2017, with some of these movies, which had been unlikely to sell well in the past, showing good results. This can be attributed, on one hand, to an expansion of the screening network and the inroads cinemas have made into smaller, remoter counties and towns, and on the other, to a more mature Chinese audience that is increasingly interested in more diverse movies. The industrialization of China's movie

sector has been underway for 16 years, and this has forged a movie-watching population that has enabled an expansion of the market to both the upper and lower ends. This population will continue to grow in the future, as diverse groups of moviegoers bring new market opportunities for all types of movies.

The sales of Chinese movies in overseas markets saw a steady rise in 2017. Chinese movies made RMB 4.253 billion (USD 648.92 million) in overseas box office and sales, which represents a 11.19 percent increase from the RMB 3.825 billion in 2016. However, although the overseas sales of Chinese movies rose in 2017, the sales did not match the performance of Chinese movies in China and the overall scale of the market. The sales and profitability of Chinese movies in overseas markets are still low. Not only are they behind Hollywood movies in overseas markets, they are also lagging behind movies made in India, which is a big player in Asia's movie industry. With the overall increase of China's power as a country, the Chinese government has been reinforcing its support to the production of local blockbusters and Chinese overseas distribution entities. Policies on co-productions between China and other countries are also being put in place. Chinese directors' ability to communicate cinematically to an international audience as well as their movie-making skills has improved. New ways of cooperation with international directors are being worked out. Chinese movies may soon be able to access overseas markets by selling their "Chinese characteristics."

## Top 10 Phenomena in China's Movie Industry in 2017

### I. The Significance of *Wolf Warriors 2* Is More than Its Box Office

In mid-2017, *Wolf Warriors 2* changed the trend of the Chinese movie market. The share of Chinese movies went from 39 percent until the second half of the year to 53.84 percent by year end. Of the total RMB 30.104 billion in box office earnings of Chinese movies, *Wolf Warriors 2* accounted for 18.9 percent. The significance of *Wolf Warriors 2* can be elaborated as follows:

Firstly, *Wolf Warriors 2* loosened the grip of imported movies in the first half of the year. The momentum it brought remained in effect for months, and even movies that opened during the Golden Week of the National Day holidays benefited from the enthusiasm for movies generated by this movie.

Secondly, *Wolf Warriors 2* brought to life a Chinese superhero, Leng Feng, with whom audiences made an immediate connection.

And lastly, the unprecedented popularity of this movie meant a diverse movie-watching public. Forty-six percent of the audience of *Wolf Warriors 2* consisted of the post-90s generation; 11 percent, post-2000s; 35 percent, post-80s; and 8 percent, post-70s and other age groups. Youngsters watched the movie with their parents, which meant this movie attracted an audience where the ratio of middle-aged viewers was clearly higher than that for other movies. Its 160 million views came from people from all age groups.

## II. Benchmark Box Office of More than RMB 1 Billion and an Average Screening Period of 8.5 Weeks

Boasting more than 50,000 screens, China's movie market is churning out more movies with more than RMB 1 billion in box office earnings. There were even movies whose box office surpassed RMB 1 billion but still did not make it to the top 10 box office list, as the threshold of the top 10 was increased to RMB 1.159 billion (including e-commerce fees), or about USD 177 million. The box office earnings of the top 10 movies averaged RMB 2.034 billion. The staggering potential of the Chinese market has forced overseas consulting institutions, which used to look down on the Chinese market, to modify their projections.

The Chinese market in 2017 has redefined a blockbuster as a film with box office earnings exceeding RMB 1 billion and is screened for at least five weeks.

Seen from the benchmark box office earnings of RMB 1 billion, a total of 13 foreign and Chinese movies made more than RMB 1 billion in 2017. These movies were screened for an average of 8.5 weeks, which is a rather long screening period. Some super blockbusters such as *Wolf Warriors 2*, *Never Say Die*, and *Dangal* were shown for more than 10 weeks; box office champion *Wolf Warriors 2* remained on screen for 14 weeks.

For popular movies, it is not likely that earnings in the first week go up but plummet in the second. Instead, their earnings grow in proportion to the length of the screening period. Sometimes, earnings in the second week surpass those in the first, the so-called "counter growth". Examples include *Wolf Warriors 2*, *Kong Fu Yoga*, *Youth*, *Dangal*, *Coco* and *xXx: The Return of Xander Cage*. Thus, public opinion about a movie is playing an increasingly important role in its box office earnings.

Table 5: Screening Period of Movies with More than RMB 1 Billion at the Box Office in 2017

Release Date	Name	Country/Region	Total box office*	E-commerce platform service charge	Screening period (week)
7.27	<i>Wolf Warrior 2</i>	China	56.83	3.76	14
4.14	<i>The Fate of the Furious</i>	USA	26.70	1.63	9
9.30	<i>Never Say Die</i>	China	22.07	1.42	12
1.28	<i>Kong Fu Yoga</i>	China	17.48	1.01	10
1.28	<i>Journey to the West: The Demons Strike Back</i>	China	16.52	0.87	10
6.23	<i>Transformers: The Last Knight</i>	USA	15.47	0.86	5
5.5	<i>Dangal</i>	India	12.99	1.01	11
12.15	<i>Youth</i>	China	11.86	0.73	5+
5.26	<i>Pirates of the Caribbean: Dead Men Tell No Tales</i>	USA	11.79	0.74	5
3.24	<i>Kong: Skull Island</i>	USA	11.59	0.63	7
11.24	<i>Coco</i>	USA	11.59	0.81	6+
2.10	<i>xXx: Return of Xander Cage</i>	USA	11.25	0.73	9
2.24	<i>Resident Evil: The Final Chapter</i>	USA	11.09	0.74	5

\* 100 MILLION RMB; BOX OFFICE DATA INCLUDES E-COMMERCE SERVICE FEES. DATA AS OF DECEMBER 31, 2017

### III. Comparison of the Top 10 Box Office Movies in North America and China

Comparing the top 10 movies by box office in the Chinese and North American markets in 2017, we find that except for *Stephen King's It*, which has not been released in the Chinese market, and *Star Wars: The Last Jedi* that was released in China in 2018, all the top box office movies in the North American market were also released in the Chinese market. Of these, *Beauty and the Beast*, *Wonder Women*, *Guardians of the Galaxy Vol. 2*, *Spider-Man: Homecoming*, *Thor: Ragnarok*, *Logan* and *The Fate of the Furious* were released in China on the same day as in North America.

Most of the top 10 box office hits of the year in North America were superhero movies, and they



made around USD 100 million in China, far lower than that in the North American market. Only *The Fate of the Furious* made it to the top 10 in both markets. The movie took home USD 408 million in China, which was 81 percent higher than in the North American market, accounting for 40.35 percent of its overseas box office. The revenue from the Chinese market became the main box office contributor of the return on investment for this movie. It can be seen from Table 6 that sales in the Chinese market decided the global rankings of some Hollywood blockbusters. Chinese audience preferences have changed the global ranking of movies, breaking the stranglehold of North America on the box office of Hollywood movies. Behind this phenomenon is the double-digit growth of the Chinese movie market. This market will not only create opportunities for Chinese movies but also for Hollywood and for movies from other parts of the world. Production companies wishing to remain in business will only need to figure out ways to woo Chinese audiences, who are constantly changing their interests.

Table 6: Box Office Top 10 in North America and China in 2017

Ranking	North America	Genre	Box Office	Ranking	China	Genre	Box Office*
1	<i>Star Wars: The Last Jedi</i>	Sci-Fi/Action	51,714.42	1	<i>Wolf Warrior 2</i>	Action	80,978.4
2	<i>Beauty and the Beast</i>	Live action fairy tale	50,401.4	2	<i>The Fate of the Furious</i>	Action	38,245.8
3	<i>Wonder Woman</i>	Action	41,256.3	3	<i>Never Say Die</i>	Comedy/Love	31,511.1
4	<i>Guardians of the Galaxy Vol. 2</i>	Sci-Fi/Action	38,981.3	4	<i>Kong Fu Yoga</i>	Comedy/Action	25,131.9
5	<i>Spider-Man: Homecoming</i>	Action/Sci-Fi	33,420.1	5	<i>Journey to the West: The Demons Strike Back</i>	Fantasy/Action	23,882
6	<i>Stephen King's It</i>	Horror	32,748.1	6	<i>Transformers: the Last Knight</i>	Action/Sci-Fi	22,293.8
7	<i>Thor: Ragnarok</i>	Action/Fantasy	31,137	7	<i>Dangal</i>	Comedy	19,279.9
8	<i>Despicable Me 3</i>	Animation	26,462.4	8	<i>Youth</i>	Drama	16,980
9	<i>Logan</i>	Action/Sci-Fi	22,627.7	9	<i>Pirates of the Caribbean: Dead Men Tell No Tales</i>	Action	16,862.5
10	<i>The Fate of the Furious</i>	Action	22,576.4	10	<i>Kong: Skull Island</i>	Action/Fantasy	16,722.6

\*10,000 USD;

NOTE: E-COMMERCE SERVICE CHARGES ARE NOT INCLUDED

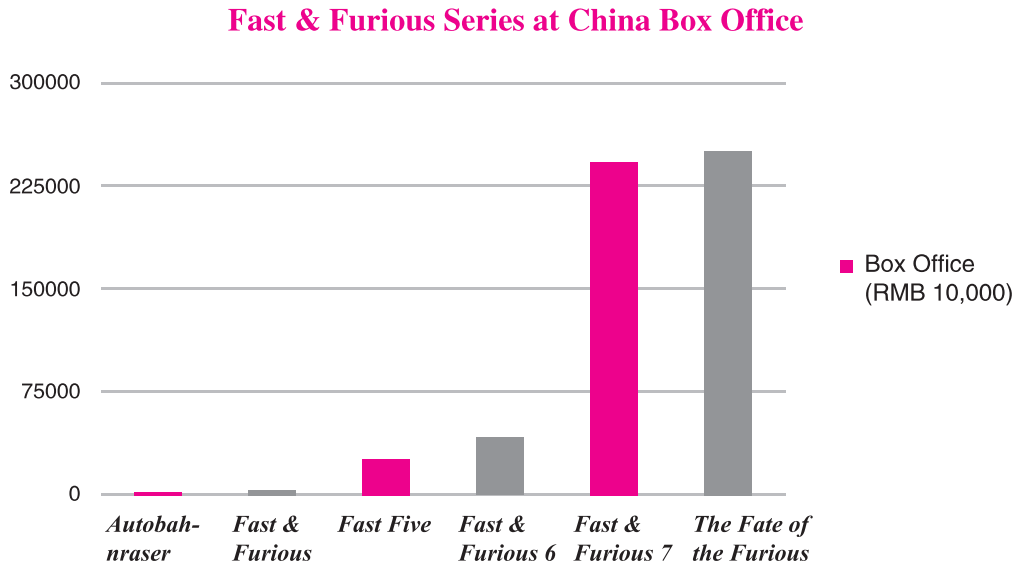
A clear gap between the Chinese and North American movie markets is reflected in movie distribution quality. The screening scale of a new movie in the North American market is accurately calculated. Only by contrasting scale with yield can we make adjustment that is close to the actual market situation. Movie distribution in the North American market is mature, which means the box office for premiere day and opening week can be predicted and controlled. Since movie distribution in China is very extensive, it is difficult to control and quantify the scale of screenings. Owing to misleading pre-sales or scheduling of movies by e-commerce platforms before the release date, some good movies often lie buried. This is one of the reasons why "sleeper hits" are common in the Chinese market.

#### IV. The Selling Power of Hollywood Movies Weakens

The best-performing Hollywood movie in the Chinese market in 2017 was *The Fate of the Furious*. On premiere day (April 14), it took RMB 417 million at the box office, becoming the premiere day box office champion of the year. The next day, it set a single-day box office record of RMB 487 million in the Chinese market. In its opening week, its box office reached more than RMB 1.3 billion. The movie was the second-highest selling movie of 2017 in the Chinese market with RMB 2.671 billion. It was the only Hollywood movie to make more than RMB 2 billion at the box office in the Chinese market in 2017.

*The Fate of the Furious* contributed more than 50 percent of the box office in the Chinese market in April, reviving the April market together with the Indian movie *Dangal* and reversing the steady decline through February and March. This suggests the Chinese movie market needs imported movies to stay afloat. However, there is more than meets the eye. The actual box office earnings of the movie after deducting e-commerce service charges was RMB 2.5 billion, which represents almost zero growth from the earnings of *Fast & Furious 7* three years earlier, which made RMB 2.421 billion. Considering the fact that more than 35,000 screens showed *Fast & Furious 7*, the 2017 blockbuster *The Fate of the Furious* did not bring any surprises and in fact, pointed to a state of diminishing returns.

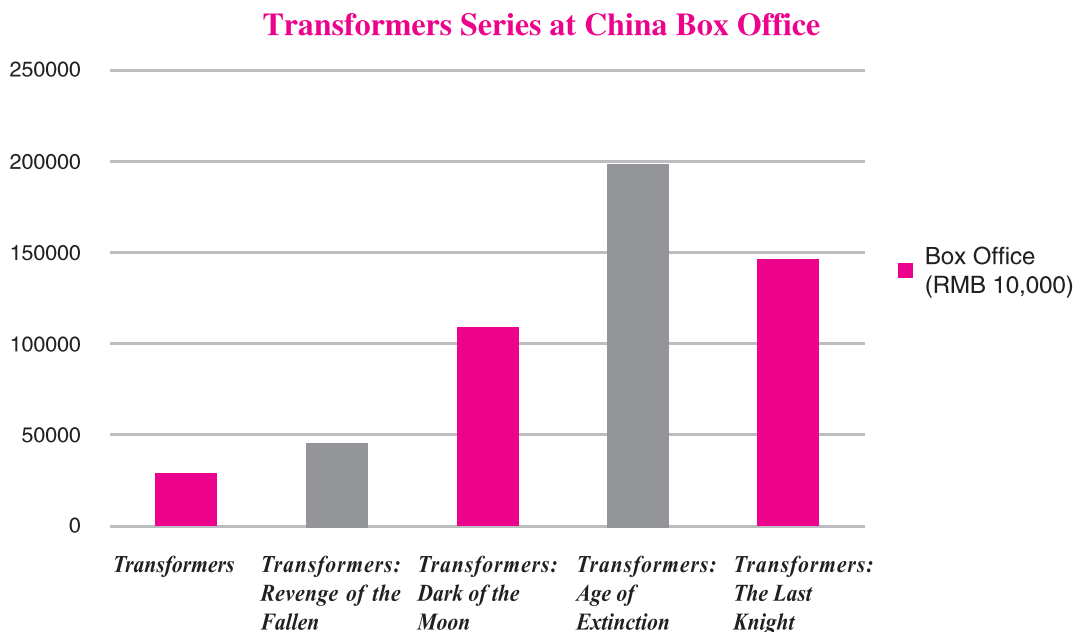
Figure 1: Box Office Figures of the Fast &amp; Furious Series in the Chinese Market



Among the "RMB 1 billion+" movies, those with the shortest screening times, including *Transformers: The Last Knight*, *Pirates of the Caribbean: Dead Men Tell No Tales* and *Resident Evil: The Final Chapter*, were all from Hollywood. Chinese audiences see most Hollywood blockbusters as fast-moving consumer goods (FMCG). The success of *The Fate of the Furious* only proves the series' brand name has some influence on Chinese audiences. It was probably nostalgia that helps the movie surpass the performance of the *Transformers* series in the Chinese market, but that is not sustainable. *Transformers: The Last Knight* was released in China on June 23. It recorded RMB 324 million at the box office on premiere day and RMB 815 million in opening week. These figures were the highest for the movie series. The decline in earnings in the following week also set a record for the series. If one deducts the RMB 86.08 million e-commerce service charges, the final box office earnings of *Transformers: The Last Knight* in the Chinese market was RMB 1.46 billion, which is RMB 520 million lower than the RMB 1.98 billion *Transformers: Age of Extinction* made in China three years earlier, a decline of 26.2 percent.

The setback suffered by *Transformers: The Last Knight* in the Chinese market was a signal that Chinese audiences' tastes were changing and that the new generation of viewers were less enthusiasts of pure visual spectacles.

Figure 2: Box Office Performance of the *Transformers* Series in the Chinese Market



Another manifestation of the weakening selling power of Hollywood movies in the Chinese market is the poor enthusiasm for superhero movies. While superhero movies performed very well in the North American market, with movies such as *Guardians of the Galaxy Vol. 2*, *SpiderMan: Homecoming*, *Wonder Woman* and *Thor: Ragnarok* raking in more than USD 300 million at the box office, their box office earnings in the Chinese market was around RMB 600 million to RMB 700 million.

### V. *Dangal* Becomes One of the Top 10 Box Office Hits in China

Before 2017, non-Hollywood movies played just a "complementary" role in the Chinese market. Indian movies lagged behind even more, playing just a supporting role. The highest-grossing Indian movie in the Chinese market was P.K., released in 2015, with RMB 118 million in box office earnings. In keeping with the expanding influence of Bollywood movies in the international market in recent years, the 2017 Indian movie *Dangal* was a huge box office success, with RMB 1.299 billion (including RMB 100 million in service charges), rising to the seventh spot among the top 10 box office hits in the Chinese market. *Dangal* not only outdid the

Hollywood blockbuster *Guardians of the Galaxy Vol. 2* that was released during the same time but also raced ahead of *Pirates of the Caribbean: Dead Men Tell No Tales*, winning box office, popularity and public praise. The movie harvested the best results in the Chinese market among Bollywood movies.

Non-Hollywood movies did surprisingly well in the Chinese market in 2017, becoming a fresh category among imported movies. The Thai movie *Bad Genius* (RMB 270 million), the British movie *Paddington 2* (RMB 200 million), and the Spanish movie *Contratiempo* (RMB 172 million) all performed better than the Hollywood movies *Cars 3* and *Life*. The cumulative box office earnings of the artistic British movie *Loving Vincent* surpassed that of *King Arthur: Legend of the Sword*. In addition, *Baby Driver*, *Gintama* and *Fireworks*, grossed more than *Blade Runner 2049*. *A Dog's Purpose* did better in the Chinese market than in the global and North American markets. Box office champion *Beauty and The Beast* made nearly RMB 100 million more than *Rogue One: A Star Wars Story*.

Even though Hollywood movies have a huge advantage in the Chinese imported movie market, in terms of both number and box office yield, non-Hollywood movies, especially imported movies in minority languages, struck a chord with Chinese audiences in 2017. During screenings in China, those movies led the market's mainstream consumption with relatively high quality and popularity. These movies not only set a new box office record for foreign movies in China but their box office sales even surpassed those in their local markets and set records for the international box office.

Table 7: Imported Movies in 2017 by Country

Ranking	Country	Number of Movies	Percentage (%)	Total Box Office*	Proportion in Total Imported Movies %
1	USA	56	59.5	2,170,284	90.2
2	India	1	1.06	119,807	4.97
2	Japan	9	9.57	45,731	1.9
3	Thailand	1	1.06	24,772	1.03
4	Spain	1	1.06	15,825	0.65

\*10,000 RMB

NOTE: E-COMMERCE SERVICE CHARGES ARE NOT INCLUDED

The Indian movie *Dangal* entered the box office top 10 in China and emerged in the market as a foreign movie with a genre and style vastly different from that of Hollywood movies. This has stimulated the production of Chinese domestic films to a degree. Chinese movie makers realized that imitating Hollywood was no longer the only way to win the market, and that the storyline was a critical factor in capturing eyeballs.

The tastes of China's movie-going audiences are changing and the market is maturing and ready to explore different genres and styles of movies from other countries.

The Chinese market is still undergoing adjustment. The consumption and sales curve of foreign movies from various countries in the Chinese market is going up, which shows the inclusiveness, diversity and maturity of the market as well as of Chinese audiences. We are seeing more audiences from different levels and more diverse choices from them. However, one must remember that the Chinese market is still in a state of flux. The increasing popularity of non-American movies in the Chinese market in 2017 does not mean that Hollywood movies have lost their edge. The Chinese movie market has not yet fully resolved its supply and demand side problems and the market is still in the recovery phase.

## VI. Action, Sci-Fi and Comedy are Chinese Audience Favorites

Analyzing the list of 95 movies that made more than RMB 100 million at the box office in the Chinese market in 2017, one finds that action, comedy and sci-fi movies are the most popular genres with Chinese audiences.

A total of 38 action movies including *Wolf Warriors 2* took about RMB 29.232 billion. Action became the highest-grossing movie genre in the Chinese market in 2017, and of course, *Wolf Warriors 2* alone took in over RMB 5.683 billion.

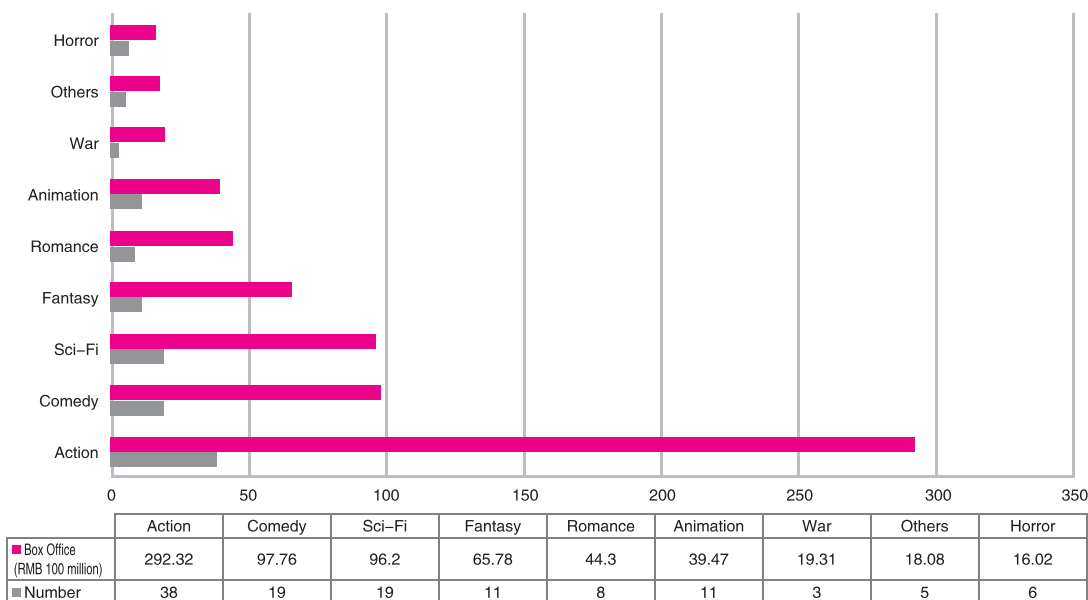
Comedy movies adapted from literary properties and starring well-known comedians, such as *Never Say Die* (adapted from the stage play of the same name), *Buddies in India* (based on the novel *Journey to the West*), *Kung-Fu Yoga* (featuring Jackie Chan) and *City of Rock* (directed by and featuring Dapeng), also emerged as popular choices with Chinese audiences. The best performing sci-fi movies all came from Hollywood. Chinese sci-fi movies had no impact on the box office in 2017; *The Three-Body Problem* turned out to be an empty promise. It was the sequels that saved the day for Hollywood movies in the

Chinese market, such as *The Fate of the Furious*, *Pirates of the Caribbean: Dead Men Tell No Tales*, *Kong: Skull Island*, *Despicable Me 3* and *War for the Planet of the Apes*. In particular, *The Fate of the Furious* continued its impressive performance in the Chinese market and topped the list of imported movies.

Hollywood movies without a brand backing were not that lucky. Their performance was varied—*Life* made RMB 135 million at the box office; *Blade Runner 2049*, RMB 76.91 million; *King Arthur: Legend of the Sword*, RMB 57.05 million; *The LEGO Batman Movie*, RMB 41.99 million; and *Power Rangers*, RMB 30.05 million. Most of these big-budget movies lagged behind the top 100 highest-grossing movies in the Chinese market. To be fair, however, Hollywood action and sci-fi movies retained a steady place at the box office. This can be attributed to the global marketing and distribution strengths of Hollywood's top six movie companies.

In 2017, two imported movies saw much success toward the end of the Chinese New Year holiday. Movies such as *xXx: Return of Xander Cage* received surprisingly good feedback in China. Medium budget movies such as *xXx: Return of Xander Cage* and *Resident Evil: The Final Chapter*, which saw mediocre performance in both the North American and global markets, each generated more than RMB 1 billion box office in China. *xXx: Return of Xander Cage*'s global box office totaled USD 346 million, of which 47 percent came from China and only 13 percent from the U.S. The global box office of *Resident Evil: The Final Chapter* totaled USD 307 million, which included USD 169 million generated in China, seizing a market share of more than 52 percent. The movie made USD 26.80 million at the box office in North America, accounting for 8.75 percent of its total. Some warm-hearted Hollywood movies have won praise from audiences for their novel, fantastic and imaginative themes. *A Dog's Purpose* and the comedy musical *La La Land* are some examples of these.

Figure 3: Movies with Box Office Earnings Exceeding RMB 100 Million in China in 2017



## VII . Hollywood's Advantage in Animation Films

In 2017, the box office earnings of animation films in the Chinese market were lower than in 2016. They stood at RMB 4.735 billion, and their contribution to the annual market was only 8.5 percent, a decrease of 10 percent from 2016.

There is a wide gap between domestic and imported animation movies. Imported and domestic animation movies hold 73.5 percent and 26.5 percent of the market share respectively. Domestic family animation movies showed the worst performance in 2017, with the number of movies released in this genre decreasing 20 percent in 2016 and the box office falling 43.9 percent. On average, box office for a single movie shrunk from RMB 75 million in 2016 to RMB 45 million in 2017, down 37.7 percent. Hollywood family animation films are the major players in the Chinese market. Seven Hollywood animation movies, including the *Coco* and *Despicable Me: 3*, accounted for 77 percent of the total animation box office in 2017. Japanese animation movies ranked second, accounting for 10.2 percent of the market. However, Japanese animation movies posted a far poorer performance in China in 2017 compared with 2016.



Table 8: Movies Released by Top 6 Hollywood Movie Companies in China in 2017

Ranking	Production Co.	Movies Released (No.)	Global Box Office*	Market Share %	Single Movie Box Office*
1	Universal Pictures	6	483,131	22.2	80,521.8
2	Walt Disney Pictures	7	472,331	21.7	67,476.8
3	Warner Bros.	9	340,403	15.6	37,822.5
4	Paramount Pictures	4	280,493	12.9	70,123
5	20th Century Fox	7	262,928	12.1	37,561.1
6	Sony Pictures Entertainment	6	229,066	10.5	38,177.6
7	Lions Gate Films	7	43,590	2	6,227.1
8	Other six studios	11	58,342	2.68	5,303.8

\* 10,000RMB.

Figure 4: Hollywood Movie Companies' Market Share in China in 2017

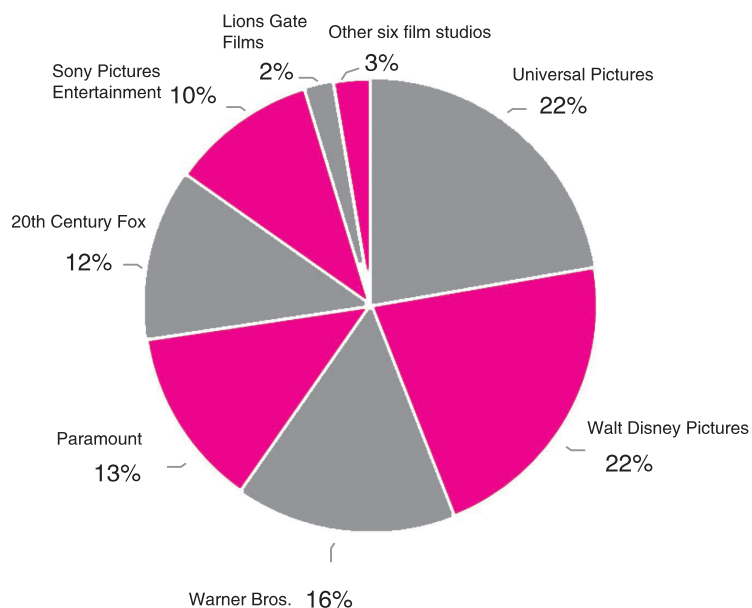


Figure 5: Movies Released by Hollywood Companies in China in 2017

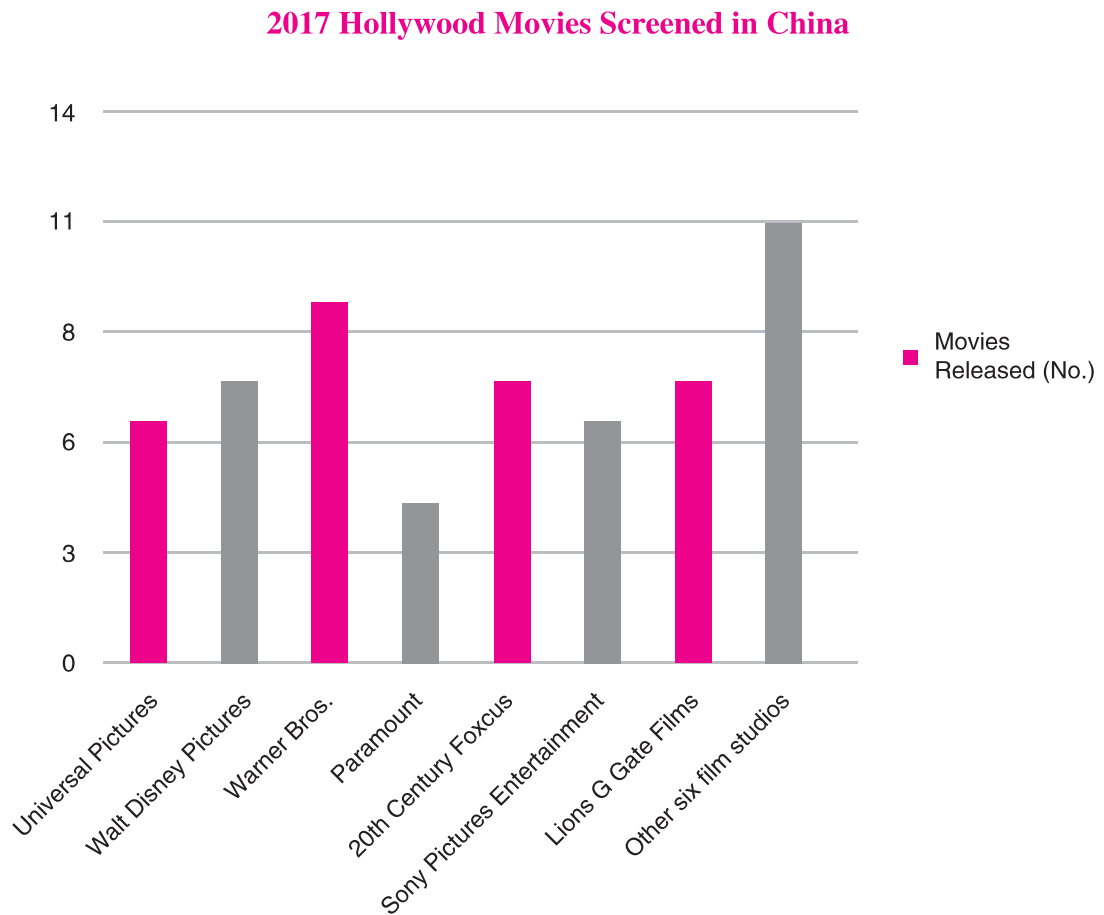
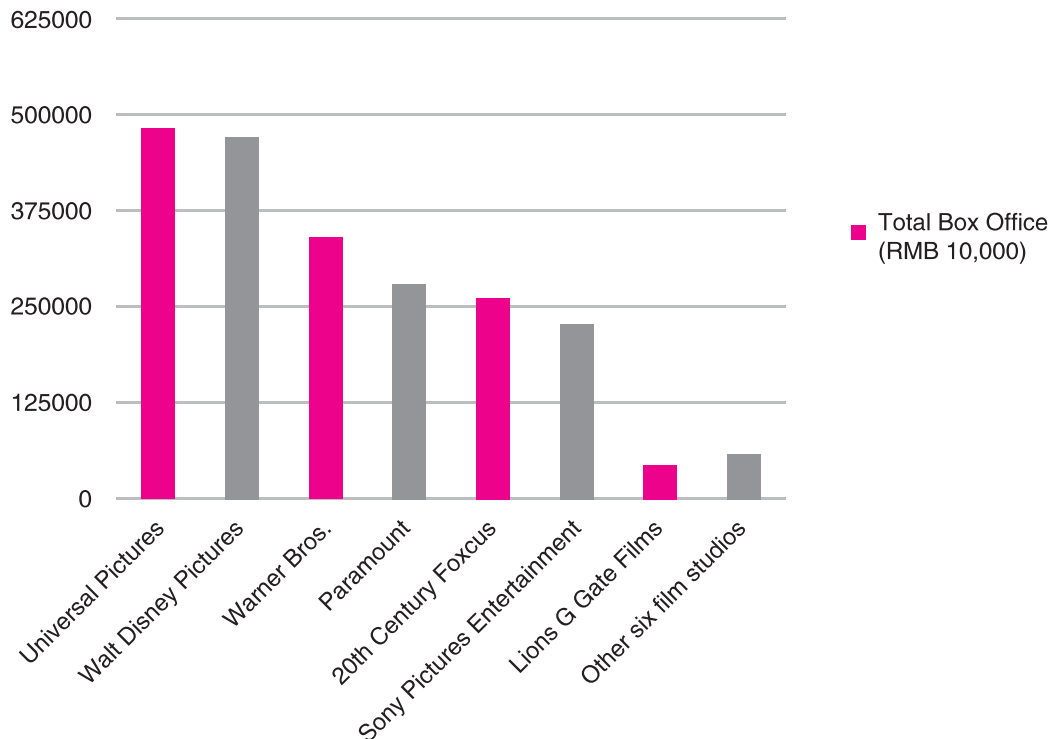


Figure 6: Box Office of Movies Released by Hollywood Companies in China in 2017

### 2017 Box Office Collection of Hollywood Movies Screened in China



Universal Pictures topped China's box office hits with six movies releases. This is closely related to the investments in movie distribution by Universal Pictures (Beijing). Although the top six Hollywood companies have offices in China or companies that assist their market operations; they cannot be compared with Universal Pictures (Beijing) in terms of affinity and familiarity with the local market.

### VIII . Documentaries Become a New Driving Force in the Chinese Market

It has been acknowledged that there isn't much audience interest in documentaries in China. In 2016, the documentary *Born in China*, directed by Lu Chuan and co-produced by China and the United States, was released during the summer vacation and only generated a box office of RMB 66

million. Expected to make USD 12 million at the box office in North America, this documentary, which was released by Walt Disney Pictures, made more than USD 13 million at the box office in one month of its release. This documentary convinced Chinese directors of the diversity of the North American movie market. The same situation happens in China as well now. In 2017, documentaries injected a fresh impetus to the Chinese market, to some extent filling the gap caused by the shortage and weakness of animation movies.

Twelve Chinese and foreign documentaries were screened, which together made RMB 234 million at the box office. Local documentaries contributed 98 percent of this. The documentary movie *Twenty Two* about "comfort women" took RMB 170 million at the box office, the highest among movies in the same genre. Other documentary movies such as *Earth: One Amazing Day* (RMB 41.71 million), *Return to the Wolves* (RMB 29.21 million) and *Paths of the Soul* (RMB 91.64 million) also did well.

The increasing presence "art films," thus far neglected by the market, was another highlight of the Chinese movie market in 2017. The outdoor adventure movie *Seventy-Seven Days* (RMB 103 million) and the literary movie *Angels Wear White* (RMB 20.16 million) did well at the box office, despite lacking well-known directors or big stars. Their success is a reflection of a more mature and diverse Chinese audience. It also underscores the positive relationship between movie quality and the box office. A mature Chinese movie market will also promote streamlined distribution through selected theaters.

## IX . Movies with Special Themes Trigger Social Topics and Become Hits in the Market

The Chinese market has never valued movies with special themes as much as it does today. Besides *Wolf Warriors 2*, the excellent market performance of *Youth*, *Duckweed*, *Paths of the Soul* and *The Ex-File: The Return of the Exes* prove this point. Movies in any genre that speak to the audience and touch on social topics are likely to do well at the box office.

While the success of *Youth* during the New Year movie season may have had something to do with the rumors about the sudden cancellation of its screening during the National Day movie season, the main reason it did well at the box office is that it spoke to the post-50s and post-60s generations. This points to the potential of the middle-aged viewing group in the growth of the Chinese movie market. There are just too few movies in the Chinese market that can resonate with them. It's a huge new space that *Youth* has explored for Chinese moviemakers in 2017.

The romance movie *The Ex-File: The Return of the Exes* resonated with audiences and defeated *Star Wars: The Last Jedi*. It was released three days before the start of 2018, while *Star Wars: The Last Jedi*, the box office champion in North America in 2017, was released in the second week of its screening, on January 5, 2018. *The Ex-File: The Return of the Exes* not only dampened the enthusiasm for *Star Wars: The Last Jedi* but intercepted its sales. It made more than RMB 1.9 billion at the box office, while *Star Wars: The Last Jedi* made only RMB 267 million in the Chinese market.

Compared with the first two "The Ex-File" movies, *The Ex-File: The Return of the Exes* did very well with young audiences. The viral marketing of the movie, which included posting videos of audience members crying, fainting, etc., after watching the movie on video platforms popular with young people, helped sales of the movie. However, it must be remembered that marketing works only when the movie is intrinsically good. *The Ex-File: The Return of the Exes* has given a new revelation to the market: against the general background of current market segments, a movie of any genre that can strike a chord with the audience has the opportunity to become a box office hit.

## X . Enduring Money-Making Ability of "Journey to the West"-Themed Movies

Every year, the Chinese movie market sees at least one new movie interpretation of the novel "Journey to the West" that makes it to the list of top box-office hits. *Journey to the West: The Demons Strike Back*, *Buddies in India* and *Wukong*, all based on "Journey to the West," had ratings of 5.6, 3.8 and 5.1, respectively, on movie.douban.com. *Wukong*, which had the lowest ticket costs of the three movies, took in RMB 697 million at the box office. It seems Chinese audiences continue to enjoy movies based on "Journey to the West." *Buddies in India* was co-produced by China and India, pointing to the potential of expanding the market for "Journey to the West"-themed movies beyond China, to the rest of Asia and even the world. The theme offers good material for co-productions.

## III. Hot Events of the Year

### I . China's Film Industry Promotion Law is Made Official

On March 1, 2017, the Film Industry Promotion Law of the People's Republic of China (hereinafter referred to as Film Industry Promotion Law) officially came into force.

The law is aimed at promoting healthy growth of China's movie industry, while carrying forward the nation's core socialist values and regulating the movie market and enriching people's lives. Its implementation has witnessed the achievement and determination of the reform of Chinese movie industry and hopes to facilitate China's transition from a big movie country to a strong movie country.

On March 21, the same month the Film Industry Promotion Law came into force, the movie authorities strictly enforced the law and in an unprecedented move imposed serious punishments such as suspension of licenses, fines and internal warnings on 326 cinemas that were found to engage in illegal operations. As of the end of 2017, 28 groups of cinemas and exhibitors, totaling several hundred, were punished.

These steps are aimed at regulating the movie market, by strictly implementing the standard for ticketing software products, enhancing supervision and adopting an appropriate exit mechanism; regulating cinema operation and forbidding box office fraud; regulating e-commerce ticket sales, prohibiting e-commerce platforms from pre-selling or selling movies without the Permit for Public Projection of Films, and interfering with or affecting movie schedules; increasing movie copyright awareness and preventing and punishing bootlegging; and fixing legal liabilities for illegal operators.

The enforcement of the Film Industry Promotion Law shows that the Chinese movie industry has entered a new phase.

## 2. E-commerce Affects and Exerts Stress on the Movie Market and Audiences

In 2017, online ticketing accounted for more than 80 percent of the Chinese movie market. Since January 1, 2017, China has been including network service charges in total box office earnings. According to the China Film Distribution and Screening Association, in 2017, the total network service charges were about RMB 4 billion. These data shows that the internet has changed Chinese audiences' movie consumption habits while also altering people's everyday lives.

Online ticketing first entered the Chinese movie market in 2010. By 2017, cinemas nationwide were linked to e-commerce platforms. In 2017, national ticketing websites completed a new round of changes. Maoyan and Taopiaopiao dominated the online ticketing market. As of the end of 2017, Maoyan had a 40 percent share of the market and Taopiaopiao, more than 20 percent. Meanwhile, an online ticket purchase is the first preference of more than 80 percent of audiences. The two e-commerce platforms are also deeply involved in movie distribution and this led to some big changes in the movie market.

China leads the world in internet development, and therefore its internet-based online ticketing business is ahead of other countries. The growth in online ticketing in 2017 is reflected in pre-sales of tickets. According to Maoyan, in 2017, pre-sales on premiere day accounted for 32.68 percent of the day's entire sales. While premiere day pre-sales of domestic movies accounted for 36.82 percent of the entire day's sales, that of imported movies accounted for 28.79 percent. However, the growth in online ticketing has created its own problems and China's movie industry players are now paying more attention to how to best resolve them. The internet is bound to have a greater influence on the movie market and the industry. Authorities will need to come up quickly with a set of policies to balance the rights and obligations of relevant parties, to regulate their operations and to ensure healthy growth of the Chinese movie market.

### 3. China's National Art-house Film Alliance: A Fulcrum to Lever Movie Distribution Reform

The China National Art-house Film Alliance (hereinafter referred to as the "Alliance") was established in October 2016 and officially launched in 2017. The Alliance mainly screens off-beat Chinese and foreign movies. In 2017, these included *Manchester by the Sea*, *August*, *Go with Your Gut* and *The Striving*.

*Manchester by the Sea*, which received six nominations at the 89th Academy Awards and finally won Best Actor in a Leading Role and Best Original Screenplay, became the first foreign movie to be shown in China through the Alliance. The movie grossed about RMB 6.74 million at the box office in China. At the time, the average output per screen was RMB 16,850. So far, more than 400 cinemas with nearly 600 screens have joined the Alliance.

The fate of domestic movies in 2017 was closely related to the operating capacity and marketing capabilities of distribution companies. Some 400 new movies were shown on big screens throughout the year. Among local movies, some made several billion yuan at the box office, while others took home only several tens of thousands or even several thousand yuan. Market data shows that even though there are dividends to be earned in the large Chinese market, not all movies can make money. In fact, there are more movies that lose money than make it. On the list of highest-grossing domestic movies of 2017, a total of 177 movies earned less than RMB 1 million, accounting for 42.96 percent of all new releases. One hundred and ten movies earned less than RMB 100,000, accounting for 26.69 percent of the total. This speaks of a colossal waste of resources. Most of these movies were poorly made and attempted

to ride off the success of others by copying their storyline or cinematic tricks. Some were even online blockbusters adapted to the big screen. Such movies reflect the inefficiency of capital investment and its adverse effect on the growth of the industry. It also shows that movie distribution in China needs an urgent overhaul. The movie distribution business is still in its insufficiency and professional distribution companies are faced with many challenges, including unstable and imbalanced operating performance. With the Chinese movie industry entering a new golden phase, the market is in urgent need of professional film distribution companies.

Table 9: Top 10 Chinese Film Distribution Companies in 2017

Ranking	Company	Number of Movies Released (No.)	Box Office*	Market Share %
1	China Film Co., Ltd.	99	206	36.8
2	Huaxia Film Distribution Co., Ltd.	62	161.7	28.9
3	Shanghai Taopiaopiao Entertainment Co., Ltd.	22	66.03	11.8
4	Beijing United Entertainment Partners	12	60.2	10.7
5	Beijing Culture	3	59.69	10.6
6	Maoyan Film Distribution	16	40.7	7.2
7	Bona Film Group	11	32.16	5.7
8	Beijing Enlight Pictures	8	25.02	4.4
9	Wuzhou Film Distribution	15	19.56	3.4
10	Sihai Distribution Association	6+8	19.41	3.4

\*100 MILLION RMB

#### 4. China Has Built 50,000 Screens and 3D Loses its Shine

China already has 50,000 screens, making it the market with most movie screens in the world. The rush to build screens remained unabated in 2017. Cinema investment will continue to attract capital in the near future. In 2017, 1,658 new cinemas were built, averaging 138 per month, and 9,597 new screens were added, averaging 800 per month. Of the 50,000 screens, 43,788 were 3D screens, accounting for 86.2 percent of the total. Another 5 percent is accounted for by 2,534 special screens



such as IMAX, China Film Giant Screen (CFGS), Dolby Atmos, DTSX and 4D. Among the special screens, IMAX and CFGS have seen the fastest growth. As of the end of 2017, there were 796 giant screens, with 502 IMAX and 294 CFGS.

However, audience enthusiasm for 3D and IMAX has not kept pace. Many Chinese parents are not too keen on letting their children watch too many 3D movies. Moreover, because of the ticket discount offered by e-commerce platforms, 3D screening does not give cinema operators a price advantage. Meanwhile, the number of local 3D movies, especially 3D animation movies, has fallen sharply. There are signs of excess investment in the Chinese IMAX market. With China being the largest IMAX International Corporation customer, the Chinese market is the main contributor of revenue to the corporation. The development of the corporation in China has broken some investment principles and the density of IMAX screens has constantly broken records. By the end of 2014, there were only 193 IMAX screens in China. Even adding 12 IMAX screens in science and technology museums, the total was only 205 IMAX screens. However, in less than three years, this number has grown to 502 and there are no signs of a slowdown. The emergence of CFGS and other giant screens has had a somewhat dampening effect on IMAX, and the imbalance between resources and production capacity continues.

As for imported movies, the quota system has kept the number of 3D and IMAX movies brought in unchanged. However, audience interest in 3D has declined, widening the gap between IMAX investment and output.

Table 10: Increase in the Number of Screens in China, 2013–2017

Year	2013	2014	2015	2016	2017
Number of Screens (No.)	18,398	23,600	31,726	41,179	50,776
Year-on-Year Increase %	+40.2	+28.2	+34	+29.7	+23.3
Number of New Screens (No.)	5,280	5,202	8,053	9,552	9,597
Annual Rate of Increase of New Screens %	34.7	-1.4	54.8	18.6	0.47
Average Daily Increase (No.)	14.4	14.2	22	26.1	26.2

Table 11: 3D, and 3D and IMAX Screens in China, 2013–2017

Year	3D (No.)	3D+IMAX (No.)	Total (No.)	Box Office (RMB 100 million)	Box Office Proportion %	Year-on-Year %
2017	35	34	69	308.02	55	+6.4
2016	50	32	82	289.9	63.4	+27
2015	41	37	78	228.23	51.7	+57.2
2014	31	36	67	145.15	48.97	+56.6
2013	33	20	53	92.76	42.6	

Table 12: IMAX Screens in China, 2013–2017

Year	IMAX/3DIMAX	Show Proportion %	Box Office (RMB 100 million)	Year-on-Year %	Box Office Proportion %
2017	9/34	8.49	18.71	−1.7	3.34
2016	5/32	8.66	19.04	−5.3	4.16
2015	13/37	13.1	20.11	+53.9	4.56
2014	11/36	14.87	13.06	+61.6	4.4
2013	10/20	9.7	8.08		3.71

Of the 9,900 cinemas and more than 50,000 screens in China today, about 4,890 cinemas and 20,321 screens are in county-level cities, accounting for 49 percent and 38 percent, respectively. The number of cinemas and screens continue to expand to third- and fourth-tier towns and even small towns in the fifth tier. They are the basis of the sustainable development of the Chinese movie market. Based on the urban population of China, on average, there is a screen for every 16,400 people. Even though this is far from the average number in North America, where every 8,000 people have access to one screen, the number is impressive considering China's population density. While one cannot say that the number of screens in China has reached saturation levels, there is considerable regional imbalance. The more important point is to assess whether movie distribution and marketing match the rich screen resources. Precision and audience segmentation are issues in the Chinese movie distribution industry that require immediate attention.

When there are more than 50,000 screens in China, market channels and networks are like

completed highways. Not only the domestic industry, but the global movie industry and transnational movie companies can hope for opportunities to grow in China's large movie market.

## 5. Discounted Tickets, A Major Problem

In evaluating the Chinese movie market in 2017, one cannot ignore the problem posed by discounted tickets. While there is no accurate data on how much of the annual box office comes from discounted tickets, an annual report of Chinese distribution companies shows that the performance of e-commerce platforms exceeds that of most traditional distribution companies. More than half of the box office earnings of domestic movies are related to it. During the mergers and acquisitions in 2017, e-commerce platforms became even more deeply involved in movie ticket sales, unleashing a new round of support for box office earnings. During the Spring Festival movie season, some movies were pulled out because no discounted tickets were available to view them. The National Day movie season and the New Year movie season are the two main movie-watching times in China. The two major e-commerce platforms were on the list of all the main New Year movie distribution or production companies. RMB 9.9 tickets returned to the market in the New Year movie season.

Although the intention behind discounted tickets may have been to promote movie sales and attract a bigger audience, they are now being used to boost box office figures. As relevant parties strive for glamorous box office data during the screening period, more discounted tickets were offered which has actually brought bubbles to the industry and damaged the interests of distribution and production companies. A movie's success is no longer about its content or quality, but about how successful the campaign to sell it with discounted tickets has been.

In February 2018, production companies asked for restrictions to be placed on discounted movie tickets. It was proposed that from Chinese New Year's Eve to Lantern Festival (February 15 to March 2), ticket prices should be no lower than RMB 19.9 and that no more than 500,000 discounted tickets per movie should be sold. This marked the start of efforts to regulate the movie industry aimed at avoiding vicious competition on the capital level and bringing the movie market back to a benign development track.

## 6. Influence of Local Chinese Movies on Hollywood

The emergence of *Wolf Warriors 2* in 2017 changed not just the market shares of local movies and imported movies, but also showed how a movie with a patriotic theme could be successful under

market conditions, without any government support. Before this, high-grossing domestic films in China were mostly comedy movies or big commercial productions. Now many production companies have new thoughts about moviemaking.

The domestic movies *The Founding of An Army*, *Sky Hunter*, *God of War* and *The Big Call* released in 2017, and *Operation Red Sea*, which is to be released in 2018, are all new mainstream movies. Commercial movies with a quintessentially Chinese theme have also been successful in the past, such as *The Taking of Tiger Mountain* and *Operation Mekong*, released two years ago. The success of *Wolf Warriors 2* is expected to encourage the production of more such movies, as their stories resonate with audiences. This is expected to put pressure on Hollywood movies. After all, the spirit core of those movies closely relates to Chinese audiences, which is something that Hollywood movies cannot copy.

*Wolf Warriors 2* was able to speak to a diverse audience. Both the post-80s and post-90s generations, as well as post-70s and older crowds contributed to the box office success of this movie. *Wolf Warriors 2* has brought back enthusiasm for movie watching. The same phenomenon was seen at play in *Youth*. The movie enthused the post-50s and post-60s generations, who make up more than 45 percent of the viewing public. Middle-aged and senior members of the audience relate more easily to domestic movies. Hollywood movies find it more difficult to make this connection. It will become another bottleneck for Hollywood movies in the Chinese market since they are finding it difficult to attract China's new audiences.

The fierce competition to win young Chinese audiences has hastened the emergence of young Chinese directors. The works of these young directors are varied and wonderful. In 2017, these movies by young directors included Wu Jing's *Wolf Warriors 2* (RMB 5.683 billion in box office earnings), Song Yang and Zhang Chiyu's *Never Say Die* (RMB 2.207 billion), Han Han's *Duckweed* (RMB 1.046 billion), Wang Baoqiang's *Buddies in India* (RMB 756 million), Da Peng's *City of Rock* (RMB 457 million), Su Youpeng's *The Devotion of Suspect X* (RMB 402 million), Li Chen's *Sky Hunter* (RMB 318 million) and Guo Ke's *Twenty Two* (RMB 170 million). In the year-end tide of new movies, *The Ex-File: The Return of the Exes* did very well among young audiences. It even surpassed the Hollywood blockbuster *Star Wars: The Last Jedi*. These young directors have brought more Chinese stories and Chinese voices to the Chinese market. Hollywood will need to reinvent itself to be successful in the Chinese market. Making sequels and resorting to high tech gimmicks will no longer cut it with Chinese audiences.

## 7. Influence and Pressure from Non-Hollywood Movies

Surprisingly, several non-Hollywood movies enjoyed immense popularity in the Chinese market in 2017, marking a change in the long standing pattern of competition between Hollywood and local Chinese films. In the past, the competition in the Chinese market was just between local movies and Hollywood blockbusters. However, the success of movies from India, Thailand, Spain, the United Kingdom, Japan and even small movie countries and medium- and small-scale independent movies from the U.S. through buyouts in 2017, has made global movies the rivals of Chinese local movies and tightened the competition for Hollywood movies.

In some cases, movies from outside Hollywood, which did well in China, generated better box office earnings in the Chinese market than they did at home. This has generated much interest in the Chinese market, promoting cultural exchanges and trade cooperation. More non-Hollywood or non-English movies will compete for the Chinese market, which is after all a huge market and will be the largest movie market at some point in future. Meanwhile, the competition posed by these movies from Bollywood, the rest of Asia, Europe, etc., also means there is growing pressure on Chinese directors to become more independent in exploring themes that speak to Chinese audiences. China should not just have the title as the largest market in the world. A large movie market does not mean a strong movie market. In the course of development from a large movie country to a strong movie country, domestic films need to be stronger, more confident and more independent.

## VI. Chinese Film Industry Policies

Since 2012 when China and the U.S. signed a Memorandum of Understanding (MoU) on a WTO dispute related to movies, China has accelerated opening up its film market. According to the MoU, China was to add 14 special films that would be screened only in 3D or IMAX, based on the quota of about 20 revenue-sharing releases yearly. Moreover, the Chinese box office share for the U.S. was to increase from 13.5 percent to 25 percent.

In the following year, Current Measures on Strengthening Cooperation and Management of Movies on Both Sides of the Taiwan Straits were issued by the State Administration of Radio and Television. According to these measures, Taiwan movies with a Permit for Public Projection of Films can be distributed in mainland China as imported movies and are not subject to the quota for imported movies.

In recent years, the Chinese government has put in place many policies to encourage exchanges

between China and other countries, such as delegating the approval of joint movie-related activities to the provincial authorities and encouraging countries along the Silk Road to hold such events such as a year of culture, art festivals, movie festivals, movie weeks, etc.

The Chinese government has signed an inter-government movie co-production agreement with 20 countries including South Korea, India, Singapore, Belgium, France, Spain, Italy, the United Kingdom, the Netherlands, Estonia, Malta, Australia, New Zealand, Canada, Denmark, Greece, Kazakhstan, Luxembourg, Russia and Brazil. According to the China Film Co-Production Corporation, the company had 84 co-productions and two associated productions approved for production by the movie authority; 60 co-productions obtained the censors' nod in 2017.

According to statistics, mainland China entered into co-production agreements with 20 countries and regions including Brazil, Russia, India, South Africa, the United States, Australia, the United Kingdom, the British Cayman Islands, the British Virgin Islands, New Zealand, Kazakhstan, France, Malaysia, Belgium, Spain, Italy, Japan and Serbia.

In the past two years, the number of movies co-produced by mainland China and the U.S. has been rising. Big-budget co-productions include *Kung Fu Panda 3*, *The Great Wall* and *The Foreigner*. Chinese and American companies have also jointly established movie production and international distribution companies.

Foreign film companies hoping to enter the Chinese market through co-productions shall comply with relevant regulations. One of the key requirements is that the investment share of overseas production companies, in terms of funds, performance, and technology should be between 20 percent and 80 percent of the final investment, and the two parties should maintain overall balance in art and technical personnel, including actors. That means overseas production companies cannot turn their works into co-productions to enter the Chinese market by using Chinese companies as front companies. However, once the movie co-produced with China is formally approved, the movie is supposed to be treated in the same manner with domestic movies in the Chinese market.

What is worth noting is that with the Chinese government improving market management in recent years, the rights and interests of foreign movies and TV series in the Chinese market have been better protected.

From 2014 to 2017, the Chinese Government, the Film Administration of the State Administration of Radio and Television (SART) and its subordinate departments issued several notices to regulate the film market.

On September 2, 2014, the Notice of the State Administration of Press, Publication, Radio,

Film, and Television on Further Implementing the Relevant Provisions on the Administration of Online Foreign Films and Television Plays was issued, which reiterates the regulations for online foreign films and TV series and stipulates that foreign films and TV series without the Permit for Public Projection of Films or Permit for Distribution of TV Series cannot be shown online.

On January 17, 2014, the Notice on Strengthening Film Market Management and Regulating Use of Movie Ticketing System was issued, which requires local governments to strictly implement relevant policies and regulations such as Technical Requirements and Measurement Methods of Cinema Ticket Management System, to establish an open, just, fair and transparent film market system and create a unified, open film market environment with orderly competition.

In 2015, the Film Administration of the State Administration of Radio and Television changed the practice of registering domestic films, such as changing its publicity notice from twice a month to three times a month, speeding up registering review and approval process, and eliminating relevant approval rights.

On September 29 and 30, 2015, the Notice on Cracking Down Bootlegging and Other Infringement and Illegal Acts and Notice on Strengthening Use of Digital Watermarking Technology and Enhancing Movie Copyright Protection were issued, which advocate the use of technological means including "digital watermarking" to enhance copyright protection while taking a firmer stand against illegal acts such as bootlegging.

On November 7, 2016, Film Industry Promotion Law was approved by the Standing Committee under the National People's Congress.

Meanwhile, co-productions with foreign countries are picking up pace. The Chinese market, which tops the world in number of screens, is welcoming top-notch movies and highly rated producers from all over the world. This dynamic market will definitely become a new blue ocean for movies around the world.

### Appendix: Recent Policies for Regulating the Chinese Movie Industry

Time of Issuance	Issuing Authority	Policy Name	Main Content
February 13, 2012		China and the United States signed a Memorandum of Understanding on a WTO dispute related to movies.	China will add 14 special films that are only screened in 3D or IMAX on the basis of the quota of about 20 revenue-sharing releases yearly; the Chinese box office share for the U.S. will increase from 18 percent to 25 percent.
2013 January	SART	Current Measures on Strengthening Cooperation and Management of Movies on Both Sides of the Taiwan Straits	All Taiwan movies are imported by China Film Group Film Import & Export Corporation. The Taiwan movies with the Permit for Public Projection of Films can be distributed in mainland China as imported movies but are not subject to the quota for imported movies.
January 17, 2014	The Film Administration of SART	Notice on Strengthening Film Market Management and Regulating Use of Movie Ticketing System	The Notice requires strictly implementing relevant policies and regulations such as Technical Requirements and Measurement Methods of Cinema Ticketing Management System, to establish and improve an open, just, fair and transparent film market system and create a unified, open movie market environment with orderly competition
March 18, 2014	SART	Detailed Rules on Implementation of Delegating Examination and Approval Powers of Local Peer-to-Peer, Exchange, Mutual, Single National Movie Events to Provincial-level Administrations of Press, Publication, Radio and Television	Since August 2013, the examination and approval of local movie events have been delegated to provincial-level administrations of press, publication, radio, and television.
March 19, 2014	SART	Notice on Further Strengthening Web Series, Micro Movies and Other Netcasting Shows	Movies, TV series, etc., that are filed at the administration of radio and television and are made public but do not have the Permit for Public Projection of Films or Permit for Distribution of TV Series may not be shown on the internet
December 22, 2014	The Film Administration of SART	Notice on Further Improving Projection Quality	The Notice mainly regulates cinema projection quality to ensure all cinema screens meet relevant technology standards on brightness and sound levels



Time of Issuance	Issuing Authority	Policy Name	Main Content
September 2, 2014	SART	Notice on Further Implementing the Relevant Provisions on the Administration of Online Foreign Films and Television Plays	The Notice reiterates the regulations for online foreign films and TV series and stipulates that foreign films and TV series without the Permit for Public Projection of Films or Permit for Distribution of TV Series cannot be shown online.
February 9, 2015	The Film Administration of SART	Notice on Doing Well in E-commerce Ticketing Work	The Notice includes electronic ticketing into the ticketing regulation system and sets forth the regulations and process of e-commerce ticketing
February 9, 2015	The Film Administration of SART	Notice on Strengthening Cinema Screen Technology Management and Improving Movie Projection Quality	The Notice requires cinemas to use the appropriate quality and grade of projection equipment
March 28, 2015	National Development and Reform Commission, Ministry of Foreign Affairs, Ministry of Commerce	Vision and Action on Jointly Building Silk Road Economic Belt and the 21st-Century Maritime Silk Road	The main content of cooperation includes the holding of a year of culture, art festivals, movie festivals, movie weeks and book fairs. Jointly create and translate art house movies and TV series. Make a splash at the Silk Road (Dunhuang) International Cultural Expo, Silk Road International Film Festival and Book Fair.
September 9, 2015	China Film Group Corporation, Motion Picture Association	Cooperation Agreement on Import and Distribution of Revenue-Sharing Movies	I. China and the United States will continue to increase cooperation in the film industry; II. China Culture Industrial Investment Fund and Warner Bros. jointly establish a movie production and international distribution company in Hong Kong, China, which will further promote U.S.-China co-productions.
September 29, 2015	The Film Administration of SART	Notice on Cracking Down Bootlegging and Other Infringement and Illegal Acts	Crack down on bootlegging and other illegal acts
September 30, 2015	The Film Administration of SART	Notice on Strengthening Use of Digital Watermarking Technology and Enhancing Movie Copyright Protection	It advocates the use of technological means including "digital watermarking" to enhance copyright protection
October 14, 2015	The Film Administration of SART	Detailed Implementation Rules on Administration of Cinema Ticketing System (Software)	It requires strict checking of cinema ticketing system. It has set forth punitive measures for illegal acts and states it is necessary to ensure there are laws and regulations and also punitive measures for violations of cinema ticketing rules.

Time of Issuance	Issuing Authority	Policy Name	Main Content
October 14, 2015	Management Office of Special Fund for Development of National Movie Industry	Notice on Regulating Cinema Ticketing System Hardware Configuration	It requires strict checking of cinema ticketing system
Early 2016	The Film Administration of SART ( [ 2016 ] No.93 Document by the Film Administration)	The Notice on Forwarding China Film Distribution and Screening Association' s Implementing Plan for the Management of the Film Market Order	It requires strengthening the management of the industrial market order
November 7, 2016	Deliberated and approved by the Standing Committee of the National People's Congress.	China' s Film Industry Promotion Law	The first law governing China's film industry
February 27, 2017	The Film Administration of SART	The Permit for Film Production and the Permit for Film Production (for a Single Film) are canceled and the Qualification Certificate for Film Technology will not be issued separately.	This decision aims to further open the film production
March 22, 2017	The Film Administration of SART	[2017] No. 96 Document by the Film Administration	Notice on the Punishment for the Malpractices of the First Batch of 326 Theatres
April 12, 2017	SART	Notice on Regulating Video-on-Demand Theaters and Their Operation	A permit issued by the movie administration department shall be obtained for video-on-demand theater and exhibitor business and screening and distribution of video-on-demand theater movies.
April 21, 2017	SART	Notice on Regulating Video-on-Demand Theaters and Exhibitors and Their Operation	The notice has proposed specific requirements for the video-on-demand filing and management of video-on-demand theaters and exhibitors; in June, the Temporary Notice on the Management of video-on-demand Theaters and Exhibitors (draft for comments) was issued.

Time of Issuance	Issuing Authority	Policy Name	Main Content
June, 2017	SART	Notice on Further Strengthening Administration of Creation and Broadcasting of Netcasting Shows	TV series and movies that have not passed censorship may not be shown on the internet as network series or movies. TV variety shows with values deemed inappropriate may not be shown on the internet, IPTV or internet TV in the name of internet variety shows. Programs that are forbidden on TV are also forbidden on the internet (including mobile internet).
June 30, 2017	China Netcasting Services Association	General Principles on Review of Netcasting Shows	The Principles define netcasting shows to include Web series, micro movies, network movies, animation TV series and movies, documentaries, special netcasting shows about art, entertainment, science & technology, finance, sports, education, etc., and other original netcasting shows; specify the system of review before netcasting; further clarify what netcasting shows can and cannot be made.
March 6, 2018	The No.14 Document by the SART	The Regulation for the Management of Video-on-Demand Theaters and Exhibitors	The regulation officially entered into practice on March 30.



# **2018 中国电影产业研究报告**

## **( 国际版 )**

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猫眼娱乐

# 2018 中国电影产业研究报告

## ( 国际版 )

说明：人民币兑美元汇率按 6.554 计算

以下票房数字如未特殊说明，均含电商服务费

### 概述

#### 一、国际电影市场概述

2017 年，全球电影票房为 399 亿美元，同比增长 3%，北美市场票房约 111 亿美元，较上年下降 2.3%，北美市场之外的海外国际市场年度电影票房是 288 亿美元，同比增幅 6%，中国市场票房产出约 85.3 亿美元，同比上升 13.45%。中国电影市场重回强劲增长轨道，进一步缩短了与北美市场差距。2017 年中国电影市场是推动全球票房增长的重要引擎。

表 1：2013--2017 五年北美、中国、全球市场票房一览

年度	北美 市场票房	占全球 市场份额 %	中国 市场票房	占全球 市场份额 %	全球 市场票房	其它市场 份额 %
2013	109	30.61	36	10.11	356	59.28
2014	104	28.36	48	13.08	366.7	58.56
2015	110	28.27	68	17.48	389	54.25
2016	114	29.38	66.7	17.19	388	53.43
2017	111.2	27.85	85.3	21.3	399.2	50.36

注：表中票房单位为 亿美元。

表 1 数据显示，全球影市近五年来基本呈上升态势，2016 年受中国市场放缓影响，有所微跌。所幸的是，2017 年经过一年市场自我修复和调整的中国电影产业再次显示蓬

勃生机，表现出良好基本面。由中国市场年度票房双位数增幅带来的红利让全球市场整体上扬 2.8%。中国电影在引领全球影业继续保持了良好上升态势的同时，还贡献了一部跻身全球票房 TOP10 的电影。

表 2：2017 年全球电影票房 TOP10

排名	片名	类型	国别	全球票房	北美票房	占比 %	海外票房	中国票房	电商服务费	中国占比 (%)
1	美女与野兽	爱情 / 奇幻	美	12.63	5.04	39.9	7.50	0.90	0.04	7.13
2	速度与激情 8	动作 / 犯罪	美	12.35	2.26	18.2	10.10	4.08	0.25	33.04
3	星球大战：最后的绝地武士	动作 / 科幻	美	12.05	5.17	42.9	6.32	-	-	-
4	神偷奶爸 3	喜剧 / 动画	美	10.33	2.65	25.7	7.68	1.57	0.09	15.20
5	蜘蛛侠：英雄归来	动作 / 科幻	美	8.88	3.34	37.6	5.46	1.18	0.07	13.29
6	战狼 2	动作	中	8.70	0.033	0.37	8.67	8.67	0.57	99.66
7	银河护卫队 2	动作 / 科幻	美	8.63	3.89	45.1	4.74	1.05	0.06	12.17
8	雷神 3：诸神黄昏	动作 / 科幻	美	8.49	3.11	36.6	5.37	1.13	0.08	13.31
9	神奇女侠	动作 / 科幻	美	8.21	4.13	50.2	4.09	0.93	0.06	11.33
10	加勒比海盗 5：死无对证	动作 / 奇幻	美	7.94	1.73	21.7	6.22	1.80	0.11	22.67

注：1、表中单位为亿美元。

2、数据统计截至 2017 年 12 月 31 日。

全球电影票房 TOP10，《速度与激情 8》《战狼 2》《加勒比海盗 5》三部影片与中国年度票房 TOP10 榜重合，这三部影片仅有《速度与激情 8》出现在北美市场票房十强榜单中，该片在北美十强榜单排名末席，中国市场对这部影片票房的贡献率超过 33%，换言之，是中国市场的成功直接帮助《速度与激情 8》超过在北美排名第一的《星球大战：最后的绝地武士》上位全球单片票房第二。

没有进入北美年度票房 TOP10 之列的《加勒比海盗 5》能够登陆全球票房 TOP10 也得益于中国市场贡献的约 1.8 亿美元的票房，这一数据在该片的总票房中约占 22.67% 份额。此外，《神偷奶爸 3》在全球票房榜比北美市场第 7 的排名，上升至全球第 4，出现



这样的名次变化，同样有中国市场助功之力。《战狼 2》以全球约 8.7 亿美元票房登上全球年度第 6 位置，其中 99.66% 的票房源于中国本土市场，这也再次印证中国市场产能和潜力都有无限空间。《战狼 2》是 2017 年全球电影榜单上唯一一部非好莱坞出品的电影，这对中国电影的发展和进步是一个肯定。

表 3：2017 年国际电影票房 TOP10

排名	片名	发行公司	国际票房
1	《速度与激情 8》	环球	10.10
2	《战狼 2》	HC	8.67
3	《神偷奶爸 3》	环球	7.70
4	《美女与野兽》	博伟	7.595
5	《星球大战 8：最后的绝地武士》	博伟	7.114
6	《加勒比海盗 5：死无对证》	博伟	6.223
7	《蜘蛛侠：英雄归来》	索尼	5.46
8	《雷神 3：诸神黄昏》	博伟	5.388
9	《勇敢者游戏：决战丛林》	索尼	5.337
10	《寻梦环游记》	博伟	5.315

注：1、表中单位为亿美元。

## 二、中国电影市场概述

2017 年中国电影市场充满活力，在经历了一年的自我修复和调整，市场再次呈现勃勃生机。全年电影票房 559.11 亿元人民币（约 85.3 亿美元），数据中包含了约 40 亿元人民币（约 6.1 亿美元）电商服务费，按同样计算方式，2017 年中国电影市场年度票房增长了 13.45%，相对于 2016 年仅 3.5% 的增幅，市场在充满活力同时表现出巨大消费潜力也是活跃的，中国电影产业发展依然处于黄金周期。

2017 年，中国全年生产电影故事片 798 部，动画电影 32 部，科教电影 68 部，纪录电影 44 部，特种电影 28 部，总计 970 部。

年度 559.11 亿元人民币总票房中，中国本土电影贡献了 301.04 亿元票房，本土电影市场占有率 53.84%。虽然这一比例是近五年来最低的了，但是在好莱坞电影风靡全球的

攻势中，本土电影能够保持超过百分之五十的市场占有率亦算很好成绩了。由于 2017 年在票房统计中加了电商服务费，全年票房超过亿元影片上升至 95 部，其中国产电影 54 部（含 2016 年延续的 4 部影片），进口电影 41 部。15 部影片票房超过 10 亿元，6 部是本土电影，9 部为进口影片。32 部影片票房超过 5 亿元，其本土影片 13 部，进口片 19 部。

表 4：2017 年中国电影票房 IOP10 排行榜

序	电影	类型	国别	档期	放映模式	票房（万）	发行公司
1	战狼 2	动作		7.27	3DIMAX	568300	北京文化集团、影联等
2	速度与激情 8	动作	美	4.14	3DIMAX	267013	中影华夏
3	羞羞的铁拳	喜剧爱情		9.30	数字 IMAX	220700	四海、华夏、猫眼
4	功夫瑜伽	喜剧动作		1.28	数字	174800	太合、耀莱、华策
5	西游：伏魔篇	奇幻动作		1.28	数字	165200	中影、和和、联瑞
6	变形金刚 5 最后的骑士	动作科幻	美	6.23	3DIMAX	154722	中影华夏
7	摔跤吧！爸爸	喜剧	印度	5.5	数字	129850	华夏
8	芳华	剧情		12.15	数字	118600	华谊兄弟
9	加勒比海盗 5 死无对证	动作	美	5.26	3DIMAX	117925	中影华夏
10	金刚骷髅岛	动作奇幻	美	3.24	3DIMAX	115884	中影华夏

注：表中单位为人民币 / 万元；数据截止 12 月 31 日。

2017 年中国电影票房 TOP10，本土片与进口片各占五席，本土电影市场占有率为 53.84%，高出进口片 7.6 个百分点。除了《战狼 2》在 2017 年超水平发挥因素，中国电影票房 TOP10 榜显示，国产片的产值持续高于进口片。一方面是国产大片竞争力与好莱坞大片已趋于棋逢对手状态，本土电影在 2017 年的市场竞争力和品质提升重新获得了观众认可。另一方面，数据显示观众对于好莱坞大片的套路因熟悉而产生了审美疲劳。

动作影片《战狼 2》以 56.83 亿元票房和 1.6 亿观影人次成为中国市场年度最卖座影片，创了华语影史单片票房纪录。好莱坞系列动作电影《速度与激情 8》26.71 亿元位列年度票房亚军，这是 2017 年唯一在中国市场票房突破 20 亿元人民币的好莱坞电影。印度体育励志电影《摔跤吧！爸爸》以 12.99 亿元的票房成为 2017 年中国市场非美影片票房之最。

中国年度电影票房 TOP10 与往年相比，突出变化是印度电影《摔跤吧！爸爸》的上榜，

非美影片首次跻身中国年度市场前十榜单，表明中国市场不再仅是好莱坞电影与中国本土电影之间的竞争，中国本土电影和好莱坞电影间的竞争已经扩展至全球各国优秀电影，从另一角度观之，中国市场对全球各国电影都具有着同样的机会。

### 三、2017 年度中国电影市场特点

在中国市场一直备受追捧的《变形金刚》系列在 2017 年意外失利，《变形金刚 5：最后的骑士》暑期档市场遭遇滑铁卢，仅收入 15.51 亿元人民币票房，这一成绩与三年前《变形金刚 4》在中国市场创造的 19.8 亿元人民币（不含电商服务费）的票房相去甚远。与 2017 年超级英雄电影在北美市场表现喜人的成绩相左，在北美市场票房超过 3 亿美元并进入年度票房 TOP10 的超级英雄电影《银河护卫队 2》《雷神 3》《神奇女侠》等均在市场不温不火，仅《蜘蛛侠：英雄归来》一片勉强挤进进口片票房 TOP10 垫底。好莱坞超级英雄电影在中国市场均遭遇市场“瓶颈”，说明好莱坞超级英雄电影对中国观众和市场消费把控力正在下降。

一些在北美乃至全球市场表现平淡，中等投资好莱坞电影在中国市场意外热卖，如《极限特工：终极回归》《生化危机 6：终章》等在中国票房都超过了 10 亿元人民币，中国市场成为这些电影最大票房市场。

2017 进口片的另一道风景线是，一些高评分的非美影片在中国市场迅速崛起，印度影片《摔跤吧！爸爸》大卖 12 亿，泰国电影《天才枪手》（2.41 亿），英国电影《帕丁顿熊 2》（1.98 亿），西班牙电影《看不见的客人》（1.58 亿）等等，这些电影在中国市场引领了主流观影消费，创造了不同国别电影的中国票房新纪录，销售成绩大多超过影片在其本土市场的票房。

近年来推动并影响中国电影市场迅猛发展的力量之一，互联网电商在线售票平台的影响力在 2017 年继续增强。数据显示，2017 年，全年电商服务费约为 40 亿元左右，占年度总票房的 7.15% 左右。中国电影院电影票的网络售票比例超过 80%。

网络售票改变了中国观众购票渠道和方式，让一部影片首日预售数据成为影响销售走势的重要参考数据之一。2017 年，中国市场上影片首日预售票房占当日票房的平均比例为 32.68%，其中，国产影片占比是 36.82%，进口影片首日预售票房占当日票房平均比例为 28.79%。

在线售票平台不仅是要改变中国观众的电影消费和购票方式，中国两大在线售票平台猫眼和淘票票在 2017 年完成整合后，开始深度介入中国电影发行业务，电商平台对于片商、发行乃至院线和影院的影响力已成为中国电影发行领域一个不能忽视的力量，与传统发行相比，电商的发行影响力是一把双刃剑，利弊皆有，电商平台的深入介入不仅是单片各数

据攀升，有时甚至是搅动了市场大盘。

解读年度观众人次数据，与北美市场 2017 年 12.39 亿年观影人次创下 25 年来北美的新高相反，中国电影市场的 16.2 亿的观影人次是又一个新高。2017 年中国城市院线观影人次比上年的 13.72 亿人次增长 18.08%。当然，若以人口基数考量，中国与北美市场的差距还是很明显的。主要表现在人均观影频率上，2017 年，北美观影人次虽有小幅回落，但是人年均观影频率还是有 3.5 次。中国按城镇人口计算，年人均观影为 1.93 次。两者之间差距几乎一倍。

不可否认，中国电影观众的增长离不开影院终端的爆发式增长。截止 2017 年底，中国电影银幕的数正式迈过 5 万块线。截止 2017 年 12 月 31 日，中国影院数 9504 家，全年新增银幕 9597 块，银幕总数达 50776 块，放映市场规模位列世界首位。

虽然已是全球银幕总量第一，中国市场上银幕数量仍存在一个供给侧与需求侧不平衡的问题。即一些区域局部市场银幕量饱和了，另一些区域市场影院和银幕却还很匮乏。局部市场饱和让那些市场经营环境恶化，过度竞争。由于放映市场快速发展拉动增量增长带来的市场红利，长期掩盖了市场资源配置的某些不合理，一旦增量增长红利在扩大规模中消耗殆尽，影院真实的经营水平和资源配置的不平衡将显现出来。

另一值得关注的现象，被称为小众电影的文艺片、纪录片在 2017 年的中国市场逐渐获得空间，一些之前不太可能引发销售热点的小众类型电影在市场取得良好票房成绩。一方面要得益于终端放映网络的扩容和新影院布局下沉更为广大的地级、县级城市，另一个方面是产业化十余年来培育和创造的中国观众群体正在走向成熟并在扩大观影层面，中国电影产业化路上已有十六年了，初步累积了将市场向上和向下拓展的观影群基础，不断拓展和扩大的观影群层在未来的时间里会继续发酵，多元化的观众层组成将为不同类型的电影带来新的市场机会。

2017 年，中国电影海外销售能力在稳步提升。数据显示，中国电影全年海外票房和销售收入 42.53 亿元人民币（折合美元 6 亿 4892 万元），较上年 38.25 亿元人民币增长 11.19%。中国电影的海外销售虽然有所上升，但与中国电影在本土市场表现，以及市场总量规模是不相匹配的。中国电影海外销售和盈利尚处于一个低水平，不仅不能与好莱坞电影的海外销售能力相比，与亚洲电影大国印度电影在海外销售与影响力也有相当的差距。伴随着中国综合国力提升，中国政府近年对中国式大片拍摄和中国海外发行机构扶持力度增强，中国与多国合拍政策的相继出台，中国导演国际化叙事能力和拍摄技术的提高，以及中国与国际导演合作思路的转变，中国电影或将探索出一条具有“中国特色”的电影海外销售之路。

## 2017 十大年度电影热点现象

### 一、《战狼 2》意义不止于票房

2017 年中，《战狼 2》改写了中国市场的年度走势。

《战狼 2》上映后将国产片的市场份额占比从 39%，一路拉升，最终国产片在下半年市场上全面翻盘，将市场份额占比最后定格在 53.84%，全年国产片产出 301.04 亿元的票房中，《战狼 2》一片贡献了 18.9%。

《战狼 2》对 2017 年中国电影具有特殊意义。这个意义有三：

首先，《战狼 2》横空出世，一扫上半年市场久存不散的阴霾，改变了本土电影与进口电影的格局。影片所带来的“头部”效应延续数月，甚至黄金周国庆档也得以继续享用到《战狼 2》带来的人气红利。

其次，一部准军事题材电影，《战狼 2》创造了一个中国银幕上新形象——中国超级英雄冷峰。这个银幕形象是以往本土电影中没有的，观众只在好莱坞电影看到，因而，让观众有新鲜感，很振奋。

最后，电影热卖创造了最广泛的观影群体。数据显示，《战狼 2》的观众年龄构成：90 后占 46%，00 后占 11%，80 后占 35%，70 后以及更多年龄段的观众占 8%。让 90 后，00 后的观众青睐主旋律电影，年轻人带着爸爸妈妈进电影院，中年以上的观众比例明显高于其它电影，这是《战狼 2》创造的一种全民观影的风尚。电影 1.6 亿人次的观众，由多层面，多年龄段构成，观众层面之广，构成之丰富为中国电影供给侧改革升级换代提供一个成功范本。

### 二、超 10 亿级票房标杆与平均 8.5 周的放映周期

拥有五万张银幕的中国电影市场，让一部电影票房 10 亿元级别从偶发演变为频发，2017 年中国年度票房 TOP10，单片票房 10 亿元级别也有无法入围年度十强的，电影票房 TOP10 的门槛被提升至 11.59 亿元（含电商服务费），折合美元约 1.77 亿元，电影票房 TOP10 榜单平均单片票房高达 20.34 亿元。中国市场表现出惊人的消费潜力，令曾经唱衰中国市场的海外咨询机构重新修正对中国电影市场的预期。

2017 年中国市场给大片和强片明确了市场定义，即票房超过 10 亿元人民币级别电影，市场上有效放映周期不少于 5 周才可称为大片、强片。

站在 10 亿级票房标杆线上回望，全年共有 13 部中外影片在中国市场收获“10 亿+”的票房，从放映周期看，此类影片一般都具有较长生命周期，2017 年的放映周期平均数值为 8.5 周，一些售卖超强影片，如《战狼 2》《羞羞的铁拳》《摔跤吧！爸爸》等市场

有效放映周期甚至要超过 10 周，中国市场年度冠军影片《战狼 2》在市场有效放映周期长达 14 周。

有强大而绵长生命力的电影基本不会出现首周票房超高，次周即“高台跳水”的局面，票房产出与市场销售周期呈现正比，有时甚至出现，次周票房超过首周票房的情况，这就是“逆袭”。如《战狼 2》《功夫瑜伽》《芳华》《摔跤吧！爸爸》《寻梦环游记》《极限特工：终极回归》均属于此类情况。由此可见，口碑发酵对影片票房的正面影响越发重要。

表 5：2017 中国市场票房超 10 亿影片放映周期统计

档期	影片名称	国家 / 地区	总票房	电商服务费	放映周期（周）
7.27	战狼 2	国	56.83	3.76	14
4.14	速度与激情 8	美	26.70	1.63	9
9.30	羞羞的铁拳	国	22.07	1.42	12
1.28	功夫瑜伽	国	17.48	1.01	10
1.28	西游伏妖篇	国	16.52	0.87	10
6.23	变形金刚 5：最后的骑士	美	15.47	0.86	5
5.5	摔跤吧！爸爸	印	12.99	1.01	11
12.15	芳华	国	11.86	0.73	5+
5.26	加勒比海盗 5：死无对证	美	11.79	0.74	5
3.24	金刚：骷髅岛	美	11.59	0.63	7
11.24	寻梦环游记	美	11.59	0.81	6+
2.10	极限特工：终极回归	美	11.25	0.73	9
2.24	生化危机 6：终章	美	11.09	0.74	5

注：1、表中单位人民币 / 亿元。票房数据包含电商服务费。

2、数据统计截止 2017 年 12 月 31 日。

### 三、北美与中国市场电影票房 TOP10 比较

对比表 6 中美市场年度票房 TOP10 影片，可以发现，除了没有引进中国市场的《小丑回魂》和 2018 年引进中国的《星球大战：最后的绝地武士》外，北美市场年度 TOP10



影片全都在 2017 年中国市场上映，其中《美女与野兽》《神奇女侠》《银河护卫队 2》《蜘蛛侠：英雄归来》《雷神 3》《金刚狼 3》《速度与激情 8》等中国上映档期与北美市场同步。

票房表现上，北美年度十强影片大多是超级英雄电影，而这些电影在中国票房大多止步于 1 亿美元左右，远低于在北美市场的票房表现。仅《速度与激情 8》一部影片同时登上中美两国市场年度十强之列，在中国市场产出 4.08 亿美元票房成绩高于北美市场的 81%，占该片海外票房的 40.35%，中国市场的票房产出成为该片投资回收的主要票房贡献者。

从表 6 数据发现，中国市场的销售决定了部分好莱坞大片的全球排名，中国观众对一部电影的喜好程度改变了全球榜单排列，打破好莱坞影片北美“一统天下”的格局，进而影响到全球大片的票房回收。形成这一现象背后，是重新回到两位数增幅的中国电影市场不断创造出更多的市场可能性。这一现象不仅出现在中国本土电影，对好莱坞电影亦或是非美国国家的影片，皆有这种可能性存在，制片公司需要解决的问题只有一个，就是如何获得“变化多端”的中国观众的芳心。

表 6：2017 年北美与中国市场电影票房 TOP10

排名	北美	类型	票房	排名	中国	类型	票房
1	《星球大战：最后的绝地武士》	科幻动作	51714.42	1	战狼 2	动作	80978.4
2	《美女与野兽》	真人童话	50401.4	2	速度与激情 8	动作	38245.8
3	《神奇女侠》	动作	41256.3	3	羞羞的铁拳	喜剧爱情	31511.1
4	《银河护卫队 2》	科幻动作	38981.3	4	功夫瑜伽	喜剧动作	25131.9
5	蜘蛛侠：英雄归来	动作科幻	33420.1	5	西游：伏魔篇	奇幻动作	23882
6	《小丑回魂》	恐怖	32748.1	6	变形金刚 5 最后的骑士	动作科幻	22293.8
7	《雷神 3》	动作奇幻	31137	7	摔跤吧！爸爸	喜剧	19279.9
8	《神偷奶爸 3》	动画	26462.4	8	芳华	剧情	16980
9	《金刚狼 3》	动作科幻	22627.7	9	加勒比海盗 5 死无对证	动作	16862.5
10	《速度与激情 8》	动作	22576.4	10	金刚骷髅岛	动作奇幻	16722.6

注：1、表中单位：美元 / 万元；

2、中国市场票房不含电商服务费。

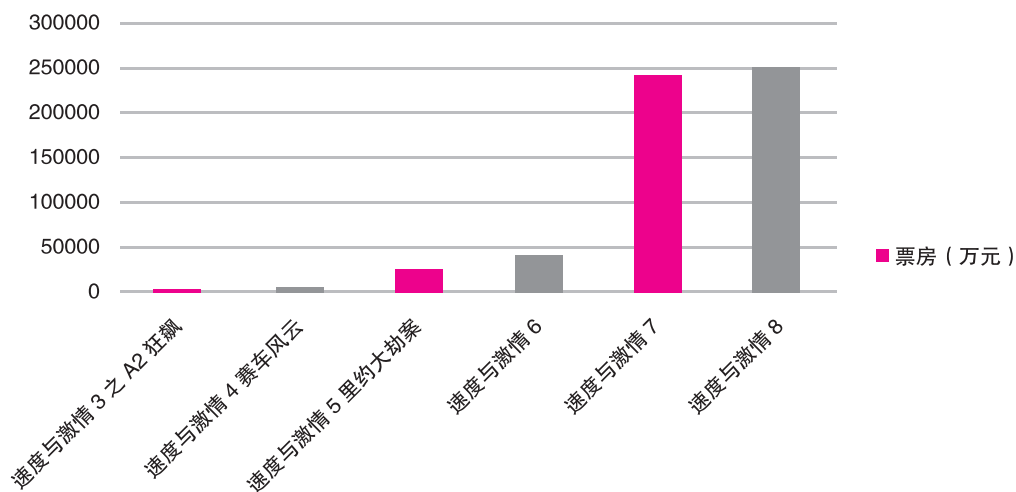
中美电影市场上有一明显差距，是表现在电影发行质量上，北美市场新片开画院线规模有较为准确计算，规模与产出对照才能作出接近市场实际的判断。北美市场的电影发行相对成熟，因而首周、首日票房皆可预测把控。中国发行由于过于粗放，放映规模难以把控和统计，受电商平台预售或预排误导，常使一些有价值的电影被淹没其中。这也是中国市场的“炮灰”影片多有出现的原因之一。

#### 四、好莱坞电影销售力开始减弱

2017 年在中国市场表现最好的一部好莱坞电影是《速度与激情 8》。影片首日（4 月 14 日）收获以 4.17 亿元人民币票房，成为年度市场影史首日票房冠军，次日又以 4.87 亿元创下 2017 中国市场单日票房纪录，首周影片票房突破 13 亿元人民币，最终影片以 26.71 亿元在中国 2017 年电影榜收获位列亚军，该片是 2017 年好莱坞电影在中国市场唯一票房超过 20 亿元人民币的影片。

《速度与激情 8》上映期间，为 4 月中国市场贡献了超过 50% 的票房，与印度电影《摔跤吧！爸爸》共同激活 4 月市场，终止了上半年市场在 2 月、3 月以来连续下跌势头，一度让人们以为中国市场要靠进口片担纲销售主力。这部 2017 年的进口片冠军影片却存有深深的隐忧。扣除电商服务费后影片实际票房是 25 亿元人民币，相对于三年前的《速度与激情 7》的 24.21 亿元票房，几乎没有什么增长。如果再放在当时已有超过三万五千张银幕的放映规模来考量，《速度与激情 8》没有给我们带来惊喜，呈现的是效益递减的状态。

图 1：《速度与激情》系列电影中国市场票房统计



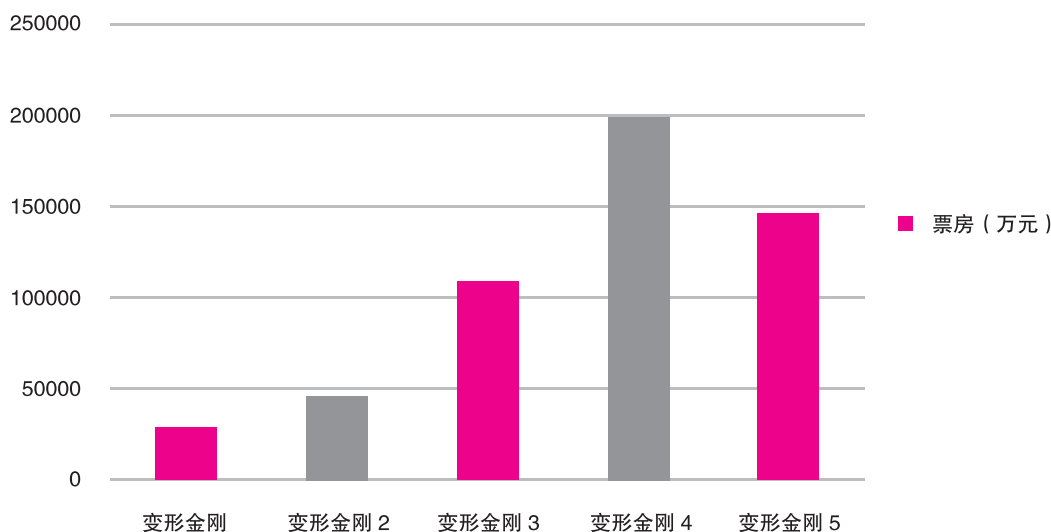


在“10亿+”的影片中，放映周期最短的几部影片《变形金刚5》《加勒比海盗5》《生化危机6：终章》皆来自好莱坞，中国观众对大多数好莱坞大片定位是快销品。《速度与激情8》表面上的成功，仅是证明这一系列电影品牌在中国观众中有一定影响力，“情怀”是它在中国市场超越“变形金刚”系列的关键，但并不具有可持续性。

《变形金刚5：最后的骑士》6月23日登陆中国市场，影片首日报收3.24亿元人民币票房，首周票房8.15亿元人民币，这一数据已是该系列票房之最，影片次周跌幅同时创下该系列纪录，扣除8608万元人民币的电商服务费，《变形金刚5》在中国市场最终收入14.6亿元人民币的票房成绩，较《变形金刚4》在中国三年前产出的19.8亿元票房，缩水5.2亿元，跌幅26.2%。

《变形金刚5》在中国市场失利传递了一个市场信号，中国观众审美口味正在变化，新生代观众群不再是单纯视觉奇观的追捧者。

图2：《变形金刚》系列电影在中国市场票房



好莱坞电影在中国市场销售力减弱的另一表现，是超级英雄电影市场遭遇“瓶颈”。2017是好莱坞电影大年，超级英雄电影在北美主场表现喜人，《银河护卫队2》《蜘蛛侠：英雄归来》《神奇女侠》《雷神3》等在北美市场票房均超过3亿美元并跻身年度票房TOP10。然而好莱坞集中爆发的超级英雄电影和续集电影在2017年中国市场遭遇“瓶颈”，票房均线停留在六七亿元人民币。

## 五、《摔跤吧！爸爸》跻身中国电影票房 TOP10 带来的启示

在 2017 年之前，非好莱坞电影在中国市场一直扮演着“拾遗补缺”的角色。印度电影更是“拾遗补缺”中的配角。在中国市场上票房最高的一部印度片是 2015 年的《我的个神啊》票房 1.18 亿元人民币。随着近年来宝莱坞电影在国际市场的影响扩大，2017 年印度电影《摔跤吧！爸爸》大卖 12.99 亿元（含服务费 1 亿元），跻身中国电影票房 TOP10 的第七。《摔跤吧！爸爸》上映期间，不仅击败同期的好莱坞大片《银河护卫队 2》，同时拦截了《加勒比海盗 5》的上行通道，获得票房、人气和口碑齐飞的佳绩。取得了宝莱坞电影在国内的最好成绩。

非好莱坞电影在 2017 市场频现惊喜，形成进口片卖场上的一股清流，泰国电影《天才枪手》（票房 2.7 亿元人民币），英国电影《帕丁顿熊 2》（票房 2 亿元人民币），西班牙电影《看不见的客人》（票房 1.72 亿元人民币）等高于好莱坞的《赛车总动员 3》《异星觉醒》。具有文艺气质的英国电影《至爱梵高·星空之谜》的累计票房超过《亚瑟王：斗兽争霸》，《极盗车神》《银魂 真人版》、《烟花》超越《银翼杀手 2049》，《一条狗的使命》在中国市场超越全球和北美榜的票房冠军《美女与野兽》，比《星球大战外传：侠盗一号》票房高出近 1 亿元人民币。

虽然，在中国进口片市场上，好莱坞电影占有巨大优势，无论是数量还是票房产出都遥遥领先，但是非好莱坞电影，小语种进口电影构筑了 2017 年中国市场上一道靓丽风景线。这些电影在中国上映期间，以较高的品质和人气，引领了市场主流消费，创造了不同国别电影的中国票房新纪录，而它们票房销售成绩都超过了影片在其本土市场票房，刷新国际票房纪录。

表 7：2017 进口片国别分类统计

排序	国别	部数	占比 %	合计票房	占比进口 %
1	美国	56	59.5	2170284	90.2
2	印度	1	1.06	119807	4.97
2	日本	9	9.57	45731	1.9
3	泰国	1	1.06	24772	1.03
4	西班牙	1	1.06	15825	0.65

注：1、票房单位人民币 / 万元。

2、票房数据不含电商服务费。

从《摔跤吧！爸爸》跻身中国电影票 TOP10，领衔了多类型多国别、多风格电影在市场异军突起，在某种程度上也刺激中国本土电影生产，令中国电影创作者意识到，模仿好莱坞不再是赢得市场的唯一手段，电影自身的质量、特色、内容才是攻克市场的秘诀。

这一市场现象还表明，中国观众的观影取向和审美趣味已日渐变化，并呈现差异性，市场开始越来越多的接纳多类型多题材多国别的电影。当然，中国市场的调整仍在继续，多国别电影在中国市场消费销售曲线趋高，一方面显示中国市场的包容和丰富性，另一方面也显示了中国市场和观众的成熟，观众层面的扩大，以及观众的多样化选择。

需要注意的是，2017 年非美国别电影在中国市场上的异军突起，并不代表好莱坞电影的优势不再，中国电影市场并没有完全解决市场产品的供给侧与需求侧，电影市场依然处于复苏期，市场潜力和消费价值也有待发掘。

## 六、动作、科幻、喜剧类电影是中国观众的最爱

解析 2017 年中国市场 95 部票房过亿影片榜单，动作、喜剧、科幻等类型电影是最受中国观众喜爱的类型。

包括《战狼 2》在内的 38 部动作影片创造了约 292.32 亿元人民币票房，动作类型片成为本年度中国市场票房最高的类型，当然，其中《战狼 2》独立产出超过 56.83 亿元票房。

以 IP 改编+知名喜剧演员参与的喜剧电影如《羞羞的铁拳》（话剧改编）、《大闹天竺》（西游题材）、《功夫瑜伽》（成龙主演）、《缝纫机乐队》（大鹏导演、主演）等年度喜剧类型电影票也是市场房主流，中国观众对喜剧类型影片上以及知名 IP 和演员的信任度高于其他类型电影。

科幻类电影票房均来自好莱坞影片，中国本土科幻电影在 2017 年因《三体》跳票而没有成绩单。

具有品牌基础的好莱坞续集电影在中国市场基本保住了颜面，如《速度与激情 8》、《加勒比海盗 5》、《金刚：骷髅岛》、《神偷奶爸 3》、《猩球崛起 3》等，尤其是《速度与激情 8》延续了其在中国市场的历来的傲人表现，位列进口片冠军。

没有品牌保证的好莱坞大片就不那么幸运了，这些影片在市场表现参差不齐，如《异星觉醒》（票房 1.35 亿元人民币）、《银翼杀手 2049》（票房 7691 万元人民币）、《亚瑟王：斗兽争霸》（票房 5705 万人民币）、《乐高蝙蝠侠大电影》（票房 4199 万元人民币）、《超凡战队》（票房 3005 万人民币），这些虽然堪称大投资电影在中国市场大多被甩

到百名之外。

客观而言，从市场和观众的稳定性、连续性角度观察，好莱坞动作科幻类电影保持了票房产出最高，表现相对稳定的优势。这要归功于好莱坞六大电影公司的全球营销和发行功力。

2017 年，有两部进口片在中国“后春节档”收获颇丰。

《极限特工：终极回归》等中等好莱坞电影中国热卖。既是市场的意外，也是市场的必然。在北美乃至全球市场票房平平，投资中等的好莱坞电影《极限特工：终极回归》和《生化危机 6：终章》在中国的单片票房都超过了 10 亿元人民币。

《极限特工：终极回归》全球总票房 3.46 亿美元中有 47% 来自中国观众的贡献，美国本土仅占 13%。《生化危机 6：终章》全球票房 3.07 亿美元，在中国票房收入约 1.69 亿美元，市场占比超过 52%。在北美仅为 2680 万美元，市场贡献率仅 8.75%。

一些具有温情色彩的好莱坞电影，因题材新颖、特色奇幻、想象丰富在市场一路顺风，赢得观众认可喜欢。诸如动物题材的《一条狗的使命》以及喜剧歌舞片《爱乐之城》等在中国市场获得观众不同程度的喜爱。

图 3：2017 年中国市场票房过亿影片类型统计



## 七、动画电影好莱坞优势明显

2017 年中国市场动画片电影票房低于 2016 年，总票房 47.35 亿元人民币，对年度大盘贡献率仅有 8.5%，较 2016 年下降了 10 个百分点。

国产动画与进口动画间差距悬殊。进口动画片与本土动画片的市场占有率是 73.5%：26.5%。国产家庭类动画电影在 2017 年市场是近年来表现最差的一年，影片发行数量上较 2016 年减少两成，票房产出则直降 43.9%，平均单部电影票房从 2016 年 7500 万人民币缩水至 4500 万元人民币，下降 37.7%。

好莱坞家庭动画电影是中国市场该类型电影销售大户，《寻梦环游记》、《神偷奶爸 3》等 7 部好莱坞动画，票房占年度动画类型票电影总票房的 77%。日本动画片在中国市场的销售仅次于好莱坞，市场占比 10.2%，不过 2017 年日本动画片成绩远低于 2016 年，市场无亮点，表现平淡。

表 8：2017 年好莱坞六大公司在中国市场发行统计

排名	电影公司	发行影片（部）	总票房	市场份额 %	单部票房
1	环球	6	483131	22.2	80521.8
2	迪士尼	7	472331	21.7	67476.8
3	华纳	9	340403	15.6	37822.5
4	派拉蒙	4	280493	12.9	70123
5	福克斯	7	262928	12.1	37561.1
6	索尼	6	229066	10.5	38177.6
7	狮门	7	43590	2	6227.1
8	其它 6 家公司	11	58342	2.68	5303.8

注：表中数据单位人民币 / 万元。

图 4：2017 年好莱坞公司在中国市场的份额

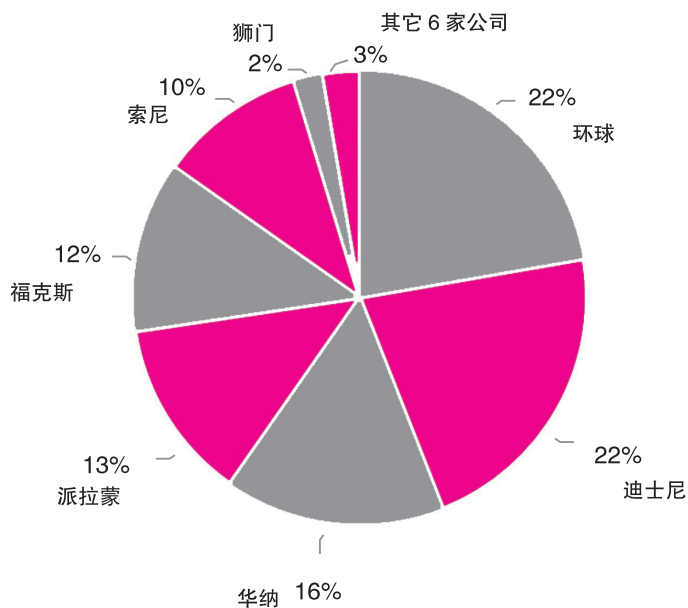


图 5：2017 年好莱坞公司在中国市场发行影片数量

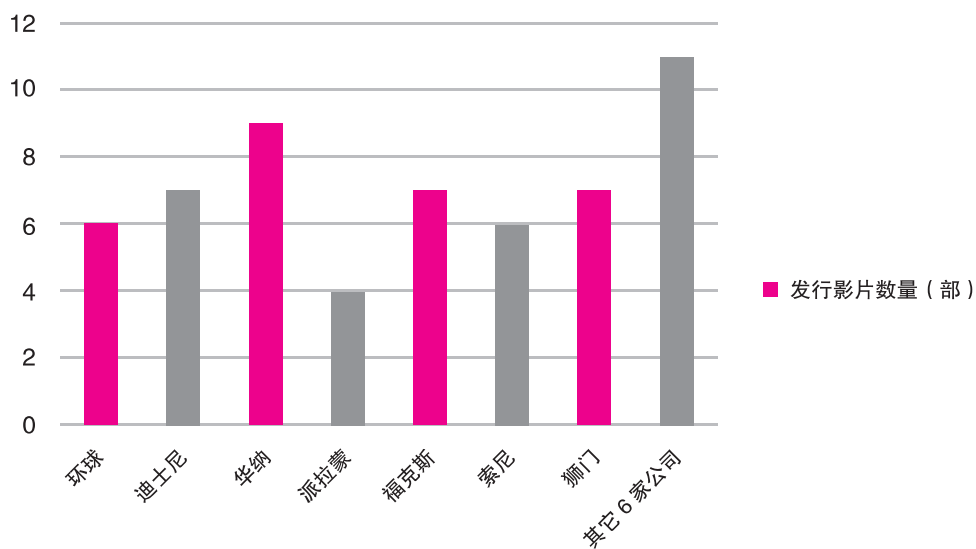
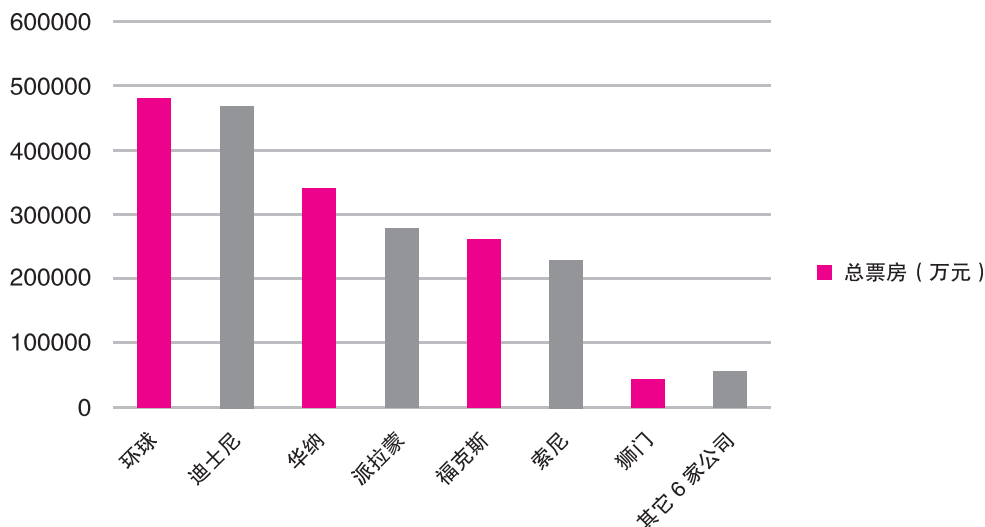


图 6：2017 年好莱坞公司在中国市场发行电影票房



环球电影公司发行 6 部影片争得中国市场票房头把交椅。这与环球（北京）电影公司的发行力度有关。虽然好莱坞六大公司在中国都有办事处或协助运作市场的公司，但是与市场结合密切，更为熟知中国市场非环球（北京）电影公司莫属。

## 八、纪录片成中国市场新鲜动力

一直以来，我们都以为中国缺乏纪录片观影氛围，2016 年由陆川导演，中美合拍的纪录片《我们诞生在中国》在暑期档上映，仅收入票房 6600 万元人民币。该片 2017 年由迪士尼公司在北美发行，预计 1200 万美元票房，放映一个月票房收入超过 1300 万美元。这让中国纪录片导演体会到北美市场的包容和多元。

今天这样情景开始在中国上演，2017 年纪录片为中国市场注入一股新鲜动力，纪录片市场的兴起在一定程度上填补了因动画片供给不足或乏力而留下的消费缺口。

全年有 12 部中外纪录片进入院线银幕发行放映，合计票房 2.34 亿元。本土纪录片占了绝对优势，贡献了 98% 的票房。“慰安妇”题材纪录电影《二十二》以 1.7 亿元人民币票房，是同类型影片票房最高，其余如《地球：神奇的一天》（票房 4171 万元人民币）《重返·狼群》（票房 2921 万元人民币）纪实电影《冈仁波齐》（票房 9164 万元人民币）等都有不俗表现。

在纪录片销售热的引领下，一直被市场冷落小众电影亦在市场崛起，成为 2017 年中国市场又一亮点。户外探险电影《七十七天》（票房 1.03 亿元人民币），文艺片《嘉年华》

（票房 2016 万元人民币），这些影片无名导演和大明星加盟，却取得良好的票房成绩，成为 2017 年具有代表性的黑马电影。这是中国电影观众成熟及观影群体的更为广泛丰富带来的市场红利，市场进一步确立了电影质量与市场票房的正向关系，日渐成熟的中国市场和观众，将推动精准发行和分线发行的出现。

## 九、“情怀电影”引发社会话题、市场追捧

中国市场从未像今天一般如此看重有情怀的电影，《战狼 2》之外，《芳华》《乘风破浪》《冈仁波齐》《前任 3》等影片优异市场表现，是中国观众口味差异化的印证，任何一种能够引爆观众情绪，引发社会话题的类型片，都有可能收获超高票房。

《芳华》在贺岁档的爆发，与此前该片在国庆档临时撤档的种种传言有关。真正让《芳华》保持持久票房热度是，50 后 60 后观众被影片唤醒的情怀，《芳华》让我们看到中国市场上 50 后 60 后观众的中老年观影群体在电影消费中潜在实力，这一市场空间十分巨大。中国市场上能够与他们对接，引发他们观影欲望的电影实在太少，这是 2017 年由《芳华》留给中国电影创作者的一个无限广阔的新空间。

爱情片《前任 3》引爆观众情绪从而击败《星球大战 8》。2017 年最后三天上映的爱情电影《前任 3》，次周遭遇 2017 北美票房冠军片《星球大战：最后的绝地武士》，《前任 3》市场销售热度不仅没有被《星球大战 8》分流，反而是以一路飘红的票房拦截了 2018 年 1 月 5 日在中国市场上映的《星球大战 8》销售之路，最终《前任 3》的累计票房突破 19 亿元人民币，《星球大战：最后的绝地武士》最终在中国市场仅收入 2.67 亿元人民币票房。

相比前两部“前任系列”，《前任 3》成功是引发了年轻观众的情感共鸣。影片在年轻人聚集的视频平台上播放的看片后观众大哭、晕倒等病毒营销亦对影片销售起到推波助澜的作用，电影的营销助推是有前提的，那就是影片质量一定得过硬。《前任 3》留给市场新的启示，就是在细分市场的大背景下，每一种能引爆观众情绪的类型片，都有可能成为票房大牛。

## 十、“西游”题材吸金力经久不衰

从年度超强国产片阵营看，每年都会有以不同类型不同角度演绎西游题材电影上榜。“西游”是中国市场吸金能力最强 IP 之一，国产片年度十强影片中，《西游伏妖篇》《大闹天竺》《悟空传》等三部影片皆与“西游”相关，三部影片的豆瓣评分分别是 5.6、3.8、5.1，既或如此，票房最低的《悟空传》也吸金 6.97 亿元人民币，中国观众对“西游”题材的热爱和宽容度由此可见一斑。



《大闹天竺》是中印合拍电影，两国合拍影片对“西游”题材的重视度，表明“西游”题材电影的市场应不局限于中国市场，亚洲乃至全球，都有可能为其提供更广阔的想象空间，这一题材，不失为合拍片项目的选材方向。

### 三、年度热点事件：

#### 1、电影产业促进法正式实施

2017年3月1日，《中华人民共和国电影产业促进法》（以下简称电影产业促进法）正式实施。

电影产业促进法是为促进电影产业健康繁荣发展，弘扬社会主义核心价值观，规范电影市场秩序，丰富人民群众精神文化生活而制定。电影产业促进法的实施，见证了中国电影产业改革的成就与决心，为中国电影产业健康发展、从电影大国到电影强国迈进提供了法制保障。

3月21日，《电影产业促进法》正式实施的当月，电影主管部门重拳出击，以执法必严的决心，以前所未有的力度，对首批查出存在违法经营行为的326家影院实施严厉处罚。处罚措施包括停业整顿、罚款、内部通报警示等。时至2017年底总计处罚了违法违规影院和院线28批，累计影院几百家。

2017年电影管理部门用法律手段管理电影行业的显著标志体现在加大力度切实规范电影市场，具体有：一是严格执行票务软件产品标准，加大监管力度，实行退出机制；二是严格规范影院经营行为，严禁票房造假；三是严格规范电商售票行为，不得对未取得《电影公映许可证》的电影片进行预售和销售，不得恶意锁场和不得通过不正当手段干预、主导影院排片；四是加强电影版权意识，依法防范、打击盗录盗播；五是依法追究违法经营者的法律责任。

电影促进法的正式实施，为中国电影产业步入法制管理开启了一个新阶段。

#### 2、电商变局：对市场和观众的影响与压力

2017年，中国市场网络售票比例超过80%，2017年1月1日网络服务费开始计入票房总数。据中国发行放映协会统计2017年，网络服务费共计约40亿元。两组数据显示，互联网在改变中国人日常生活的同时，也改变了中国观众的电影消费习惯。

电商在线售票从2010年进入中国电影市场，到2017年实现了全国影院接入电商平台。2017年，全国电商售票网站完成新一轮洗牌，在线售票网站格局变为猫眼、淘票票双雄并立。数据显示，截至2017年底，在线售票市场猫眼影业占有40%左右份额，淘票票占有超过

20% 份额。两家电商平台几乎控制着中国在线售票市场。与对应的是有超过 80% 的观众首先选择线上购票渠道。两大电商平台在 2017 年获得如此丰厚的资源后亦深度参与电影发行，影响了电影市场发生较大变化。

互联网发展，中国领先于全球，凭借互联网的在线售票业务的繁荣也为全球之领先。2017 年，电商在线售票的发展突出在电影预售业务，据猫眼平台统计的数据，2017 年市场首日预售票房占首日销售比例达 32.68%，国产片首日预售票房占首日票房比为 36.82%，进口片的预售占比为 28.79%。

对于互联网在线售票发展带来的问题，行业各方还在探索最佳解决方式。不能回避的是，互联网对电影市场影响会越来越大，电影主管部门亟需一套平衡各方权利和义务的政策，以规范各方经营行为，保证中国电影市场的健康有序发展。

### 3、艺联院线联盟：撬动发行改革的一个支点

成立于 2016 年 10 月的艺术电影放映联盟（以下简称“艺联”），在 2017 年正式启动。艺联院线联盟主要放映具有独特艺术价值的中外影片。2017 年，相继有《海边的曼彻斯特》《八月》《内心引力》《奋斗》修复版等国内外优秀文艺电影通过艺联院线联盟走进院线大银幕。其中，在第 89 届奥斯卡金像奖共获 6 项提名，且最终斩获最佳男主角与最佳原创剧本两项大奖的《海边的曼彻斯特》在中国的上映，也成为艺联院线联盟首部上映的海外电影，影片在中国市场共收获约 674 万元人民币票房。当时单银幕平均产出 16850 元人民币票房。影片发行放映之后，艺联院线联盟至今已有 400 多家影院近 600 块银幕加盟。

2017 年市场上本土电影的命运与发行公司运作能力与营销水平息息相关。全年大约有 400 多部新片进入院线大银幕放映。这些国产片有单部票房几十亿，也有单部票房仅为千元，万元票房，这天差地别两极分化犹如自然界的“冰火两重天”。市场反馈数据表明，在中国这一庞大的市场里，虽有人口红利和旺盛的电影消费需求，却不是所有电影都能赚钱，赔钱的电影远多于市场上赚钱的电影。

年度本土电影票房榜单中，约有 177 部国产片票房不足百万元，占年度上映新片 42.96%。约 110 部影片票房不足 10 万，占比 26.69%。撕开大数据光鲜的一面，这些既无效益又浪费资源的影片数据是如此让人惊心。影片扎堆，和赶场式进入市场充当炮灰的电影大多粗制滥造，跟风雷同，甚至还有以网大级电影质量的产品滥竽充数，这些现象一方面反映出行业内资本投资的无效率，产业内资本依然过剩，资本投机无序，对产业发展有害无益。另一方面表明国内电影发行亟待革新。由于电影发行市场的竞争尚处在不充分的环境中，专业电影发行公司的经营有诸多困难，经营业绩也是不稳定，不平

衡的。随着中国电影产业进入新一轮黄金发展期，市场亟待专业的、具有现代发行素质电影发行公司出现。

表 9：2017 年中国电影发行公司 TOP10

排名	公司	发行影片数量（部）	票房	市场占比 %
1	中影电影股份	99	206	36.8
2	华夏电影发行	62	161.7	28.9
3	上海淘票票影业	22	66.03	11.8
4	北京聚合影联	12	60.2	10.7
5	北京京西文化旅游	3	59.69	10.6
6	猫眼电影发行	16	40.7	7.2
7	博纳影业	11	32.16	5.7
8	光线影业	8	25.02	4.4
9	五洲电影发行	15	19.56	3.4
10	四海发行联盟	6+8	19.41	3.4

注：1、表中单位为人民币 / 亿元。

#### 4、五万张银幕与 3D 电影热渐进减弱

中国已经有五万张银幕了，这个全球放映规模最大的市场，2017 年的渠道建设依然处在一个高速度，未来几年里投资影院仍是吸引资本的一个热点。2017 年新增影院 1658 座，平均月新增影院 138 座，新增银幕 9597 张，平均月新增银幕 800 张。

五万张银幕中，3D 银幕 43788 张，占银幕总量 86.2%。其它 IMAX、中国巨幕、杜比全景声、DTSX 临境音厅、4D 厅、其它巨幕厅等 6 种特殊影厅共 2534 个，占银幕总数 5%。在特殊影厅中以 IMAX、中国巨幕发展较快。截止 2017 年底，巨幕厅有 796 个，其中 IMAX 有 502 张，中国巨幕 294 张。

2017 年大数据显示，虽然影院和银幕建设保持较快速度，但是 3D 放映和 IMAX 巨幕放映热却在减弱。3D 放映降温，与观众选择有关。家庭类电影，家长们是不愿意让孩子过多看 3D 电影。电商平台的票补让 3D 放映格式没有价格优势，同时本土电影尤其是动画片 3D 格式电影也是锐减。IMAX 巨幕在中国市场也有投资过剩的征兆，由于中国

市场已是 IMAX 国际公司最大客户，中国市场的产出也是该公司主要收入支撑，IMAX 公司在中国发展早已打破了之前投资的一些原则，其密度也是不断破纪录。在 2014 年底，IMAX 巨幕中国在是 193 张，加上全国 12 家科技场馆配有 IMAX 银幕，也才 205 张 IMAX 巨幕。可是不到三年时间，全国 IMAX 巨幕已到 502 张，且发展速度不减减缓。中国巨幕和其它巨幕格式的出现，也对 IMAX 巨幕有分流，资源与产能之间已出现不平衡情况。

进口片因受引进配额影响，3D 和 IMAX 节目还保持在一定量上。但是中国市场上 3D 放映热已经成为过去式，市场效益衰减是不争的事实，同时 IMAX 巨幕的投资与产出间落差诸如这些问题应该引起投资者高度关注。

表 10：2013—2017 中国市场银幕增长统计

年度	2013	2014	2015	2016	2017
院线银幕数（块）	18398	23600	31726	41179	50776
同比增长率 %	+40.2	+28.2	+34	+29.7	+23.3
年增加银幕（张）	5280	5202	8053	9552	9597
新银幕年增长 %	34.7	-1.4	54.8	18.6	0.47
日均增长（张）	14.4	14.2	22	26.1	26.2

表 11：2013—2017 中国 3D（含 3D+IMAX）放映统计

年度	3D（部）	3D+IMAX（部）	合计（部）	票房（亿元）	票房占比 %	同比 %
2017	35	34	69	308.02	55	+6.4
2016	50	32	82	289.9	63.4	+27
2015	41	37	78	228.23	51.7	+57.2
2014	31	36	67	145.15	48.97	+56.6
2013	33	20	53	92.76	42.6	

表 12：2013—2017 中国 IMAX 格式放映统计

年度	IMAX/3DIMAX	节目占比 %	票房（亿元）	同比 %	票房占比 %
2017	9/34	8.49	18.71	-1.7	3.34
2016	5/32	8.66	19.04	-5.3	4.16
2015	13/37	13.1	20.11	+53.9	4.56
2014	11/36	14.87	13.06	+61.6	4.4
2013	10/20	9.7	8.08		3.71

在中国现有的 9900 座影院和五万多张银幕中，县级城市影院约有 4890 座，市场比例占 49%，银幕 20321 张，占有率为 38%。影院和银幕的布局持续下沉，通向广袤的三、四线城镇乃至五线以下小城镇，这是中国市场可持续增长的基础。以中国城镇人口计算，现在平均每 1.64 万人就拥有一张银幕，这个平均数与北美平均 8000 人拥有一张银幕虽尚存差距，但是以中国人口的密度看，人口拥有的银幕数占比已相当可观了。不能说中国放映市场银幕数量已经饱和，区域市场的不平衡是有的，即有的区域银幕数富裕，有的区域还有待建设。关键是有了充裕的银幕资源，电影发行的水平和营销能否匹配，精准投放与细分受众是中国电影发行亟待解决的难题。

当中国放映市场有超 5 万银幕的规模，市场的渠道和网络如同修好的高速公路，不仅本土电影，乃至全球电影业和跨国电影公司都有可能在中国这个最大的电影市场寻得成功机会，对于中国市场无限想象的空间和期待正是中国电影产业的机遇。

## 5、不能回避的“票补”

评估 2017 年中国市场，就不能回避市场发行中的“票补”问题。在年度票房里有多少是“票补”，这也许难以得到准确的数据。在中国发行公司的年度表中，电商平台的发行成绩数据超过多数传统发行公司，国产片一半以上的票房与之相关。究其原因，电商平台在 2017 年并购期间，为争夺市场份额以更强悍态势介入电影销售层面，开启了新一轮的“票补”大战。春节档出现有影片因无力参与票补而撤档。国庆档，岁末贺岁档是大战“票补”的“黄金机遇”，国内两大电商平台分别出现在所有重点贺岁电影发行或出品公司名单中，9 块 9 的电影票也随贺岁档重返市场。

“票补”是留给 2017 年市场的“毒瘤”。也许最初的票补有做营销的初衷，在影片销售中起到一种促销作用，用于吸引更多观众。随着票补力度越来越大，各方为了争夺档

期内光鲜的票房数据，“票补”实际上给行业带来了泡沫，同时伤害了片方的利益，变成电影发行不是比拼影片内容和质量，而是演变成谁被资本去拼“票补”。

2018 年 2 月，一个由片方倡议“限制票补”出台了。倡议“限制票补”提出，大年三十到正月十五（2.15-3.2）期间，全国影院票价（普通观众实际支付部分）不低于 19.9 元，在补贴的票数方面也有限制，单部影片不得超过 50 万张。这也许就是行业监管的开始，告别“票补”，避免被资本层面的恶性竞争裹挟，是让电影市场回到良性发展轨道的开端。

## 6、中国本土电影对好莱坞的影响和压力

《战狼 2》在 2017 年的出现，改变的不仅是国产片与进口片的市场占有率。这部带有强烈爱国主义色彩的本土电影在没有任何政府参与的纯市场运作下取得商业成功意味着中国制片公司在中国新主流电影的探索上找了一条可行的市场之路。此前，中国本土电影的票房大片大多以喜剧电影或纯商业大制作为主，如今，许多制片公司的思路发生了变化。

2017 年本土电影《建军大业》《空天猎》《荡寇风云》《巨额来电》以及《红海行动》等都属于新主流电影的范畴，这类影片在“商业拍摄手法+市场运作”的背后，是国家内核，注入这种中国主流精神的商业电影在前两年的《智取威虎山》《湄公河行动》等影片上就已有成功范例，《战狼 2》在 2017 年取得的传奇般的胜利之后，预计在未来的中国市场上，将会涌现出更多同类型的影片。这将会给好莱坞电影带来市场压力，毕竟此类电影的精神内核和与中国观众的紧密联系是好莱坞电影无法模仿的。

《战狼 2》带来的更广泛观众群，不仅 80 后 90 后的主流观众愿意为它贡献票房，70 后以及 70 后以前的观众群体对这部影片接受度也高于其他电影，《战狼 2》几乎创造了一种全民观影风尚。类似情况还有《芳华》，影片唤醒了 50 后 60 后观众群。这类观众群超过 45%，是之前从未有过的现象，中老年观影群更容易与本土电影产生情感共鸣，对于以年轻观众为主流观众群的好莱坞电影而言，很难与这些新生观众群建立紧密的联系，难以占有中国市场的新晋观众群体，也会成为好莱坞大片在中国市场又一瓶颈。

对中国年轻观众群的争夺更加激烈，催生了中国年轻导演出现的速度，年轻导演作品丰富、多元还很精彩，2017 年，市场涌现了吴京的《战狼 2》（票房 56.83 亿元人民币）、宋阳与张迟昱的《羞羞的铁拳》（票房 22.07 亿人民币）、韩寒的《乘风破浪》（票房 10.46 亿元人民币）、王宝强的《大闹天竺》（票房 7.56 亿元人民币）、大鹏的《缝纫机乐队》（票房 4.57 亿元人民币）、苏有朋的《嫌疑人 X 的现身》（票房 4.02 亿元人民币）、李晨《空天猎》（票房 3.18 亿元人民币）、郭柯的《二十二》（票房 1.7 亿元人民币）等一批年轻电影人。年末最后一波新片高潮中的《前任 3：再见前任》更是引爆了青年观众的情绪，电影一路大卖，超过了好莱坞顶级大片《星球大战 8：最后的绝地武士》。这些年轻的电影人给中国市场



带来更多中国故事，中国声音。好莱坞在中国市场面对这批充满活力的青年电影人时，也应保持一定危机意识，若好莱坞仍然以保守的续集电影为唯一武器，将很难持续吸引让中国主流年轻观众，毕竟高科技大特效已不能像从前一样激发中国观众的肾上腺素了。

## 7、非好莱坞电影的影响与压力

多部非好莱坞影片在 2017 年中国市场意外走红，改变了长久以来中国本土片与进口片之间博弈格局。以往中国市场是本土电影与好莱坞大片间的竞争，2017 年来自印度、泰国、西班牙、英国、日本等多国，甚至是电影小国的电影，以及用买断批片方式引进美国的中小独立电影在中国市场屡获成功，不仅使中国本土电影的对手演变成了全球电影，对好莱坞电影无疑也形成一种竞争态势。

非好莱坞电影在 2017 年的中国市场取得良好成绩，产生的影响和作用是多方面的。一方面，这些电影在中国市场的票房成绩大多超过其在本土票房，刺激了这些国家对中国市场的想象和期待，刺激相互文化交流和电影贸易。未来还会有更多非好莱坞，非英语的电影也会争相挤进中国市场，毕竟这是一个庞大的市场，在未来某一个时候就是全球最大电影市场。另一方面，这类电影也给中国本土电影带来压力，在一个开放且将更加开放的市场，本土电影的竞争对手不仅是好莱坞，还有来自宝莱坞，来自欧洲，亚洲等各方的优秀电影，都是本土电影既有的或潜在的竞争对手。中国不能仅有一个全球最大市场的名号，电影市场大，不能替代电影文化强，在中国由电影大国迈向电影强国的进程中本土电影更需自强、自信、自立。

## 四、中国电影产业政策

自 2012 年，中美双方签署就解决 WTO 电影相关问题谅解备忘录起，中国市场加快了对外开放的步伐。根据协议，中国将在原每年引进分账电影配额约 20 部的基础上增加 14 部仅支持 3D 或 IMAX 放映格式的特种影片，并且引进片中，美方的票房分账从不超过 13.5% 升至 25%。

次年，中国国家新闻出版广电总局颁布《关于加强海峡两岸电影合作管理的现行办法》，根据办法规定，凡取得《影片公映许可证》的台湾影片，作为进口影片在大陆发行，不受进口影片配额限制。

近年来，中国政府相继出台多项政策，鼓励中外电影交流，包括将海外电影展映活动的审批职责下放，鼓励丝绸之路沿线国家互办文化年、艺术节、电影节、电影周等活动。

中国政府相继与韩国、印度、新加坡、比利时、法国、西班牙、意大利、英国、荷兰、

爱沙尼亚、马耳他、澳大利亚、新西兰、加拿大、丹麦、希腊、哈萨克斯坦、卢森堡、俄罗斯、巴西等 20 国签署政府间电影合拍协议，根据中国电影合作制片公司提供的数据，2017 年，合拍公司获电影局批准立项合拍片 84 部，协拍片两部；审查通过合拍片 60 部。

据统计，2017 年，中国内地与巴西、俄罗斯、印度、南非、美国、澳大利亚、英国、英属开曼群岛、英属维京群岛、新西兰、哈萨克斯坦、法国、马来西亚、比利时、西班牙、意大利、日本、塞尔维亚等 20 个国家和地区实现了合作制片。

近两年，中国内地与美国的合拍片数量亦呈上升趋势，《功夫熊猫 3》《长城》《英伦对决》等中美合拍的大制作影片为两国的合作制片摸索出了一条新路径。中美两国企业还合资成立了电影制作和国际发行公司，共同推进中美合拍电影项目。

国外制片公司想要通过合拍方式进入中国市场需要符合相关规定。其中最主要的为，与中国合作拍摄影片的海外制片者的资金、表演、技术和工艺等方面的投入比例需占最终投入的 20%-80% 之间，双方应保持艺术和技术人员投入的总体平衡，包括演员。这意味着，海外制片者并不能通过中国公司挂名的形式将自己的作品变成合拍片，从而进入中国市场。不过，一旦通过正规途径与中国合作拍摄影片获批，合拍片在中国市场可以享受国产片待遇。

值得注意的是，中国政府近年来对市场管理日渐规范，外国影视剧在中国的权益得到了更好的保护。

从 2014 年至 2017 年，中国政府、国家新闻出版广电总局电影局及其下属部门先后出台一系列旨在进一步开放市场，强化行业行业管理的规范。

2014 年 9 月 2 日，《关于进一步落实网上境外影视剧管理有关规定的通知》出台，重申网上境外影视剧管理规定，自 2015 年 4 月 1 日起，凡未获得《影片公映许可证》或《电视剧发行许可证》的境外影视剧一律不得上网播放。

2014 年 1 月 17 日，《关于加强电影市场管理规范电影票务系统使用的通知》下发，要求各地严格推行《电影院票务管理系统技术要求和测量方法》等政策法规，其目的是建立和完善公开、公正、公平和透明的电影市场体系，营造全国统一开放、竞争有序的电影市场环境。

2015 年，总局电影局将国产电影备案公示由每月两次改为每月三次，缩短了备案审批时间，并陆续取消和下放了有关审批权。

2015 年 9 月 29 日和 30 日，又连续出台《关于严厉打击在影院盗录影片等侵权违法行为的通知》和《关于加强数字水印技术运用、严格影片的版权保护的通知》，在申明严厉打击在影院盗录侵权等违法行为态度的同时，倡导利用包括“数字水印”在内的科技手段，加强版权保护。



2016 年 11 月 7 日《电影产业促进法》由全国人大常委会审议通过。

中国政府一方面加大本土市场的规范力度，一方面加快与各国的合拍进程，跃居世界银幕总量最大的市场的中国，正在以越来越开放的姿态迎接各国优秀影片和优秀制片者的到来，而这块充满活力的市场必将成为世界电影的新蓝海。

#### 附：中国电影产业近年主要政策

政策颁布时间	政策颁布机构	政策名称	主要内容
2012 年 2 月 13 日		中美双方就解决 WTO 电影相关问题的谅解备忘录	中国将在原每年引进美国电影配额约 20 部的基础上增加 14 部仅支持 3D 或 IMAX 放映格式的特种影片；美方票房分账从不超过 18% 升至 25%。
2013 年 1 月	国家新闻出版广电总局	关于加强海峡两岸电影合作管理的现行办法	台湾影片由中国电影集团进出口分公司统一进口。凡取得《影片公映许可证》的台湾影片，作为进口影片在大陆发行，不受进口影片配额限制。
2014 年 1 月 17 日	国家新闻出版广电总局电影局	关于加强电影市场管理规范电影票务系统使用的通知	严格推行《电影院票务管理系统技术要求和测量方法》等，建立和完善公开、公正、公平和透明的电影市场体系，营造全国统一开放、竞争有序的电影市场环境
2014 年 3 月 18 日	国家新闻出版广电总局	关于地方对等交流互办单一国家电影展映活动审批职责下放省级新闻出版广电行政部门的实施细则	自 2013 年 8 月起，地方对等交流互办单一国家电影展映活动的审批职责下放至省级新闻出版广电行政部门。
2014 年 3 月 19 日	国家新闻出版广电总局	关于进一步加强网络剧、微电影等网络视听节目的通知	凡在广播影视部门备案公示，但未取得《电影公映许可证》和《电视剧发行许可证》的电影和电视剧等，不得在网上播出，
2014 年 12 月 22 日	国家新闻出版广电总局电影局	进一步提高放映质量的通知	主要针对影院银幕亮度和声压级达不到应有技术标准的现象，规范影院放映质量管理
2014 年 9 月 2 日	国家新闻出版广电总局	关于进一步落实网上境外影视剧管理有关规定的通知	重申网上境外影视剧管理规定，自 2015 年 4 月 1 日起，凡未获得《影片公映许可证》或《电视剧发行许可证》的境外影视剧一律不得上网播放。
2015 年 2 月 9 日	国家新闻出版广电总局电影局	关于做好电子商务售票工作的通知	将电子票务纳入票务规范体系，明确电子商务售票的规范和流程

政策颁布时间	政策颁布机构	政策名称	主要内容
2015 年 2 月 9 日	国家新闻出版广电总局电影局	关于加强影院放映技术管理、提高电影放映质量的通知	要求影院确保放映设备的质量和品质
2015 年 3 月 28 日	国家发改委、外交部、商务部	推动共建丝绸之路经济带和 21 世纪海上丝绸之路的愿景与行动	合作重点包括沿线国家间互办文化年、艺术节、电影节、电影周和图书展等活动。合作开展广播影视局精品创作及翻译。办好丝绸之路（敦煌）国际文化博览会、丝绸之路国际电影节和图书展。
2015 年 9 月 9 日	中国电影集团、中国电影协会	分账影片进口发行合作协议	一、中美双方将继续致力于电影产业合作； 二、中国华人文化产业投资基金与美国华纳兄弟电影公司在中国香港合资成立电影制作和国际发行公司，将进一步推进中美合拍电影项目。
2015 年 9 月 29 日	国家新闻出版广电总局电影局	关于严厉打击在影院盗录影片等侵权行为的通知	严厉打击在影院盗录侵权等违法行为
2015 年 9 月 30 日	国家新闻出版广电总局电影局	关于加强数字水印技术运用、严格影片的版权保护的通知	倡导利用包括“数字水印”在内的科技手段，加强版权保护
2015 年 10 月 14 日	国家新闻出版广电总局电影局	电影院票务系统（软件）管理实施细则	严格审核影院票务系统。明确了对违规行为的处罚措施，推动影院票务系统规范管理工作有规可依、违规必究。
2015 年 10 月 14 日	国家电影事业发展专项资金管理办公室	关于规范影院票务系统硬件配置工作的通知	严格审核影院票务系统
2016 年初	电影局（影字〔2016〕93 号）	关于转发中国电影发行放映协会〈关于开展电影市场秩序治理活动实施方案〉的通知	强化行业市场秩序治理
2016 年 11 月 7 日	全国人大常委会审议通过。	《电影产业促进法》	中国第一部电影法规
2017 年 2 月 27 日	国家电影局	取消《摄制电影许可证》和《摄制电影许可证（单片）》，不再单独发放《电影技术合格证》。	进一步放开电影制片
2017 年 3 月 22 日	国家电影局	影字[2017]96 号	关于对首批 326 家违法影院进行处罚的通知

政策颁布时间	政策颁布机构	政策名称	主要内容
2017 年 4 月 12 日	国家新闻出版广播电影电视总局	关于规范点播院线、点播院线规范经营的通知	从事点播影院、点播院线电影放映、发行服务，要依法取得电影主管部门颁发的许可证
2017 年 4 月 21 日	国家新闻出版广电总局	关于规范点播影院、点播院线经营管理工作的通知	对点播影院、点播院线申报、管理等提出了具体要求；6 月，公布《关于点播影院、点播院线管理暂行规定（征求意见稿）》。
2017 年 6 月	国家新闻出版广电总局	关于进一步加强网络视听节目创作播出管理的通知	未通过审查的电视剧、电影，不得作为网络剧、网络电影上网播出。导向不正确的电视综艺节目，也不得以网络综艺节目的名义在互联网、IPTV、互联网电视上播出。不允许在广播电视播出的节目，同样不允许在互联网（含移动互联网）上播出。
2017 年 6 月 30 日	中国网络视听节目服务协会	网络视听节目内容审核通则	给出了网络视听节目的明确界定：具体包括网络剧、微电影、网络电影、影视类动画片、纪录片，文艺、娱乐、科技、财经、体育、教育等专业类网络视听节目，以及其他网络原创视听节目；明确了先审后播和审核到位的制度；进一步明确了网络视听节目什么能拍什么不能拍。
2018 年 3 月 6 日	广电总局令 第 14 号	点播影院、点播院线管理规定	此规定 3 月 30 日正式实施。