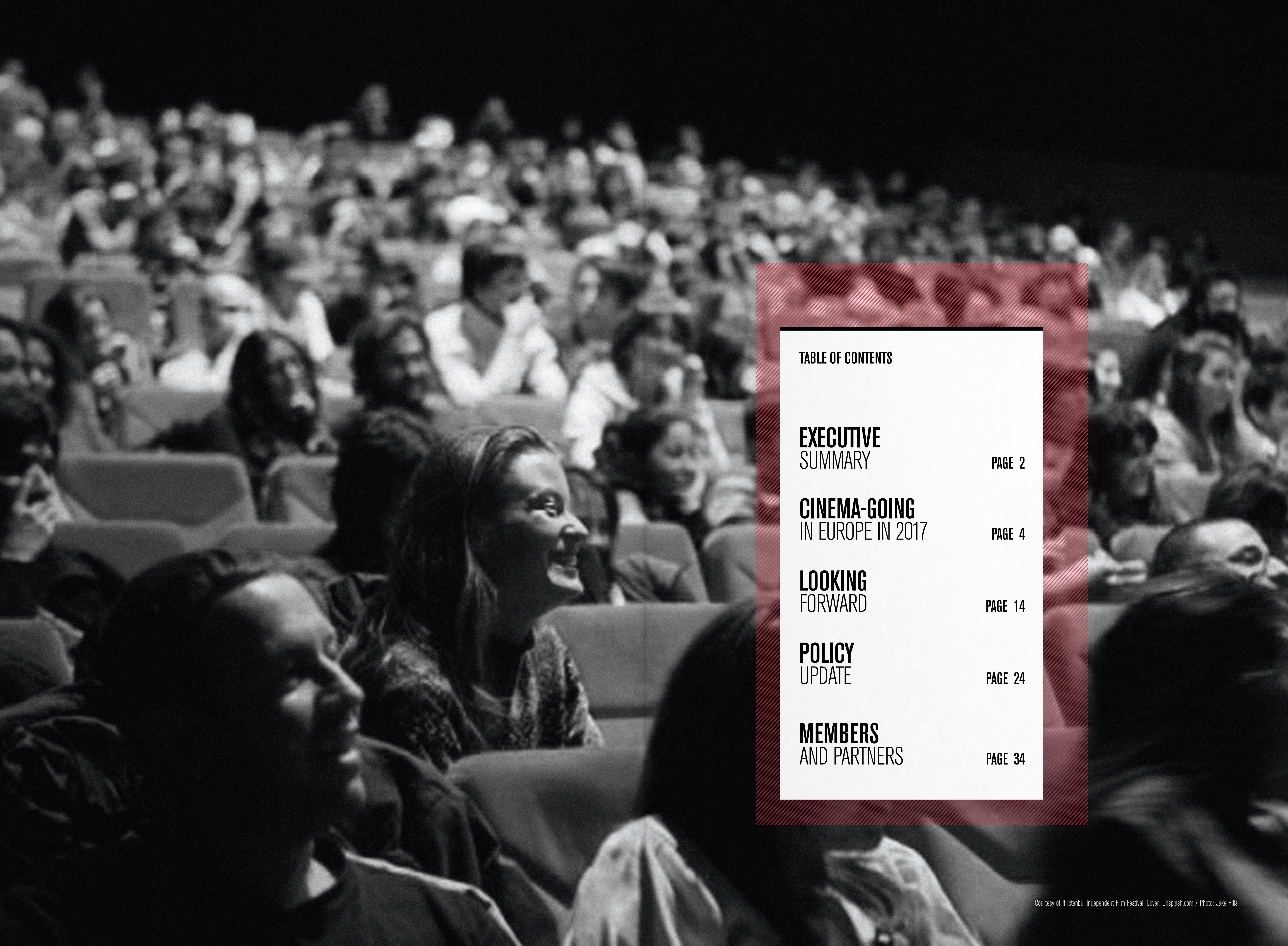
UNIC ANNUAL REPORT 2018

UNIC
Union Internationale des Cinémas
International Union of Cinemas



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Courtesy of !f Istanbul Independent Film Festival. Cover: Unsplash.com / Photo: Jake Hills

WELCOME

FROM PHIL CLAPP

CEO of the UK Cinema Association,
President of the International Union of Cinemas

Welcome to this, our 2018 report detailing the key cinema trends in Europe, one of the most diverse, innovative and dynamic regions in the World. UNIC, the Union Internationale des Cinémas / International Union of Cinemas, is the European grouping of cinema trade associations and key operators, covering 37 territories across the region. 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.

Cinema-going in Europe is thriving and remains one of the most popular leisure activities across the region.

In 2017, cinemas across UNIC territories accounted for 1.34 billion admissions and €8.6 billion in box office revenues, representing a quarter of the global theatrical market for films.

Europe's rich cultural diversity is reflected in an extremely exciting and varied cinema landscape that attracts audiences across the region. Its success in 2017, evident through the 2.5 per cent increase in admissions across UNIC territories, confirms the value of cinema-going and the importance of its continued positioning at the heart of governmental and industry efforts towards further prosperity for the entire European film sector – to the benefit of both industry stakeholders and audiences alike.

Furthermore, this positive trend not only illustrates the overall health of the industry but also points to the success of efforts in recent years to make cinema-going ever more engaging, diverse and immersive. This is the result of continued and massive investment in innovation from cinema operators and their partners, who engage with modern audiences through a variety of means.

37 territories
represented by UNIC

40,500 screens
across UNIC territories

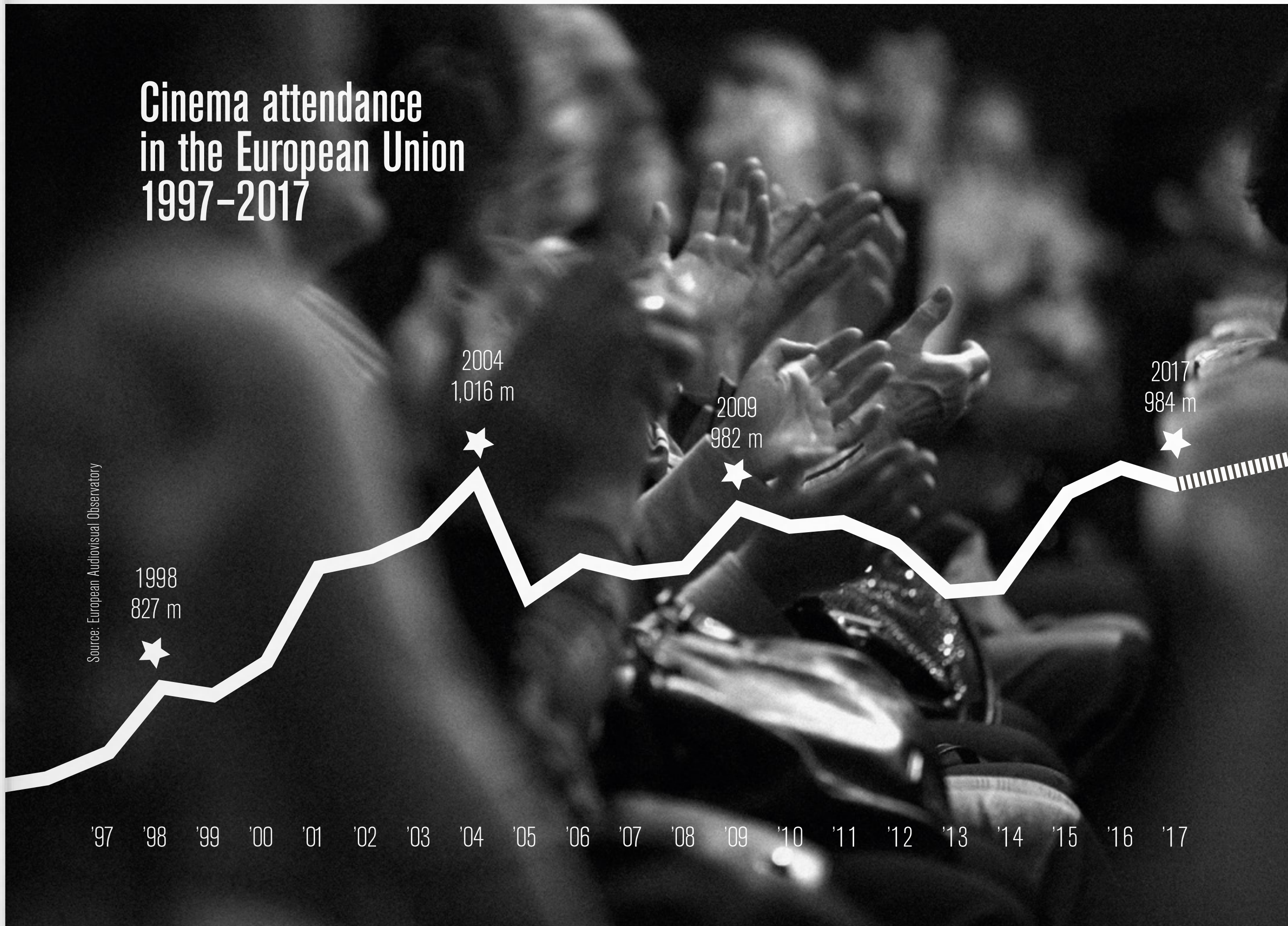
Continuous upgrades to the cinema "offer" in terms of innovation in theatres themselves as well as the sector's efforts in developing more fine-grained marketing approaches have resulted in audiences receiving a more tailored experience; one that stands out in an increasingly competitive and connected world.

Operators now have more channels than ever through which to attract and engage audiences. Evolving patterns in consumption and decision-making therefore represent both challenges and opportunities and it is of the utmost importance that operators build on their success in this regard in order to benefit both the audiences of today and the cinema-goers of the future.

UNIC will continue to stay on top of these new trends through active monitoring, to better support its members by keeping them up-to-speed with the fast-paced developments that impact the industry today.

Furthermore, we will continue to build on the strong relationships we have established with European, national and international government bodies and regulators in order to help shape the political and legal framework that influences our industry, with a view to enable all cinemas to flourish. What follows therefore also documents our advocacy efforts in Brussels and elsewhere.

We very much hope that you enjoy this report.



CINEMA-GOING IN 2017
EUROPEAN UPDATE

1.34 billion admissions / +2.5 per cent increase on 2016

€ 8.6 billion box office revenue / +1.7per cent increase on 2016

CINEMA-GOING ACROSS UNIC TERRITORIES IN 2017

2017 was another year of growth for the European cinema industry. While total admissions for EU Member States decreased slightly by 0.6 per cent compared to 2016, total admissions for all UNIC territories increased by 2.5 per cent, totalling 1.34 billion visits to the cinema.

Box office revenue across UNIC territories reached € 8.6 billion, an increase of 1.7 per cent from 2016 as Europe continues to represent a quarter of the global theatrical market for films. Total cinema revenue for the European Union slightly decreased by 0.5 per cent, totalling € 7.0 billion at the box office and representing the third-best results ever.

Cinema operators' continued investment in audience development initiatives and a slate of highly successful local films across Europe can be seen as the main drivers of this positive trend. As has been the case for previous years, however, box office was mainly driven by international titles, including, but not limited to, *Despicable Me 3, Beauty and the Beast, Star Wars: The Last Jedi, The Fate of the Furious* and *Pirates of the Caribbean: Dead Men Tell No Tales.*

RECORD YEAR IN RUSSIA, FRANCE AND THE UK

Russia reached over 212 million visits for the first time to become the largest UNIC territory in terms of admissions. Russian box office revenue increased by 9.5 per cent, fuelled by a range of successful local films including the US co-production *Posledniy Bogatyr,* which was the second highest-grossing film of the year in Russia.

Despite a slight 1.8 per cent decrease in admissions, France experienced its third-best performance of the past 50 years with 209 million visitors, bolstered by popular local films *Raid Dingue* and *Valérian et la Cité des Mille Planètes*. Similarly, the UK enjoyed a record-breaking year (box office +2.5 per cent / admissions +1.4 per cent), with *Dunkirk* asserting itself as the most successful European film of 2017 with over 17 million admissions in the EU alone.

Germany experienced mixed results following a particularly disappointing 2016, with a 3.2 per cent increase in box office while admissions grew by 1.0 per cent. This was despite the success of local production *Fack Ju Göhte 3*, which also made it to the box office top 5 in Austria, where total box office decreased by 1.9 per cent and admissions by 3.6 per cent. In comparison, Switzerland experienced a stable year (box office +1.0 per cent / admissions +1.0 per cent) with the help of local production *Die Göttliche Ordnung*.

Top 5 UNIC territories in terms of admissions

Russia	France	UK	Germany	Spain
212.2 million	209.4 million	170.6 million	122.3 million	99.7 million

Courtesy of Cineworld Group

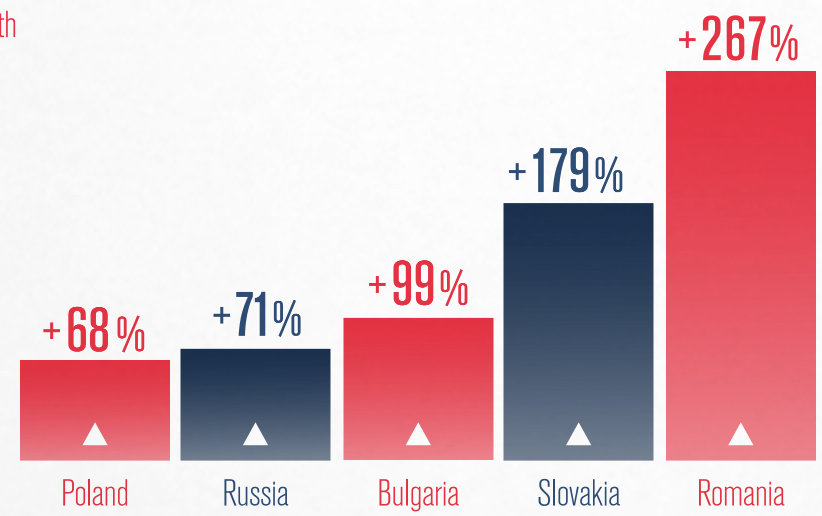
VARYING FORTUNES IN SOUTHERN EUROPE AND SCANDINAVIA

The Spanish cinema sector finished 2017 just shy of the symbolic mark of 100 million admissions, with the local animation film *Tadeo Jones 2: El Secreto del Rey Midas* in the box office top 5. Cinema operators in this territory were also recently rewarded for their advocacy efforts, as the Spanish government announced its plan to reduce the VAT rate on cinema tickets.

Following a positive 2016, the Italian industry suffered from a lack of successful local and international titles (box office -11.6 per cent / admissions -12.4 per cent) while Portugal enjoyed another year of growth (box office +5.8 per cent / admissions +4.6 per cent).

The Turkish market continues to grow at an exponential rate (box office +25.9 per cent / admissions +22.1 per cent) with national productions dominating the box office. Greece enjoyed a stable year

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



(box office +0.9 per cent / admissions +0.7 per cent), adding to the positive results witnessed in the region and the renewed success of cinemas in the neighbouring Balkans, including Bosnia and Herzegovina (box office +21.0 per cent / admissions +17.8 per cent) and Croatia (box office +5.8 per cent / admissions +5.7 per cent).

As has often been the case, local productions were amongst the most successful films of the year in all four Scandinavian countries. Nevertheless, the region experienced varying results, as Denmark (box office -4.1 per cent / admissions -8.1 per cent) suffered another year of decline, while Norway's negative results (box office -8.3 per cent / admissions -10.3 per cent) followed a record-breaking 2016. On the other hand, Finland experienced a fantastic year (box office +8.8 per cent / admissions +3.0 per cent) with a local production leading the box office once again.

GROWING CENTRAL AND EASTERN EUROPEAN MARKETS

The cinema industry in several Central and Eastern European territories continued to experience growth in 2017. Poland enjoyed another record year (box office +10.8 per cent / admissions +8.7 per cent), with three local films ranked in the box office top 5 for a market share of 23.2 per cent.

In Slovakia, admissions increased by more than one million, and the Czech Republic enjoyed its second-best performance of all time despite a slight decrease of 0.3 per cent in box office and 2.5 per cent in admissions. Romania (box office +10.3 per cent / admissions +6.5 per cent), Bulgaria (box office +4.7 per cent / admissions +0.8 per cent) and Hungary (box office +4.1 per cent / admissions +2.1 per cent) all experienced similarly positive results. The same trend could be observed in Ukraine, a territory represented by UNIC since June 2017, where provisional figures indicate a 26.8 per cent growth in admissions.

AN AVERAGE OF 1.5 VISITS TO THE CINEMA ACROSS EUROPE

Admissions per capita across all UNIC territories in 2017 averaged 1.5 visits per year, the same result as in 2016. Ireland (3.4) and France (3.3) experienced the highest rates of cinema-going, while cinema-going frequency continues to increase in Croatia (1.1), Poland (1.5) and Portugal (1.5), highlighting opportunities for future growth.

Annual visits to the cinema in 2017

1.5 across UNIC territories	**3.4** in Ireland	**3.3** in France	**2.2** in Denmark	**1.4** in the Czech Republic

Average ticket price in 2017

€ 6.4 across UNIC territories	**€ 4.2** in Romania	**€ 6.0** in Spain	**€ 9.0** in Austria	**€ 12.1** in Sweden

MARKET SHARE OF EUROPEAN FILMS

The market share of European films increased slightly across the region in 2017, reaching 27.5 per cent.* As was the case in the past few years, Turkey experienced the highest national films' market share across UNIC territories with a local share of 56.8 per cent, followed by France with 37.4 per cent and Finland with 28 per cent.

DIGITAL CONVERSION

Digital conversion amongst cinemas across Europe remained stable at 96 per cent in 2017. Impressive progress in the last five years has brought several Southern and Eastern European territories closer to the 100 per cent mark, most significantly the Czech Republic (90 per cent), Romania (96 per cent) and Poland (98 per cent).

SCREEN DENSITY

The total number of cinema screens across UNIC territories increased slightly in 2017, coming in at approximately 40,500. UNIC territories averaged 49 screens per million inhabitants, a figure which has remained stable in recent years.

PROSPECTS FOR 2018

The industry looks forward to a busy and exciting release schedule in 2018, full of promising European as well as international titles. The continuing existence of a tier of highly successful independent and local cinemas in many territories, complemented by dynamic local film production, ensures the resilience of the European cinema ecosystem.

* Source: European Audiovisual Observatory

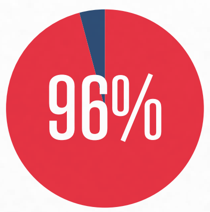
Screens per million inhabitants

56 in the European Union

84 in Norway

66 in Italy

35 in Poland



digitised screens in the European Union in 2017

Top 5 UNIC territories in terms of national films' market share

Turkey 56.8 %

France 37.4 %

Finland 28 %

Germany 23.9 %

Poland 23.2 %

HIGHEST GROSSING NATIONAL FILMS

21 UNIC territories had a local film in their box office top 5 last year, including Finland, Germany, Lithuania, Poland, Slovakia and Turkey, where a national production led the market in 2017.

Poland

Lithuania

Germany

Turkey

Slovakia

Finland

Courtesy of Fotolia.com / Photo: Nebojsa Bobic, Posters: Listy do M. 3, courtesy of TVN: Trys Milijonai Eurų, courtesy of Vabalo Filmai: Fack ju Göhte 3, courtesy of Constantin Film: Ciara, courtesy of Continental Film: Tuntematon Sotilas, courtesy of SF Studios: Recep Ivedik 5, courtesy of Camasirhane

COUNTRY (CURRENCY)	BOX OFFICE IN LOCAL CURRENCY 2017	BOX OFFICE CHANGE IN %	ADMISSIONS 2017	ADMISSIONS CHANGE IN %	PER CAPITA	NATIONAL FILMS' SHARE IN %	SCREEN DENSITY	AVERAGE TICKET PRICE IN EUROS
Albania (ALL)	180.0	+7.0	0.3	+7.0	0.1	n/d	3	4.0
Bosnia and Herzegovina (BAM)	5.7	+21.0	1.1	+17.8	0.3	0.2	11	2.7
Austria (EUR)	130.2	-1.9	14.5	-3.6	1.7	5.1	64	9.0
Belgium (EUR)	161.0	+8.6	19.6	+0.8	1.8	8.4	47	8.2
Bulgaria (BGN)	50.7	+4.7	5.6	+0.8	0.8	7.9	30	4.6
Croatia (HRK)	134.2	+5.8	4.5	+5.7	1.1	2.1	42	3.9
Czech Republic (CZK)	2,004.2	-0.3	15.2	-2.5	1.4	19.0	50	5.0
Denmark (DKK)	1,080.8	-4.1	12.5	-8.1	2.2	20.0	80	11.6
Estonia (EUR)	19.4	+9.8	3.5	+6.7	2.7	8.0	55	5.5
Finland (EUR)	98.3	+8.8	8.9	+3.0	1.6	28.0	59	11.1
France (EUR)	1,380.6	-0.6	209.4	-1.8	3.3	37.4	91	6.6
Germany (EUR)	1,056.1	+3.2	122.3	+1.0	1.5	23.9	58	8.6
Greece (EUR)	65.0	+0.9	10.1	+0.7	0.9	10.0	49	7.0
Hungary (HUF)	20,652.4	+4.1	14.9	+2.1	1.5	8.8	37	4.5
Ireland (EUR)	113.8	+5.8	16.1	+2.1	3.4	n/d	105	7.1
Israel (ILS)	582.6	+7.0	18.2	+7.0	2.1	9.1	52	7.9
Italy (EUR)*	584.8	-11.6	92.3	-12.4	1.5	17.6	66	6.3
Latvia (EUR)	12.9	+5.3	2.5	-1.6	1.3	7.8	28	5.2
Lithuania (EUR)	20.2	+14.0	4.0	+9.4	1.4	21.5	24	5.0
Luxembourg (EUR)	8.4	+3.8	1.2	+4.8	2.0	1.9	63	7.1
Macedonia (MKD)	82.0	+6.0	0.4	+9.0	0.2	n/d	6	3.4
Montenegro and Serbia (RSD)**	1,463.1	+6.4	3.8	+7.3	0.5	12.0	16	3.2
Netherlands (EUR)	301.9	+4.9	36.0	+5.3	2.1	11.1	56	8.4
Norway (NOK)	1,260.9	-8.3	11.8	-10.3	2.2	16.1	84	11.5
Poland (PLN)	1,072.4	+10.8	56.6	+8.7	1.5	23.2	35	4.5
Portugal (EUR)	81.7	+5.8	15.6	+4.6	1.5	2.4	55	5.2
Romania (RON)	266.6	+10.3	13.9	+6.5	0.7	2.0	20	4.2
Russia (RUB)	5,3289.5	+9.5	212.2	+10.0	1.5	23.2	32	3.8
Slovakia (EUR)	34.5	+18.9	6.7	+18.1	1.2	20.8	45	5.2
Slovenia (EUR)	11.6	-0.6	2.3	+0.5	1.2	5.4	56	5.0
Spain (EUR)	597.0	-0.7	99.7	-0.5	2.2	17.1	76	6.0
Sweden (SEK)	1,968.2	+2.7	16.9	-4.1	1.7	16.4	91	12.1
Switzerland (CHF)	209.9	+1.0	13.9	+1.0	1.6	6.8	69	13.6
Turkey (TRY)	876.2	+25.9	71.6	+22.1	0.9	56.8	32	2.9
Ukraine (UAH)	2,380.0	+32.2	28.0	+26.8	0.8	3.7	12	2.8
UK (GBP)	1,277.9	+2.5	170.6	+1.4	2.6	21.2	66	8.5

1.34 billion admissions

+2.5% increase from 2016

€ 8.6 billion box office revenue

+1.7% increase from 2016

*Cinetel: 90 per cent of the market, SIAE global results to be published in June 2018

**Data collected for Montenegro and Serbia is combined due to local distribution practices

Source: UNIC members

Complementary information from BG (National Film Center), CZ (Unie Filmovych Distributoru), DE (German Federal Film Board), EE (Eesti Filmi Instituut & Baltic Films Co-operation Platform), GR (Greek Film Center), HR (Hrvatski Audiovizualni Centar), HU (Nemzeti Média- és Hírközlési Hatóság), IE (Wide Eye Media), LT (Lietuviu Filmu Centras & Baltic Films Co-operation Platform), LV (Nacionàlais kino centrs & Baltic Films Co-operation Platform), PL (Polski Instytut Sztuki Filmowej), PT (Instituto do Cinema e do Audiovisual), RO (Romanian Film Centre), RU (Nevafilm Research), SI (Slovenski filmski center), SK (Únia filmov´ych distribútorov) and IHS Markit

Screen density calculated per million inhabitants

COUNTRY	TOP 1	TOP 2	TOP 3	TOP 4	TOP 5
Albania	The Fate of the Furious	Daddy's Home 2	Fifty Shades Darker	Despicable Me 3	Murder on the Orient Express
Austria	Star Wars: The Last Jedi	Fack Ju Göhte 3	Despicable Me 3	Fifty Shades Darker	Beauty and the Beast
Belgium	Beauty and the Beast	Despicable Me 3	The Fate of the Furious	Star Wars: The Last Jedi	Pirates of the Caribbean: Salazar's Revenge
Bosnia and Herzegovina	The Fate of the Furious	Beauty and the Beast	Fifty Shades Darker	Murder on the Orient Express	Despicable Me 3
Bulgaria	The Fate of the Furious	Star Wars: The Last Jedi	Beauty and the Beast	Despicable Me 3	Pirates of the Caribbean: Salazar's Revenge
Croatia	Star Wars: The Last Jedi	Despicable Me 3	The Fate of the Furious	Fifty Shades Darker	It
Czech Republic	Despicable Me 3	Pirates of the Caribbean: Salazar's Revenge	Star Wars: The Last Jedi	Thor: Ragnarok	Po Strništi Bos
Denmark	Star Wars: The Last Jedi	Beauty and the Beast	Despicable Me 3	Fifty Shades Darker	Alle for tre
Estonia	Despicable Me 3	Pirates of the Caribbean: Salazar's Revenge	Boss Baby	Sangarid	Cars 3
Finland	Tuntematon Sotilas	Star Wars: The Last Jedi	Pirates of the Caribbean: Salazar's Revenge	Despicable Me 3	Beauty and the Beast
France	Despicable Me 3	Star Wars: The Last Jedi	Raid Dingue	Valérian et la Cité des Mille Planètes	Baby Boss
Germany	Fack Ju Göhte 3	Despicable Me 3	Star Wars: The Last Jedi	Fifty Shades Darker	Beauty and the Beast
Greece	Murder on the Orient Express	Pirates of the Caribbean: Salazar's Revenge	Despicable Me 3	The Fate of the Furious	It
Hungary	Star Wars: The Last Jedi	Despicable Me 3	Kincsem	Thor: Ragnarok	The Fate of the Furious
Ireland	Beauty and the Beast	Star Wars: The Last Jedi	Despicable Me 3	Dunkirk	Sing
Israel	Wonder Woman	The Fate of the Furious	Despicable Me 3	Maktub	Boss Baby
Italy	Beauty and the Beast	Despicable Me 3	Fifty Shades Darker	The Fate of the Furious	It
Latvia	Despicable Me 3	Vectēvs, kas bīstāmaks par datoru	Boss Baby	The Fate of the Furious	Pirates of the Caribbean: Salazar's Revenge
Lithuania	Trys milijonai eurų	Zero 3	Despicable Me 3	Pirates of the Caribbean: Salazar's Revenge	Emilija iš Laisvės Alėjos
Luxembourg	Star Wars: The Last Jedi	Despicable Me 3	Beauty and the Beast	The Fate of the Furious	Fifty Shades Darker
Macedonia	The Fate of the Furious	Beauty and the Beast	Star Wars: The Last Jedi	Fifty Shades Darker	Thor: Ragnarok
Montenegro and Serbia*	Beauty and the Beast	Boss Baby	Zona Zamfirova	Fifty Shades Darker	Despicable Me 3
Netherlands	Despicable Me 3	Pirates of the Caribbean: Salazar's Revenge	Beauty and the Beast	Star Wars: The Last Jedi	The Fate of the Furious
Norway	Star Wars: The Last Jedi	Beauty and the Beast	Pirates of the Caribbean: Salazar's Revenge	Askeladden – I Dovregubbens Hall	The Fate of the Furious
Poland	Listy Do M. 3	Botoks	Star Wars: The Last Jedi	Despicable Me 3	Sztuka Kochania. Historia Michaliny Wisłockiej
Portugal	The Fate of the Furious	Despicable Me 3	Beauty and the Beast	Fifty Shades Darker	Pirates of the Caribbean: Salazar's Revenge
Romania	The Fate of the Furious	Pirates of the Caribbean: Salazar's Revenge	Thor: Ragnarok	Fifty Shades Darker	Star Wars: The Last Jedi
Russia	Pirates of the Caribbean: Salazar's Revenge	Posledniy Bogatyr	Guardians of the Galaxy Vol. 2	The Fate of the Furious	Despicable Me 3
Slovakia	Čiara	Všetko Alebo Nič	Únos	Despicable Me 3	Fifty Shades Darker
Slovenia	Despicable Me 3	Fifty Shades Darker	The Fate of the Furious	Boss Baby	Košarkar naj bo
Spain	Beauty and the Beast	Despicable Me 3	Tadeo Jones 2: El Secreto del Rey Midas	Star Wars: The Last Jedi	The Fate of the Furious
Sweden	Star Wars: The Last Jedi	Solsidan	Beauty and the Beast	It	Pirates of the Caribbean: Salazar's Revenge
Switzerland	Despicable Me 3	Star Wars: The Last Jedi	The Fate of the Furious	Die Göttliche Ordnung	Pirates of the Caribbean: Salazar's Revenge
Turkey	Recep Ivedik 5	Ayla	Aile Arasında	Çalgı Çengi İkimiz	The Fate of the Furious
UK	Star Wars: The Last Jedi	Beauty and the Beast	Dunkirk	Despicable Me 3	Guardians of the Galaxy Vol. 2
Ukraine	Pirates of the Caribbean: Salazar's Revenge	Guardians of the Galaxy Vol. 2	Thor: Ragnarok	The Fate of the Furious	Despicable Me 3

Source: UNIC members
Complementary information from BG (National Film Center), CZ (Unie Filmových Distributorů), DE (German Federal Film Board), EE (Eesti Filmi Instituut & Baltic Films Co-operation Platform), GR (Greek Film Center), HR (Hrvatski Audiovizualni Centar),
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National films | Non-national EU films | EU/national qualified production

*Data collected for Montenegro and Serbia is combined due to local distribution practices

LOOKING FORWARD

2017 proved that cinema-going across UNIC territories remains on an upward trajectory, reflected in both growing admissions figures and a significant increase in box office revenues.

Across UNIC territories, 40,500 screens create awareness around and interest in both European and international films, enabling hundreds of millions of visitors to discuss stories that entertain us, make us think and reflect on everyday life. That said, while Europe is perhaps a uniquely diverse film region, its cinemas face a number of shared challenges and opportunities.

CINEMAS AT THE CENTRE OF THE VALUE CHAIN

All cinemas across Europe – regardless of their size or location – make significant contributions to cultural diversity, are essential to the commercial and cultural success of the European film industry and have a powerful social influence. As 2017 admissions show, audiences continue to attach great value to the shared experience of seeing a film on the big screen and are ready to reward creativity as well as the investments made into providing state-of-the-art cinematic experiences. Undoubtedly, cinema-going represents the "gold-standard" for film-viewing; watching a film on the big screen allows audiences to truly experience films as originally intended by their directors.

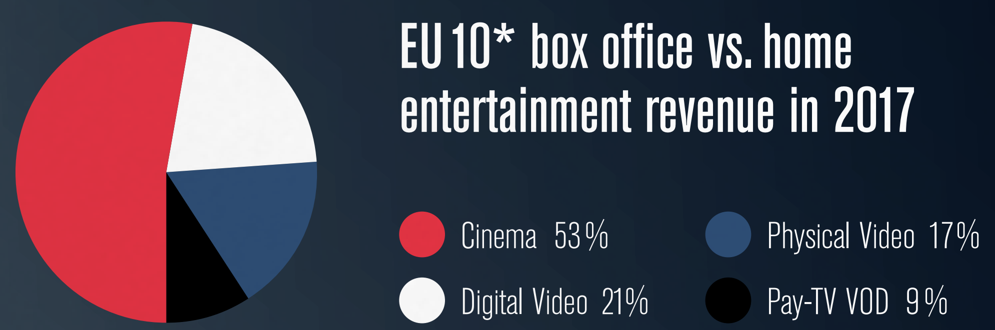
Theatrical exhibition sets the benchmark for all subsequent methods of distribution. Contractual agreements base the value of all later windows on the performance of a film in its theatrical run and, as the home entertainment sector continues to struggle, cinema-going remains the key pillar of the wider film economy. The strong performance of the sector maintains hundreds of thousands of jobs for predominantly young people across urban as well as rural areas in all regions of Europe. These positive trends are also reflected in consumer attitudes; research conducted across the five biggest EU territories shows that respondents attribute a higher value to the cinema experience when compared to other "out-of-home" cultural activities, including trips to a concert, a leisure park or the opera.

Cinema also clearly remains the place where value is created around individual film titles. Whereas the average revenue per view on a subscription-based VOD service is around €0.20, the average price for a cinema ticket in the EU is €6.70. Furthermore, revenues from cinema tickets are redistributed between cinema operators, distributors, national film funds and artists, contributing to the production of local content and the overall well-being of the European cultural sector. A visit to the cinema also has above-average multiplier effects on neighbouring commercial activities, contributing to urban regeneration by creating new jobs and attracting investors, small businesses and new residents.

VOD platforms continue to grow and are increasingly investing in the creation of original films – a development that is welcomed by cinema operators. Europe's cinema landscape depends on close collaboration and risk-sharing between various stakeholders across the film value chain. Given these significant investments and as a matter of principle, cinema operators would welcome further commitment to investment in local production and increased transparency and data sharing by major international platforms – including iTunes and Netflix.

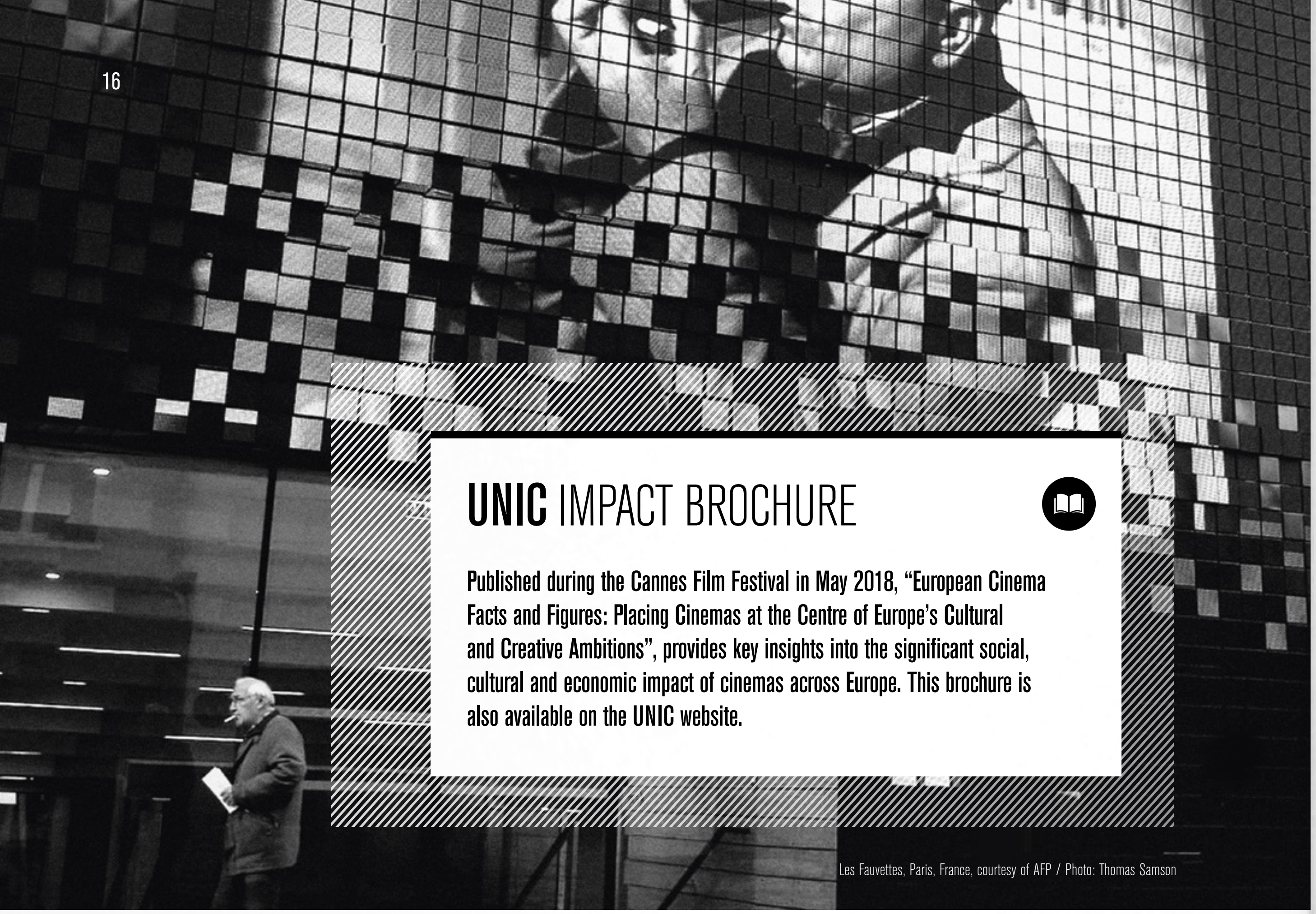
In an increasingly fragmented entertainment landscape, cinema operators recognise that it is crucial to understand what the cinema-going audience expects. Experts in data analytics expect a 10 to 20 per cent increase in admissions if their tools are efficiently used to make cinema marketing more-fine grained and personalised. To achieve the best possible results, this requires collaboration across the value chain between all stakeholders.

EU 10* box office vs. home entertainment revenue in 2017



Source: IHS Markit

* The Czech Republic, Denmark, France, Germany, Italy, Poland, Portugal, Spain, Sweden and the UK



Les Fauvettes, Paris, France, courtesy of AFP / Photo: Thomas Samson

UNIC IMPACT BROCHURE

Published during the Cannes Film Festival in May 2018, "European Cinema Facts and Figures: Placing Cinemas at the Centre of Europe's Cultural and Creative Ambitions", provides key insights into the significant social, cultural and economic impact of cinemas across Europe. This brochure is also available on the UNIC website.

Continuing to offer the best possible experience to cinema-goers also requires operators to engage in a dialogue with film directors and post-production professionals concerning the capacities and limitations of film presentations in theatres to ensure that audiences get to see a film as the director intended.

While the cinema sector is well-placed to continue to build its business around exclusive theatrical releases, industry leaders are engaging in discussions on how better to integrate subsequent release platforms into the distribution model for individual film titles. In the end, the objectives of these negotiations should be that all stakeholders – including smaller independent cinemas – are able to reap the benefits of greater inter-industry collaboration.

In Europe, governments would be well-advised to let the industry take the lead in this complex process and not undermine the key principles on which our sector depends, namely contractual freedom and theatrical exclusivity.

THE NEXT GENERATION

The future growth and sustainability of our sector depends on the ability of cinemas and their partners in film distribution to attract, retain and grow attendance among young audiences. While cinema-going amongst younger Europeans remains strong – particularly in growing Central and Eastern European territories – the more mature markets in Western Europe face the challenge of sometimes plateauing or even declining in frequency of visits amongst younger customer groups. Of course, there is no question that this pressure is due to there being fewer young people in many European territories. Young people also have a limited amount of money to spend but a great deal of choice in terms of leisure opportunities, whether they are film-related or not. Therefore, the industry has to work harder to keep 18–25 years old in the habit of cinema-going, to ensure that they become and remain a loyal audience. From teenage screenings to film education programmes to youth-focused social media engagement, individual cinema operators as well as collective sector initiatives are seizing the opportunity to grow future youth admissions across UNIC territories.

In order to learn more about the drivers of and barriers to cinema-going amongst younger people, a pan-European research project was commissioned by UNIC and key industry partners, conducted across three European territories – Germany, the UK and Spain.

The study's findings illustrate that cinema remains an important out-of-home leisure activity today. Moreover, they highlighted that exhibitors are already finding ways to answer the key needs of young people, by offering unique experiences, giving them the opportunity to socialise, providing escapism and opening up the possibility to discover something new. Therefore, building on these sentiments through making the cinema an increasingly social space is just as important as offering extraordinary technology and comfort in the pursuit of an immersive, rewarding and engaging experience.

3,176
Premium Large screens

4,400
immersive sound installations

1,220
4D and immersive seating systems

Installed in cinemas worldwide in 2017

€ 1.5 billion
invested in digital cinema by European exhibitors between 2005–2015

Source: IHS Markit

INNOVATION AND THE BIG SCREEN

Having invested massively in the transition to digital over the past decade, cinema operators across Europe continue to innovate and upgrade their theatres to provide cutting-edge and ever-more immersive cinematic experiences. Exhibitors are investing in the highest sound and projection quality and are experimenting with new theatre designs and seating arrangements, adapting their services to the needs and preferences of specific audiences. Furthermore, the sector continues to improve access to cinema for all, as digitisation has facilitated the use of subtitling and audio-description technologies inside the screening room.

As continuous innovation and change become central elements of the cinema business, identifying "game-changing" technologies and evaluating new consumer trends have become integral challenges. In order to ensure inter-operability and access to films for all types of cinemas, the development of a new generation of technology standards will be a strategic imperative for the industry in the future.

Courtesy of photocase.com / zettberlin

UNIC TECHNOLOGY GROUP

The UNIC Technology Group is composed of senior cinema technology executives from more than 20 member territories. Its main objective is to monitor and evaluate technology trends and innovation in the film industry in order to remain informed and well advised on the latest technological developments.

UNIC MARKETING GROUP

The UNIC Marketing Group gathers marketing executives from major European cinema operators. It enables its members to share key audience trends and analyse the latest engagement opportunities in cinema and its related industries.

UNIC RETAIL GROUP

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

(Left) Courtesy of 123rf / Photo: dolgachov. (Right) Cine32. Auch. France. courtesy of Encore Heureux Architectes / Photo: Sébastien Normand

The digital shift has enabled all types of cinemas to better engage with their customers. Nowadays, the cinema-going experience starts days before a visit to the theatre and operators are experimenting with new techniques to connect with potential guests before, during and after screenings. Digital engagement strategies are multifaceted and can include online ticketing, automated social media engagement and innovative customer loyalty schemes, to name but a few examples. These initiatives are underpinned by sophisticated data analytics programmes that help reach individual cinema-goers in a more personalised manner.

A TRULY GLOBAL BUSINESS

Cinema-going today is a global and dynamic phenomenon, with growing annual box office revenues of $38.6 billion becoming increasingly spread across the world. With the rapid development of the industry in Latin America, Africa and the Asia-Pacific region, the centre of gravity of the global cinema community is shifting. However, despite these changes, Europe remains a key building block of the global motion picture industry, accounting for around 23 per cent of total box office returns.

Over the last 12 months, sector growth around the World and consolidation along the value chain (and increasingly across borders) has again illustrated that cinema exhibition is a truly global and inter-connected business, a trend which is only likely to continue in the years to come.

This increasingly international and inter-connected dimension of the industry is creating a tier of international cinema groups that benefit from increased efficiencies and economies of scope and scale.

GLOBAL CINEMA FEDERATION

In today's increasingly global cinema sector, operators recognise the extent to which the business opportunities and policy challenges they face – such as film theft, technology standards, theatrical release practices, international trade practices and the highly valued relationship with partners in film distribution – are shared by their counterparts in other territories. To address these issues and raise the profile of cinema with global regulatory bodies and industry partners, twelve leading cinema operator companies and the two most internationally-active trade bodies have come together to form the Global Cinema Federation, an initiative intended to inform, educate and advocate on behalf of the sector worldwide.

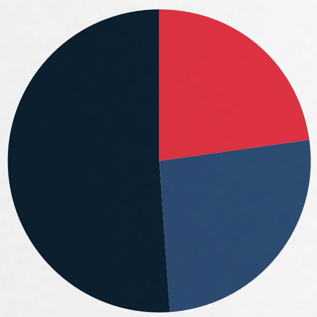
GLOBALCINEMAFEDERATION.ORG

Courtesy of Kinoteka

At the same time, the continuing existence of a tier of highly successful independent and local cinemas in many territories will ensure the resilience of the European cinema ecosystem.

As such, the global exhibition industry benefits both from international investment and from trade partnerships that – in accordance with WTO rules – seek to limit imposed barriers to trade such as screening quotas and levies on the importation of cinema technology. At the same time, UNIC respects the desire of public bodies to support local production and distribution activities with the objective of developing and sustaining a strong, local cinema ecosystem. Promoting international trade and investment into cinema and celebrating local cinema culture can go hand in hand and are, in the vast majority of cases, not mutually exclusive.

Source: IHS Markit



European box office vs. B.O. in the US and Rest of the World in 2017

Europe 23 %
Rest of the World 51 %
US 26 %

Understanding global trends and developing local business strategies are both necessities, and smaller and independent organisations in particular might require assistance and support in understanding and navigating this constantly changing landscape. European support bodies, as well as UNIC, should provide such assistance where they can in order to maintain a diverse and competitive cinema sector.

From this perspective, the operators involved recognise the extent to which the business opportunities and policy challenges they face are common amongst their international colleagues. To address these issues, as well as to inform, educate and advocate on behalf of the sector worldwide, the Global Cinema Federation was launched in June 2017, opening up the possibilities for international dialogue and large-scale collaboration.

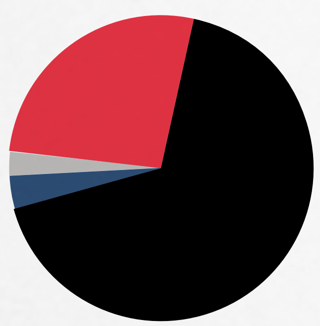
Another important recent development was the re-opening of cinemas in Saudi Arabia. In 2017, the Saudi government announced that the ban on cinemas would be lifted as part of ambitious economic and social reforms. To serve a population of more than 32 million, most of whom are under the age of 30, Saudi Arabia wants to set up around 350 cinemas with over 2,500 screens by 2030, which it hopes will attract nearly $1 billion in annual ticket sales.

A DIVERSE OFFER

The cinema "offer" has become increasingly diversified, catering for changing and more fragmented preferences. Together with a growing supply of films as well as "event cinema" offers, more dynamic and flexible programming helps to meet increasingly diverse consumer preferences.

The numbers of films screened in cinemas has doubled in several UNIC territories over the last decade. Whilst, as has been the case in previous years, box office revenues have been mainly driven by international titles, there remains a slate of highly successful local films across Europe.

Europe rightly prides itself on such an unparalleled and diverse offer of local and European films produced each year. The role of cinemas in increasing awareness of and providing access to a selection of these titles is essential in order to maintain diversity and investment in local production, even if operators at times find it challenging to book every film that is produced. Support networks such as Europa Cinemas help maintain audience demand for non-national European films and are, in UNIC's view, the best way to promote a pan-European market for films.



EU market share of films in cinemas in 2017 (by country of origin)

- Europe 27.5 %
- EU including US 3.7 %
- US 66.2 %
- Rest of the World 2.6 %

Source: European Audiovisual Observatory

GET CONNECTED

In order to better engage with policy makers, industry representatives and keen cinema-goers across Europe, UNIC upweighted its communications strategy in 2018:

New UNIC website

Now providing a one-stop-shop for everything related to UNIC, the association's work in Brussels and broader industry trends and developments across UNIC territories.

WWW.UNIC-CINEMAS.ORG

Social media

UNIC's Twitter account forms an integral part of the association's monitoring activities regarding policy developments and industry trends. Combined with the UNIC Facebook page, it provides an effective means of keeping on top of breaking developments related to cinema exhibition and circulating announcements of UNIC activities, publications and news.

/ UNIC.Cinemas
@UNIC_Cinemas

Big Screen Feature newsletter

Taking a "behind-the-scenes" look at the world of cinema exhibition, Big Screen Feature is aimed at communicating lesser-known aspects of the industry that play a crucial role for professionals, policy makers and, of course, cinema-goers. Anyone can sign-up for the newsletter via the new UNIC website.

Stay updated

2018 promises to be an exciting year for both operators and audiences alike and UNIC strives to reflect this dynamic, innovative aspect of the industry in its activities, with many more announcements to come throughout the year.

UNIC WOMEN'S CINEMA LEADERSHIP PROGRAMME

UNIC MENTORING SCHEME

Last year at CineEurope, UNIC announced the launch of its Women's Cinema Leadership Programme – a ground-breaking mentoring scheme for women in cinema exhibition – aiming to provide an opportunity for six talented women from the sector to receive one-to-one career advice, network and learn from outstanding women executives across the cinema landscape. The initiative was warmly welcomed by the industry and has proved to be a great success.

UNIC launched the second edition of the programme at CineEurope in June 2018, involving new mentors and mentees. The key long-term objective is to broaden and deepen the talent pool for leadership in the sector and to further raise business awareness around the importance of more gender-balanced leadership.

TOWARDS A MORE BALANCED CINEMA INDUSTRY

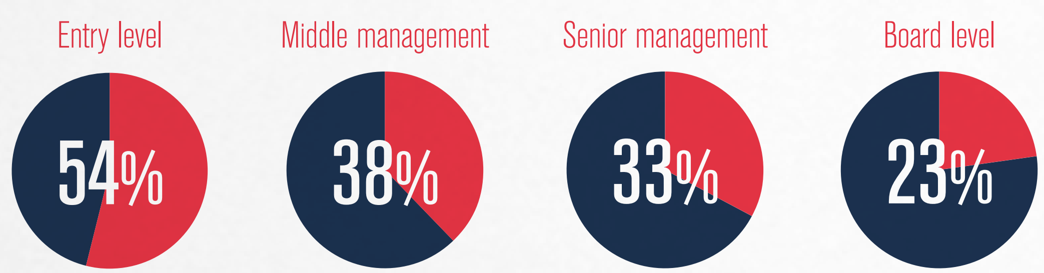
In many UNIC territories, women make up over half of the cinema audience, yet are not equally represented in the boardroom. Although limited data is available on the subject, estimates suggest that women are under-represented in all leadership positions in the European cinema industry.

The need to promote more women into management positions in cinema is strongly rooted in business rationale as much 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.

The industry needs to redouble its efforts to encourage and empower emerging female professionals.

UNIC also believes that it is equally important to bring the industry together more frequently to discuss how we can stimulate change. Last year at CineEurope, UNIC organised a panel debate focused on "Women in Cinema – The Business Case" which explored the issue of gender-balanced leadership in the industry. In 2018, UNIC continued the discussion and, together with the European Commission, organised a session on the female audience and content.

Average share of women working in leading cinema companies in 2017 (by level of seniority / selected EU territories)*



Source: UNIC members

* Estimates from Denmark, the Netherlands and the UK

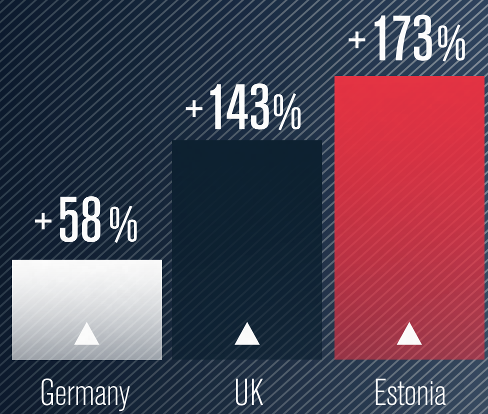
CINEEUROPE
11–14 JUNE 2018

CineEurope, UNIC's official convention, is the perfect opportunity to celebrate cinema-going and discuss many of the issues outlined in this report. With support from all of the major US studios as well as leading independent and European film companies, the event has become one of the biggest cinema conventions in the international theatrical market.

POLICY UPDATE

x2

The number of films screened in cinemas has almost doubled in 15 years



Source: European Audiovisual Observatory

KEY EUROPEAN POLICY DEVELOPMENTS AND UNIC'S ADVOCACY EFFORTS

The organisation's principal objective is to represent the interests of European cinema operators and their national cinema associations when dealing with policy-makers in Brussels and to support its members across Europe.

UNIC engages with both the European institutions and the industry to provide a voice for cinema exhibition. Through organising events, producing publications and meeting with high-level policy makers, it strives to convey the social, cultural and economic importance of cinema-going along with the industry perspective on key policy issues.

Heading into 2018, there is little less than a year until the next European Parliamentary elections (May 2019) and 18 months until the appointment of a new European Commission.

The Digital Single Market (DSM) strategy remains particularly engrained in the current Commission's DNA. When the European Commission announced its plan in early 2015, its objective for the audiovisual industries was to promote cross-border access to films and television programmes in order to enable consumers to access content offered by digital platforms based in other EU Member States. At the time, the Commission seemed not to be overly concerned about the (potentially devastating) impacts that such unlimited cross-border access could have on theatrical exclusivity and current financing of films and television programmes.

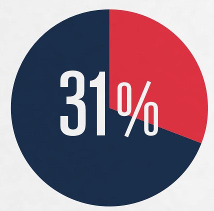
UNIC, in collaboration with other trade organisations, has since then continued to voice its concerns regarding the Commission's approach and promoted more reasonable and market-led solutions to improving cross-border access, if and when it makes sense.

The industry's efforts in combatting measures that would undermine the exclusivity of the theatrical window have been successful in terms of the Regulation on Geo-blocking. The final text adopted by the Parliament and the Council reflected this, taking into account the specific nature of the content industry in its decision not to ban Geo-blocking for audiovisual works.

CANNES AND UNIC'S COLLABORATION WITH THE EUROPEAN FILM CONTEST

Each year, UNIC organises an outreach programme at the Cannes Film Festival. In 2018, this included co-organising a cocktail reception at the Plage de la Quinzaine together with industry partners to promote film and cinema. UNIC was also a partner of the EU Film Contest, a competition organised by the Creative Europe MEDIA Programme to promote the cultural diversity of European film to young audiences in an accessible manner. The ten winners were invited to Cannes to have a behind-the-scenes look at the festival and meet the wider European film industry and meet with representatives from cinema exhibition.

Courtesy of Hotel Lutetia



European non-national films make up 31 per cent of all films shown in European cinemas

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. The association is a member of several coalitions and industry associations. Please find below a list of our main policy partners.

Creativity Works!

Creativity Works! is a leading coalition established by UNIC and partners, representing Europe's cultural and creative sectors. It aims to share facts and opinions concerning the work of artists, creative professionals and their business partners. Its main objective is to showcase how copyright contributes to growth in employment, development and cultural diversity across Europe. UNIC will chair the coalition in 2018/2019.

AV Coalition

UNIC is a proud member of the informal AV Coalition, which brings together organisations working across the audiovisual sector in Europe, representing film and TV directors, screenwriters, performers and other creators, skilled professionals, producers, distributors and publishers of film and television content and cinema operators. It is highly representative of a sector of vital importance to economic growth and job creation as well as a crucial contributor to cultural diversity in the EU.

Netopia-Forum for the Digital Society

UNIC is a member of Netopia, a web publication and idea forum based in Brussels, which publishes reports and arranges events with the purpose of stimulating discussion on the future of the internet.

Europa Cinemas & CICAE

Europa Cinemas is the first network of cinemas focusing on European non-national films, uniting more than 2,800 screens across 43 countries. 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.

CICAE and Europa Cinemas, with support from the Creative Europe MEDIA programme, organise the European Art Cinema Day, when more than 1,000 cinemas team-up to present a curated program including previews, children's films and classics to celebrate European cinema.

ARTCINEMADAY.ORG

EAO & EUIPO

UNIC is a member of the European Audiovisual Observatory's Advisory Committee, a body of the Council of Europe which provides detailed analysis and a comparative European overview of the audiovisual industry in 41 different countries.

UNIC is a private-sector representative of the European Observatory on Infringements of Intellectual Property Rights (EUIPO), a network of industry stakeholders responsible for the fight against infringements of intellectual property rights.

Cine32, Auch, France, courtesy of Encore Heureux Architectes / Photo: Sébastien Normand

Another area of concern for the audiovisual sector is the European Commission's efforts to apply the "Country of Origin Principle" to the licensing of ancillary broadcasters' rights. Trilogues are currently ongoing and UNIC therefore continues to monitor developments very closely, as any limits placed on exclusive territorial licensing could affect theatrical exclusivity in a number of UNIC territories.

UNIC also welcomed the preliminary political agreement on the Audiovisual Media Services Directive (AVMSD) and the agreed position on Article 13.2 in particular, concerning the financial contributions of all audiovisual media services, including online. The new Article 13.2 perfectly reflects this key concern to ensure fairer competition between all stakeholders and we believe this is a positive step towards the creation of a fair level playing field between new and existing players.

Elsewhere, and in light of the current discussions surrounding the future of the MEDIA Programme, UNIC and its fellow industry bodies have endeavoured to ensure that the MEDIA budget is preserved and that the Programme becomes more market-oriented heading into the next period. UNIC therefore welcomes the ambitious proposal made by the European Commission on 2 May 2018, which includes a substantial increase of the budget for MEDIA, rising from €756 m to €1,200 m.

The Parliament and Council are also discussing the "value gap" proposal as part of the new Copyright Directive, namely the need for financial contributions from internet intermediaries when it comes to remunerating rightholders online. UNIC continues to support the need for such contributions, as well as robust copyright enforcement more broadly, to safeguard the value of rights concerning audiovisual works. In relation to this, and following-up on the Communication of September 2017 dedicated to the removal of illegal content, in February 2018 the Commission published a recommendation on "measures to effectively tackle illegal content online." Although this was certainly a step in the right direction, one can regret that the Commission is not taking more ambitious measures. Film theft remains the biggest threat to the well-being of the cinema industry. The illegal and unlicensed use of films deprives cinema operators, film distributors, producers and creators – in fact all of the thousands of people involved in the production and exhibition of any film – of important revenues. We therefore continue to advocate for more transparency from online intermediaries that benefit from the wealth of European and international works available online.

EU OUTREACH DAYS

Members of the European Parliament and Commission officials value insights from and exchanges with senior executives from the European cinema industry to develop solid policies for the wider film sector. UNIC therefore organises EU outreach days, both for UNIC member associations and CEOs of key European cinema operators. We held seven such days over the past three years and aim to increase that number over 2018 and beyond.

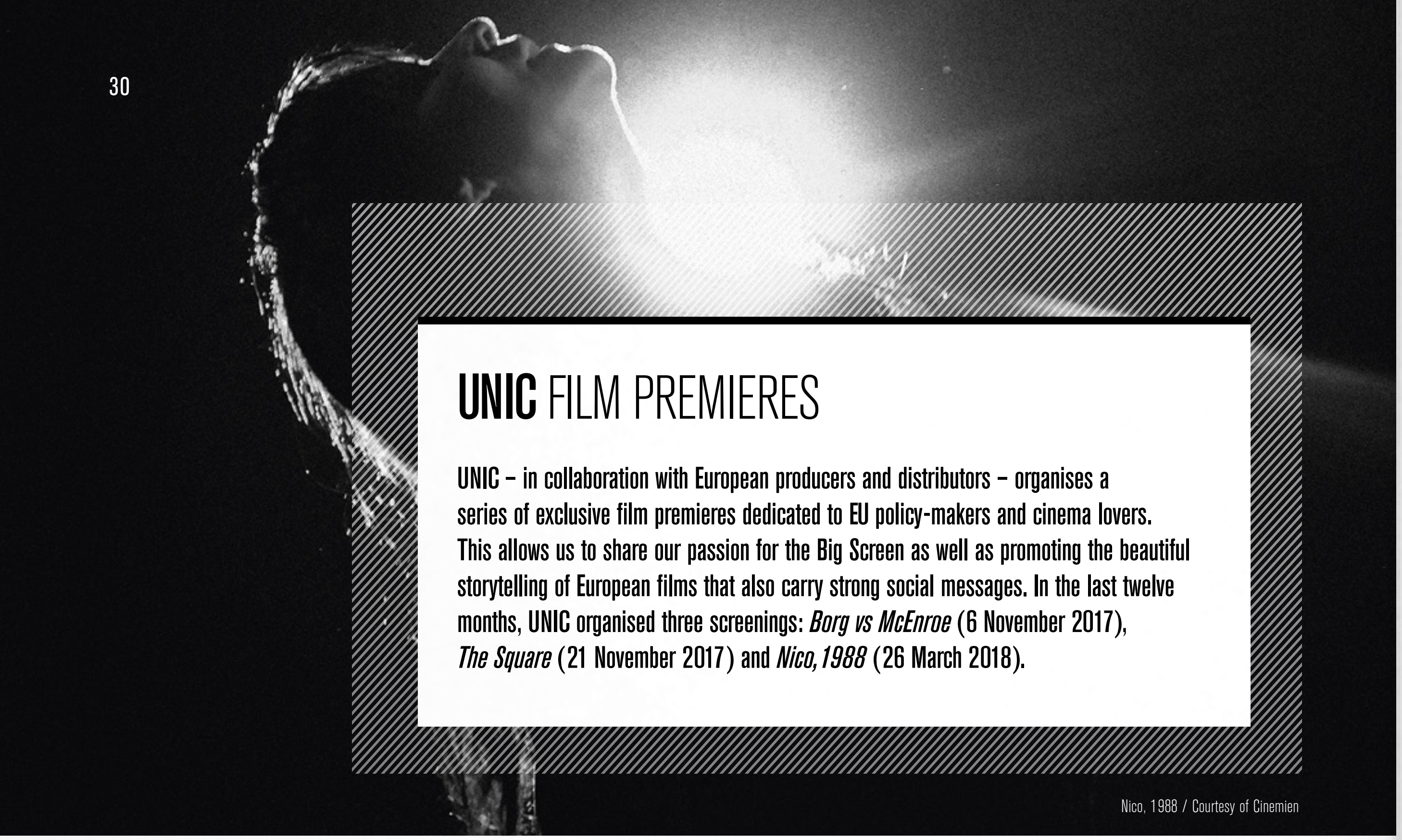
Courtesy of Wikimedia Commons

"INVESTING IN THE FUTURE OF EUROPEAN CINEMA INDUSTRY" CONFERENCE AT THE EUROPEAN PARLIAMENT

For the third consecutive year, **UNIC** organised a conference at the European Parliament in February 2018, in partnership with **MEP Pervenche Berès, MEP Emma McClarkin, MEP Helga Trüpel** and **MEP Bogdan Wenta**, to explore key trends in European cinema exhibition.

The event proved to be a great success and attracted over 100 key EU decision-makers and cinema industry stakeholders who shared their experiences and views on the cinema-going experience and the future of policymaking related to cinemas. A fourth edition is planned for 2019.

Courtesy of IMAX



UNIC FILM PREMIERES

UNIC – in collaboration with European producers and distributors – organises a series of exclusive film premieres dedicated to EU policy-makers and cinema lovers. This allows us to share our passion for the Big Screen as well as promoting the beautiful storytelling of European films that also carry strong social messages. In the last twelve months, UNIC organised three screenings: *Borg vs McEnroe* (6 November 2017), *The Square* (21 November 2017) and *Nico, 1988* (26 March 2018).

Nico, 1988 / Courtesy of Cinemien

EUROPEAN FILM FORUM AT CINEEUROPE

The European Film Forum was launched in 2015 to provide opportunities for dialogue between policy-makers and industry stakeholders. Whilst national regulations have a strong impact on the film sector, the EU supports the industry through financing programmes. UNIC is a co-organiser of the Forum sessions taking place during CineEurope in Barcelona.

A further key objective of UNIC is to strengthen the organisation's relations with policy-makers and industry representatives across all EU Member States. Establishing stronger relations with national associations, operators and informal cinema networks in Central and Eastern Europe is a key priority, given UNIC's relative lack of representation in some territories and the influence that this region has in shaping EU decisions.

This goes hand-in-hand with the need for even closer collaboration with all film and cinema organisations based in Brussels.

Finally, UNIC on occasion engages with national governments and regulators to ensure that cinemas are placed at the centre of national growth strategies for film. At a time when EU leaders are required to navigate a political landscape that is increasingly Eurosceptic and influenced by major international and institutional challenges, it is essential that Europe and national governments take the right approach to culture and cinema. Cinema – along with the arts and cultural and creative sectors in general – can play a key role in re-establishing a positive and forward-looking narrative for the European project, at the same time strengthening cultural diversity, social cohesion and economic development across all Member States.

UNIC'S KEY POLICY POSITIONS

Visit our website to learn more about UNIC's policy positions on the following issues:

DIGITAL SINGLE MARKET
TERRITORIALITY AND EXCLUSIVITY
REWARDING INVESTMENT
AUDIOVISUAL MEDIA SERVICES DIRECTIVE
CREATIVE EUROPE MEDIA
INNOVATION AND TECHNOLOGY
CULTURE, BUSINESS AND COMMUNITY
MUSIC RIGHTS
ACCESSIBILITY
TAXATION

CONCLUSION

In the interest of voicing its members' interests, opinions and concerns in a comprehensive manner, UNIC places great emphasis on the importance of building relations with policy-makers and industry representatives across all EU Member States. As the relationship between Member States and the EU forms an integral part of legislation on both a European and national level, UNIC will continue to work closely with industry and association partners on both levels to fully engage with its membership and better understand territory-specific legislative environments.

The association's efforts in expanding its network throughout Central and Eastern Europe have proved successful so far in terms of policy-maker engagement and membership, and this will certainly remain a key are of focus.

From what's above, it is clear that the coming years will be crucial in terms of the continued success of the European cinema industry and its ability to amaze audiences across UNIC territories.

UNIC's advocacy efforts in the near future rely on ensuring that the EU continues to enable cinema operators to provide audiences with unparalleled and diverse film-viewing experiences, while at the same time promoting a fair, competitive and culturally diverse cinema ecosystem.

Kino International, Berlin, Germany, Courtesy of Yorck Kinogruppe / Photo: Daniel Horn

MEMBERS AND PARTNERS

Association members

AUSTRIA
Fachverband der Kino-, Kultur- und Vergnügungsbetriebe

BELGIUM
Fédération des Cinémas de Belgique
Federatie van Cinemas van Belgïe

DENMARK
Danske Biografer

FINLAND
Suomen Filmikamari

FRANCE
Fédération Nationale des Cinémas Français

GERMANY
HDF KINO e.v.

ISRAEL
Cinema Industry Association

ITALY
Associazione Nazionale Esercenti Cinema,
Associazione Nazionale Esercenti Multiplex

NETHERLANDS
Nederlandse Vereniging van Bioscoopexploitanten

NORWAY
Film & Kino

POLAND
Polish Exhibitors' Association

SPAIN
Federación de Cines de España

SWEDEN
Sveriges Biografägareförbund

SWITZERLAND
SKV – ACS Association Cinématographique Suisse

TURKEY
Turkish Cinema Operators' Association

UKRAINE
United Ukranian Cinemas

UK
UK Cinema Association

Operator members

CINAMON
Estonia, Latvia, Lithuania, Finland

LES CINÉMAS GAUMONT PATHÉ
Belgium, France, the Netherlands, Switzerland

CINEMAX
Slovakia

CINEPLEX
Germany

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

CINEWORLD GROUP AND CINEMA CITY INTERNATIONAL
Bulgaria, Czech Republic, Hungary, Ireland, Israel, Poland, Romania, Slovakia, United Kingdom, US

KARO FILM
Russia

KINEPOLIS GROUP
Belgium, Canada, France, Luxembourg, the Netherlands, Poland, Spain, Switzerland

KINOPOLIS
Germany

KINO ARENA
Bulgaria

MARS ENTERTAINMENT (CJ CGV GROUP)
Turkey

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, Latvia, Lithuania, Poland, United Kingdom

YELMO CINES (CINÉPOLIS GROUP)
Spain

Partners of European Cinema Exhibition Programme

UNIC is proud of its partnership with leading brands in the European cinema space

SHOULD YOU WISH TO JOIN UNIC, PLEASE GET IN TOUCH VIA COMMUNICATIONS@UNIC-CINEMAS.ORG

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