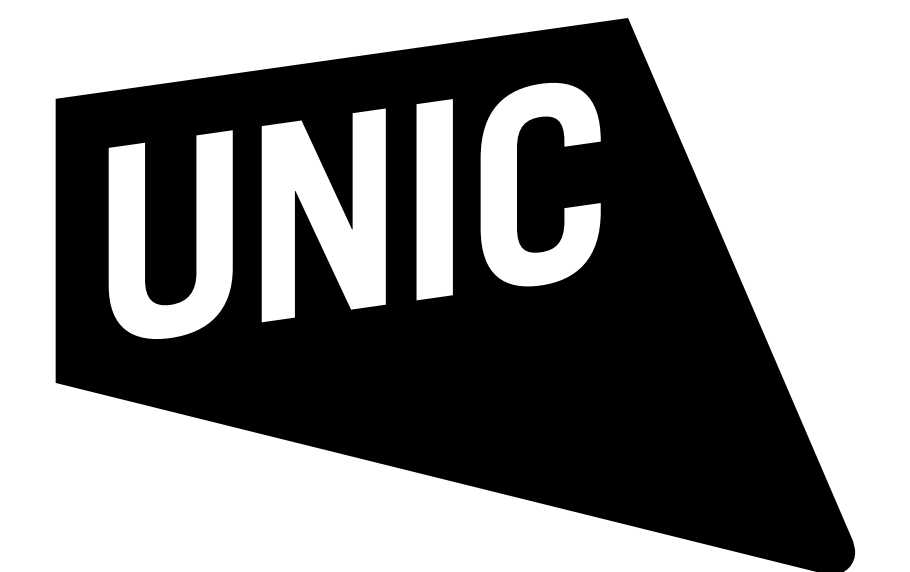




Annual **REPORT** 2021



UNION INTERNATIONALE DES CINÉMAS
INTERNATIONAL UNION OF CINEMAS

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IN 2020

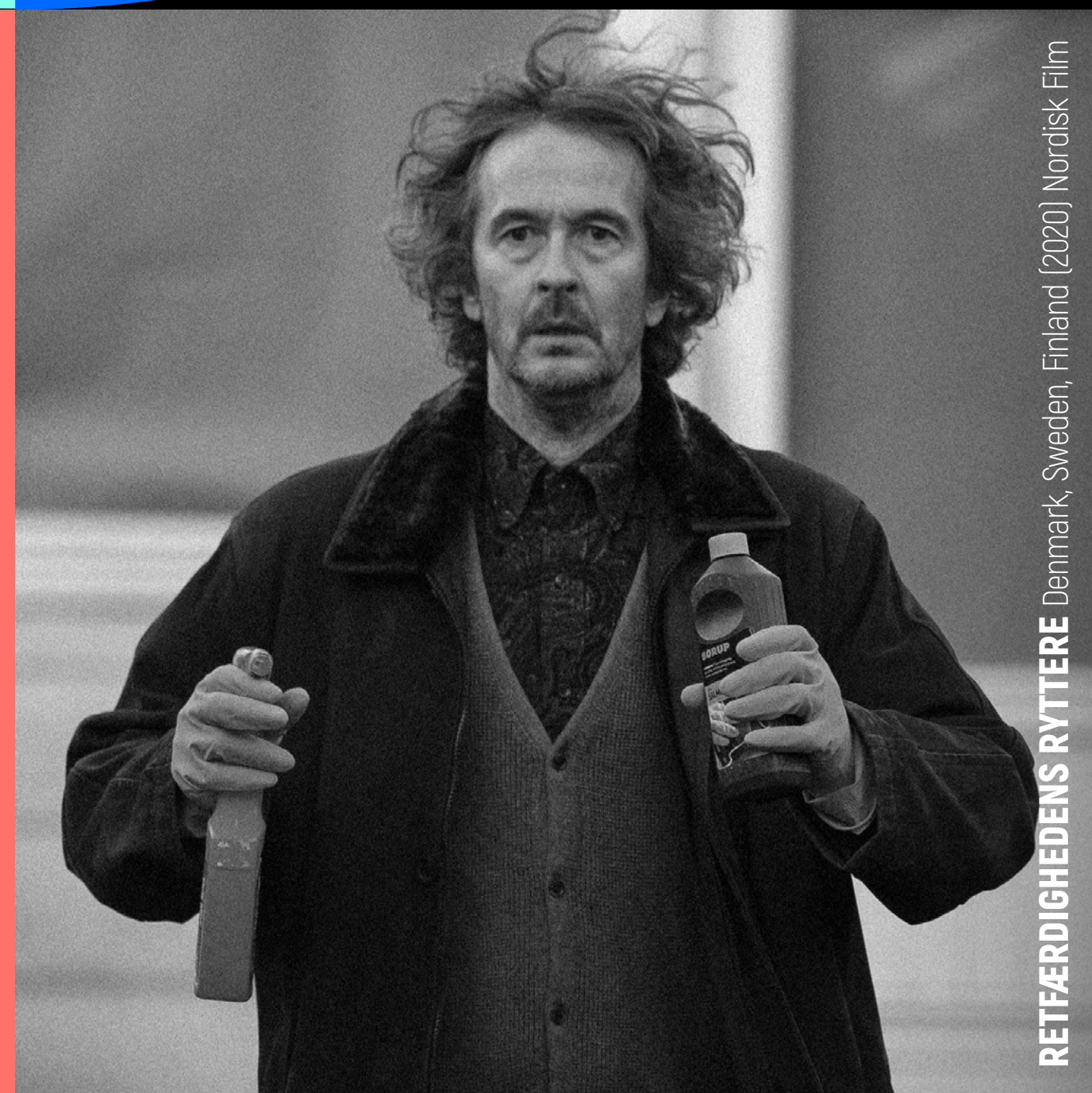
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WELCOME & EXECUTIVE SUMMARY

from **Phil Clapp** — CEO of the UK Cinema Association and President of the International Union of Cinemas

Welcome to this

— our 2021 annual report on key cinema trends in Europe — a region that remains one of the most diverse, innovative and dynamic in the World.

UNIC, the Union Internationale des Cinémas/International Union of Cinemas represents key European cinema operators and their national associations across 38 territories. We promote the cultural, social and economic benefits of a vibrant cinema-going culture in Europe, providing a strong and influential voice for European cinema operators on issues of shared interest.

During the period covered by this report, cinemas, not just in Europe but across the World, continued to face the unprecedented challenges presented by the COVID-19 pandemic. As a result, many sites were required to remain closed for prolonged periods and even when open, were mandated to operate under safety measures that significantly restricted audience numbers.

It would be difficult to overstate the threat that the pandemic presented to the livelihoods of the hundreds of thousands of dedicated staff working in our industry, as it did to so many other sectors. UNIC therefore remains hugely grateful for the financial support that governments across the region were able to offer its members to ensure that the future of the industry and as many jobs as possible were secured.

Without these measures, the sector would be in a very much worse position as it looks over the coming months to emerge from the shadow of COVID-19.

All of the evidence we have, as sites have been gradually allowed to re-open in 2021 is that that recovery is going to be a strong one, with audiences eager to once again enjoy the Big Screen experience and cinemas keen to retake their position at the heart of local communities.



38

TERRITORIES
represented
by UNIC

43,000

SCREENS
across UNIC
territories

€8.8

BILLION AT THE BOX OFFICE
across UNIC territories in 2019

One of the key impacts that the pandemic had on our industry was to test the resilience of the theatrical model, whereby cinemas enjoy a period of exclusivity for each title before it is made available on other formats.

While the need to adopt different approaches when cinemas were required to close was understood, UNIC sees no evidence that the principles underpinning this previous proven model have fundamentally changed. Furthermore, we believe there are much greater dangers in models which put valuable film titles at risk from cannibalisation of revenues and – even more worrying – the ravages of film theft early in their release.

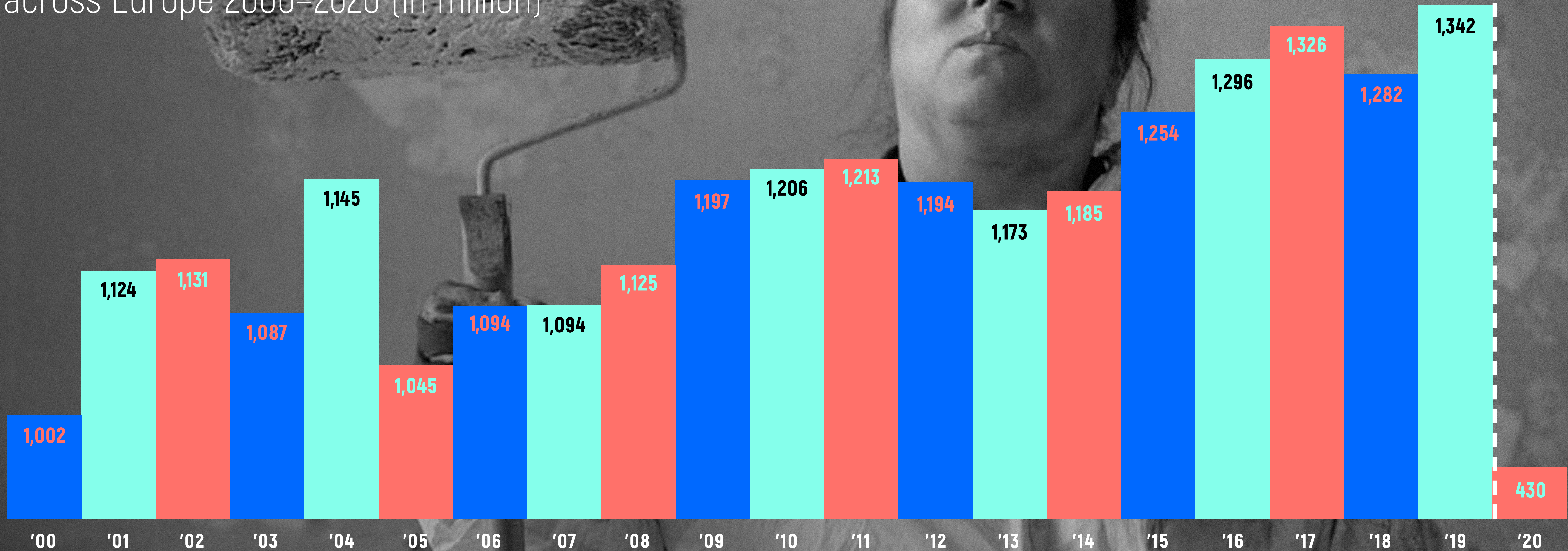
We will therefore continue to argue strongly for the maintenance of a significant period of theatrical exclusivity and against further ‘experiments’ with day-and-date or similar release strategies.

The last 18 months have shown the strength of our industry – not just those who operate cinemas, but also colleagues in film distribution, cinema technology, concessions, ticketing, data analytics, screen advertising and so many other parts of the sector. We would like to thank each and every one of them for the support they have provided to our organisation and its members as we have all sought to navigate these challenging and unpredictable times.

We very much hope you find what’s in this report to be of interest and look forward to seeing you at the Big Screen soon.

CINEMA ADMISSIONS

across Europe 2000–2020 (in million)



+34%

GROWTH BETWEEN 2000 AND 2019

The European cinema industry was on a steady growth trajectory when it was struck by the COVID-19 pandemic.

Source: UNIC, European Audiovisual Observatory and Media Salles.

SE MIELETÖN REMPPA Finland (2020) Nordisk Film



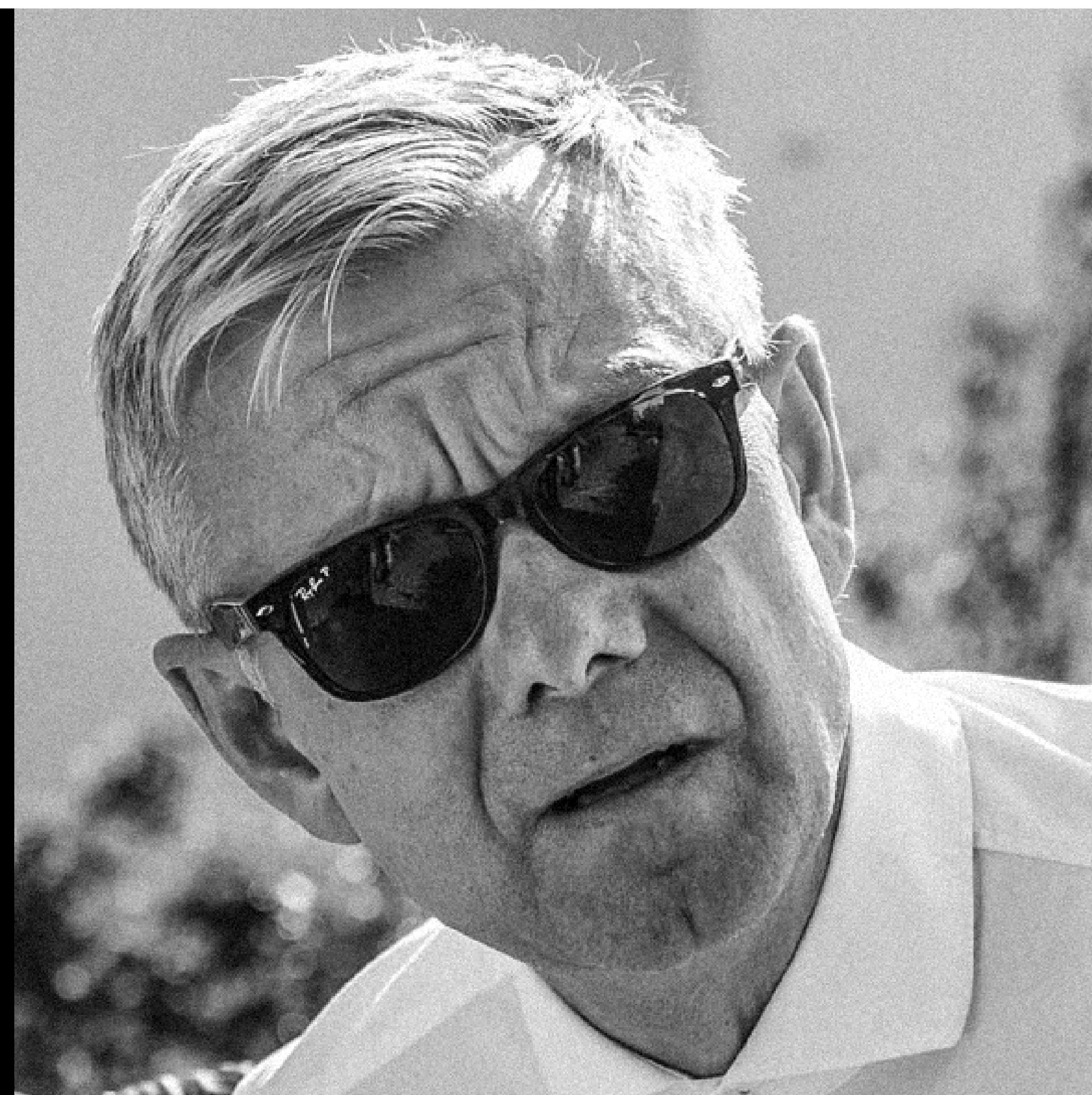
CINEMA-GOING

in 2020

430 MILLION ADMISSIONS

across UNIC territories in 2020

– 68.4% DECREASE ON 2019



€2.6 BILLION AT THE BOX OFFICE

across UNIC territories in 2020

– 70.4% DECREASE ON 2019

Cinema-going in Europe in 2020 – Facts and figures

In late February 2020, cinemas in the North of Italy were required to close as the Italian government introduced a series of restrictions to try to halt the spread of the (then) novel COVID-19 outbreak in the region. A nationwide ban followed on 8 March, leading to an unstoppable ‘domino effect’, resulting in the gradual closure of almost all cinemas across Europe by mid-March. Over the following weeks, less than 2 per cent of the 43,000 screens in Europe remained open.

Norwegian cinemas were the first to re-open their doors on 7 May 2020, this after 56 days of complete closure. Most European screens re-opened thereafter, some as late as August or September 2020. After welcoming over 213 million visitors in 2019, French exhibitors endured 100 days of full closure. Many territories were confronted by localised and highly complex rules, leading to a staggered and sometimes confusing re-opening process – such as in Germany, where there were different closure and re-opening dates for the 16 Länder.

European governments introduced a range of new health and safety requirements, which variously limited occupancy, mandated mask wearing or banned the sale of food and drinks. More specific rules such as the closure of malls further delayed the re-opening of cinemas in some Eastern European territories.

Unfortunately, just as cinemas were showing the first early signs of recovery towards the end of the Summer, spikes in COVID-19 cases led to a second round of closures around Europe. Again, almost all European cinemas closed their doors between mid-October and December 2020, until May and June 2021. With a few exceptions, the overwhelming majority of European cinemas were closed for almost half of 2020 and otherwise operated under strict – and in some cases economically unviable – limitations.

MARKET SHARE OF EUROPEAN FILMS IN 2020

compared to
25.7% in 2019
and 29.4% in 2018*

39.7%

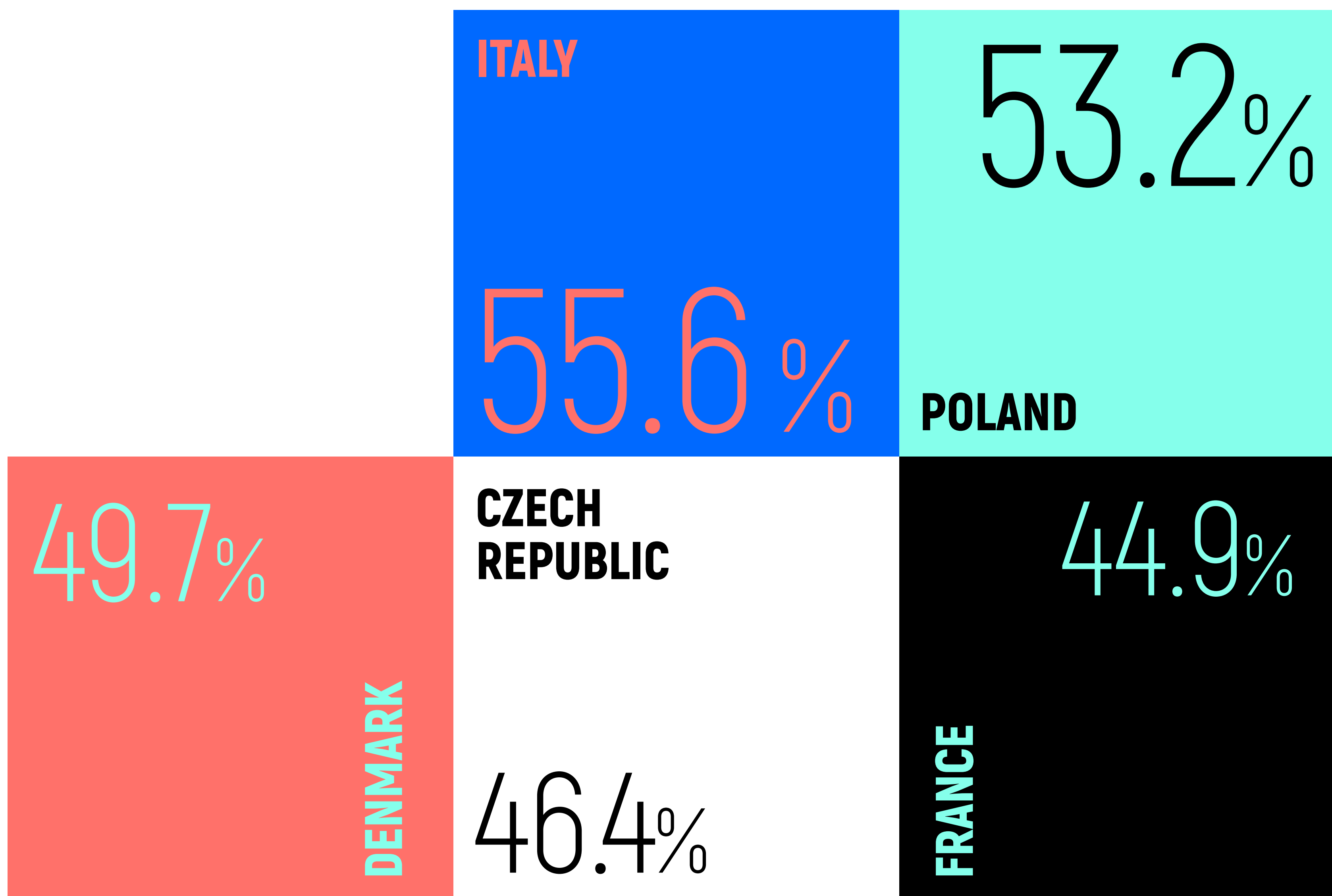
In the Netherlands, cinemas were first required to close between 15 March and 1 June 2020. They were initially allowed to operate with an occupancy limit of 30 visitors per show, which was scrapped from 1 July 2020. Various localised restrictions were introduced from late September, leading to a nationwide capacity limit of 30 people per screening room in addition to other reinforced requirements. From mid-October, mask wearing became mandatory and cinemas were banned from selling food and drinks. A second lockdown was then introduced between 4 and 19 November, before a final round of closure from 15 December 2020 to 5 June 2021, a total of 265 days of complete closure for Dutch operators since the start of the

pandemic. Sites re-opened in 2021 with a 50-person capacity limit, mandatory mask wearing until seated and a ban on food and drink sales until 10pm. This national example as much as any serves to highlight the complexity of the re-opening process for European cinemas.

These dramatic developments across the region led to a 70.4 per cent drop in box office and 68.4 per cent drop in admissions in 2020 across UNIC territories, equating to a total reduction of €6.2 billion in revenues and 930 million in admissions compared to 2019. A similar 68.8 per cent reduction in box office could be observed in the European Union, resulting in a €4.0 billion drop in revenues, while admissions reached an all-time low of 257 million. Amongst the worst-affected territories in Europe were Romania, Portugal and the UK, where box office decreased by more than 75 per cent in each case. Israel suffered a staggering 88 per cent drop in admissions and box office. Admissions per capita reached an all-time low of 0.5 visits per year in Europe, compared to the average 1.5 in previous years. Only France (1.0), Denmark (1.2), Estonia (1.4) and the Netherlands (1.0) managed to remain above 1 annual visit per inhabitant.

TOP 5 EU TERRITORIES

in terms of market share
for national films



The relevance and success of local European releases has never been clearer than during this challenging year.

These figures came after a very successful 2019, when European cinemas grossed over €8.8 billion at the box office and attracted more than 1.36 billion cinema-goers. In the European Union, cinemas had recorded their best results for 15 years, with admissions reaching the 1 billion mark for the first time since 2004. 2020 was at first on a similarly positive trajectory, with Italian exhibitors recording in January their third best result in the past 10 years, bolstered by the successful release of the local title *To/lo To/lo* – which ended up as the sixth most successful film in terms of admissions in the EU and UK, with over 6.6 million tickets sold in 2020.

The relevance and success of local European releases has never been clearer than during this challenging year. Because of the staggered nature of the re-opening process at global level, with cinemas re-opening at a different pace in Europe, Asia and North America, we saw throughout the year a continuing postponement of major releases, in particular from the major US studios.

TOP 5 MOST SUCCESSFUL EUROPEAN FILMS

released during reopening periods in 2020 in the EU and UK
(in million admissions)*



30 JOURS MAX

France / October 2020

1.2 MILLION



LES BLAGUES DE TOTO

France, Luxembourg and Belgium / August 2020

1.1 MILLION



BIGFOOT FAMILY

Belgium and France / August 2020

1.0 MILLION



DRUK

Denmark, Sweden and the Netherlands / September 2020

1.0 MILLION



PADRE NO HAY MÁS QUE UNO 2 LA LLEGADA DE LA SUEGRA

Spain / July 2020

2.3 MILLION

*Source: European Audiovisual Observatory and Comscore
Photo: Sony Pictures Releasing, StudioCanal, SND, Belga Films, Nordisk Film

Local titles helped cushion the impact of the pandemic

With the support of local distributors and producers, national films' market share reached new heights across the region, such as in Denmark (49.7 per cent), the Czech Republic (46.4 per cent), France (44.9 per cent), Italy (55.6 per cent), Russia (46.5 per cent) and Poland (53.2 per cent). In total, 15 European territories registered a market share for national films of above 25 per cent, as audiences returned during Summer 2020 to enjoy the sorely-missed experience of watching a film together on the Big Screen. According to data from the European Audiovisual Observatory, the market share of European films in the EU reached a new high of 39.7 per cent – compared to 25.7 per cent in 2019.

Local titles helped cushion the impact of the pandemic in several territories, including in Denmark, which suffered the lowest box office drop in Europe (-42.4 per cent) thanks to a series of highly successful local titles released post-pandemic. Similar success stories can be reported across a range of European territories, including but not limited to Finland, the Netherlands, Norway and Russia. In Turkey, where local titles have historically dominated at the box office, the national films' market share reached an astonishing 78 per cent.

SWEDEN

Sweden was one of the few countries to allow cinemas to remain open throughout 2020. Nevertheless, many exhibitors decided to close from March due to occupancy restrictions. In November, public gatherings were limited to 8 people, making it even more challenging for local operators to remain open. Svenska Bio, the second-largest cinema chain in the country, kept several of its sites opened throughout the year – even briefly holding the title of Europe's biggest operator by box office revenue, programming catalogue titles as well as allowing customers to rent screening rooms for private events or Bio-on-Demand, a cinema-on-demand on the Big Screen. Swedish exhibitors had to wait until 1 June 2021 for the capacity limit to be increased to a more viable 50 people per show, paving the road to recovery.

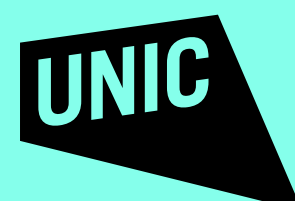
TERÄSLEIDIT

Finland (2020) SF Studios

The UNIC research on the impact of COVID-19 on the cinema industry is still ongoing and is available for free on the UNIC website.

INDUSTRY MONITORING

UNIC has been closely monitoring the impact of the Coronavirus outbreak on the cinema industry across Europe from March 2020, regularly updating a publicly available research on the topic throughout the year. The exhaustive research includes detailed information on national closure processes, support mechanisms, measures related to employment, taxation as well as rent and related costs. UNIC also shared information on audience engagement initiatives during – as exhibitors engaged with their audience even during lockdowns – and after closure, including large scale reopening campaigns. UNIC also made available a document listing EU financial initiatives that could be of relevance to European cinema operators.



UNION INTERNATIONALE DES CINÉMAS
INTERNATIONAL UNION OF CINEMAS

Released in January, the UK/US co-production *1917* was the leading title of 2020. Highlighting the importance of US blockbusters for the European cinema industry, the other leading films of 2020 were *Tenet*, *Bad Boys for Life*, *Sonic the Hedgehog*, *Dolittle* and *Star Wars: The Rise of Skywalker* – all major studio titles. It is worth pointing out that Christopher Nolan's *Tenet*, the second most successful title of 2020 with 11.6 million admissions in the EU, was released in October 2020, between two lockdown periods and despite strict occupancy restrictions and health and safety requirements across Europe.

During Summer and Autumn 2020, when most European cinemas were allowed to re-open, cinema operators launched a series of back-to-the-cinema campaigns. Through re-opening guidelines, videos showcasing safety measures, movie contests, discounts, audience surveys and special screenings, to name but just a few activities, exhibitors successfully managed to rebuild their audience's confidence in safe cinema-going and promote the magic of the Big Screen experience.

While the industry continues to assess the impact of COVID-19 on European cinemas, it is heartening that the number of cinema screens in Europe remained stable at 43,000 and that the overwhelming majority of sites survived these prolonged periods of closure.



ADIEU LES CONS

France (2020) Gaumont

Reopening performances in 2020

Albeit briefly and under strict safety requirements and occupancy limitations, most European cinemas were allowed to re-open between June and October 2020. During that time, we witnessed the resilience of the film sector, its capacity to adapt to challenging circumstances and kickstart its recovery process thanks to national re-opening campaigns and the support of local and European productions. Here are a few titles worth mentioning.

In Spain, *Padre no hay más que uno 2*, released in late July, grossed almost half a million euro on its opening week – 60 per cent better than its prequel, which was the most successful local title of 2019. In total, the film attracted over 2.2 million visitors for €12.5 million at the box office. Despite only being released in Spain, where it became the most successful film of 2020, it also ended up becoming the third most successful European production of 2020, just behind *Tolo Tolo* and *1917*, both released pre-pandemic.

– we witnessed
the resilience of the film sector

In Poland, the true story *25 lat niewinnosci. Sprawa Tomka Komendy* released in September grossed over €3.4 million, leading at the box office for four consecutive weeks – only to be replaced by another local title *Banksterzy*. National productions dominated the box office throughout the following weeks, contributing to a 53.2 per cent national films' market share.

In Denmark, the local film *Druk* was released on 24 September and attracted 102,000 admissions in its opening weekend – the best debut performance for a Danish drama for the past seven years. The film continued to attract audiences throughout October, with over half a million tickets sold after just three weeks in cinemas. *Druk* won Best International Feature Film at the 93rd Academy Awards, as well as the BAFTA Award for Best Film Not in the English Language and European Film Award for Best Film.

In France, the comedy *Adieu les cons* attracted 600,000 visitors on its opening week in October, for the best opening performance for a local film since the re-opening of French cinemas on 22 June. This result was achieved despite a 9pm curfew introduced across half the country. Unfortunately, the film was stopped in its tracks as cinemas were required to close again on 30 October. On Wednesday 19 May 2021, French cinemas re-opened and welcomed over 285,000 visitors – with cinema-goers queuing for the early morning screenings. *Adieu les cons* was back on the Big Screen and immediately led the charts and attracted over 1.8 million visitors in total in the following weeks.

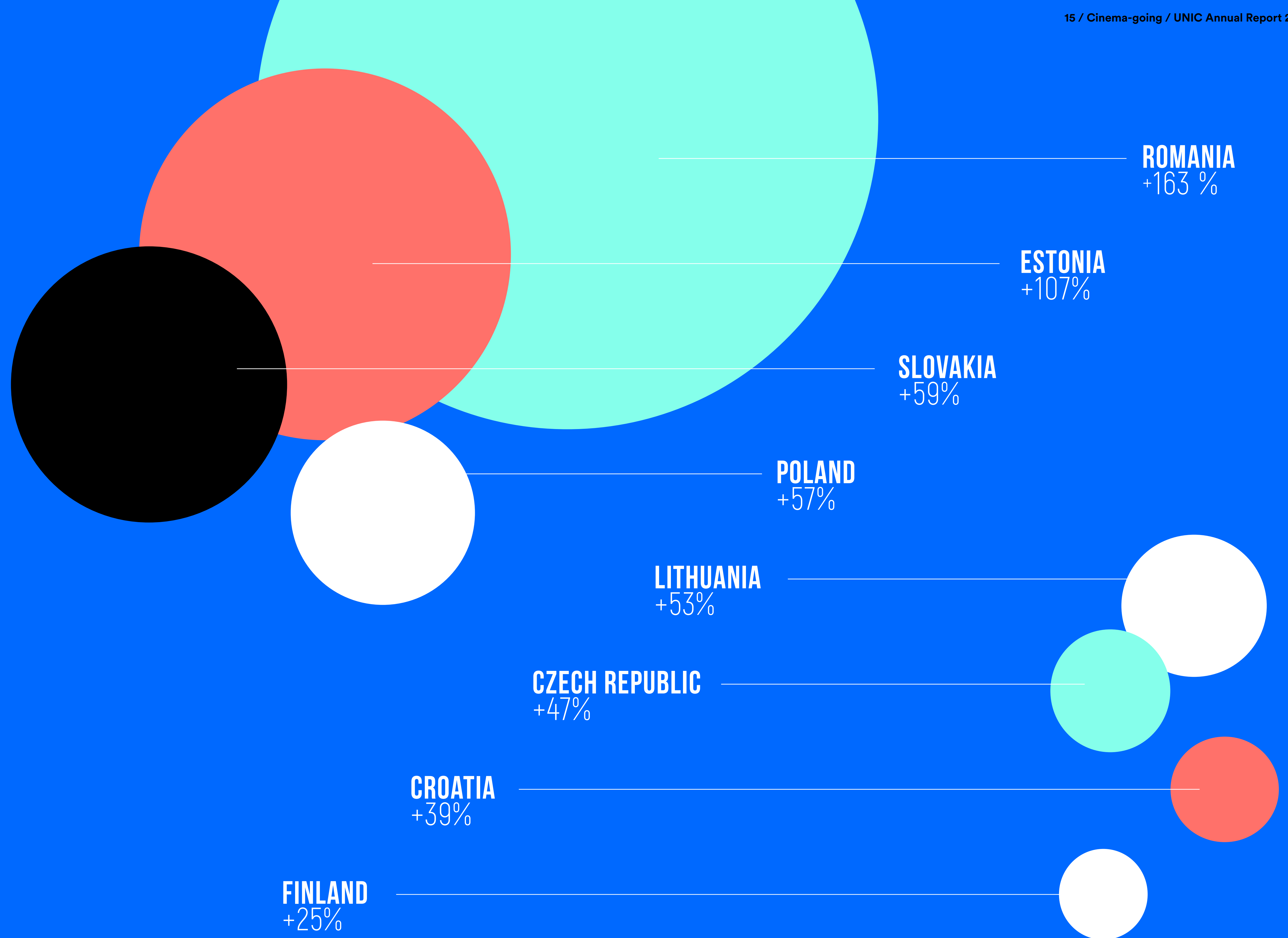
These are just a few of the striking examples of highly successful European films which were released by daring local distributors in difficult times. Some films also travelled across their national borders, such as the Italian *Pinocchio*, the French *Le prince oublié* and the German *Das perfekte Geheimnis*, which were distributed in multiple territories and attracted hundreds of thousands of cinema-goers.



25 LATNIEWINNOSCI

Poland (2020) Kino Swiat

There are still opportunities for growth in the sector, evident through increasing admissions in several European territories over the last decade (2009–2019)





57

LOCAL EUROPEAN TITLES

57 local European titles made it to the box office top five across UNIC territories in 2020 – compared to 24 in 2019 – illustrating the fundamental role of cinemas in the promotion of diversity and creativity.

TALVE Estonia (2020) Hea Film, **VIKEND SA CALETOM** Serbia (2020) United Media, **TERÄSLEIDIT** Finland (2020) SF Studios, **SARLATÁN** Czech Republic, Poland, Ireland, Slovakia (2020) CinemArt, **DRUK** Denmark, Sweden, Netherlands (2020) Nordisk Film, **PŘÍLIŠ OSOBNÍ ZNÁMOST** Czech Republic (2020) Continental Film, **SIFIR BIR** Turkey (2020) CGV Mars Dagitim, **HALVAI 5-0** Greece (2020) Village

CINEMA-GOING

across UNIC territories
in 2020

COUNTRY (CURRENCY)	BOX OFFICE IN LOCAL CURRENCY			ADMISSIONS				NATIONAL FILMS' SHARE	NUMBER OF SCREENS
	2020	2019	CHANGE	2020	2019	CHANGE	PER CAPITA		
ALBANIA (ALL)	80.7	354.5	-77.2%	0.1	0.6	-78.6%	0.1	44.0%	15
AUSTRIA (EUR)	34.6	129.5	-73.3%	3.8	13.7	-71.8%	0.4	4.4%	562
BELGIUM (EUR)	44.5	171.2	-74.0%	5.6	19.5	-71.3%	0.5	n/a	498
BOSNIA AND HERZEGOVINA (BAM)	2.1	6.8	-69.5%	0.4	1.3	-70.1%	0.1	3.0%	63
BULGARIA (BGN)	12.7	49.0	-74.1%	1.3	5.0	-73.3%	0.2	9.2%	211
CROATIA (HRK)	44.6	156.6	-71.5%	1.4	4.9	-71.5%	0.3	10.0%	192
CYPRUS (EUR)	1.4	6.7	-78.8%	0.2	0.8	-78.8%	0.2	0.0%	40
CZECH REPUBLIC (CZK)	906.0	2,616.6	-65.4%	6.4	18.3	-65.2%	0.6	46.4%	542
DENMARK (DKK)	627.2	1,089.1	-42.4%	7.2	12.2	-41.3%	1.2	49.7%	473
ESTONIA (EUR)	10.7	21.8	-50.9%	1.8	3.7	-51.2%	1.4	26.7%	91
FINLAND (EUR)	43.6	95.9	-54.5%	3.9	8.4	-53.9%	0.7	39.1%	355
FRANCE (EUR)	432.6	1,448.7	-70.1%	65.2	213.0	-69.4%	1.0	44.9%	6,127
GERMANY (EUR)	318.0	1,024.0	-69.0%	38.1	118.6	-67.9%	0.5	35.1%	4,926
GREECE (EUR)	19.9	61.0	-67.4%	3.1	9.6	-67.3%	0.3	28.2%	547*
HUNGARY (HUF)	6,508.4	22,163.7	-70.6%	4.3	15.2	-71.6%	0.4	4.3%	375
IRELAND (EUR)	30.6	117.5	-73.9%	3.8	15.1	-74.6%	0.8	0.0%	534
ISRAEL (ILS)	67.6	552.3	-87.8%	2.1	17.3	-87.8%	0.2	n/a	393*
ITALY (EUR)	189.5	667.9	-71.6%	30.3	104.4	-71.0%	0.5	55.6%	3,667
LATVIA (EUR)	5.1	15.0	-65.9%	0.9	2.7	-67.0%	0.5	19.9%	60
LITHUANIA (EUR)	8.5	22.5	-62.3%	1.5	4.1	-63.0%	0.6	21.9%	71

*2019 data

Source: UNIC members

Complementary information from CH (ProCinema), CZ (Unie Filmových Distributoru), BG (Национален филмов център), DE (Filmförderungsanstalt), EE (Eesti Filmi Instituut & Baltic Films Co-operation Platform), FR (Centre National du Cinéma et de l'Image Animée), GR (Ελληνικό Κέντρο Κινηματογράφου), HR (Hrvatski Audiovizualni Centar), HU (Nemzeti Média- és Hírközlési Hatóság), IE (Wide Eye Media), IT (Cinetel/SIAE), LT (Lietuviu Filmu Centras & Baltic Films Co-operation Platform), LU (Centre National de l'Audiovisuel), LV (Nacionālais kino centrs & Baltic Films Co-operation Platform), ME (Filmski centra Crne Gore), MT (National Statistics Office), PT (Instituto do Cinema e do Audiovisual), RO (Centrul National al Cinematografiei), RU (Nevafilm Research), SK (Únia filmových distribútorov), UK (British Film Institute).

CINEMA-GOING

across UNIC territories
in 2020

COUNTRY (CURRENCY)	BOX OFFICE IN LOCAL CURRENCY			ADMISSIONS				NATIONAL FILMS' SHARE	NUMBER OF SCREENS
	2020	2019	CHANGE	2020	2019	CHANGE	PER CAPITA		
LUXEMBOURG (EUR)	3.1	10.3	-69.6%	0.3	1.1	-70.0%	0.6	1.3%	37
NORTH MACEDONIA (MKD)	24.6	102.4	-76.0%	0.1	0.4	-74.7%	0.1	4.8%	18
MALTA (EUR)	1.1	5.0	-78.6%	0.2	0.7	-77.9%	0.3	N/A	33
MONTENEGRO (EUR)	0.3	1.2	-71.7%	0.1	0.3	-69.9%	0.2	7.0%	18
NETHERLANDS (EUR)	151.6	347.6	-56.4%	16.8	38.0	-55.9%	1.0	21.0%	996
NORWAY (NOK)	557.7	1,303.4	-57.2%	4.9	11.3	-57.0%	0.9	35.7%	479
POLAND (PLN)	312.9	1,143.0	-72.6%	17.1	60.9	-71.9%	0.5	53.2%	1,511
PORTUGAL (EUR)	20.6	83.1	-75.3%	3.8	15.5	-75.5%	0.4	3.1%	565
ROMANIA (RON)	68.0	300.3	-77.4%	3.3	14.3	-76.9%	0.2	23.5%	449
RUSSIA (RUB)	22,600.0	54,802.1	-58.8%	87.3	216.3	-59.6%	0.6	46.5%	5,575*
SERBIA (RSD)	611.6	1,814.2	-66.3%	1.5	4.5	-67.4%	0.2	8.0%	158
SLOVAKIA (EUR)	14.0	37.3	-62.5%	2.4	6.5	-63.8%	0.4	34.0%	269
SLOVENIA (EUR)	2.9	12.6	-77.1%	0.5	2.3	-77.0%	0.3	3.0%	111
SPAIN (EUR)	172.3	624.1	-72.4%	28.6	105.5	-72.9%	0.6	25.0%	3,593
SWEDEN (SEK)	676.3	1,890.4	-64.2%	5.7	15.6	-63.7%	0.6	25.5%	932
SWITZERLAND (CHF)	69.3	198.3	-65.1%	4.5	12.9	-65.0%	0.5	13.9%	609
TURKEY (TRY)	299.7	980.4	-69.4%	17.4	59.6	-70.8%	0.2	78.0%	2,700
UK (GBP)	296.7	1,252.4	-76.3%	44.0	176.1	-75.0%	0.7	9.2%	4,596
UKRAINE (UAH)	992.8	2,883.7	-65.6%	10.0	30.7	-67.4%	0.2	6%	580*

















*2019 data

Source: UNIC members

Complementary information from CH (ProCinema), CZ (Unie Filmových Distributoru), BG (Национален филмов център), DE (Filmförderungsanstalt), EE (Eesti Filmi Instituut & Baltic Films Co-operation Platform), FR (Centre National du Cinéma et de l'Image Animée), GR (Ελληνικό Κέντρο Κινηματογράφου), HR (Hrvatski Audiovizualni Centar), HU (Nemzeti Média- és Hírközlési Hatóság), IE (Wide Eye Media), IT (Cinetel/SIAE), LT (Lietuviu Filmu Centras & Baltic Films Co-operation Platform), LU (Centre National de l'Audiovisuel), LV (Nacionālais kino centrs & Baltic Films Co-operation Platform), ME (Filmski centra Crne Gore), MT (National Statistics Office), PT (Instituto do Cinema e do Audiovisual), RO (Centrul National al Cinematografiei), RU (Nevafilm Research), SK (Únia filmových distribútorov), UK (British Film Institute).

TOP 5 FILMS

across UNIC territories
in terms of box office

	#1	#2	#3	#4	#5
Albania	I Love Tropoja 	Bad Boys for Life	Falco 	Jumanji: The Next Level	The Gentlemen (UK/US) 
Austria	Bad Boys for Life	Tenet	Dolittle	Knives Out	Star Wars: Episode IX - The Rise of Skywalker
Bosnia and Herzegovina	Bad Boys for Life	The Gentlemen (UK/US) 	Holop (RU) 	Tenet	Quo Vadis, Aida? 
Bulgaria	Bad Boys for Life	Dolittle	Sonic the Hedgehog	After We Collided	Star Wars: Episode IX - The Rise of Skywalker
Croatia	The Gentlemen (UK/US) 	Bad Boys for Life	Tenet	1917 (UK/US) 	Sonic the Hedgehog
Cyprus	Jumanji: The Next Level	Efthia (GR) 	Bad Boys for Life	Tenet	Mulan
Czech Republic	V síti 	Příliš osobní známost 	Šarlatán 	3Bobule 	Chlap na střídačku 
Denmark	Druk 	Retfærdighedens ryttere 	Klovn the Final 	De forbandede år 	Frozen 2
Estonia	Tenet	Talve 	Sipsik 	Dawn of War (EE/FI/LV/LT) 	Trolls World Tour
Finland	Frozen 2	Teräsleidit 	Tenet	Se mietetön remppa 	Parasite
France	Tenet	1917 (UK/US) 	Sonic the Hedgehog	Bad Boys for Life	Star Wars: The Rise of Skywalker
Germany	Bad Boys for Life	Tenet	Star Wars: The Rise of Skywalker	Nightlife 	Sonic the Hedgehog
Greece	Efthia 	1917 (UK/US) 	Halvai 5-0 	Gia panta 	Tenet
Hungary	Bad Boys for Life	The Gentlemen (UK/US) 	Tenet	Star Wars: The Rise of Skywalker	Knives Out
Ireland	1917 (UK/US) 	Little Women	Sonic the Hedgehog	Bad Boys for Life	Dolittle
Italy	Tolo Tolo 	Me contro Te - Il film: La vendetta del Signor S 	Odio l'estate 	Tenet	1917 (UK/US) 
Latvia	Pilsēta pie upes 	Klases salidojums 2 	Sonic the Hedgehog	Frozen 2	Tenet
Lithuania	Tobulas pasimatymas 	Importinis jaunikis	1917 (UK/US)	Frozen 2	Tenet
Luxembourg	1917 (UK/US)	Bad Boys for Life	Tenet	Sonic the Hedgehog	Jumanji: The Next Level

Source: UNIC members

Complementary information from CH (ProCinema), CZ (Unie Filmových Distributorů), BG (Национален филмов център), DE (Filmförderungsanstalt), EE (Eesti Filmi Instituut & Baltic Films Co-operation Platform), FR (Centre National du Cinéma et de l'Image Animée), GR (Ελληνικό Κέντρο Κινηματογράφου), HR (Hrvatski Audiovizualni Centar), HU (Nemzeti Média- és Hírközlési Hatóság), IE (Wide Eye Media), IT (Cinetel/SIAE), LT (Lietuvių Filmu Centras & Baltic Films Co-operation Platform), LU (Centre National de l'Audiovisuel), LV (Nacionālais kino centrs & Baltic Films Co-operation Platform), ME (Filmski centra Crne Gore), MT (National Statistics Office), PT (Instituto do Cinema e do Audiovisual), RO (Centrul National al Cinematografiei), RU (Nevafilm Research), SK (Únia filmových distribútorov), UK (British Film Institute).

 National films  Non-national EU films  European/National qualified production

TOP 5 FILMS

across UNIC territories
in terms of box office

	#1	#2	#3	#4	#5
North Macedonia	Bad Boys for Life	I Love Tropoja (AL)	Jumanji: The Next Level	Dolittle	Honeyland
Malta	Jumanji: The Next Level	Bad Boys for Life	1917 (UK/US)	Dolittle	Tenet
Montenegro	Holop (RU)	The Gentlemen (UK/US)	Bad Boys for Life	Tenet	After We Collided
Netherlands	1917 (UK/US)	Tenet	De Beentjes van Sint-Hildegard	Bad Boys for Life	April, May en June
Norway	Børning 3	Frozen 2	Knutsen & Ludvigsen 2 - Det Store Dyret	1917 (UK/US)	Tenet
Poland	365 dni	Psy 3: W imię zasad	Jak zostałem gangsterem. Historia prawdziwa	Mayday	25 lat niewinności. Sprawa Tomka Komendy
Portugal	1917 (UK/US)	Bad Boys for Life	Birds of Prey	Tenet	Sonic the Hedgehog
Romania	Miami Bici	Bad Boys for Life	5 Gang: Un altfel de Crăciun	Jumanji: The Next Level	Dolittle
Russia	Holop	Frozen 2	The Gentlemen (UK/US)	Prityazhenie 2	Tenet
Serbia	Holop (RU)	The Gentlemen (UK/US)	Tenet	After We Collided	Vikend sa caletom
Slovakia	Sviňa	Príliš osobná známosť	Šťastný Nový Rok (SK/CZ)	Chlap na střídačku (CZ)	Bad Boys for Life
Slovenia	Bad Boys for Life	Sonic the Hedgehog	Dolittle	1917 (UK/US)	Frozen 2
Spain	Padre no hay más que uno 2	1917 (UK/US)	Tenet	Bad Boys for Life	Dolittle
Sweden	Frozen 2	En del av mitt hjärta	Star Wars: The Rise of Skywalker	Tenet	Bad Boys for Life
Switzerland	Platzspitzbaby	Tenet	Bad Boys for Life	1917 (UK/US)	Jumanji: The Next Level
Turkey	Etilerin Savaşı	Rafadan Tayfa Göbeklitepe	Baba Parası	Bayı Toplantısı	Sfır Bir
UK	1917 (UK/US)	Sonic the Hedgehog	Tenet	Bad Boys for Life	Dolittle
Ukraine	The Gentlemen (UK/US)	Dolittle	Bad Boys for Life	Tenet	Sonic the Hedgehog

Source: UNIC members

Complementary information from CH (ProCinema), CZ (Unie Filmových Distributoru), BG (Национален филмов център), DE (Filmförderungsanstalt), EE (Eesti Filmi Instituut & Baltic Films Co-operation Platform), FR (Centre National du Cinéma et de l'Image Animée), GR (Ελληνικό Κέντρο Κινηματογράφου), HR (Hrvatski Audiovizualni Centar), HU (Nemzeti Média- és Hírközlési Hatóság), IE (Wide Eye Media), IT (Cinetel/SIAE), LT (Lietuvių Filmu Centras & Baltic Films Co-operation Platform), LU (Centre National de l'Audiovisuel), LV (Nacionālais kino centrs & Baltic Films Co-operation Platform), ME (Filmski centra Crne Gore), MT (National Statistics Office), PT (Instituto do Cinema e do Audiovisual), RO (Centrul National al Cinematografiei), RU (Nevafilm Research), SK (Únia filmových distribútorov), UK (British Film Institute).

 National films
  Non-national EU films
  European/National qualified production



THE RECOVERY

of the European
cinema industry

LOSS IN BOX OFFICE REVENUES

€6.2 billion

ESTIMATED LOSS in other revenues for the European cinema industry in 2020

€4.5 billion

The impact of COVID-19 on European cinemas

No one could have predicted the duration and the severity of the unprecedented social and economic challenges brought by the COVID-19 pandemic. European cinema operators were not spared, as illustrated by the 68.4 per cent drop in admissions across the region in 2020, accounting for a total loss of €6.2 billion in box office revenues alone. The coronavirus pandemic dealt the sector a devastating blow, one from which the industry will take some time to recover.

While press reports have focused on box office losses to highlight the plight of exhibitors in Europe, it does not provide a full picture of the impact of COVID-19 on UNIC members. Box office represents only a share of each exhibitor's income, with significant revenues also arising from in-theatre sales, private events as well as B2B and screen advertising. While it is challenging to precisely assess the total amount of revenues lost by cinema operators in Europe, estimates from the European Audiovisual Observatory evaluate losses from other revenue sources than box office to amount to over €3.1 billion in the EU alone – which would equate to over €4.5 billion for Europe in 2020.

NOT ACCOUNTING for the significant fixed costs that cinema operators had to cover during closure.

The figures above do not account for the significant fixed costs that most cinema operators had to cover during closure, including rent, energy bills and temporary leave compensation, amounting to hundreds of millions of euros per week.

The social impact of the pandemic on the industry was equally severe. Most of the staff working in cinemas had their hours reduced, were furloughed or put on unpaid leave by those employers without the ability to continue paying salaries in the absence of state support. The closure of cinemas also had an impact on other businesses, from cinema equipment manufacturers to retail and other services located next to or inside cinema complexes themselves. As time progressed, national authorities announced measures to support jobs and livelihoods and provided a range of support schemes to help exhibitors survive this unprecedented period.

That said, growing admissions in Europe over the last decade bring confidence in the sector's ability to come back stronger from this pandemic. The 1.36 billion admissions and €8.8 billion at the European box office in 2019 were built on the shoulders of a proven business model, which remains crucial for ensuring that audiences can enjoy the unparalleled cultural and social experience of watching films together on the Big Screen.

In 2019, in the European Union, cinemas recorded their best results for 15 years, with admissions reaching the 1 billion mark for the first time since 2004.

1.36 BILLION ADMISSIONS

across UNIC territories in 2019

€ 8.8 BILLION AT THE BOX OFFICE

across UNIC territories in 2019

All the evidence points to cinemas being one of the safest indoor spaces in terms of COVID-19 infections.

As soon as they were required to close in March 2020, cinema operators did their utmost to restore their business and adapt to these unprecedented times. They worked alongside national authorities in the drafting of detailed health and safety guidelines. These rules – which have been monitored by UNIC and can be found on our website – differ from country to country, depending on local circumstances and have constantly evolved since March 2020 as restrictions were eased or tightened.

All the evidence also points to cinemas being one of the safest indoor spaces in terms of COVID-19 infections. Not a single outbreak of COVID-19 anywhere across the globe has been traced to a cinema, multiplex or public screening venue. Moreover, several scientific research published in 2020 demonstrated that cultural events played a minimal role in the spread of the virus ¹ and confirmed the safety of cinema auditoriums and cinema-going compared to other social environments and activities. ²

Beyond these reports, audience surveys conducted across Europe have shown that cinema-goers were pleased with the measures rolled out by exhibitors to ensure that they felt safe and welcome to return to the Big Screen. In Germany, a survey conducted in July 2020 had 85 per cent of

respondents satisfied with hygiene and precautionary measures taken by cinema operators – with a similar exercise in Spain reaching in July a 90 per cent satisfaction rate and 91 per cent amongst Polish respondents in October 2020.

As already highlighted in the previous section of this report, the re-opening process in Europe was gradual and staggered. National cinema associations, along with industry partners from distribution and production, launched national campaigns to celebrate the Big Screen experience and encourage cinema-goers to return to the cinema. Individual operators also launched a wide range of audience engagement initiatives – during and after closure – reminding their audiences of the unique experience of enjoying a film on the Big Screen. Some companies even introduced home delivery services during lockdown, bringing the cinema experience to cinema-goers' homes.

Bolstered by these efforts, European cinemas were showing the first signs of a healthy recovery in September and October 2020, getting close to pre-pandemic audience levels, in spite of strict occupancy restrictions and a lack of new content. The successful release of *Tenet* resulted in triple-digit box office week-on-week growth across Europe and went on to attract 11.6 million visitors in the EU alone.



¹ Etude des facteurs sociodémographiques, comportements et pratiques associés à l'infection par le SARS-CoV-2 (ComCor), Institut Pasteur, December 2020.

² Covid-19 Ansteckung über Aerosolpartikel – vergleichende Bewertung von Innenräumen hinsichtlich des situationsbedingten R-Wertes, TU Berlin, February 2021.



EFTYHIA

Greece (2019) Tanweer Alliances

This positive trend could be observed globally, as four of the five most successful films of 2020 were released in the second half of the year. In China, where all cinemas were closed for almost six months between January and July 2020, the local title *The Eight Hundred* released in August grossed over \$400 million alongside *My People, My Homeland*, another Chinese production. In Japan, the local animation film *Demon Slayer* surpassed all expectations by becoming the highest-grossing film of 2020 with half a billion dollar at the global box office – the first non-Hollywood title to achieve the feat.

These results prove that the recovery of the industry depends hugely on the availability of new film content and having a strong and diverse film slate. The lack of major studio releases in 2020 and in the first half of 2021, combined with the need to respond to ever-changing official recommendations – very often given at short notice – resulted in massive uncertainty.

Cinemas were required to close again across most of Europe between mid-October and December 2020 as COVID-19 cases soared globally. This second – or in some cases third – wave of lockdowns ended being the longest in terms of consecutive days of closure for cinema operators. In France, cinemas re-opened their doors after 201 days on 19 May 2021, with some such as Greece having to wait until early July to finally welcome audiences back.

The cinema experience was sorely missed by film fans around the world during these prolonged periods of absence, as illustrated by the highly positive re-opening performances between May and August 2021. Across Europe, the 2021 recovery phase was much faster than what was witnessed in 2020, with audience returning more quickly and in larger numbers, attracted by a more solid slate of new releases. Again, local titles played a major role in the first re-opening weeks. In Denmark, three local titles were in the box office top five, while the Estonian title *Eesti Matus* led in front of major international titles.

The recovery of the industry depends hugely on the availability of new film content and having a strong and diverse film slate.

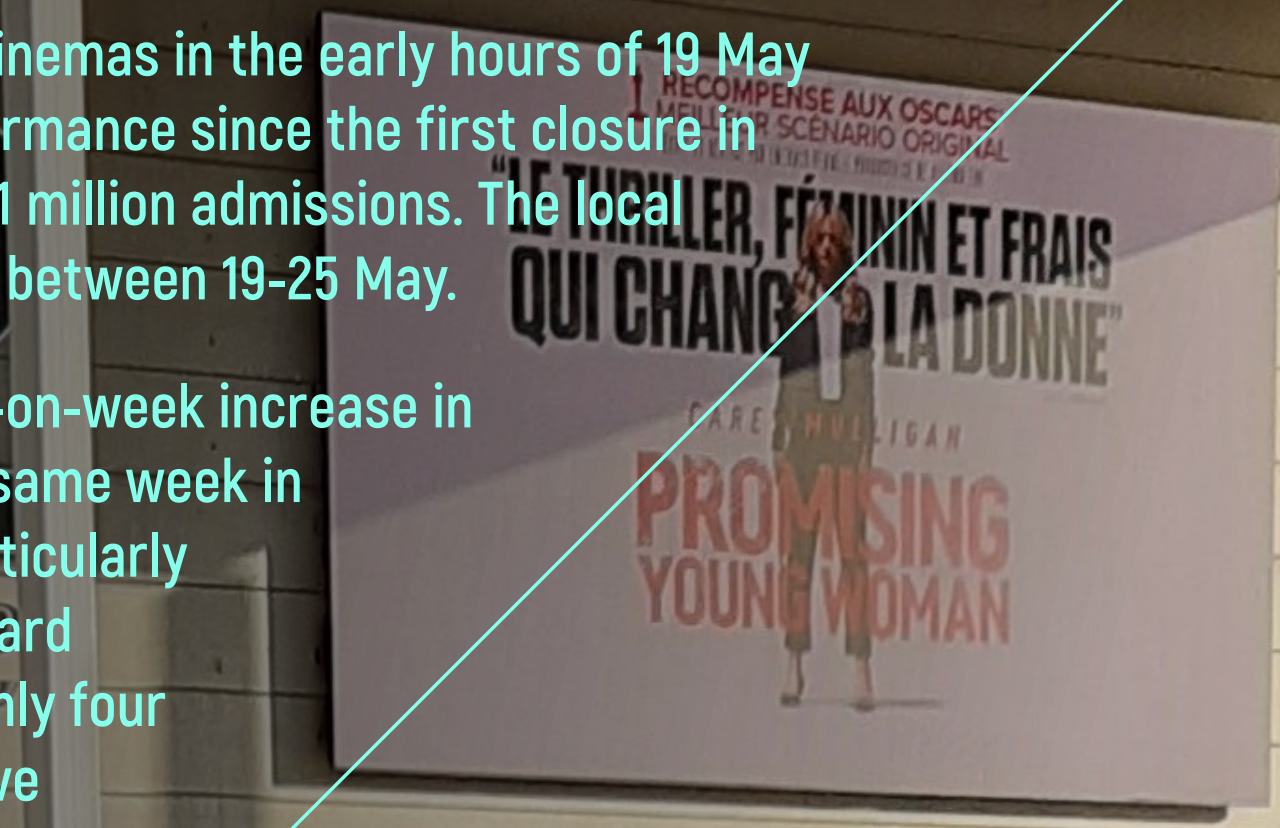
THE RECOVERY OF FRENCH CINEMAS IN 2021

French cinema-goers showed their passion for the Big Screen by queuing at their local cinemas in the early hours of 19 May 2021. In the following four days, French cinemas registered the third best weekend performance since the first closure in March 2020 with 1.6 million tickets sold. Back in June 2020, it took them 10 days to reach 1 million admissions. The local title *Adieu les cons*, first released in October 2020, attracted over 500,000 cinema-goers between 19-25 May.

La Fête du Cinéma, organised between 30 June and 4 July, resulted in a 94 per cent week-on-week increase in admissions, as over 3.5 million people flocked local cinemas – 16 per cent more than the same week in 2019 and 18 per cent more than the same week in 2018. The first half of July 2021 was particularly successful for recovering French cinemas, as they managed to consistently reach standard pre-pandemic results. Since 19 May 2021, five titles reached 1 million admissions, when only four had managed to do so between 22 June and 29 October 2020. In what was another positive signal, below 25 years-old represented 39 per cent of visitors according to data from Vertigo – compared to 37 per cent over the same period in 2019.

The swift and unexpected introduction of a COVID-19 pass to enter French cinemas resulted in a 70 per cent drop in admissions between 20 and 21 July, from when the rule was enforced. However, the local blockbuster *Kaamelott* attracted over 800,000 visitors on its first week in cinema and few weeks later, *OSS 117: Alerte rouge en Afrique noire* attracted 210,000 visitors on its opening day in early August, doing better than the two previous films in the series.

In total, French cinemas recorded 3.6 million admissions in May 2021, 8.4 million in June and 14.1 million in July, registering consecutive months of growth, with gradually eased restrictions, indicating the industry's ability to come back stronger from this pandemic.



CINEMA OPENINGS IN 2021

Just in time for the Sarajevo Film Festival, the Austrian cinema chain Cineplexx opened a new cinema in Sarajevo on 16 June 2021. With 8 screens and more than 1,000 seats, this new site is equipped with all the latest technologies, offering a state-of-the-art experience to local cinema-goers.

This is just one example of a major cinema opening since the start of the pandemic, despite the financial and logistical challenges it represents. In China, nearly 6,000 new cinema screens were built in 2020 alone. In Saudi Arabia, the local cinema chain MUVI announced it would grow to 307 screens nationwide over 2021, opening 23 new sites. These investments illustrate the strength and resilience of the film industry worldwide.



Photo: Cineplexx

The value of cinema and the theatrical window

Ensuring that, where appropriate, each film has an exclusive release in cinema theatres remains a top priority for UNIC and the cinema operators it represents. Any move to establish a very short window – or to eradicate it entirely – would put hundreds of thousands of jobs at risk and inevitably lead to less rather than more diversity of films and cinemas.

Exclusivity is vital for the health of the film and cinema industry and something that ultimately benefits the entire film value-chain, from financing to distribution, throughout each film's life-cycle. Box office revenues are redistributed and benefit the whole industry, actively contributing to the financing of European content and supporting European distributors and producers.

This is also thanks to the transparency that exists in the cinema exhibition industry when it comes to box office figures, stark contrast to the position on streaming data and actual revenue created by VOD platforms, who mostly base success on subscriptions.

Cinemas are also recognised as the best starting point for a film which gains visibility before, during and after its time on the Big Screen. That visibility and success impacts subsequent release windows. Positively, a theatrical release means more revenue for all stakeholders in every stage of a movie's life, which in turn can be invested in new content and in improving the experience. It also provides the opportunity for the widest possible audience to discover and enjoy as broad a range of film content as possible, offering unique cultural and social experiences and creating unparalleled excitement around releases.

Throughout 2020 and into 2021, a number of potential blockbusters were postponed by months, in some cases several times. Some studio titles even skipped the theatrical window altogether and were used as reference to try re-design a longstanding and proven release business model. But the performance of these films should be viewed – and only viewed – in the context of the exceptional circumstances surrounding their release.

Business practices and their results in the context of a pandemic should not represent benchmarks for what the future holds and the industry should commit to create the best conditions for the whole sector to recover as soon as possible. Recent day-and-date ‘release experiments’ from US studios have recorded lacklustre results, including massive decreases in box office on their second week in cinema, demonstrating the cannibalising effects that come with reduced exclusivity. Some studios have also faced a backlash from the ‘talent’ side, for a lack of involvement in the decision-making process. And these films are inevitably also amongst the most pirated as soon as they were made available on streaming platform, further hurting their performance at the box office as well as online, to no-one’s benefit.

The Big Screen
will remain a
unique, event-
driven common
experience

The cinema experience offers choice and is not one that ties the audience to one provider or service. It also offers a unique community and social aspect, which the pandemic has made even more essential for our health and wellbeing. If anything, weeks of lockdown have proven that the Big Screen cannot be replicated at home and will remain a unique, event-driven common experience.



HOLOP
Russia (2019)
Central Partnership

PILSĒTA PIE UPESLatvia, Czech Republic, Lithuania
(2020) ACME Film

Cinemas will continue to play the role they always have

While there remains understandable uncertainty as to how long it will take cinemas to fully recover, and when they will be able to operate without any restrictions on occupancy, operators are hopeful that progress in the roll-out of vaccination across Europe and globally will lead to a more stable recovery process in the coming months. Various forecasts, including from the global technology research companies Omdia and PricewaterhouseCoopers, predict the cinema industry to recover by 2022-23 and return to its pre-pandemic growth trajectory by 2024-25.

The focus of the entire industry must be on ensuring that this recovery happens as quickly as possible so that audiences are able to return to enjoy the unique experience of watching films on the Big Screen. This will depend on having a strong and diverse slate to entice audiences out of their homes and into cinemas.

Ultimately, cinemas will continue to play the role they always have – as the most popular and affordable form of entertainment available outside of the home.

PROJECTED GLOBAL GROWTH by segment 2020–25 (Top 3)

30%

VIRTUAL REALITY

29%

CINEMA

27%

DATA CONSUMPTION

THE VALUE OF CINEMA

In light of the COVID-19 pandemic and its impact on cinemas across Europe and beyond, here is a reminder of what makes the cinema sector so special, unique and essential for European citizens.

CINEMA IS CULTURE

European cinemas boost cultural dialogue in one of the most diverse regions in the World. They provide an opportunity for people to understand and express their sense of local, national and European identity, reaching out to young and old and those from different backgrounds. In the coming weeks and months, celebrating European diversity will be more important than ever.

CINEMA IS COMMUNITY

Whether located in large cities, smaller towns or rural areas, cinemas are modern meeting places that help stimulate dialogue on a range of important issues, combat social exclusion, revitalise interest in culture and foster innovation and creativity. Cinemas will play a vital role in bringing people together once the pandemic is behind us.

THE ECONOMIC ROLE OF CINEMA

Cinemas contribute significantly to GDP, create local jobs and are essential to the development of the creative industries, a cornerstone of modern knowledge-based economies. The cinema sector also forms an integral component of Europe's broader cultural and creative fabric, creating value for the entire European film industry, and will form a crucial part of its recovery.

CINEMA IS INNOVATION

European cinema operators are global leaders in terms of cutting-edge technology, the result of substantial investment and continued innovation. Innovative and creative solutions both inside and outside of the screening room provide audiences across Europe with the most engaging, diverse and immersive experience possible.

INNOVATION, DIVERSITY AND SUSTAINABILITY

Adapting to these challenging circumstances, European cinema operators proactively experimented and innovated, adjusting their offer to the changing needs and preferences of their audiences.

Cinema operators programmed an unparalleled offer of international, European and local films – not to mention other types of content, such as screenings of live events and video game competitions. In addition, private screenings and more generally premium experience offers - particularly suitable in times of social distancing – were rolled out throughout the year, making it possible for cinema-goers to enjoy the Big Screen experience whatever the restrictions.

Through employing innovative marketing tools and in partnership with some of the leading companies in the digital world, exhibitors were able to engage with their customers not only after but also during successive lockdowns. They were able to keep the relationship with their audience alive on social media, encouraging their community to engage and share their love and passion for the Big Screen. Those digital tools have also allowed the sector to identify new ways to improve the customer experience and ensure safe re-opening through a focus on online bookings, reserved seating or videos to explain new health and safety measures.

Cinemas continue to reinvent themselves and deliver state-of-the-art experiences. Massive investment in innovation – both inside and outside of the screening room – to offer the very best experience and customer journey to cinema-goers in theatres large and small have contributed to growing box office results in recent decades.

UNIC expert groups on marketing, technology and retail (including the UNIC Circular Economy Retail Group) – as well as the UNIC Women's Cinema Leadership Programme – are just some of the key initiatives launched in recent years by our association to facilitate exchange of information and best practices within the cinema industry on all these pressing issues.

If anything, the pandemic has highlighted how dynamic and flexible the cinema sector is today, catering to changing and increasingly fragmented preferences. The future recovery of the industry depends on its ability to deliver diverse, high-quality content to the Big Screen.

ACCESSIBILITY

The sector continues to improve access to cinema for all, as digitisation has facilitated the greater use of subtitling and audio description technologies for deaf and visually impaired customers inside the screening room. Below are a few recent initiatives to ensure the accessibility of the Big Screen experience to the largest number.

In the UK, the UK Cinema Association Technology Challenge Fund was established in 2018 to explore new ways of delivering 'closed captions' not only to those who needed them, but potentially for all cinema screenings, massively widening the range of films available to deaf customers, and their ability to enjoy the Big Screen experience with friends and family.

In the Netherlands, the Dutch cinema association NVBF in collaboration with the Netherlands' Audiovisual Accessibility Foundation (SAT) has in 2019 made available two free apps for hearing and visually impaired cinema-goers. In addition, the Netherlands Film Fund introduced an obligation for local productions to make their films more accessible.

In Finland, almost all local films are now subtitled for hearing impaired cinema-goers and provided with an audio description for visually impaired people, with the support of The Finnish Film Foundation. In 2021, a professional accessibility guide was made available to advise and provide more information to cinemas and their partners in order to promote the accessibility of screenings and to identify practical problems.



INDUSTRY EVENTS

UNIC has been organising regular events in Brussels, including premiere screenings, industry seminars, policy outreach days and even a yearly conference at the European Parliament. All of these were put on hold because of COVID-19 in 2020 and the first half of 2021. We're looking forward to seeing you again in the coming months to discuss the current trajectory of European cinema-going, audience trends and the latest in policy developments that impact the sector – keep in touch!

CineEurope

Official Convention of the International Union of Cinemas

Each year, CineEurope, UNIC's official convention and the biggest get-together of cinema operators in Europe, the Middle East and Africa, provides a unique opportunity for industry professionals to gather in Barcelona to network, reflect on and debate current issues, discover the latest innovative solutions for the cinema-going experience and celebrate the Big Screen together with US and European studio partners.

CineEurope 2021 took place from 4-7 October at the CCIB in Barcelona, after the 2020 edition was cancelled. The convention served to highlight the strength of our sector and its power to bring everyone together and explored ways to emerge stronger from the pandemic.



CINEMA DAYS

Each year in Brussels, the UNIC Cinema Days welcome an exclusive group of senior executives and key figures from across the European and international cinema landscape for an exciting two days of debates, workshops and social activities. The UNIC Cinema Days 2020 took place online on 12 and 13 October, with the aim to provide an opportunity to our members and partners to discuss the latest trends in the ever-changing cinema business and explore the “new normal” for our sector.

Throughout the first half of 2021, UNIC organised a series of virtual events to engage with its members and share updates on the state of the European cinema industry – with the invaluable support of industry partners at Celluloid Junkie, the BoxOffice Company and Comscore. On 23 June 2021, more than 100 UNIC members and industry partners joined us for a special UNIC ‘Mini’ Cinema Day to celebrate the re-opening of cinemas across Europe in 2021. More information about these sessions can be found on the UNIC website.



EUROPA CINEMAS INNOVATION PRIZE

UNIC was part of the selection committee for the new Europa Cinemas funding scheme “Collaborate to Innovate” which aims to encourage and support network exhibitors’ initiatives related to innovation and developed collaboratively at a national, regional or European scale, foster innovative practices for a better circulation of European films and boosting their audiences and test new cinema-going experiences and developing attractive content and services for audiences, in particular the younger ones. Awardees can be found on the Europa Cinemas website.

Photo: Europa Cinemas

GLOBAL IMPACT

Reflecting the wider audiovisual sector itself, cinema has evolved into an increasingly global business. While Europe remains a key building block of the global film industry, growing admissions around the world have redefined our historic conception of the film business. The COVID-19 pandemic has further highlighted the global nature of the cinema industry, as countries emerged from the pandemic in different ways and at a difference pace.

GLOBAL CINEMA FEDERATION



In June 2017, the World's leading cinema operators announced the establishment of the Global Cinema Federation, a worldwide grouping intended to represent cinema exhibition's global interests. Operators involved recognise the extent to which the business opportunities and policy challenges they face are shared by counterparts across territories. To address these and raise the profile of cinema with global regulatory bodies and industry partners,

eleven leading cinema operators and the two most internationally-active trade bodies have come together to found the Global Cinema Federation, a federation of interests intended to inform, educate and advocate on behalf of the sector worldwide. Throughout the pandemic, the GCF has exchanged information about the impact of COVID-19 on cinemas and support measures, while also issuing common letters to the studios to call for new content to be released.



QUO VADIS, AIDA?

Bosnia and Herzegovina, Austria, Romania, Netherlands, Germany, Poland, France, Turkey, Norway (2019) Deblokada

203,600

DIGITAL CINEMA SCREENS GLOBALLY

+3% increase on 2019

\$12 BILLION

BILLION GLOBAL BOX OFFICE IN 2020

- 72% decrease on 2019

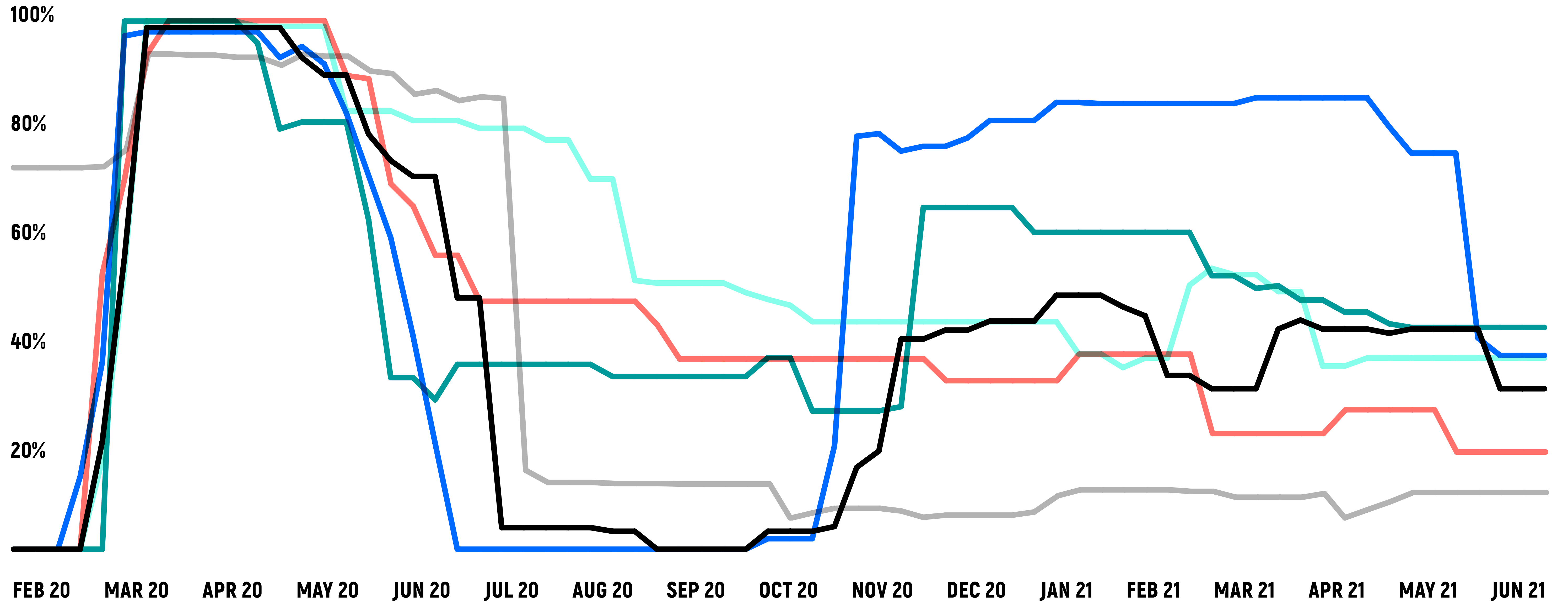
- 80% in the US and Canada / - 68% in Europe, Middle East & Africa / - 66% in Asia Pacific / - 82% in Latin America



PADRE NO HAY MAS QUE UNO 2 Spain (2020) Atresmedia Cine

PERCENTAGE OF CINEMA SCREENS CLOSED BY REGION

WESTERN EUROPE
CENTRAL AND EASTERN EUROPE
NORTH AMERICA
CENTRAL AND LATIN AMERICA
MIDDLE EAST AND AFRICA
ASIA AND OCEANIA



BIG SCREEN FEATURE

**SIGN UP ONLINE ON
[UNIC-CINEMAS.ORG](https://unic-cinemas.org)
TO SUBSCRIBE TO OUR
NEWSLETTER!**

Big Screen Feature provides a behind-the-scenes look at the world of cinema exhibition including technology, policy, facts and figures, upcoming events and insights from cinema professionals themselves.

“What I cherish the most is the intensity of the cinema experience.”



Gregory Theile
CEO, Kinopolis, Germany

The moment you fell in love with the Big Screen?

“Kinopolis is a family business and has existed for more than 115 years. My great grandfather opened his first theatre in 1905. The cinema has always been part of my life and it is fair to say that cinema defines our family’s DNA. I have countless memories of watching movies in one of our cinemas. Being a big *Star Wars* fan as a kid, one of the most memorable cinema experiences was definitely watching *The return of the Jedi* on the Big Screen. I just loved the story, the music, the characters, the fantasy and the suspense. Now, after so many years, the fascination and love for the cinema is stronger than ever. When I watched the opening of *The Rise of Skywalker* in our Dolby Cinema at the Mathäser Filmpalast in Munich I knew that – no matter what – the magic of the cinema can’t be replaced by anything else.”

“The best thing about the cinema experience for me is that it is UNIQUE and MEMORABLE.”



Laura Fumagalli
Marketing & Events Manager, Arcadia Cinemas, Italy

The best thing about the cinema experience?

“It is unique because, besides being an out-of-home, full dedicated attention, communal experience, all of us – as patrons – are LITTLE in front of the immersive huge screen and great sound, great architectural environment and, last but certainly not least, great story in front of us.

It is memorable because it is impossible, in any other viewing contexts, to reach that kind of genuine appreciation and excitement of truly raving fans. Only the Big Screen gives you those unique experiences that you will remember forever and talk about with your family’s future generations and friends for many years to come.

We look forward to being back in cinemas to support the creative community and offer more unique and memorable film experiences on the Big Screen to both present and future generations of audiences.”

DIVERSITY AND INCLUSION

Although limited data is available, estimates suggest that women remain significantly under-represented across almost all leadership levels in the European cinema industry.

The need to promote more women into management positions in cinema is as strongly-rooted in business rationale as it is in equality. Numerous studies have demonstrated that companies that strive for gender-balanced leadership outperform others in terms of profitability, turnover and shareholder value.

This is why UNIC launched the Women's Cinema Leadership Programme in 2017. It has since rolled out four editions to provide "up and coming" female cinema professionals with a unique opportunity to receive one-to-one career advice and guidance from a female senior industry executive recognised for her leadership and business success across the wider cinema landscape.

Alongside this, UNIC continues to work on all aspects of diversity within the cinema exhibition sector, including equal representation and accessibility, in the aim of recognising best practice, reflecting on what the industry can do better to encourage and promote more inclusive practices across the board.

UNIC WOMEN'S CINEMA LEADERSHIP PROGRAMME

In June 2017, we launched the Women's Cinema Leadership Programme – UNIC's flagship initiative to broaden and deepen the talent pool for leadership in our sector and to empower female professionals in order for the industry to realise its full potential. Each year, the Programme provides rising female leaders with an exclusive opportunity to receive one-to-one mentoring and networking opportunities, and to learn from an outstanding group of women executives from across the cinema landscape. Following the success of the first four editions, in 2021 UNIC launched the fifth edition of the Programme, welcoming a new group of mentors and mentees representing 19 countries and 22 companies.

In September 2020, UNIC launched a newsletter for the Programme, with the aim of providing its community of mentors and mentees with a platform to engage with each other and share experiences and learnings. The monthly newsletters feature interviews with current and past participants, Programme updates and relevant information for the group.

UNIC has also been cooperating with the online publication Celluloid Junkie, who published a series of articles and interviews about the scheme. In addition, four years ago Celluloid Junkie launched an annual list of the "Top 50 women in cinema" to acknowledge the success and achievements of women in exhibition.



UNIC
WOMEN'S
CINEMA LEADERSHIP PROGRAMME

CJ
Celluloid Junkie

UNIC EXPERT GROUPS

UNIC MARKETING GROUP

The UNIC Marketing Group brings together marketing executives from major European cinema operators. It shares insights and opinions regarding key audience trends across Europe and examines the latest engagement opportunities in cinema as well as in other industries.

The group met virtually in December 2020 to discuss key audience trends as well as engagement opportunities and challenges related to the ongoing COVID-19 pandemic and the recovery of the European cinema industry.

In January 2021, UNIC organised a virtual seminar on cinema technology, involving members of the UNIC Technology Group as well as industry partners. The event was hosted and co-moderated by our colleagues at Celluloid Junkie and Filmgrail, best known for the CJ Cinema Summit, a webinar launched in 2020 to help the global motion picture community reconnect during the COVID-19 pandemic.

Throughout the pandemic, the UNIC Technology Group has continued to actively engage with its partners within the cinema technology community, including the European Digital Cinema Forum, the International Cinema Technology Association and the Inter-Society Digital Cinema Forum. With the support of manufacturers and service providers, UNIC members have been able to ensure the efficient maintenance of their digital cinema equipment throughout periods of closure.

UNIC TECHNOLOGY GROUP

The UNIC Technology Group brings together senior cinema technology executives from across Europe. It monitors and evaluates technology trends and innovation cycles in the film industry and advises UNIC's Board of Directors on key positions regarding ongoing technological developments across the cinema landscape.

UNIC RETAIL GROUP

The UNIC Retail Group is formed of retail and concession managers from leading European cinema operators. The group aims to help exhibitors of all sizes and locations to optimize their retail business by conducting research and sharing best practice.

As part of this initiative, in February 2020 UNIC, The Coca-Cola Company and The BlueStocking Partnership launched the BriefCases project. In collaboration with the University of the Arts London and Norwich University of the Arts, the project tasked design students from various courses with designing innovative disposable packaging and visual communications messaging with the aim of increasing the amount of disposable packaging being recycled by making it easier for guests and cinemas. The winners presented their solutions at the UNIC Virtual Cinema Days in October 2020.

UNIC organised on 20 April 2021 a virtual seminar focusing on the issue of sustainability, in collaboration with The Coca-Cola Company. The event involved members of the three UNIC expert groups on cinema technology, marketing and retail. The objective of this seminar was to gain a 360° perspective on the issue of sustainability, its relevance for all key areas of cinema operations and to identify feasible and affordable solutions. The programme included a series of 'quick-fire' sessions, best practices and a panel involving members of the three UNIC expert groups. More information about the project as well as recent meetings of the group can be found on the UNIC website.

UNIC CIRCULAR ECONOMY RETAIL GROUP

The UNIC Circular Economy Retail Group, created in November 2019, brings together a large number of European cinema operators, representing companies of various sizes and locations, to workshop on the topic of sustainability – from both a legal and best practice standpoint – and develop strategies to reduce the impact of our industry on the environment.



POLICY Update

EU POLICY UPDATE

Working out of its Brussels office, UNIC's principal objective is to act as the voice of European cinema operators and their national associations on the European stage.

In doing so, the association engages both with the European institutions and the industry to provide a strong, unified voice for cinema exhibition. Be it through regular meetings with high-level policy-makers, organising events, participating in seminars, panels and conferences (both policy and industry-led) or producing publications outlining the industry's perspective on key policy issues, UNIC endeavours to ensure that the social, economic and cultural relevance of cinema-going remains front-and-centre in relevant regulatory discussions at the EU level.

This also involves fostering relations with policy-makers and industry representatives in all EU Member States (including colleagues from the wider film and audiovisual value-chain), bearing in mind the need for wholesome representation and influence. As and when necessary, the association also engages with national governments and regulators to ensure that cinemas remain central to both national and European growth strategies for film and that the right approach to culture and cinema is communicated as effectively as possible.

In 2020/2021, UNIC shifted much of its focus towards policy developments related to the COVID-19 pandemic and its impact, with cinemas being one of the hardest-hit sectors and in need of urgent support measures at national and European level.

UNIC STATEMENTS

UNIC and its partners from Europe's cultural and creative sectors have actively engaged with policy makers throughout the pandemic, publishing a series of official statements – all available on the UNIC website, including some of the headlines below.

**Let's stick together:
the long-term health
of the European cinema
sector – and all of those
who work in it – demands
unity and responsibility**

– 20 MARCH 2020

**Time to put words into
action! Europe's cultural
and creative sectors
call for ambitious
EU budgetary measures
to get through the
COVID-19 pandemic**

– 5 MAY 2020

**European cinema
body demands further
public funding support
for cinemas during
COVID-19 pandemic**

– 3 NOVEMBER 2020

**A welcome budgetary
increase for Creative
Europe MEDIA, an essential
programme for the recovery
and sustainability of the
European film and audio-
visual sector in COVID-19
times**

– 22 JANUARY 2021



PLATZSPITZBABY

Switzerland [2020] C-Films AG

The aim is to mitigate the economic and social impact of COVID-19 and make European economies and societies more sustainable, resilient

While public health remained the priority, as the pandemic progressed, by the focus turned to the economic outlook; lockdown measures, although absolutely necessary, forced countless sectors to close their doors practically overnight, including cinemas. These long months of closure, coupled with the necessary limitations brought by safety guidelines upon re-opening, have resulted in significant losses.

In response, the European Commission and Council of the EU both came forward with proposals for an EU recovery package (Next Generation EU) and accompanying Multi-annual Financial Framework (MFF) budget for 2021-27, alongside a host of other initiatives at EU level including support for temporary work schemes (SURE), State Aid flexibility, the Coronavirus Response Investment Initiative (CRII) to name a few.

The Council's proposal, adopted in July 2020, represented a historic agreement among Member States, who agreed on a package enabling the EU to borrow money to finance its recovery alongside its MFF budget.

Following the negotiations between the European Parliament, the Council and the Commission, a preliminary political agreement on the EU MFF budget for 2021-27 was reached in November 2020.

In December 2020, EU leaders and MEPs gave their final green light to the €1.8 trillion MFF budget. The final text sets out €15 billion in top-ups for key EU programmes, the so-called "10 selected EU flagship programmes" and Horizontal issues such as biodiversity targets, gender and equal opportunities.

The cultural and creative sector had been earmarked as one of the ecosystems that had been the most impacted by the pandemic

Under NextGenerationEU, a Recovery and Resilience Facility (RRF) instrument was launched. This will make €672.5 billion in loans and grants available to support reforms and investments undertaken by Member States. The aim is to mitigate the economic and social impact of COVID-19 and make European economies and societies more sustainable, resilient and better prepared for the challenges and opportunities of the green and digital transitions. The RRF entered into force on 19 February 2021.

To benefit from the support of the Facility, Member States had to submit their recovery and resilience plans to the European Commission by April 2021 – these were then reviewed by the Commission and presented to the Member States for adoption.

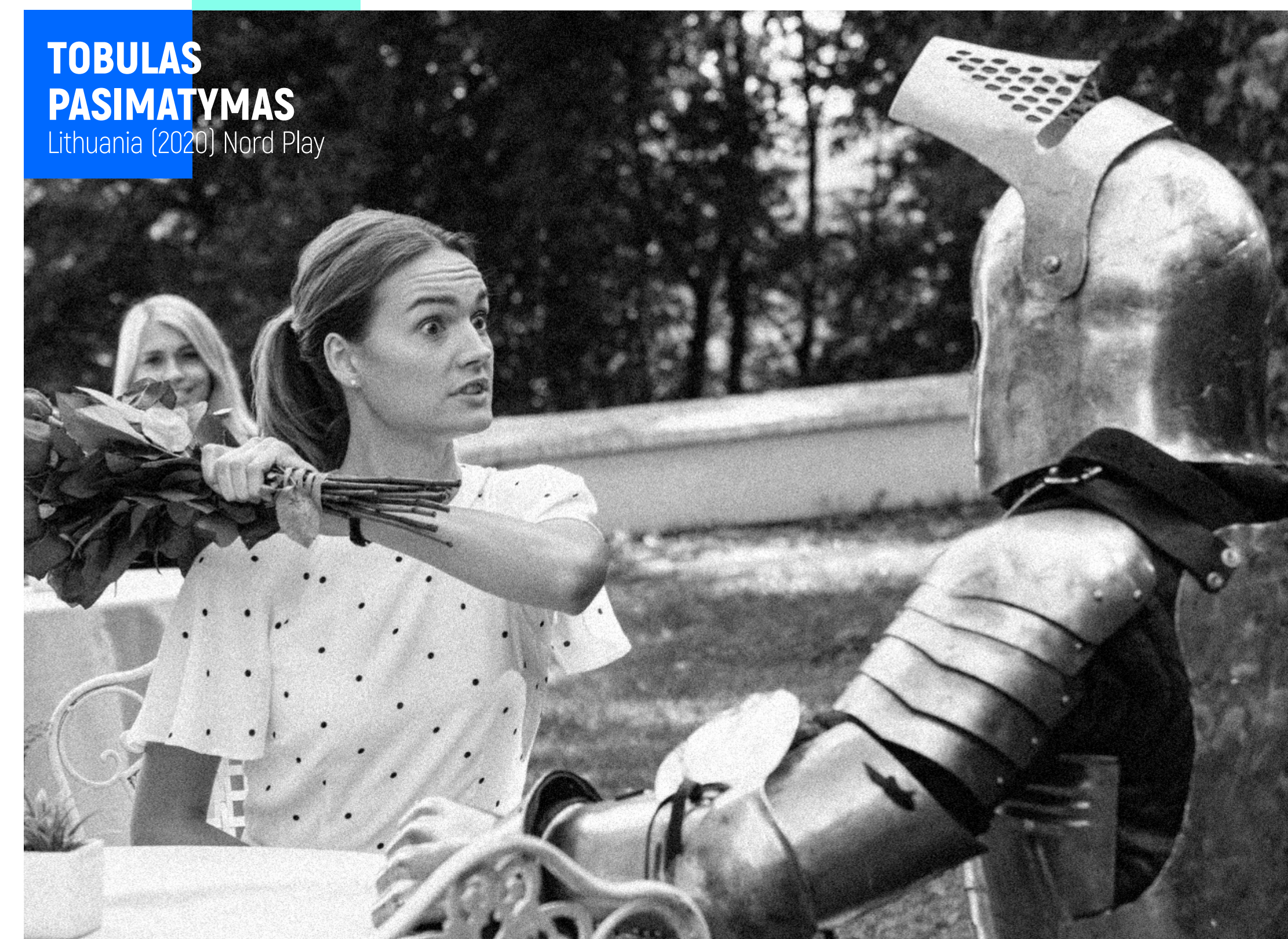
The cultural and creative sector had been earmarked by the Commission in its proposal as one of the key 14 ecosystems that had been the most impacted by the pandemic and that should therefore be a priority for the recovery under this new instrument. UNIC, together with several organisations, advocated for dedicated support to cultural and creative industries under the national Recovery and Resilience Plans. Unfortunately, while the Commission instructed Member States to dedicate at least 30 per cent of their national RRF to sustainability measures and 20 per cent to digitisation, no indications were given to support CCIs. Therefore, many national RRF have not included a single reference to the sector.

In parallel, UNIC has continued its work on files that are relevant to the industry.

The Creative Europe Programme received a final envelope of €1.642 billion and was launched early 2021. To support the industry post-COVID-19, the 2021-27 budget was frontloaded with a third of the budget to be committed in the first 2 years of the programme. In 2021, the Creative Europe programme will benefit from an overall increase of 60 million EUR compared to 2020, a budget increase of 25 per cent compared to the previous year.

The European Commission also published its long-awaited assessment of the Geo-blocking Regulation on 30 November 2020. While it excludes audiovisual services from the scope, for now, another review is scheduled for 2022 and a stakeholders' dialogue will be launched in H2 2021 "with a view to foster a wider availability of content across the Union", in the framework of the Media and Audiovisual Action Plan. The Portability Regulation – allowing EU citizens to "carry" their online subscription when travelling to another EU Member State – is also being evaluated.

TOBULAS PASIMATYMAS
Lithuania [2020] Nord Play



Commissioner Breton – mainly in charge of issues related to cinemas and audio-visual – published the “Media and Audiovisual Action Plan” in December 2020. The plan will guide the European Commission in its actions to support the film and audiovisual sector, particularly via the MEDIA Programme and is built on three pillars: recover, transform, enable & empower. 10 accompanying actions were identified, with a view to help production and distribution companies to compete on a European and global level. The use of data, the need to become greener and more inclusive, increased availability of content but also the use of virtual reality are mentioned as key actions.

UNIC, together with several European AV organisations, submitted amendments to the Council draft conclusions and to the Parliament draft report. The Council conclusions were adopted on 18 May 2021 and recognized the importance of territorial exclusivity for the European film and audiovisual sector, while also acknowledging the role of cinemas. Following the publication of the European Parliament draft report on the Media and AV Action Plan, UNIC worked with EP political groups to push for amendments related to cinemas. The report was adopted by the Culture committee in September 2021.

The Copyright in the Digital Single Market Directive is also under implementation in Member States. Most relevant for the industry was the implementation of Article 17, which provides for new rules on content-sharing platforms. At last, the European Commission – after a series of meetings with relevant stakeholders - published its guidelines in May 2021, three days before the deadline for implementation. It remains to be seen how the new Article will be used in court cases about content-sharing platform responsibilities.

The implementation of the Audiovisual Media Services Directive (AVMSD) is also ongoing, with several countries having decided to implement Article 13.2 and require online

platforms to contribute to the national film funds. By 19 December 2022 at the latest, the Commission will have to submit a report on the application of this Directive.

The European Commission also unveiled its Digital Services Act Package (Digital Services Act and Digital Markets Act) on 15 December and the Portuguese Presidency published two compromise texts before the end of its Presidency. On the Digital Markets Act, UNIC has been working on amendments together with a coalition of European AV organisations.

In the Parliament, the draft IMCO report on the DSA – the leading committee on the issue, associated with the Legal Affairs committee- was published at the end of May with exchanges in Committee and deadline for amendments in July, a vote in Committee in autumn and vote in plenary (first reading) in December 2021.

UNIC continues to work closely on the abovementioned files and broader developments in its 4 key parliamentary Committees: Culture & Education (CULT), Legal Affairs (JURI), the Internal Market and Consumer Protection (IMCO) and Industry, Research and Energy (ITRE). On the Commission’s side, this involves liaising with and following the work of the Commissioners responsible for key portfolios for cinemas, namely Thierry Breton (Internal Market), Mariya Gabriel (Innovation, Research, Culture, Education and Youth) and Executive Vice-President Margrethe Vestager (Europe Fit for the Digital Age).

Above all, and although to differing extents, it has been encouraging to see that culture remains a priority for certain figures within the European institutions. UNIC will redouble its efforts to ensure that cinemas remain at the heart of policymakers’ decision-making when it comes to support, rules and guidance for the entire film value-chain, both in light of COVID-19 and more generally. Doing so includes recognition of the key principles on which cinemas rely – such as territoriality and theatrical exclusivity. It is only by bearing these in mind and refraining from pursuing short-term gains over long-term prosperity that the sector – along with the wider film value-chain it greatly contributes to – can count on a bright future once we emerge from the pandemic.

SINGLE USE PLASTIC DIRECTIVE (SUPD)

According to the SUPD, the use of expanded polystyrene is now banned since 1 January 2021 & new cups and food packages were ordered, being made primarily out of cardboard/paper. However, the COVID-19 pandemic increased the demand for domestic single use items and home deliveries, resulting in a shortage in the packaging industry. In addition, all types of disposable cups that are to be delivered and sold after 3 July 2021 in the EU must have the SUP label but there is no guarantee that these cups will be available in the second half of the year - due to shortage issues and a global shipping trade crisis. Due to these shortages, the producers of these cups are prioritizing their largest customers in their supply chain, which do not include the cinemas.

Because of this, cinema operators may not be able to comply in time with the SUPD requirements - UNIC has raised the issue at European level to try to ensure that cinemas will not get sanctioned for not complying with the Directive requirements but are given sufficient time to receive their new cups and packages.

POLICY PARTNERS

UNIC manages the exhibition sector's relations with the European Commission, the European Parliament and the Council of the European Union. It also represents cinemas' interests when dealing with other international bodies. We are a member of several coalitions and industry associations, some of which are featured on this page.

Creativity Works!

Creativity Works! is a leading coalition established by UNIC and partners, representing Europe's cultural and creative sectors.

AV Coalition

UNIC is a proud member of the informal AV Coalition, which brings together organisations working across the audiovisual sector in Europe.

MEDIA Coalition

UNIC is a member of the informal MEDIA Coalition, a group of organisations concentrating its efforts on the future of the Creative Europe MEDIA programme.

Netopia

– Forum for the Digital Society

UNIC is a member of Netopia, a web publication and idea forum based in Brussels, stimulating discussion on the future of the internet.

Europa Cinemas

Europa Cinemas is the network of cinemas focusing on European non-national films, uniting more than 3,131 screens across 43 countries. Each year they recognise stand-out innovative projects and approaches from their members with the Innovation Prize, with support from Creative Europe MEDIA.

CICAE

The Confédération Internationale des Cinémas d'Art et d'Essai (CICAE) is a non-profit association aiming at promoting cultural diversity in cinemas and festivals.

EAO

UNIC is a member of the European Audiovisual Observatory's Advisory Committee, a body of the Council of Europe.

EUIPO

UNIC is a private-sector representative of the European Observatory on Infringements of Intellectual Property Rights (EUIPO).

WIPO

UNIC serves as an observer at the World Intellectual Property Organization (WIPO), the global forum for intellectual property services, policy, information and cooperation.

KEY AREAS OF INTEREST

- ▶ **REGULATION ON ADDRESSING UNJUSTIFIED GEO-BLOCKING**
- ▶ **DIRECTIVE LAYING DOWN RULES ON THE EXERCISE OF COPYRIGHT AND RELATED RIGHTS APPLICABLE TO CERTAIN ONLINE TRANSMISSIONS OF BROADCASTING ORGANISATIONS AND RETRANSMISSIONS OF TELEVISION AND RADIO PROGRAMMES**
- ▶ **DIRECTIVE ON COPYRIGHT IN THE DIGITAL SINGLE MARKET**
- ▶ **COPYRIGHT ENFORCEMENT**
- ▶ **DIGITAL SERVICES ACT (DSA) AND DIGITAL MARKETS ACT (DMA)**
- ▶ **REGULATION ON CROSS-BORDER PORTABILITY OF ONLINE CONTENT**
- ▶ **AUDIOVISUAL MEDIA SERVICES DIRECTIVE (AVMSD)**
- ▶ **REGULATION ESTABLISHING THE CREATIVE EUROPE PROGRAMME/MEDIA PROGRAMME**
- ▶ **DIRECTIVE ON THE REDUCTION OF THE IMPACT OF CERTAIN PLASTIC PRODUCTS ON THE ENVIRONMENT**
- ▶ **ACCESSIBILITY & INCLUSION**
- ▶ **MEDIA AND AUDIOVISUAL ACTION PLAN**
- ▶ **MUSIC RIGHTS**



CONCLUSION

The last 18 months have undeniably been the most challenging faced by European cinemas in their long history. COVID-19 has dealt the sector a devastating blow, one from which the industry will take some time to recover.

The strong performances of cinemas around the world upon re-opening in 2021 sent clear signals that audiences have been reassured of the safety of cinema-going and that they will return if new films are available on the Big Screen. Cinema operators' efforts to ensure the safety and wellbeing of staff and customers have already paid off.

UNIC will continue to call on its industry partners to remain united and ensure that the sector emerges successfully from this pandemic. The only way to achieve this is to focus on ensuring both sustainability for all stakeholders in the value chain as well as the availability of films to the benefit of audiences.

As proven by the remarkable results of 2019 and growing admissions and box office results across Europe and globally in the past decade, the cinema business stands on strong foundations.

Let's meet again soon, in a cinema, enjoying together the unique beauty of the Big Screen.



KLASES SALIDOJUMS 2

Latvia (2020) LabsKino

MEMBERS AND PARTNERS

Association members

Austria

**Fachverband der Kino-,
Kultur und Vergnügungsbetriebe**

Belgium

**Fédération des Cinémas de
Belgique**

Czech Republic

Czech Cinema Association

Denmark

Danske Biografer

Finland

**Finnish Cinema Exhibitors'
Association**

France

**Fédération Nationale
des Cinémas Français**

Germany

**HDF KINO e.V. (Hauptverband
Deutscher Filmtheater)**

Israel

Cinema Industry Association

Italy

**Associazione Nazionale Esercenti
Cinema**

Netherlands

**Nederlandse Vereniging van
Bioscoopexploitanten**

Norway

Film & Kino

Poland

Polish Exhibitor's Association

Russia

**Russian Association of
Cinema Owners**

Spain

Federación de Cines de España

Sweden

Sveriges Biografägareförbund

Switzerland

**SKV – ACS Association
Cinématographique Suisse**

Turkey

**Turkish Cinema
Operators' Association**

Ukraine

United Ukrainian Cinemas

UK

UK Cinema Association

MEMBERS AND PARTNERS

Operator members

Cinamon

Estonia, Latvia, Lithuania, Finland

Les Cinémas Pathé Gaumont

Belgium, France, the Netherlands,
Switzerland, Tunisia

Cinemax

Slovakia

Cineplex

Germany

Cineplexx

Albania, Austria, Bosnia and
Herzegovina, Croatia, Greece,
Italy, Kosovo, North Macedonia,
Montenegro, Serbia, Slovenia

Cineworld and Cinema City International

Israel, Ireland, Hungary, Poland, Czech
Republic, Romania, Bulgaria, Slovakia,
United Kingdom, United States

Karo Film

Russia

K Cineplex

Cyprus

Kinepolis Group

Belgium, Canada, France, Luxem-
bourg, the Netherlands, Poland,
Spain, Switzerland, United States

Kinopolis

Germany

Kino Arena

Bulgaria

Movies@Cinemas

Ireland

Nordisk Film Biografer

Denmark, Norway

Odeon & UCI Cinemas (AMC Group)

Austria, Estonia, Finland, Germany,
Italy, Ireland, Latvia, Lithuania,
Norway, Portugal, Spain, Sweden,
United Kingdom

Omniplex Cinemas

Ireland, Northern Ireland

Svenska Bio

Denmark, Finland, Sweden

UGC

Belgium, France

Vue International

Denmark, Germany, Ireland,
Italy, Lithuania, Poland, United
Kingdom

Yelmo Cines (Cinépolis Group)

Spain

UNIC is proud of its partnership with leading brands in the European Cinema Space

MEMBERS AND PARTNERS

Partners of European Cinema Exhibition Programme



**SHOULD YOU WISH TO
JOIN UNIC, PLEASE GET IN TOUCH**
communications@unic-cinemas.org

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Jaime Tarrazón (FECE)

Vice-Presidents

Richard Patry (FNCF)

Edna Epelbaum (ACS)

Tomasz Jagiełło (Polish Cinema Association)

Mario Mazzetti (ANEC)

EXECUTIVE TEAM

Laura Houlgatte, CEO

Guillaume Branders, Senior Industry Relations Manager

Diana Stratan, Project Manager

Laure Galtier, Office Manager

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UNIC

Union Internationale des Cinémas /

International Union of Cinemas

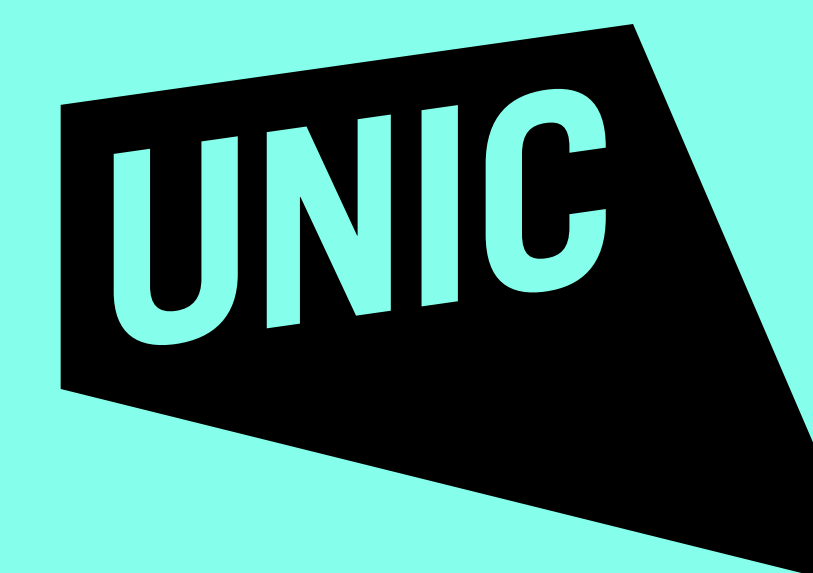
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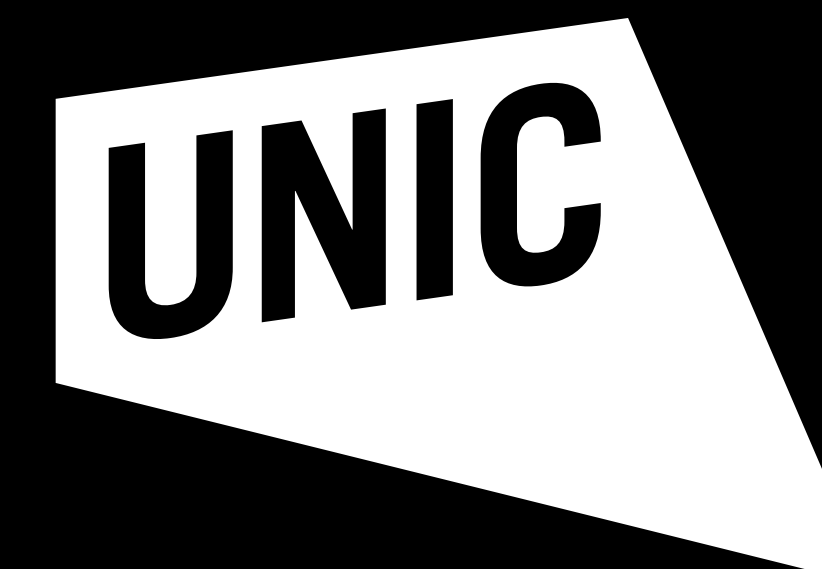
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UNION INTERNATIONALE DES CINÉMAS
INTERNATIONAL UNION OF CINEMAS

WE LOVE THE BIG SCREEN

UNIC is the European grouping of cinema
trade associations and key operators



UNION INTERNATIONALE DES CINÉMAS
INTERNATIONAL UNION OF CINEMAS