

Annual Report

2024



UNION INTERNATIONALE DES CINÉMAS
INTERNATIONAL UNION OF CINEMAS

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FROM PHIL CLAPP,
CEO OF THE UK CINEMA
ASSOCIATION AND
PRESIDENT OF THE
INTERNATIONAL UNION
OF CINEMAS

Welcome to this,
our 2024 Annual
Report on key
cinema trends in
Europe – a region
that remains one
of the most diverse,
innovative and
dynamic in the
World.

Welcome & Executive Summary

UNIC, the Union Internationale des Cinémas/International Union of Cinemas, represents key European cinema operators and their national associations across 39 territories. Our mission is to promote the cultural, social and economic benefits of a thriving cinema-going culture in Europe, providing a strong and influential voice for European cinema operators on issues of shared interest.

After three years disrupted first by the COVID pandemic and then cost of living issues, cinemas came into 2023 with high hopes that the recovery seen the previous year would continue to pick up pace.

And while that was true for a significant number of European territories, with countries such as the Netherlands, Belgium, Serbia, Austria and Bosnia and Herzegovina seeing box office revenues match or in some cases exceed pre-COVID levels, the impact of strikes in the US and the resultant reduction in the number of film titles available from the major studios in the second half of the year undoubtedly held the sector back from fully hitting the heights previously seen.

Nevertheless, with local content continuing to make a strong contribution in many UNIC territories, 2023 saw cinema admissions in the EU increase by an estimated 22.5 per cent, with over 662 million visits recorded across the region. Box office revenue exceeded €5.1 billion, a 26.7 per cent increase compared to the previous year.

Across all UNIC territories, 998.1 million tickets were sold, amounting to an estimated €7.3 billion in revenue. These impressive figures were achieved despite – as mentioned above – the impacts of strikes in the US, but also the continuing challenges of rising operational costs and the ongoing disruption caused by the Russia/Ukraine war.

2023 was also a year in which studios and major distributors further re-affirmed their trust in and support for exclusive theatrical releases, recognising cinemas as the optimal venues to experience cinematic works. A robust and diverse film slate remains crucial in attracting both existing and new audiences.

All cinemas strive to remain innovative and offer audiences an unforgettable experience, both providing best-in-class sound and projection and diversifying their programming and wider activities to cater to various tastes – as highlighted in UNIC’s recent Innovation and the Big Screen publication.

In April 2024, industry analysts ‘Gower Street Analytics’ increased their forecast on the global box office for the year to \$32.3 billion, up from their initial assessment of \$31.5 billion in December 2023.

We hope you find this report engaging and insightful and look forward to seeing you soon.

39
TERRITORIES
represented
by UNIC

44,000
SCREENS
across UNIC
territories in 2023

€7.3 BILLION
AT THE BOX OFFICE

across UNIC
territories in 2023

+ 23.3 per cent
vs 2022 box office
across UNIC territories

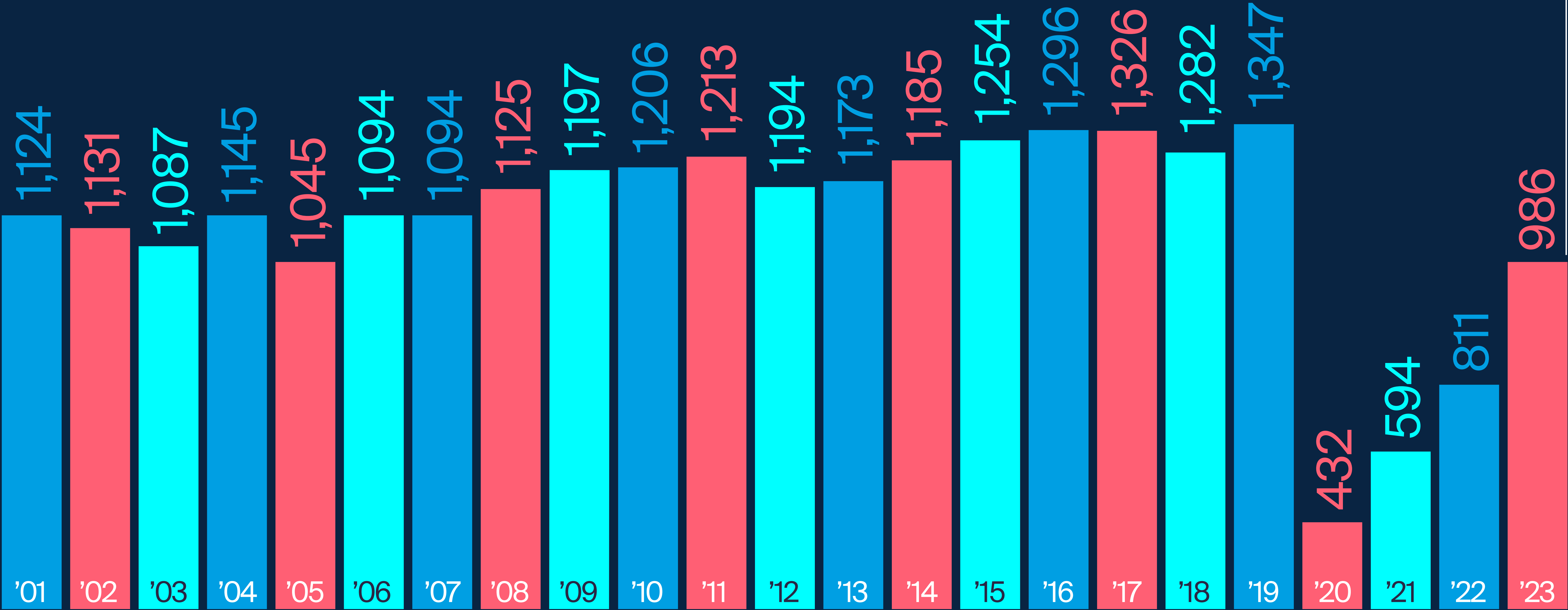
+ 26.7 per cent
vs 2022 box office
in EU

– 7.8 per cent
vs 2017–2019
box office in EU

Cinema admissions

across Europe 2001-2023 (millions)

+21.6%
vs 2022 admissions



-7.8%

vs 2017-2019 box office in EU



cinema-going in 2023

Cinema-going in Europe in 2023

Facts and figures

Cinemas remain places where records are set, as seen with the simultaneous release of two films that captured global audiences' attention. Warner Bros' *Barbie* amassed an astonishing \$1.44 billion globally, dominating the charts in the UK and Ireland (£96 million), Germany (€55.3 million), Spain (€5.3 million) and numerous other European countries. *Barbie* contributed 9% to the year's overall box office in the UK & Ireland, securing its position as the sixth highest-grossing film of all time in the UK and the most successful film ever in Ireland. The Greta Gerwig-helmed feature was also the highest-grossing film ever directed by a woman.

Meanwhile, Universal Pictures' *Oppenheimer* brought in over \$952 million worldwide. With many viewers opting for a double feature of *Barbie* and *Oppenheimer*, often in premium formats, the "Barbenheimer" phenomenon sparked unprecedented buzz on social media. Audiences flocked to cinemas for the double bill, resulting in an exceptional summer in countries like the Netherlands, Belgium, Sweden, Poland, the UK, Spain, and Italy among others. In Italy, one of the few countries where *Barbie* and *Oppenheimer* were released one month apart, results between May and August surpassed those achieved in 2017–2019, which helped the second quarter in the territory achieve the best ever box office revenue figures. The Dutch box office was 25% above the pre-pandemic average in August 2023, with July and August recording the highest grossing months of the decade. Germany also achieved its highest grossing monthly result of the past ten years in August, 42% above the pre-pandemic average.

2023 proved to be a successful year for European cinemas thanks to smash-hit international titles including *Barbie*, *Oppenheimer*, *The Super Mario Bros. Movie*, *Spider-Man: Across the Spider-Verse*, *Mission: Impossible – Dead Reckoning Part One* and *Wonka*, as well as a wide range of highly popular national releases.

Gower Street Analytics estimated that the 2023 global box office reached \$33.9 billion, a 30.5% increase on 2022. Europe, Middle East and Africa recorded revenues close to \$9.0 billion, a 25% increase on 2022.

Looking at UNIC territories, European admissions surged by 21.6%, hitting 986 million and nearing the one-billion mark. Total box office for the year reached €7.2 billion, marking a modest 7.8% decrease from 2017–2019 results in the EU but a substantial increase of 26.7% in the EU and 23.7% in Europe compared to 2022.

**986 MILLION
ADMISSIONS**
in Europe in 2023
+21.6% increase
on 2022

**€7.2 BILLION
AT THE BOX OFFICE**
in Europe in 2023
+ 23.7% increase
on 2022

The *Super Mario Bros. Movie* crossed the billion-dollar mark globally, while *Taylor Swift: The Eras Tour* set a new record for the highest global opening weekend for a concert film, earning \$128 million. Released in October 2023 across 94 territories and over 4,500 venues, the Grammy-winning artist achieved top rankings in the US, UK, Germany, Spain, and Italy.


A large number of European countries – including the Netherlands, Belgium, Bulgaria, Romania, Georgia, Croatia, Albania, Bosnia and Herzegovina, Serbia and Montenegro – ended the year with box office revenues above their 2017–2019 average.

The Dutch market achieved over 31 million admissions, 25.2% more than in 2022, and earned €333 million, an increase of 29% on 2022. Beyond content, these impressive results were also linked to a significant number of new cinema openings, expansions and refurbishments, these contributing to higher attendance (from 1.4 admissions per capita in 2022 to 1.7 in 2023).

Serbia saw box office increase by 26% compared to 2022, mainly thanks to the local title *Guardians of the Formula* by Dragan Bjelogrić, which delivered stronger results than both *Barbie* and *Oppenheimer*. The film director is known for another Serbian record-breaking title, *Toma*, which was a hit across the entire Balkan region in 2021. This latest Serbian drama, adapted from a local novel and set in the Cold War, collected numerous awards at various international film festivals. Released in October 2023, the theatrical run of *Guardians of the Formula* lasted into the first months of 2024.

Albania's box office in 2023 was 16.5% above the 2017–2019 average, thanks to the record success of local productions. Indeed, the top three titles of the year were all Albanian – *Ne kuader te dashurise*, *Police Per Koke* and *5 here Jo* – generating higher revenues than Hollywood blockbusters and boosting the local market share to an unprecedented 31%.

Bosnia and Herzegovina also exceeded its pre-Covid results, mainly due to the opening in the last couple of years of new multiplexes offering premium services.



ALIBI.COM 2
FRANCE (2023),
AXEL FILMS, BAF PROD,
STUDIOCANAL,
TF1 STUDIO PRODUCTION.



When quality, diverse and well-marketed titles are there, audiences are there too.

Belgium recorded a 2% increase compared to the 2017–2019 box office, thanks to the success of *Barbie*, *The Super Mario Bros. Movie*, *Avatar: The Way of Water* and *Oppenheimer*, which together accounted for 18.5% of the overall yearly admissions. The strong performance of independent films also contributed to the positive results of 2023, with Belgian arthouse cinemas registering 30% more admissions than in 2022.

Romania also scored excellent results in 2023 with four domestic releases ending in the top 10 for the first time ever. After *Barbie* and *Oppenheimer*, in third position Jesús del Cerro's *Miami Bici 2* was watched by 430,000 Romanians in only three weeks. The three other Romanian films ranking 5th, 6th and 7th in the top 10 are the comedies *Romina*, *Wedding for Money* and *The Action Pack*.

Other countries like Austria, the Czech Republic, Finland, Hungary and Slovakia were on par with 2017–2019 box office results.

In the Czech Republic, 2023 box office was 7.6% above 2022 and only 0.9% below the pre-pandemic average. Local films strongly contributed, with 21.4% market share. The Czech comedy *ONEMANSHOW – The Movie* by Kamil Bartošek delivered 291,761 admissions and €2.24 million in its opening weekend in domestic cinemas, surpassing *Barbie*. *ONEMANSHOW – The Movie* is produced, scripted and directed by influencer Kamil Bartošek also known as Kazma Kazmitch, who is one of the most famous Czech pranksters and well-known for the online series *One Man Show*.

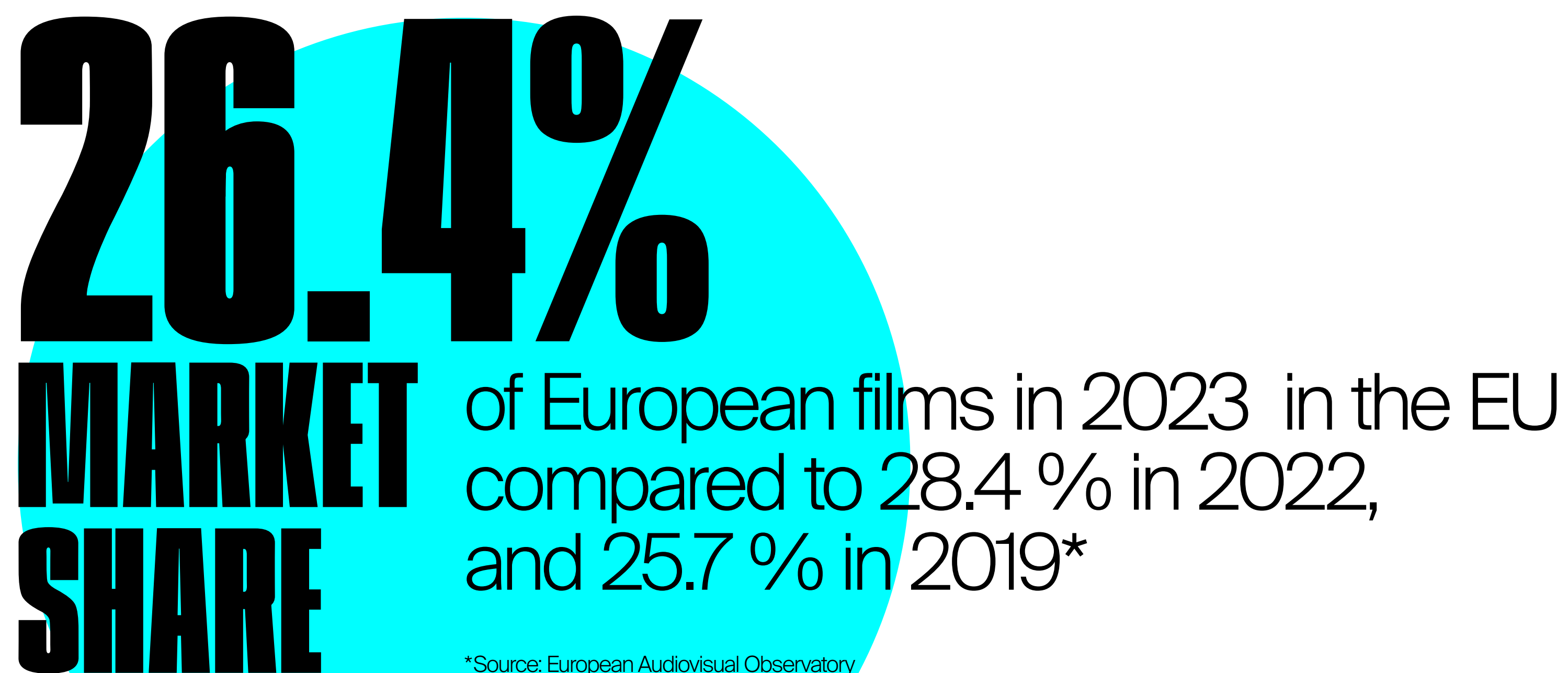
Italian box office earned €496 million and cinema admissions totalled 71 million, impressive increases of 62% and 59% respectively on 2022. This was due to an unparalleled cinematic summer, with *Barbie*, *Mission Impossible: Dead Reckoning Part One* and *Oppenheimer*, but also due to exceptional results for local productions, in particular the dramedy *C'è Ancora Domani*.

These encouraging results in Europe were achieved despite the ongoing impact of the war between Russia and Ukraine, the political crisis in the Middle East and the economic downturn in Turkey. In addition, in the second half of 2023 the writers' and actors' strikes in Hollywood slowed down the speed of recovery, with a number of much awaited tentpoles postponed to 2024 or 2025.

Despite a renewed commitment from Hollywood studios to release their films exclusively in cinemas, the number of film releases in 2023 was not yet back to 2019 levels, partly explained by the impact of the strikes and the costs of productions. On average, there were approximately 409 new cinema releases in 2023 across the EU and UK, compared to 370 in 2022 but 480 in 2019. Looking specifically at the offering of US films, an average of 122 US titles were released across the EU and UK in 2023, compared to 130 in 2019.

Although the impact of the strikes has also been felt through the first half of 2024, with an increased film supply for the rest of the year we are confident that successful admissions and box revenues will continue to contribute to a healthy market. After all, when quality, diverse and well-marketed titles are there, audiences are there too.

In April, [Gower Street Analytics](#) revised its 2024 Global box office projection to \$32.3 billion, an increase on the original projection of \$31.5 billion published in December 2023.



26.4%
MARKET SHARE

of European films in 2023 in the EU compared to 28.4 % in 2022, and 25.7 % in 2019*

*Source: European Audiovisual Observatory



ASTERIX & OBELIX:
THE MIDDLE KINGDOM
FRANCE (2023), TRÉSOR
FILMS, PATHÉ FILMS.

TOP 5

European territories
in terms of
admissions

FRANCE
180.4 million

UK
123.6 million

GERMANY
95.7 million

SPAIN
77.8 million

ITALY
70.6 million

European territories
in terms of market
share for national films

TURKEY
42.7 per cent

FRANCE
36.7 per cent

ALBANIA
31 per cent

ITALY
24.3 per cent

NORWAY
23.5 per cent

TOP 5

Most successful European films released in 2023 (in million admissions)



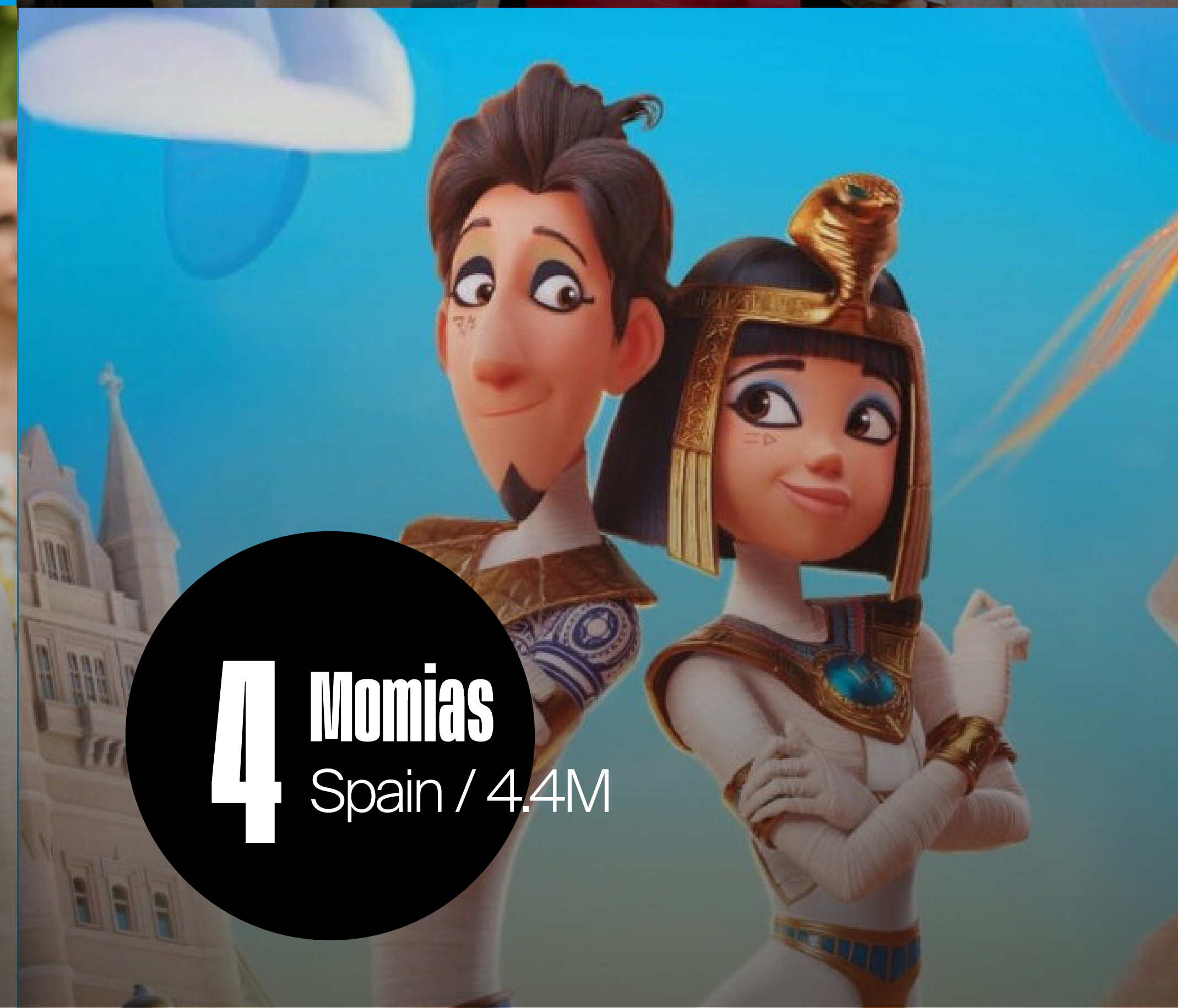
1 **Astérix & Obélix: L'Empire du Milieu**
France / 6.4M



2 **C'è Ancora Domani**
Italy / 4.9M



3 **Alibi.com 2**
France / 4.5M



4 **Momias**
Spain / 4.4M



5 **Les Trois Mousquetaires: D'Artagnan**
France / 4M

SUCCESS OF LOCAL TITLES

Local titles played a key role in European cinemas' success story in 2023 and the first half of 2024. In France, 12 national films scored over a million admissions, with three reaching the year's top 10: *Astérix & Obélix: L'Empire du Milieu* (4.6 million admissions), *Alibi.com 2* (4.3 million), and *Les Trois Mousquetaires: D'Artagnan* (3.4 million). 20 French films recorded between 500,000 and 1 million admissions, contributing to a national market share of 39.8%. Among the most successful French local titles there were not only popular comedies but also animations, like *Miraculous – The Film* and the investigation drama and Palme D'Or winner *Anatomie d'une chute*.

In Italy, the market share for local films increased, achieving 24.3% of total revenues and 25.9% of admissions. Italian titles grossed €120.7 million in 2023, twice as much as in

2022. The Italian 'dramedy' *C'è Ancora Domani*, the first film directed by the actress Paola Cortellesi, was the top-grossing film of the year with box office takings of €32.9 million in 2023, exceeding *Barbie* and other US tentpoles and becoming the fifth most successful Italian film of all time. It has furthermore been sold across all European and some international markets, where it will be released throughout 2024. Nine other Italian titles recorded between 500,000 and 1 million admissions.

In Norway, during the Christmas holiday season, three out of four cinema tickets were sold for a Norwegian film, such as *Bukkene Bruse på Badeland*, which after just one week had secured tenth place among the most-watched films of 2023 with 172,205 tickets sold, and *Den første julen i Skomakergata*, with over 404,000 tickets sold as of 2 January 2024. Through the year as a whole, Norwegian films accounted for 23.5% of total revenues. Four Norwegian films ranked in the yearly top 10, all distributed by Nordisk. 7 of the 10 most watched films at the Bygdekinoen (rural cinemas in remote areas with no permanent venues) were Norwegian.

In Denmark, four local titles reached the top 10 – *Meter i sekundet*, *Når befrielsen kommer*, *Bastarden*, *Kysset* – and were watched by a total audience of 1.1 million, delivering the same market share as "Barbenheimer". These top Danish films contributed significantly to the 25% local market share by tickets sold.

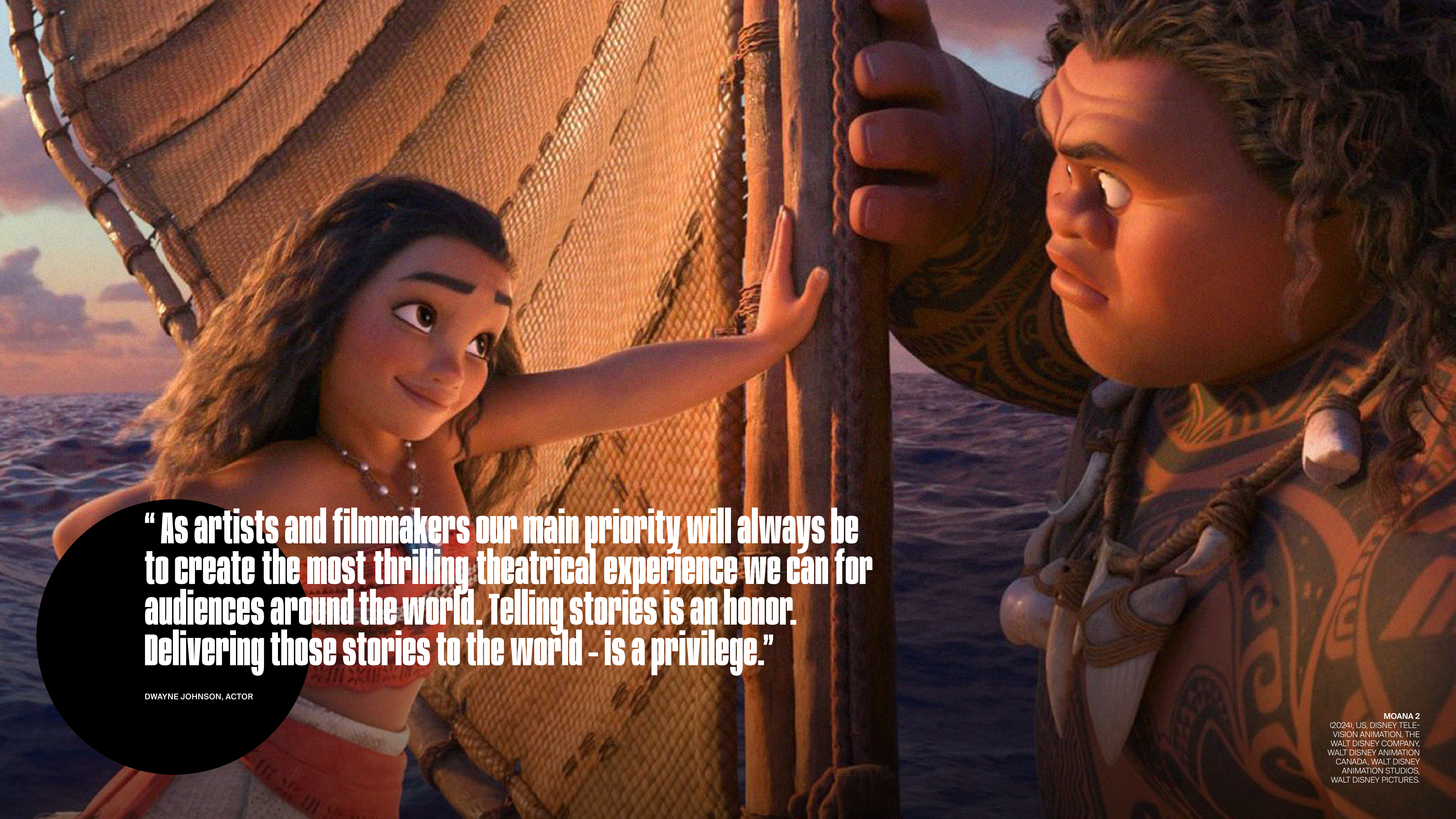
Poland released very diverse local productions in 2023. Agnieszka Holland's *Green Border* – released in September following its Special Jury Prize in Venice – earned €3.5 million with 762,000 admissions. It was dethroned in November by DK Welchman and Hugh Welchman's animated film *Chłopi*, Poland's candidate for the Oscars, which after a record debut week, reached 1.5 million admissions and ranked fourth in the yearly top 10. The third most watched Polish film in 2023 was the family live-action flick, *O psie, który jeździł koleją*, with 717,000 admissions. *Budda. Dzieciak '98* was released on 21 March 2024, breaking the record as the best-performing Polish documentary in history. The documentary about the Youtuber and influencer Kamil Labudda was watched by over 351,000 viewers in only one week, becoming the third best opening result of 2024 and the best Polish opening of the first quarter 2024.

The local Finnish and international success of Jalmari Helander's war film *Sisu* earned upwards of €2.4 million in its domestic market and \$12.8 million worldwide. Remarkably, *Sisu* grossed over \$3.3 million in its opening weekend in the US from over 1,000 screens, a major achievement for a film in English and Finnish language with R ratings. This Finnish production ranked in top positions in Germany in its opening week and played for over four months in top positions in Finnish cinemas, with over 150,000 admissions. The first quarter of 2024 also proved the success of local titles in Finland, since 6 of out the 10 most watched films were local titles. This brought the share of domestic films by box office in the first quarter to 52%. The most watched films between January and March were *Maija of Myrskyluoto*, with over 420,000 viewers and *Luottomies: All In*, with more than 290,000 tickets sold. Thanks to the success of Finnish titles, the first quarter of 2024 was ahead of 2023 by 24.6% in admissions and 30.8% in box office, performing even 27.6% above the 2017–2019 average box office.

UNIC weekly box office reports



UNIC has been collaborating with partners at Comscore, the industry media measurement and analytics company, to produce weekly box office analysis for UNIC members. This provides a weekly overview of box office results globally and across Europe, including a box office chart for five leading European markets – namely France, UK and Ireland, Germany, Spain and Italy. This industry update offers cinema operators a unique opportunity to monitor the ongoing recovery and strength of the European cinema industry, highlighting the growing success of international as well as national releases.

A scene from the animated film Moana 2. Moana, on the left, is looking towards Maui, on the right. They are on a boat with a large, woven sail. The background shows the ocean and a sunset sky. Maui is wearing his signature patterned tunic and has a large, ornate necklace. Moana is wearing a red top and a necklace with a pearl. The lighting is warm, suggesting late afternoon or early evening.

“ As artists and filmmakers our main priority will always be to create the most thrilling theatrical experience we can for audiences around the world. Telling stories is an honor. Delivering those stories to the world - is a privilege.”

DWAYNE JOHNSON, ACTOR

MOANA 2
(2024), US, DISNEY TELEVISION ANIMATION, THE WALT DISNEY COMPANY, WALT DISNEY ANIMATION CANADA, WALT DISNEY ANIMATION STUDIOS, WALT DISNEY PICTURES.

Diverse and original content drove admissions in 2023

Not only did local content drive audiences to the cinemas in 2023, but these titles also brought a clear diversity in storytelling. Traditional tales or stories based on known film IPs no longer dictate cinematic success and today's audiences crave unique narratives that challenge conventions and push boundaries.

For the first time in a quarter of a decade, the top three films globally were not part of a franchise but were based on original content with a variety of source material: *Barbie* (toy IP), *The Super Mario Bros. Movie* (gaming IP), and *Oppenheimer* (an issue-led biography).

Barbie stands as a shining example, grossing well over \$1 billion worldwide, and demonstrating that non-traditional plots that work to disrupt societal standards are resonating with audiences. Following *Barbie's* success, new films based on toy IP form a distinct possibility for years ahead, building on the success underpinning *Transformers* and *Dungeons and Dragons*. Mattel is reportedly developing 45 different projects for theatrical titles, including *Barney the Dinosaur*, *Hot Wheels*, and *Uno*. At CinemaCon 2024, Lionsgate announced the release of the film *Monopoly* in 2025, produced by Margot Robbie's production company Lucky Chap.

The Super Mario Bros. Movie led the way in a new film trend with films issued by world-renowned videogames IP, followed by *Five Nights at Freddie's*. New original gaming-issued films will be released in the next couple of years, like *Minecraft* – starring Jack Black – and *The Sims* – also produced by Margot Robbie. In addition, the third chapter of *Sonic the Hedgehog* is set to debut in December 2024.

In North America, 29 franchises took 54.7% of the box office earned by the top 50 films in 2023, well down on the high of 79.7% in 2021 but with a similar number of films.

Audiences are increasingly seeking out films that offer fresh perspectives, unique narratives and authentic representations. Numerous mid-tier author films have been released and, against all expectations, have become mainstream. In Italy for example a number of arthouse films were ranking in top positions for several weeks in the first quarter of 2024, such as Yorgos

Lanthimos's *Poor Things*, Jonathan Glazer's *The Zone of Interest*, Hayao Miyazaki's *The Boy and the Heron*, Aki Kaurismaki's *Fallen Leaves*, Justine Triet's *Anatomy of a Fall* and Ken Loach's *The Old Oak*.

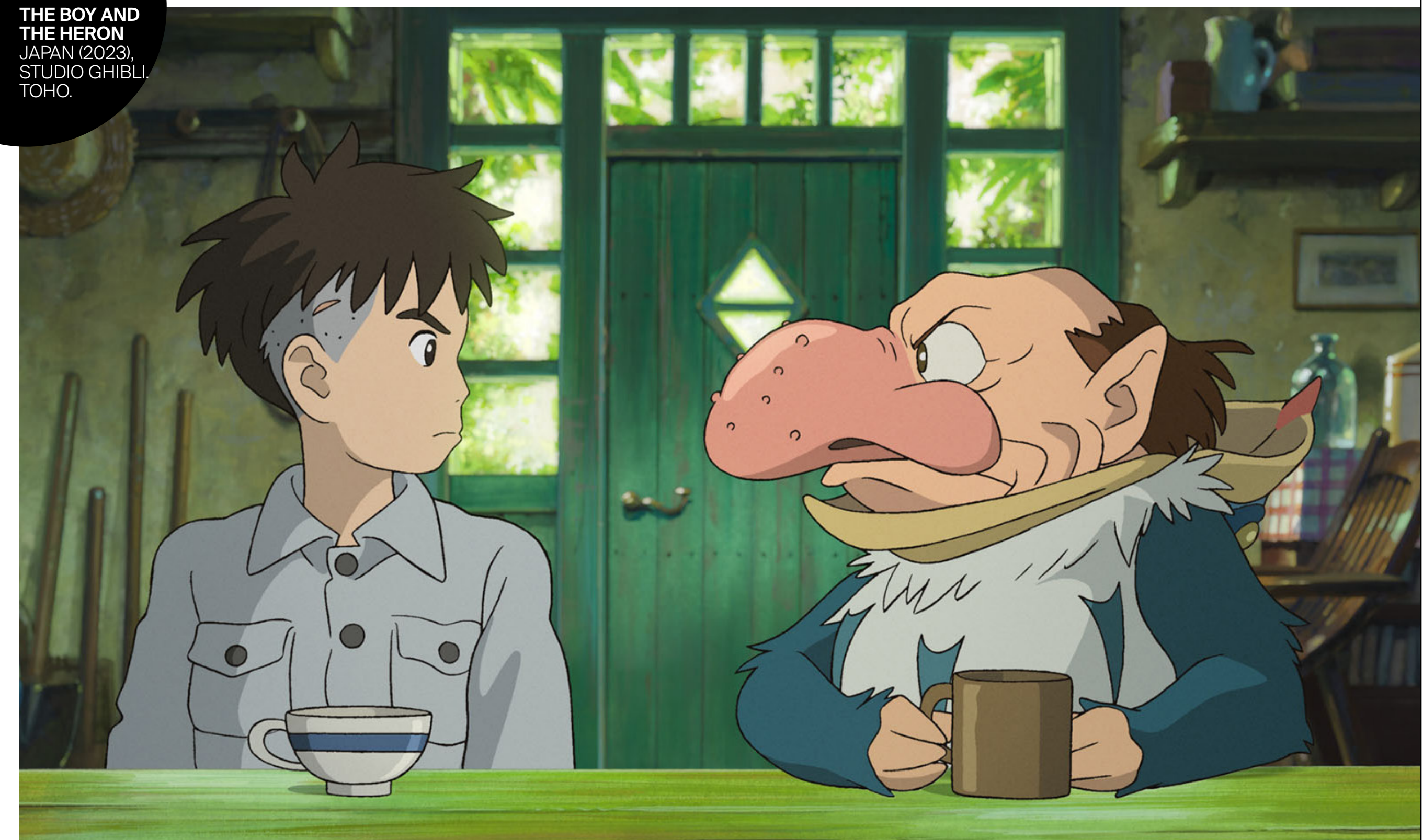
Asian auteur films were enjoyed by European audiences across 2023 and 2024, as witnessed by the success of Wim Wenders' *Perfect Days*, Celine Song's *Past Lives*, Kore-eda's *Monster* and Hayao Miyazaki's *The Boy and the Heron*.

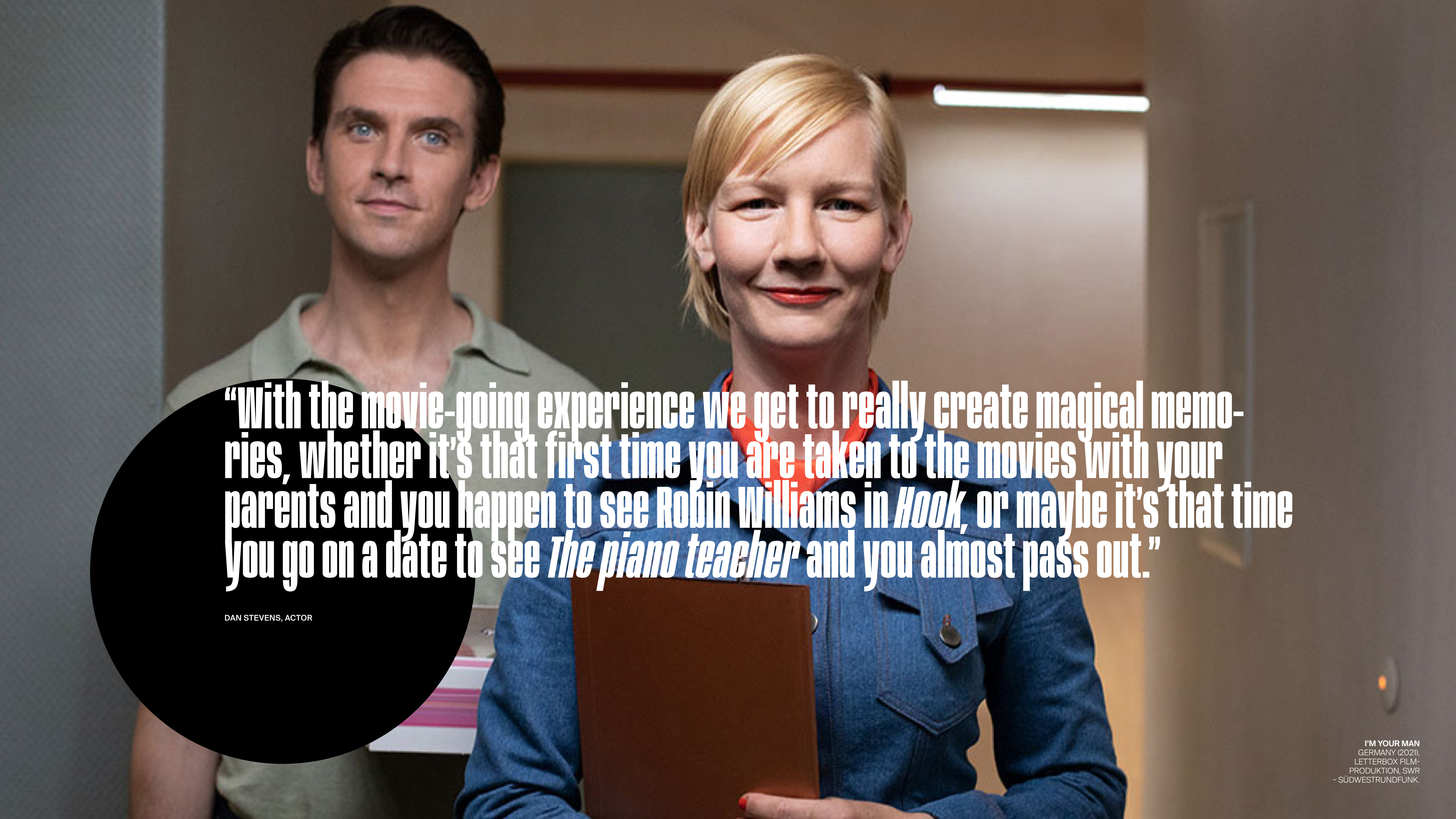
Anime has been thriving, tapping into an existing loyal community, with significant online buzz around new film releases. *The First Slam Dunk*, released in Europe throughout 2023, grossed \$153 million globally, whereas the

Demon Slayer franchise continues to gather crowds of fans across the World.

Other successes in 2023 suggest possible genres that could be further exploited and drive new audiences to the cinema, such as music concerts released as event cinema, taking inspiration from the record-breaking *Taylor Swift: The Eras Tour* and *Renaissance: A Film by Beyoncé* or music biopics, after the success of *Bob Marley: One Love*, followed in 2024 by *Back to Black* on Amy Winehouse and in 2025 by *Michael* on Michael Jackson.

THE BOY AND THE HERON
JAPAN (2023),
STUDIO GHIBLI,
TOHO.





“With the movie-going experience we get to really create magical memories, whether it’s that first time you are taken to the movies with your parents and you happen to see Robin Williams in *Hook*, or maybe it’s that time you go on a date to see *The piano teacher* and you almost pass out.”

DAN STEVENS, ACTOR

CINEMA-GOING ACROSS UNIC TERRITORIES IN 2023

Country (Currency)	BOX OFFICE in local currency (in million)				ADMISSIONS (in million)				National films' share 2023 (by box office)	Screens 2023
	2023	2022	Change from 2022 in %	Change from 2017-2019 in %	2023	2022	Change from 2022 in %	Change from 2017-2019 in %		
Albania (ALL)	288.3	183.6	57.0%	16.5%	0.4	0.3	42.0%	-2.5%	31.0%	18
Austria (EUR)	125.4	100.0	25.4%	-0.4%	11.6	9.7	19.5%	-14.4%	6.9%	563
Belgium (EUR)	167.2	141.7	18.0%	1.9%	16.7	14.7	13.6%	-13.3%	10.0%	505
Bosnia and Herzegovina (BAM)	9.2	7.2	27.2%	48.9%	1.3	1.1	19.6%	13.4%	3.6%	81
Bulgaria (BGN)	53.2	41.9	26.9%	9.4%	4.5	4.0	12.8%	-13.5%	8.2%	221
Croatia (HRK)*	21.0	16.5	27.4%	8.0%	3.8	3.2	18.0%	-18.8%	4.6%	180
Cyprus (EUR)	5.4	3.9	36.0%	-19.8%	0.6	0.5	28.3%	-24.4%	6.0%	40
Czech Republic (CZK)	2,275.2	2,115.5	7.6%	-0.9%	13.3	13.5	-1.2%	-19.7%	21.4%	882
Denmark (DKK)	1,005.9	994.1	1.2%	-11.3%	10.1	10.2	-1.3%	-21.9%	21.4%	499
Estonia (EUR)	21.0	15.2	37.8%	3.2%	2.8	2.2	30.1%	-21.9%	21.8%	90
Finland (EUR)	93.6	72.3	29.4%	-1.4%	7.2	5.8	23.1%	-15.0%	23.0%	383
France (EUR)	1,333.9	1,094.4	21.9%	-3.9%	180.4	152.0	18.7%	-13.2%	36.7%	6320
Georgia (GEL)	19.0	14.2	27.4%	61.7%	1.5	1.3	21.8%	19.2%	3.7%	40
Germany (EUR)	929.1	722.0	28.7%	-6.5%	95.7	78.0	22.7%	-17.1%	24.3%	4901
Greece (EUR)	52.1	37.5	39.0%	-13.1%	7.4	5.5	34.8%	-23.9%	8.0%	464
Hungary (HUF)	22,518.7	17,881.4	25.9%	3.9%	11.1	10.2	8.5%	-27.1%	5.6%	420
Ireland (EUR)	101.7	91.6	11.1%	-13.6%	11.5	10.5	9.6%	-26.5%	3.5%	558
Israel (NIS)	402.3	386.9	4.0%	-27.7%	12.2	12.1	0.8%	-29.9%	12.3%	416
Italy (EUR)	495.7	306.7	61.6%	-16.3%	70.6	44.5	58.6%	-23.2%	24.3%	3484
Latvia (EUR)	13.4	11.2	19.9%	-2.2%	2.0	1.7	18.4%	-21.1%	5.7%	80
Lithuania (EUR)	21.4	18.1	18.3%	-1.6%	3.4	3.0	14.9%	-17.2%	14.6%	74
Luxembourg (EUR)	10.9	7.9	36.6%	29.6%	1.0	0.8	29.5%	-12.6%	1.2%	37**

Source: UNIC members.

Complementary information from Comscore, CY (DJK Group), CZ (Unie Filmových Distributoru), BG (Национален филмов център), DE (Filmförderungsanstalt), EE (Forum Cinemas), FR (Centre National du Cinéma et de l'Image Animée), GR (Ελληνικό Κέντρο Κινηματογράφου), HU (Nemzeti Média- és Hírközlési Hatóság), IE (Pearl&Dean), LU (Centre national de l'audiovisuel), LT (Forum Cinemas), LV (Forum Cinemas), MK (Macedonian Film Center), PT (Instituto do Cinema e do Audiovisual), RO (Centrul National al Cinematografiei), RU (Nevafilm Research), UA (Planeta Kino).

* Croatia switched to EUR on Jan 2023, all previous BO data has been converted to EUR

** 2022 data

*** estimates

CINEMA-GOING ACROSS UNIC TERRITORIES IN 2023

Source: UNIC members.

Complementary information from Comscore, CY (DJK Group), CZ (Unie Filmových Distributoru), BG (Национален филмов център), DE (Filmförderungsanstalt), EE (Forum Cinemas), FR (Centre National du Cinéma et de l'Image Animée), GR (Ελληνικό Κέντρο Κινηματογράφου), HU (Nemzeti Média- és Hírközlési Hatóság), IE (Pearl&Dean), LU (Centre national de l'audiovisuel), LT (Forum Cinemas), LV (Forum Cinemas), MK (Macedonian Film Center), PT (Instituto do Cinema e do Audiovisual), RO (Centrul National al Cinematografiei), RU (Nevafilm Research), UA (Planeta Kino).

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** 2022 data

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Country (Currency)	BOX OFFICE in local currency (in million)				ADMISSIONS (in million)				National films' share 2023 (by box office)	Screens 2023
	2023	2022	Change from 2022 in %	Change from 2017-2019 average in %	2023	2022	Change from 2022 in %	Change from 2017-2019 average in %		
Montenegro (EUR)	1.2	0.8	44.2%	15.9%	0.3	0.2	34.2%	-5.9%	0.2%	14
Netherlands (EUR)	333.3	258.5	28.9%	3.1%	31.3	25.0	25.2%	-15.0%	12.6%	1069
North Macedonia (MKD)***	90.3	67.4	34.0%	-0.5%	0.3	0.3	26.7%	-16.5%	5.0%	26**
Norway (NOK)	1,226.0	1,106.2	10.8%	-6.7%	9.4	8.8	6.7%	-20.2%	23.5%	481
Poland (PLN)	1,039.7	815.8	27.5%	-6.6%	50.4	42.8	17.9%	-14.6%	18.5%	1585
Portugal (EUR)	72.9	55.4	31.7%	-10.2%	12.3	9.6	28.0%	-19.6%	2.1%	566
Romania (RON)	308.8	246.2	25.5%	16.6%	13.0	11.2	15.9%	-3.2%	18.0%	462
Russia (RUB)	39,002.9	23,667.2	64.8%	-26.1%	126.1	83.2	51.5%	-39.9%	72.0%	5868
Serbia (RSD)	2,131.1	1,691.1	26.0%	28.4%	4.0	3.5	12.9%	-4.9%	19.0%	180
Slovakia (EUR)	34.6	28.0	23.6%	-1.0%	5.0	4.3	15.7%	-21.5%	12.0%	242
Slovenia (EUR)	12.8	11.5	11.5%	7.0%	1.9	1.8	2.4%	-17.0%	7.6%	106
Spain (EUR)	504.5	394.6	27.9%	-16.3%	77.8	61.8	25.9%	-23.0%	17.0%	3591
Sweden (SEK)	1,548.9	1,389.5	11.5%	-20.3%	11.2	10.4	7.8%	-31.5%	14.9%	952
Switzerland (CHF)	176.6	143.5	23.0%	-10.5%	10.9	9.1	20.0%	-15.9%	6.5%	623
Turkey (TRY)	2,812.1	1,350.4	108.2%	207.6%	31.4	36.3	-13.6%	-53.1%	42.7%	2431
UK (GBP)	979.2	903.5	8.4%	-22.9%	123.6	117.3	5.4%	-29.2%	4.9%	4773
Ukraine (UAH)	2,196.9	1,155.2	90.2%	-12.2%	14.6	9.1	60.5%	-50.0%	14.7%	458
European Union (EUR)	5,125.9	4,046.6	26.7%	-7.8%	662.2	540.5	22.5%	-17.9%		24,790
EU + UK (EUR)	6,247.3	5,097.9	22.5%	-10.8%	785.8	657.8	19.5%	-19.9%		29,563
Europe (EUR)	7,178.5	5,803.5	23.7%	-12.3%	986	810.9	21.6%	-25.3%		43,267

TOP 5 FILMS ACROSS UNIC TERRITORIES IN 2023

	TOP 1	TOP 2	TOP 3	TOP 4	TOP 5
Albania	Ne Kuader Te Dashurise	Police per Koke	5 here Jo	Barbie	Fast X
Austria	Barbie	Avatar: The Way of Water	The Super Mario Bros Movie	Oppenheimer	Rehragout-Rendezvous
Belgium	Barbie	The Super Mario Bros Movie	Avatar: The Way of Water	Oppenheimer	Elemental
Bosnia And Herzegovina	Barbie	Avatar: The Way of Water	Oppenheimer	Fast X	Meg 2: The Trench
Bulgaria	Barbie	Avatar: The Way of Water	Fast X	Oppenheimer	The Super Mario Bros Movie
Croatia	Barbie	Oppenheimer	Avatar: The Way of Water	The Super Mario Bros Movie	Fast X
Cyprus	Barbie	Camping – The Final Battle	Oppenheimer	The Super Mario Bros Movie	Fast X
Czech Republic	Avatar: The Way of Water	Barbie	Oppenheimer	ONEMANSHOW – The Movie	Guardians of the Galaxy – Vol. 3
Denmark	Barbie	Oppenheimer	Avatar: The Way of Water	Meter i sekundet	The Super Mario Bros Movie
Estonia	Barbie	Suvitajad	Oppenheimer	Vigased pruudid	The Super Mario Bros Movie
Finland	Barbie	Oppenheimer	The Super Mario Bros Movie	Indiana Jones And The Dial Of Destiny	Kuolleet lehdet
France	The Super Mario Bros Movie	Barbie	Avatar: The Way of Water	Asterix & Obelix: l'Empire du Milieu	Oppenheimer
Georgia	Barbie	Avatar: The Way of Water	Oppenheimer	Puss in Boots: The Last Wish	Napoleon
Germany	Barbie	Avatar: The Way of Water	The Super Mario Bros Movie	Oppenheimer	Elemental
Greece	Barbie	Oppenheimer	Fonissa	The Super Mario Bros Movie	Avatar: The Way of Water
Hungary	Barbie	Oppenheimer	Avatar: The Way of Water	Guardians of the Galaxy Vol. 3	The Super Mario Bros Movie
Ireland	Barbie	Oppenheimer	The Super Mario Bros Movie	Wonka	Spider-Man: Across the Spider-Verse
Israel	The Celebration	Barbie	The Super Mario Bros Movie	Fast X	Oppenheimer
Italy	C'è Ancora Domani	Barbie	Oppenheimer	The Super Mario Bros Movie	Avatar: The Way of Water
Latvia	Avatar: The Way of Water	Barbie	Oppenheimer	Puss in Boots: The Last Wish	The Super Mario Bros Movie

Source: UNIC members.

Complementary information from Comscore, CY (DJK Group), CZ (Unie Filmovych Distributoru), BG (Национален филмов център), DE (Filmförderungsanstalt), EE (Forum Cinemas), FR (Centre National du Cinéma et de l'Image Animée), GR (Ελληνικό Κέντρο Κινηματογράφου), HU (Nemzeti Média- és Hírközlési Hatóság), IE (Pearl&Dean), LU (Centre national de l'audiovisuel), LT (Forum Cinemas), LV (Forum Cinemas), MK (Macedonian Film Center), PT (Instituto do Cinema e do Audiovisual), RO (Centrul National al Cinematografiei), RU (Nevafilm Research), UA (Planeta Kino).



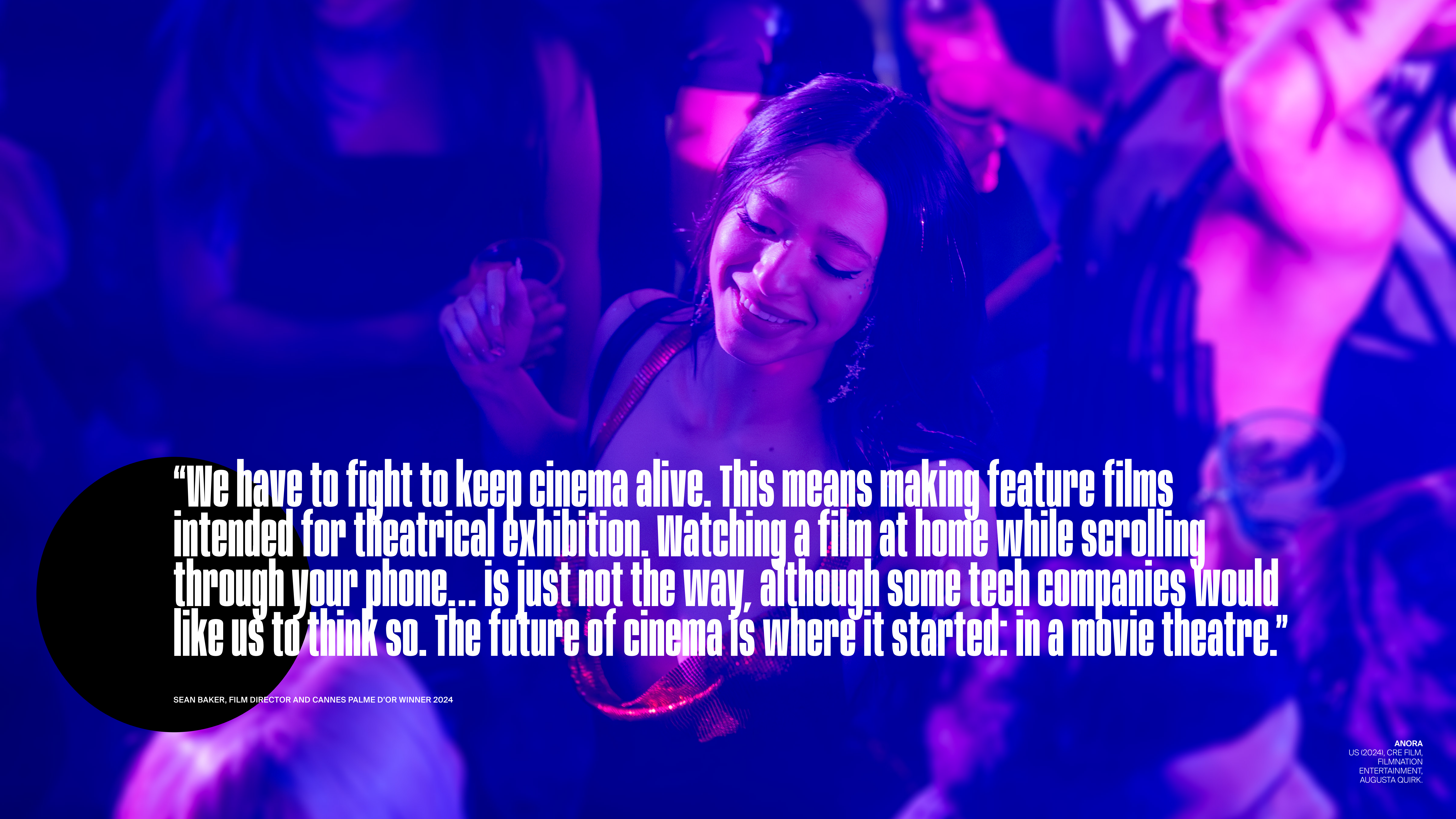
TOP 5 FILMS ACROSS UNIC TERRITORIES IN 2023

	TOP 1	TOP 2	TOP 3	TOP 4	TOP 5
Lithuania	Avatar: The Way of Water	Barbie	Oppenheimer	Puss in Boots: The Last Wish	Reemigrantai
Luxembourg	Barbie	The Super Mario Bros Movie	Avatar: The Way of Water	Oppenheimer	Mission Impossible: Dead Reckoning Part 1
Montenegro	Barbie	Oppenheimer	Čuvari formule	The Super Mario Bros Movie	Avatar: The Way of Water
Netherlands	Oppenheimer	Barbie	The Super Mario Bros Movie	Avatar: The Way of Water	Mission Impossible: Dead Reckoning Part 1
Norway	Barbie	Oppenheimer	The Super Mario Bros Movie	Den første julen i Skomakergata	Mission Impossible: Dead Reckoning Part 1
Poland	Barbie	Puss in Boots: The Last Wish	Oppenheimer	Chłopi	Avatar: The Way of Water
Portugal	Barbie	Fast X	Oppenheimer	Avatar: The Way of Water	The Super Mario Bros Movie
Romania	Barbie	Miami Bici 2	Oppenheimer	Fast X	Romina, VTM
Serbia	Čuvari formule	Barbie	Oppenheimer	The Super Mario Bros Movie	Indigo Kristal
Slovakia	Oppenheimer	Barbie	Avatar: The Way of Water	Invalid	Puss in Boots: The Last Wish
Slovenia	Barbie	Oppenheimer	The Super Mario Bros Movie	Fast X	Šepet Metulja
Spain	Barbie	The Super Mario Bros Movie	Avatar: The Way of Water	Oppenheimer	Elemental
Sweden	Barbie	Oppenheimer	Avatar: The Way of Water	The Super Mario Bros Movie	Indiana Jones And The Dial Of Destiny
Switzerland	Barbie	Avatar: The Way of Water	The Super Mario Bros Movie	Oppenheimer	Mission Impossible: Dead Reckoning Part 1
Turkey	Rafadan Tayfa 3: Galaktik Tayfa	Oppenheimer	Atatürk 11881-1919	Fast X	Ölümlü Dünya 2
UK	Barbie	Oppenheimer	The Super Mario Bros Movie	Wonka	Guardians of the Galaxy – Vol. 3
Ukraine	Mavka: Lisova pisnya	Barbie	Oppenheimer	Avatar: The Way of Water	Dovbush

Source: UNIC members.

Complementary information from Comscore, CY (DJK Group), CZ (Unie Filmových Distributoru), BG (Национален филмов център), DE (Filmförderungsanstalt), EE (Forum Cinemas), FR (Centre National du Cinéma et de l'Image Animée), GR (Ελληνικό Κέντρο Κινηματογράφου), HU (Nemzeti Média- és Hírközlési Hatóság), IE (Pearl&Dean), LU (Centre national de l'audiovisuel), LT (Forum Cinemas), LV (Forum Cinemas), MK (Macedonian Film Center), PT (Instituto do Cinema e do Audiovisual), RO (Centrul National al Cinematografiei), RU (Nevafilm Research), UA (Planeta Kino).



A woman with long dark hair, wearing a dark sequined dress, is smiling and looking down in a crowd. The scene is lit with vibrant blue and purple lights, suggesting a movie premiere or festival atmosphere. Other people are visible in the background, some holding up phones to take pictures.

“We have to fight to keep cinema alive. This means making feature films intended for theatrical exhibition. Watching a film at home while scrolling through your phone... is just not the way, although some tech companies would like us to think so. The future of cinema is where it started: in a movie theatre.”

SEAN BAKER, FILM DIRECTOR AND CANNES PALME D'OR WINNER 2024

ANORA
US (2024), CRE FILM,
FILMNATION
ENTERTAINMENT,
AUGUSTA QUIRK.

Celebrating European diversity

The number of titles released in cinema has increased in 2023, but it's not yet back to 2019 levels.



26

EUROPEAN TITLES

made it to the box office top five across UNIC territories in 2023 compared to 24 in 2022, 29 in 2021 and 24 in 2019

THEATRICAL RELEASES IN THE EU AND THE UK

(on average)

2019: 480 releases

including 130 US productions

2020: 250 releases

including 80 US productions

2021: 290 releases

including 100 US productions

2022: 370 releases

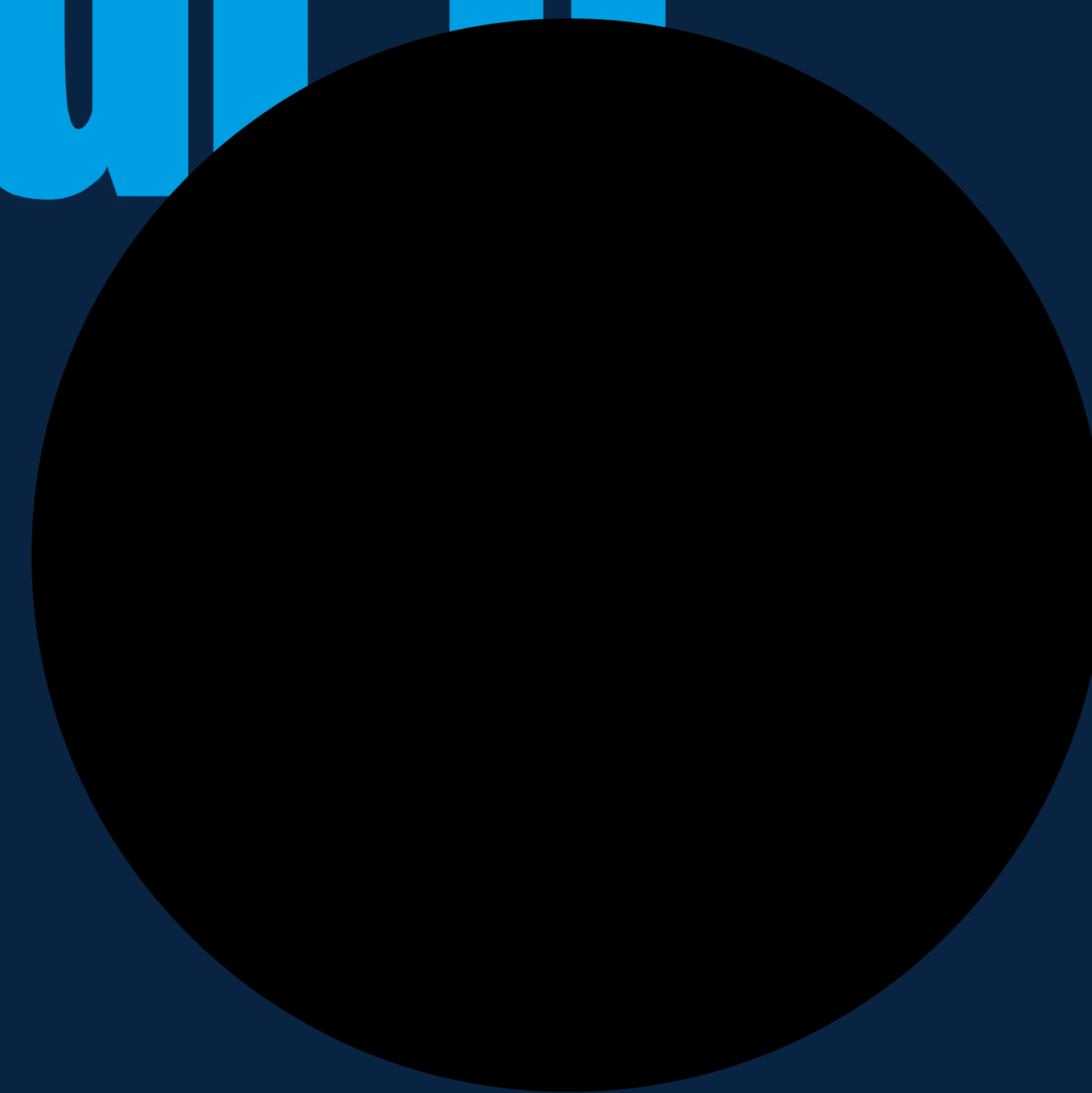
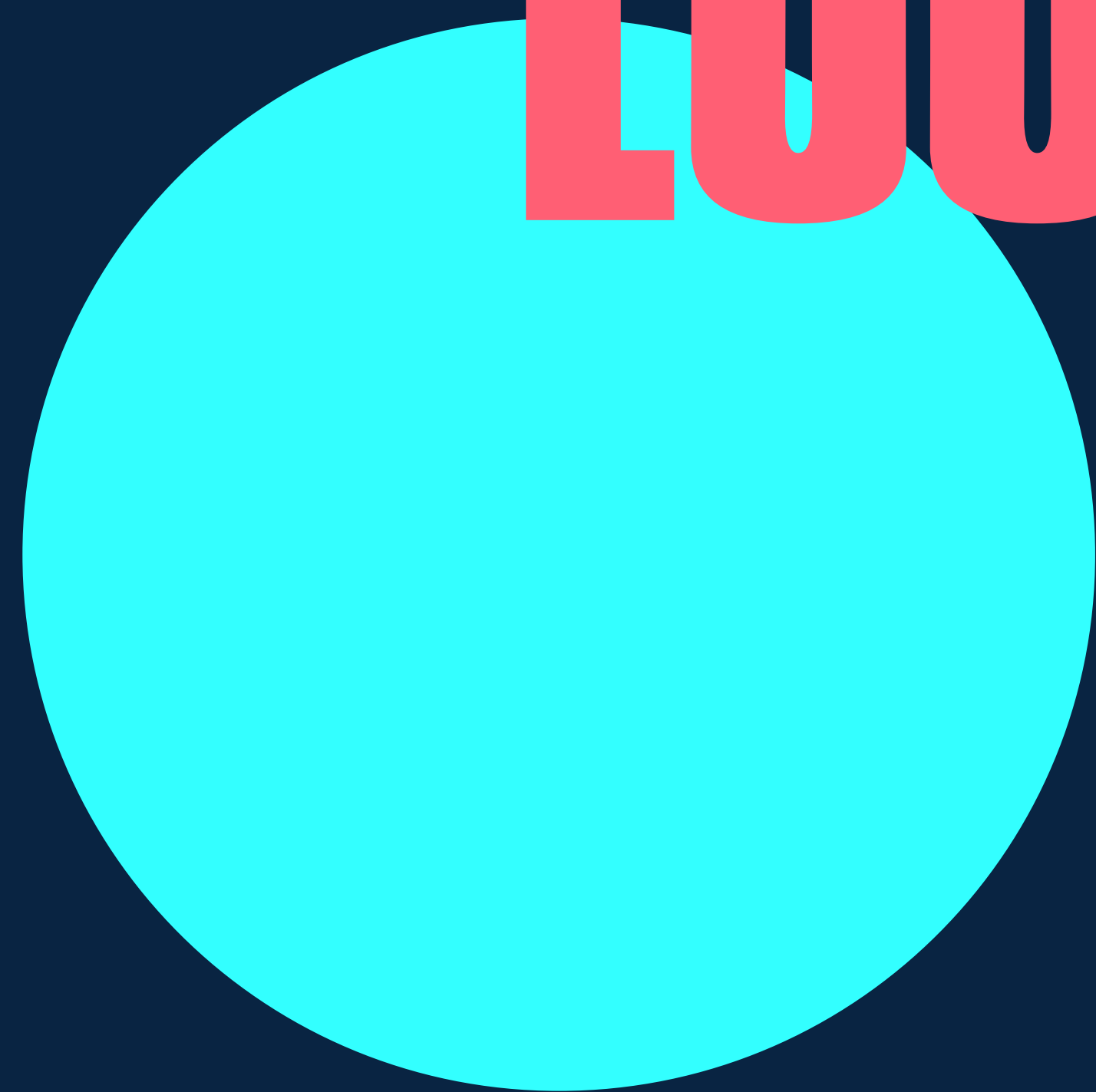
including 108 US productions

2023: 409 releases

including 122 US productions

ASTERIX & OBELIX: THE MIDDLE KINGDOM, FRANCE (PROD. 2023), TRESOR FILMS, PATHÉ FILMS / PEASANTS, POLAND, SERBIA, LITHUANIA (2023), CHK OPI SP 2 OO, BREAKTHRU FILMS, DIGITALKRAFT ART SHOT, CANAL+ POLSKA / CAMPING, THE FINAL BATTLE, CYPRUS (2023) / GUARDIANS OF THE FORMULA, SERBIA, SLOVENIA, MONTENEGRO, NORTH MACEDONIA (2023), COBRA FILM DEPARTMENT, TON FILM, PERFO PRODUCTION, BITTER FRAMES PRODUCTION, FILM STUDIO SKOPJE / REHRAGOUT RENDEZVOUS, GERMANY (2023), ARD DEGETO FILM GMBH, BR BAYERISCHER RUNDKUNF, CONSTANTIN FILM AG / ATATURK 1881-1919, TURKEY (2023), LANISTAR FILM, O3 MEDIA / FÓNISZA, GREECE (2023), TANWBER PRODUCTIONS, VIEW MASTER FILMS, COSMOTÉ TV, EKOME / C'È ANCORA DOMANI, ITALY (2023), WILDSIDE, VISION DISTRIBUTION, SKY ITALIA / SUVITAJAD, ESTONIA (2023), APOLLO FILM PRODUCTIONS, KASSIKULD, TASKA FILM / MAVKA: THE FOREST SONG, UKRAINE (2023), ANIMAGRAD ANIMATION STUDIO, FILM UA GROUP, UKRAINIAN STATE FILM AGENCY / INVALID, SLOVAKIA (2023), AZYL PRODUCTION, RTVS / IO CAPITANO, ITALIA (2023), ARCHIMEDE, RAI CINEMA, TARANTULA / FALLEN LEAVES, FINLAND (2023), SPUTNIK, BUFO, PANDORA FILM VERLEIHI / ANATOMIE D'UNE CHUTE, FRANCE (2023) LES FILMS PELLÉAS, LES FILMS DE PIERRE, FRANCE 2 CINÉMA / MANTA MANTA - ZWOTER TEIL, GERMANY (2023), CONSTANTIN FILM, BAREFOOT FILMS, OLGA FILM / METER I SEKUNDET, DENMARK (2023), NORDISK FILM PRODUCTIONS / THE ZONE OF INTEREST, UNITED KINGDOM, POLAND, UNITED STATES (2023), FILM4, HOUSE PRODUCTIONS, EXT-REME EMOTIONS, A24 / MUMMIES, SPAIN (2023), 4 CATS PICTURES, ATRSMEDIA CINE Y TELEVISION, MOVISTAR PLUS+, TELEVISIO DE CATALUNYA / TVC / TV3 / 3CAT / ONEMANSHOW - THE MOVIE, CZECH REPUBLIC (2023), KAMIL BARTOSEK / THE THREE MUSKETEERS: D'ARTAGNAN, FRANCE, SPAIN, GERMANY, BELGIUM (2023), CHAPTER 2, PATHÉ FILMS, M6 FILMS / POLICE PER KOKË, ALBANIA (2023), BLUEBERRY PRODUCTIONS / REEMIGRANTAI, LITHUANIA (2023), UAB STAMBUS PLANAS / DE TATTAS' 2, NETHERLANDS (2023), TALENT UNITED FILM & TV, BRABANT FILMS / THE FIRST CHRISTMAS IN SKOMAKERGATA, NORWAY (2023), NORDISK FILM PRODUCTION AS / WIL, BELGIUM (2023), LECTER SCRIPTED MEDIA, MNUETTO FILM, MINDS MEET / MIAMI BICI 2, ROMANIA (2023), WATCHME PRODUCTIONS, VIDRA PRODUCTIONS

Looking forward



Evolving Cinema Trends: A Look Ahead

2023 was a positive year for European cinemas with more than 7 billion euros at the box office and 986 million admissions. While a good deal of this success was driven by strong US titles – such as *The Super Mario Bros. Movie*, *Barbie* and *Oppenheimer* – most European territories also benefited from very successful national releases – from Italian dramedy to Norwegian Christmas films to French Musketeers, as highlighted above.

This performance was a continuation of a growth trend that has been ongoing since the early 90s in Europe and 2023 proved that this business model is more relevant than ever. Proof of this resilience, the overall number of cinema screens in EU and the UK in 2023 continued to remain comparatively stable, increasing by about 350 screens from 2022 to 33,215 operational screens, according to the data from the European Audiovisual Observatory. Based on overall data from Omdia, the number of screens between 2019 and 2023 grew by 0.8 per cent in Europe and by 6.1 per cent globally.

2023 also showed the existence of a clear appetite amongst audiences for a wide range of cinematic experiences, with record-breaking performances for a number of releases demonstrating the relevance of the Big Screen. The year saw highly successful titles catering to specific age groups, such as family comedies, children animations or genre films, such as horrors or science fiction. The performance of such a broad range of titles demonstrates that cinemas need all types of content – from international blockbusters to arthouse titles and event cinema productions, local, European and international – to offer the best to all audiences.

This is in no small part thanks to the continuous and significant investment made by cinema operators all across Europe to improve cinema-going. From premium large formats to dine-in experiences, from pre-screening yoga sessions to afternoon teas, from new subscription models to diverse programming, there is something for everyone. Europe is an incredibly diverse cinema landscape, in what it can offer from both a content and experience perspective. From multiplexes to single screens, from municipality cinemas to independent cinemas, all strive constantly to innovate and remain cherished social and cultural hubs, as well as driving local economies and providing local jobs.

All cinemas are committed to show a diversity of titles and as an increasing trend, arthouse cinemas now turn to more mainstream titles – like *Barbie* and *Oppenheimer* – while commercial cinemas show increasing amounts of independent and arthouse titles.

Given the strong results of the first part of 2023, it has been frustrating to witness the impact of the actors' and writers' strikes on the release schedule, particularly visible in the last months of 2023 and early 2024. In addition and as highlighted above, cinemas are also faced with less major US films released in cinemas combined with a lack of local blockbusters, a number of European productions with small commercial potential, competition with streamers to acquire and show the best content (with some established distributors being priced out), lack of visibility of and promotional power of certain films, to name just a few.

From multiplexes to single screens, from municipality cinemas to independent cinemas, all strive constantly to innovate and remain cherished social and cultural hubs, as well as driving local economies and providing local jobs.

THE ZONE OF INTEREST
UNITED KINGDOM,
POLAND, US (2023),
FILM4, HOUSE
PRODUCTIONS,
EXTREME EMOTIONS,
A24.





OPPENHEIMER
US, UK (2023), UNI-
VERSAL PICTURES,
ATLAS ENTERTAIN-
MENT, GADGET
FILMS, SYNCOPY.

Cinemas continue to set records and create unparalleled excitement around films.

The sector has also been facing a dramatic increase in fixed costs – staff, rent, insurance, energy and tax for example – making daily business operations challenging and, in some cases, hampering their capacity to invest in new technology. Some cinema operators have been looking at bills that have been multiplied by a factor of 10.

All that said, 2024 may surpass expectations, with Gower Street Analytics raising projected global box office to \$32.3 billion, a revision from their original projection of \$31.5 billion published in December 2023. It is notable that the increase would have been greater were it not for exchange rate changes between December, essentially wiping out over a third of the gains seen collectively across international markets.

The first months of 2024 were marked by a number of long-awaited US blockbusters attracting large crowds to the Big Screen, such as *Dune: Part Two*, *Kung Fu Panda 4*, *Godzilla x Kong: The New Empire* and *Challengers*. The remainder of 2024 will feature promising tentpoles such as *Joker 2: Folie à Deux*, *Despicable Me 4*, *Gladiator 2* and *Wicked*, among many others. European titles have also performed well, including British productions like the music biopic *Back to Black* and the period comedy *Wicked Little Letters*, the Italian dramedy *C'è Ancora Domani* gathering enthusiastic audiences also in the UK, France, Germany and Spain as the German comedy *Chantal im Märchenland*, a spin-off of the *Fack ju Göhte* trilogy.

These same positive trends can be observed globally.

In China, the first quarter of 2024 was below the three-year average benchmark by only 3%, elevated by the successful Chinese New Year period in February. It was the third best quarter in China since the start of the decade and 6% up on the first quarter 2023. This exceptional performance was achieved thanks to the highest-grossing title of the Chinese New Year, the comedy drama *Yolo*, a remake of Japanese film *100 Yen Love* from 2014, which scored \$472 million.

South Korea was the key market in the Asia Pacific region in the first quarter 2024, with March 46% above the same month last year and 2% above the month's pre-pandemic benchmark. Local blockbuster thriller *Exhuma* generated \$53 million in March alone, becoming the third highest grossing release in South Korea since November 2019, just behind *The Roundup* (\$104 million) and *Avatar: The Way Of Water* (\$107 million).

Cinemas therefore continue to set records and create unparalleled excitement around films – theatrical works for everyone. For audiences. For the industry. For creatives. Cinemas are the cornerstone of the European film sector, supporting the circulation of European films, creating jobs and paying local tax, helping finance European works and offering an unparalleled social and cultural hub for citizens.

This is an industry with an unmatched record of innovation and which continues to deliver. Cinemas offer choice and do not tie the audience to one provider or service. They also offer a unique community and social aspect, and the Big Screen experience, which cannot be replicated at home, will remain a unique, event-driven common experience.

The whole industry should support a strong, diverse and reliable and well-marketed supply of film content to cinemas, with a significant period of exclusivity.

In addition, and especially with challenges that cinemas continue to face, policy-makers must continue their efforts in safeguarding and celebrating cinemas, regardless of their size or location – they are all within one ecosystem. Cinemas must remain the privileged place where to watch films, whether US blockbusters or European arthouse titles.

The value of the theatrical window

“Our mission is to put cinema in centre of the world. Every screening at a cinema is unique.”

THIERRY FREMAUX,
GENERAL DELEGATE OF
CANNES FILM FESTIVAL

A ‘window’ of exclusivity for cinema operators is vital for the health of the film and cinema industry and a proven business model, one that ultimately benefits the entire film value chain, from financing to marketing to distribution, throughout each film’s life cycle. It provides an 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 for audiences and creating unparalleled excitement around releases.

Cinemas are recognised as the best starting point for a film, allowing it to gain visibility before, during and after its time on the Big Screen. Box office revenues in turn drive performance and audience awareness across all other platforms and markets, contributing significantly to the financing and diversity of European works 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, in stark contrast to the position on streaming data and actual revenue created by VOD platforms, who mostly base success on subscriptions.

Any move to establish a very short window – or to eradicate it entirely – would have an impact on cinema operators’ revenues, affecting the profitability of theatres as well as reducing their

economic, social, and cultural impacts, putting hundreds of thousands of jobs at risk. In turn, this would impact the diversity of cinemas in Europe – arthouses, independents, single-screens, multiplexes, etc.

Smaller operators tend to access some films later in their release and they would therefore be even more affected by a shorter window. This would also hit the diversity of content shown in European cinemas, as operators would be forced to programme fewer, larger titles on more screens in order to maximise profit during a short window. Additionally, documentaries, first films or independent animations continue their theatrical run several weeks after their national release, without having a peak in the debut weekend. Their success is mainly due to ‘word of mouth’ or to a longer but more niche promotional campaign. A shorter or reduced window would therefore be detrimental to their success.

Between 2020 and 2022, with a global pandemic that forced the World to stay at home, streaming peaked and suddenly the race was on for streamers to stake their claim and studios to establish their own platforms to experiment day-and-date releases.

Fast-forward to 2024 and the landscape looks markedly different with some smaller streaming platforms having either disappeared, merged, or been absorbed by larger players. At the same time, studios, with film budgets often exceeding \$100 million, have recognised the financial implications of streaming platforms: while a single streaming account can host multiple viewers, each cinema ticket represents a



separate sale, and an exclusive theatrical release offers an unmatched launchpad allowing films to perform better on following windows. This has prompted a renewed focus on the theatrical window, representing a significant pivot away from the streaming-centric approach. As such, studios are putting more effort into promoting and publicly endorsing the theatrical release of their productions, often highlighting the phrase ‘only in cinemas’ on their promotional assets.

Films with a theatrical release in cinemas have more visibility and an increased audience awareness. In the UK, the screen advertising agency DCM presented the result of a survey of 3,000 respondents in July 2023. Films with an exclusive theatrical release were valued as having the highest quality, followed by films with a simultaneous release in cinemas and SVOD, films in SVOD first and then films of pay TV and free TV. The survey shows the consumers’ perception that a film released in cinemas is seen as a real mark of quality, particularly if it has an exclusive theatrical window.

The argument that an exclusive theatrical release is of benefit also for the following exploitation windows has been confirmed in the 2023 report of the European Audiovisual Observatory “Territoriality and release windows in the European audiovisual sector”.

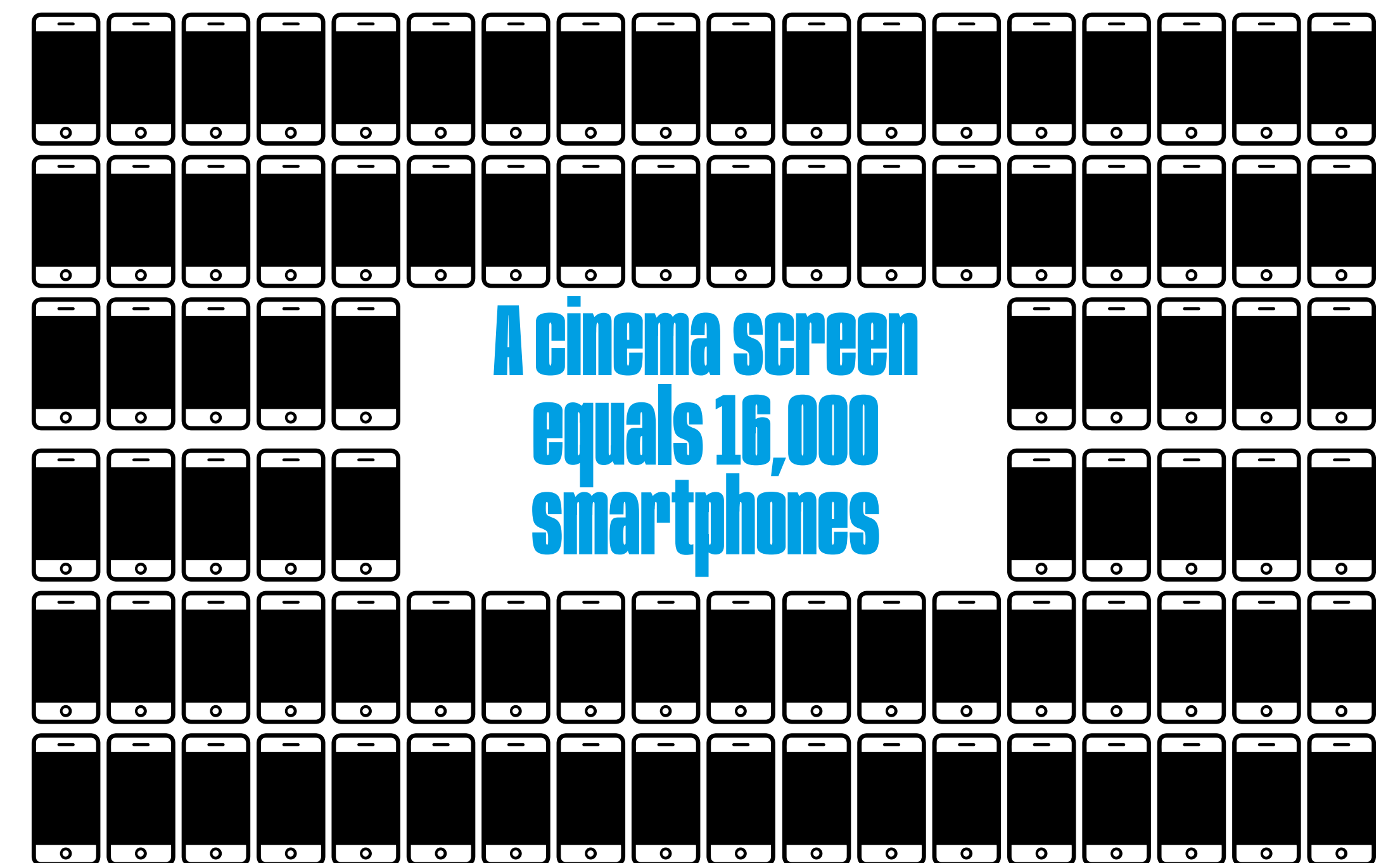
This study shows that the higher the admissions in cinemas to the film, the more countries the film is available in on VOD services. While only 31% of theatrical films with fewer than 1,000 admissions were available on VOD, most of the films with more than 25,000 admissions were available on VOD and for films with more than 250,000 admissions, more than 88% were available. This increases to 96% for films with more than a million admissions and to 99% for films with more than five million. The same study shows a direct correlation between the number of countries with VOD availability and the number of theatrical release markets. For films without VOD availability, the number of theatrical release markets could explain this absence.

A total of 82% of European films without a later VOD availability had only one release market (in 72% of the cases, their national one), 11% had two release markets and only 7% had more than three release markets.

Furthermore, an early release on VOD exposes any film to a higher risk of piracy. According to estimates by the independent analysis company MUSO, the most pirated films of 2023 included *Oppenheimer*, fuelled partially by high quality unlicensed Blu-ray copies becoming available in mid-November and also by its release on PVOD the same month. *Avatar: The Way of Water* was the second most pirated film of the year, seeing 10% of the total piracy audience share in January 2023 with subsequent spikes in demand in March and June 2023, the months when it was released on streaming platforms. According to MUSO, the largest spikes in unlicensed demand for a title happen when high-resolution unlicensed versions become available, reflecting a potentially significant loss of revenue in cinemas and on streaming platforms due to piracy.

“As an art inextricable from the social, communal theatrical experiences, we are committed to bringing movies to theatres – amazing, prize-winning new classics – to the big screen in multiple countries. It is crucial that we ensure cinema culture does not exist online but continues to find audiences in real places.”

EFE CAKAREL, CEO MUBI



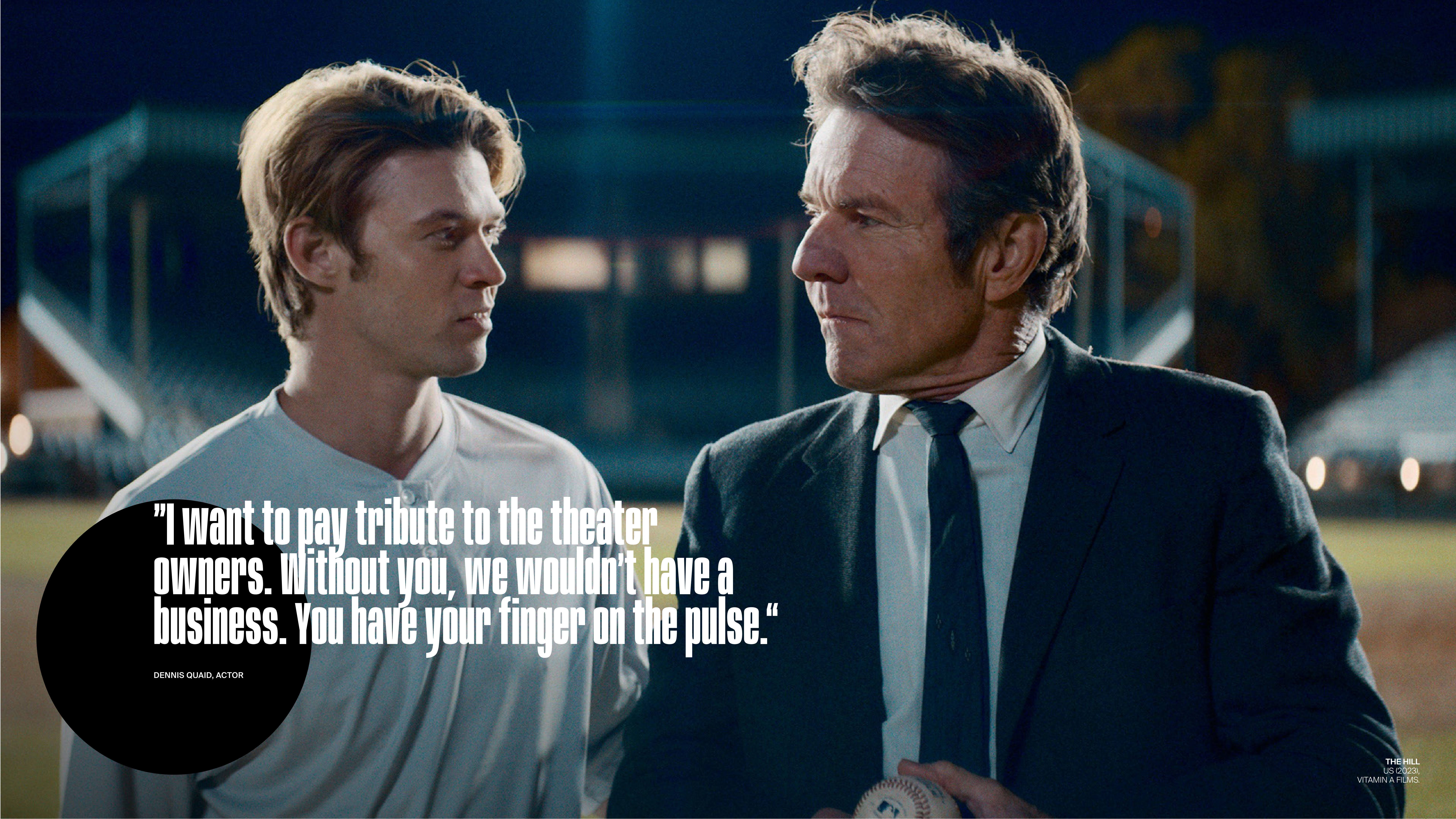
European titles often perform better on the long term, with premieres at international film festivals providing them increased visibility and creating anticipation in audiences to watch them on the Big Screen. The French drama *Anatomy of a Fall*, which won the Palme D'Or at 2023 Cannes Film Festival followed by a large number of accolades, toured in about 15 festivals around the World before being released in France at the end of August and in over 30 international markets from August 2023 to March 2024.

As of May 2024, the film has grossed over \$35.6 million at the global box office, demonstrating the long-term value and strength of the theatrical release model.



ANATOMY OF A FALL
FRANCE (2023), LES
FILMS PELLÉAS, LES
FILMS DE PIERRE,
FRANCE 2 CINÉMA,
AUVERGNE-RHÔNE-
ALPES CINÉMA.





"I want to pay tribute to the theater owners. Without you, we wouldn't have a business. You have your finger on the pulse."

DENNIS QUAID, ACTOR

Cinema is economy

A study released in November 2023 by the British Film Institute (BFI) states that cinema attendance is likely to drive footfall and spending in other venues, indicating that cinemas can make an important contribution to revitalising high-streets, and that they drive pride-in-place for local communities. A trip to the cinema is often accompanied by a visit to a restaurant, pub, bar, local shops but also other cultural activities (such as a museum visit, heritage site) and even a local park.

Cinemas are crucial to the economic wellbeing of the leisure, retail and even residential health of communities. They exert above-average multiplier effects on adjacent commercial activities, revitalising urban landscapes by fostering job creation, attracting investments, nurturing small businesses and drawing in new residents.

A study carried out in Belgium by Vertigo on behalf of Cinedata in 2018–2019 reveals that 33.5% of visitors combined a visit to the cinema with another leisure activity. Overall, 3.5 million cinemagoers said they had visited a bar before or after the film, 2.5 million had gone to a restaurant and a further 500,000 had completed their evening at the cinema with another leisure activity. Cinemas act as a driver to other economic activities.

Within the broader context of Europe's cultural and creative industries, which employ 15 million people and generates €640 billion, the cinema sector has a central role. It is estimated that close to 100,000 people are directly employed in cinemas in France, Germany, Spain, Italy and the UK alone.

Cinema contributes to audience's well-being

Walt Hickey, Pulitzer Prize-winning author, recently published the book "You Are What You Watch: How Movies and TV Affect Everything" showing the impact on film on the individual and society. In this publication he showcases how cinemas engage mind and body at physical level and have psychological and physiological effects, such as galvanic skin response and a nervous system response. A cinema full of people will create the same reactions for all, and the intensity of this emotional reaction is universal, measurable and repeatable, which is a unique feature of this industry.

In Sweden, a group of cinema chains proposed to Parliament members that cinema visits should be part of the national public health measures – the so-called 'healthcare contribution' – which is a benefit where employees can spend up to 5,000 tax-free Swedish Kronor a year on health-promoting activities, such as gym membership, dietary guidance, massage or meditation. According to these cinemas, the concept of health and welfare should be expanded to include cultural experiences, such as cinema visits.

THE VALUE OF CINEMAS

Cinema is society

A cinema serves as a social hub, a part of architectural legacy and communal pride. It functions as a gathering spot, fostering discussions, idea exchanges, and increasingly, as a venue for socialising before or after screenings.

Cinemas also play a pivotal role as educators, imparting lessons from early childhood to profound themes as we mature. They serve as a medium for socialising young minds, aiding in attention span development and entertainment with learning. Cinemas ignite curiosity and enthusiasm for culture and cultivate an environment that nurtures innovation and fosters the flourishing of creative endeavours. Cinemas contribute to local, national, and international conversations on topics and issues that drive European culture. Enabling all segments of a community to be simultaneously exposed to a film fosters a societal platform for discussing crucial topics.

Films showcased in cinemas influence trends, spark discussions both online and offline, generate buzz, and catalyse societal movements. From tender ages, cinema instils in children not only fundamental social skills but also a penchant for engaging with and enjoying narratives.

In his study on the impact of cinemas and films on society, Walt Hickey shows how films have a long-term measurable impact on society, geo-politics and the economy. Films impact our lives across a wide array of choices, such as travel trends (ex. *Lord of the Rings* effect in New Zealand or Thailand for *The Beach*), naming (with a generation of people called Maximus in the US from *Gladiator*), or professions (increased interest in marine biologists for *Jaws*).

Cinema is inclusive and accessible

Cinemas are inclusive and accessible cultural venues, with a growing number of initiatives targeting disadvantaged audiences or specific demographic groups, like dementia-friendly screenings, screenings for visually or hearing-impaired audiences with open or closed captions and audio-description and adapted shows for autism-affected visitors. Special programmes are dedicated to parents with newborns, to preschool children and to seniors.

Minorities and diverse audiences are also taken into account, with expat screenings with English subtitles in European capitals or country-specific film cycles appealing to migrant communities. Cinemas are engaged in developing initiatives fostering diversity, from film events on LGBTQ+ themes or retrospectives celebrating black film-making talent.

Accessibility in cinemas is also from an economic perspective, with different pricing strategies adopted by operators to facilitate access from all demographics, regardless of their socio-economic status.

THE VALUE OF CINEMAS

Film Slate and Marketing

Cinemas rely on one product – content. In order to attract all audiences – and beyond the significant investments made by cinemas to better understand their audiences and improve the experience – exhibitors need a reliable, consistent and diverse flow of content all year round. Diversity when it comes to genres, from romcoms to horror to animation; and when it comes to size from small niches films to mid-size titles and blockbusters; and geographic diversity.

The romcom *Anyone But You* released internationally in January 2024 became the highest-grossing R-rated romcom worldwide since *Bridget Jones's Baby* in 2016, ranking in top positions in several European countries and showing the potential of this partially neglected genre, which succeeded to attract crowds of teenage audiences. Also debuting early 2024, the thought-provoking surreal period drama on female empowerment, *Poor Things*, scored great results in Europe, registering the best opening for Yorgos Lanthimos in a large number of markets.

Cinemas cannot build success on a sporadic calendar – films need to be released on a regular basis and they need to take into account all demographics. This is also crucial for cinemas to secure their investments – a solid, well-known and well-promoted slate provides confidence for the future, especially from investors.

This is also true from a marketing standpoint. Cinemas are in a unique position when it comes to understanding audiences thanks to the richness of data that they process. They have been innovating continuously to fine tune their own campaigns in order to entice people out of their home. But collaboration with distribution is absolutely crucial and more needs to be done to increase films' visibility, from an early stage. From out of home advertising to more traditional outlets, while also using social media channels – all media should be used to promote content.

That's something that also applies to European titles. With 2,347 feature films produced in 2023, there is a real need to look at the commercial potential of these films, who they are targeted to and build specific marketing campaigns around them. Although one has to acknowledge that Europeans cannot compete with the large sums spent by studios on global rollout, more should be done to give films visibility and increase awareness among audiences.

Last but certainly not least – more should be done to avoid confusion with the audience about what they can watch at the cinema and what they can watch on streaming.

Cinemas are in a unique position when it comes to understanding audiences thanks to the richness of data that they process.

GUARDIANS OF THE FORMULA
SERBIA, SLOVENIA,
MONTENEGRO, NORTH
MACEDONIA (2023),
COBRA FILM DEPART-
MENT, TON FILM,
PERFO PRODUCTION,
BITTER FRAMES
PRODUCTION, FILM
STUDIO SKORJE.



Accessibility, Diversity and Inclusion

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

In Poland a new project called Cinema Without Barriers was initiated in 2022 by Zamek Cultural Centre in Poznań, thanks to the financial support of PFRON and continued within Europa Cinemas' Collaborate to Innovate scheme. Cinema Without Barriers is a project that includes a series of regular screenings for visually and hearing-impaired audiences in three Polish towns and is looking to expand further in Poland and in other European countries.

Once a month a particular film becomes the keynote of a Meeting Without Barriers, during which an expert discusses an issue related to human rights, sustainable development

and democratic values. In February 2024, the first Forum Without Barriers took place in Poznań over three days, an event intended for the cinema industry, discussing issues of accessibility and social inclusion. Representatives from areas including film production, cinema distribution, cinema management, as well as organisers of film festivals gathered and took part in numerous lectures, presentations, and workshops. Discussions revolved around the challenges and opportunities for undertaking comprehensive actions related to cinema accessibility for people with various needs. At the event, representatives from the Finnish Film Foundation and the UK Cinema Association shared insights on how accessibility is implemented in their own territories.

The UK Cinema Association is active in researching and supporting initiatives for visitors with physical disabilities, sight or hearing impairments, neurodivergence and those with learning disabilities or who are affected by dementia. The Accessible Screenings UK website – www.accessiblescreeningsuk.co.uk – is an invaluable tool for locating venues in the UK

UN P'TIT TRUC EN PLUS,
FRANCE (2024), CINE
NOMINE, M6 FILMS,
AUVERGNE RHÔNE-ALPES
CINÉMA, SAME PLAYER,
KABO FILMS, ECHO STUDIO,
BNP PARIBAS PICTURES,
IMPACT FILM.



providing these kinds of initiatives. And in 2023 the UKCA decided to support the start-up Built for Good Technology in the launch of Watchword, a smart glasses solution employing closed captions in augmented reality and synchronised with the film for deaf, deafened or hard of hearing audiences. The technology is currently in its trial phase in some test cinemas in the UK, with a view to a roll-out in the whole country in the longer term.

The French cinema federation FNCF is also engaged on the topic of accessibility, with ongoing efforts to ensure that all French films supported by CNC have their subtitled and audio-described versions available in cinemas on the film's release date. Several personal subtitling and audio-description solutions are being

developed, such as mobile applications and headsets. Furthermore, in 2023 Allociné – the French website with all information on cinema screenings – developed a new feature to specify all accessibility details for each venue and screening in France, in partnership with AccesLibre.

“The barriers of age, race, relationship, status and background fade away, and we are all simply human beings bound together by our love for the silver screen. And in an age where digital connectivity often leaves us even more isolated than ever, the cinema offers a sanctuary of human connection.”

LUPITA NYONG'O, ACTRESS



Sustainability Initiatives across Europe



Measures to increase sustainability and energy efficiency in cinemas, as well as to lower their carbon footprint are spreading across Europe, with a number of national industry-wide initiatives to support cinemas in this transition to a greener business.

In Austria, the Ministry of Environment and the Ministry of Culture were commissioned to develop Ecolabel guidelines for cinemas together with the industry, building on the existing guidelines for museums, theatres, tourism businesses and events. Following several online workshops with the Austrian Cinema Association, the Austrian Federal Economic Chamber and numerous cinemas from all over Austria, draft guidelines were drawn up, which were adopted by the Ecolabel Advisory Board in June 2022 and came into force on 1 July 2022. This was the first time that an Ecolabel guideline was introduced to promote and reward sustainable management and social responsibility in Austrian cinemas. Cinemas with consistent sustainable management can apply for the Austrian Ecolabel. This ranges from general management to efficient energy and water management, environmentally friendly and sustainable procurement of food, beverages, electricity, paper, materials and cleaning agents, solutions for climate-friendly mobility and waste avoidance and separation.

Schubert Kino in Graz and the Haydnkino in Vienna are the first Austrian cinemas to have successfully completed the Ecolabel certification process with a positive audit. More Austrian cinemas are currently on their way to certification.

The FNCF in France officially launched a Sustainability Committee at the 2023 Deauville Congress. The work of this new committee includes carbon emission measurements, energy consumption audits and training for cinema staff on green practices. Based on an extensive survey sent to all FNCF members, the Committee will issue a toolkit for operators with which they will be able to create their own roadmap on the most suitable measures for them on waste management, energy efficiency, construction of sustainable buildings and renewable energy supply. The first deliverables of the Committee will be shared during the 2024 FNCF Congress.

In Spain, the national cinema association FECE together with representatives of the whole value chain launched in September 2023 the Audiovisual Alliance for Sustainability. This initiative gathers professionals from production, distribution, exhibition, cinema academy, technical industries and broadcast in order to create a realistic roadmap for sustainability in the audiovisual sector and discuss with national and European institutions. The goal is to agree on a common carbon calculator to be used by the whole industry to monitor and start reducing carbon emissions as soon as possible, even before it becomes a legal obligation for the industry.

At its yearly conference in March 2024, the UKCA presented together with Zero Carbon Forum the initiative “Road to Net Zero”. Working on a sample of cinemas, the goal of this initiative is to assess what creates more carbon emissions in cinemas and what is the pathway to reach net zero, covering areas such as concessions, energy, waste, building, supply chain.

In Germany, the national cinema association HDF, the arthouse cinema association AG Kino and the federation of municipal cinemas BkF are collaborating to develop minimum sustainability standards in cinemas. After an initial workshop at the Berlinale, the second workshop took place at the cinema congress in Baden-

Baden in April 2024 and other two will follow throughout 2024. The main aim is to develop minimum standards for sustainability in cinemas by February 2025, compiling recommendations that would be supported by all industry stakeholders. The areas being addressed include resources, energy, waste, sustainable consumption and water.

UNIC continues to monitor these national initiatives and highlight best practices of green cinemas across Europe and to include discussions around sustainability, energy efficiency, circular economy and waste management in its industry events and expert group meetings.



ONEMANSHOW
- THE MOVIE
CZECH REPUBLIC
(2023), KAMIL
BARTOSEK.

Innovative Audience Engagement Strategies

Cinema operators are going more and more creative when it comes to finding innovative strategies to attract new audiences. Social media has been used by cinemas for their marketing activities for more than a decade, but the content, tone and format used on these platforms are constantly evolving.

Cinemas are increasingly using social media to build online communities, showcase their venue to a broader audience, engage with film fans and leverage buzz around new releases. Cinemas rely more on user-generated content and influencers to promote their programming. TikTok and Instagram videos are increasingly popular as a means to share behind-the-scenes of cinema life, premieres and exclusive events.

Digital marketing also includes mobile apps and Customer Relationship Management softwares to send targeted communication to audiences based on their consuming habits, interests and profile.

Operators are also experimenting with new communication channels, with podcasts on new releases or film classics, regular cinema shows on Twitch and printed magazines for the more traditional audience. Eventising highly anticipated film releases with themed parties, Q&A with talents and decorations in the cinema lobby has proven to be highly appreciated by the audiences, with great examples from *Barbie* and *The Super Mario Bros. Movie* in 2023.

Audience Profile & Behaviour

Figures from 2023 prove that audiences of all age groups have returned to the cinema, after a couple of disruptive years, thanks to a diverse film offer appealing to all demographics and to well-thought national initiatives to encourage cinema-going like the national cinema days or Cine Senior in Spain.

According to a French [study](#) published by Vertigo Research in September 2023, the cinema remains the ideal place to watch a film with 81.5% of people questioned saying they favour the Big Screen, ahead of television (7.8%) and the Internet (4.4%). The study confirms that the trailer shown in cinemas remains the primary source of incentive for the public to go see a film (55.5%), followed by Internet research (38.1%), whereas word of mouth has been mentioned only by 20.4% of respondents.

Visitors are more impatient to watch a newly released film on the Big Screen: 82.6% decide to go to the cinema within 15 days of the film release, with the 15–24-year-olds being more likely to see a film on the day of its release or during the first weekend (37%).

Cinema-goers tend to plan their cinema visits, with 38% of respondents deciding several weeks ahead to go to the cinema, while 33% plan the day before going. This choice, however, seems linked to frequency habits: if occasional people anticipate the most (78.3%), frequent visitors most often decide to go there the same day (39.1%). This trend is reflected in booking practices: a third of the audience booked their ticket ahead of the screening in 2023 (compared to a quarter in 2019) to ensure that they have a seat but also to avoid queues. Online bookings are now a habit for one third of 15–24-year-olds and half of 25–34-year-olds (vs. 20% in 2019). Online ticketing by mobile phone went from 20% in 2019 to 36% in 2023.

Ticket price is not a priority criterion by itself, but having an unlimited card has an impact on the choice of cinema site (cited by 11.7% of respondents in 2023 vs 6% in 2019). More visitors attended special events around films, with under 35 attending these events the most, and mainly collectively. Among 15–19-year-olds, three out of four say they come with family or friends. Overall, going to the cinema remains largely a collective experience, with almost 80% specifying that they went to see a film with a group in 2023.

In Italy, CinExpert publishes regular reports on the socio-demographic profile of the Italian audience. 2023 was characterised by the growth of the female audience (+77% compared to 2022) and of the older age groups (50–59-year-olds were up by 92%; 60+ years old by 81%). The share of casual visitors has increased (36%), attracted by the cinematographic phenomena that marked 2023 – *C'è Ancora Domani*, *Barbie* and *Oppenheimer* – and which have had a strong hold on those who don't go to the cinema much.

In the UK, Cinema First tries to understand the latest consumer habits and attitudes towards cinema-going through its Entertainment and Attitudes Tracker, with two survey waves in 2023. While findings suggested that fewer people were looking to cut back on treats or outings, there was a clear correlation between the lowest frequency returners also being the most cost-focused segment.

Cinema-going return rates rose significantly in 2023 to hit a healthy 82% which, considering an assumed natural annual customer churn rate, effectively means that attendance is near to pre-pandemic levels. Teenagers and parents were the demographics with the highest return rates. The shortfall in reaching pre-pandemic admissions was seen to lie in the frequency of visits, which remained stable from late 2022 onwards. Slate awareness didn't seem to be very high, with only 30% of the respondents stating they had a rough idea of the films released and 26% knowing only few big titles.

In Spain a national campaign called CineSenior was launched in 2023 to encourage the return of elderly audiences to the cinemas, with a 10-million-euro investment by the Ministry of Culture. Audience over 65 could attend screenings on Tuesdays in any of the 420 partner cinemas (3,000 screens) for €2. This led to a 49.6% increase in attendance of this age group compared to the previous year and Tuesday was the weekday with the highest growth compared to 2022 in the period when the campaign was held. In addition, the average attendance of CineSenior Tuesdays was 23% higher than the same period in 2019. Encouraged by the results, the Spanish government has decided to renew the subsidy for 2024, allocating 12 million euros, 20% more than in 2023.

Going to the cinema remains largely a collective experience, with almost 80% specifying that they went to see a film with a group in 2023.

A group of four women are sitting in a vibrant, abstract environment with bright colors and geometric shapes. They are all wearing matching pink outfits and sunglasses. The woman on the left is holding a laptop. The woman in the center is looking directly at the camera. The woman on the right is wearing large sunglasses and looking off to the side. The background is a mix of bright colors and abstract patterns.

**"The cinema has given me some of
the best memories of my life"**

ARIANA GREENBLATT, ACTRESS

BARBIE
US (2023), WARNER BROS,
HEYDAY FILMS, LUCKY-
CHAP ENTERTAINMENT,
NBGG PICTURES,
MATTEL IMAGES.

Global impact

Reflecting the wider film sector itself, cinema has evolved into an increasingly global business and Europe remains a key building block of the global film industry.

2023 ended with a global box office of approximately \$33.9 billion, with Europe, Middle East and Africa accounting for \$8.98 billion, US for \$9.07 billion, Asia Pacific for \$13.2 billion and Latin America for \$2.7 billion.

Global Cinema Federation



In June 2017, the World's leading cinema operators announced the establishment of the Global Cinema Federation, a world-wide 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, leading cinema operators – AMC Theatres, CGV, Cinemark, Cineplex, Cinépolis, Cineworld and Regal Cinemas, Event Cinemas, Kinopolis, Pathé Cinémas, PVR INOX Limited, Toho Cinemas Ltd. and Vue – as well as the two most internationally active trade bodies NATO and UNIC – 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.

The Executive Committee was joined in April 2024 by Kinopolis and Jane Hastings (Event Cinemas) was elected as the new Chair following a seven year mandate by Alejandro Ramirez (Cinépolis).

In 2024, the Executive Committee organised a round of meetings with studios – Warner Bros Discovery, Paramount, Walt Disney and Universal – as well as with the Producers' Guild of America and the Directors' Guild of America. These meetings provided an opportunity to put the spotlight on the international market, talk about shared challenges and opportunities and advocate for more and diverse content.

The GCF continues its work on a number of key priorities, including but not limited to film theft, theatrical release practices, music rights and the highly valued relationship with partners in film distribution. The GCF intends to become the centralised source of knowledge for the international market, pooling and sharing resources and presenting how cinemas innovate around the World.

NATO Cinema Foundation



Our American colleagues at the National Association of Theatre Owners launched in 2022 the Cinema Foundation, dedicated to promoting the essential cinema exhibition industry by developing future diverse workforces and growing moviegoing communities worldwide through research, education, and philanthropy.

The Cinema Foundation's work is based on five pillars:

1. Invest in data and research: building relationships and growing the industry through comprehensive data and research.
2. Promote the cinema-going experience: develop and implement all-industry initiatives like National Cinema Day to grow audiences and promote the industry.
3. Celebrate cinema careers, education, and diversity: celebrating and promoting the industry as a great place to work via recruitment campaigns, training programs, and opportunities for career growth.
4. Build a Centre for Innovation and Technology: create a cross-industry innovation think-tank where thought leaders will help develop and test initiatives focused on industry growth.
5. Support industry charities: partner with existing industry charities to expand their impact and reach and amplify their messaging and programming.

The Cinema Foundation published its first report in March 2023 "The State of the Cinema Industry" covering the latest trends and innovation of exhibition in the US, celebrating the value of cinema and theatrical exclusivity and analysing audience behaviours.

The Foundation also currently leads on organising the US National Cinema Day.

213,192 SCREENS

globally in 2023

0.1% increase
on 2022

6.1% increase
on 2019

2023 WORLDWIDE BOX OFFICE

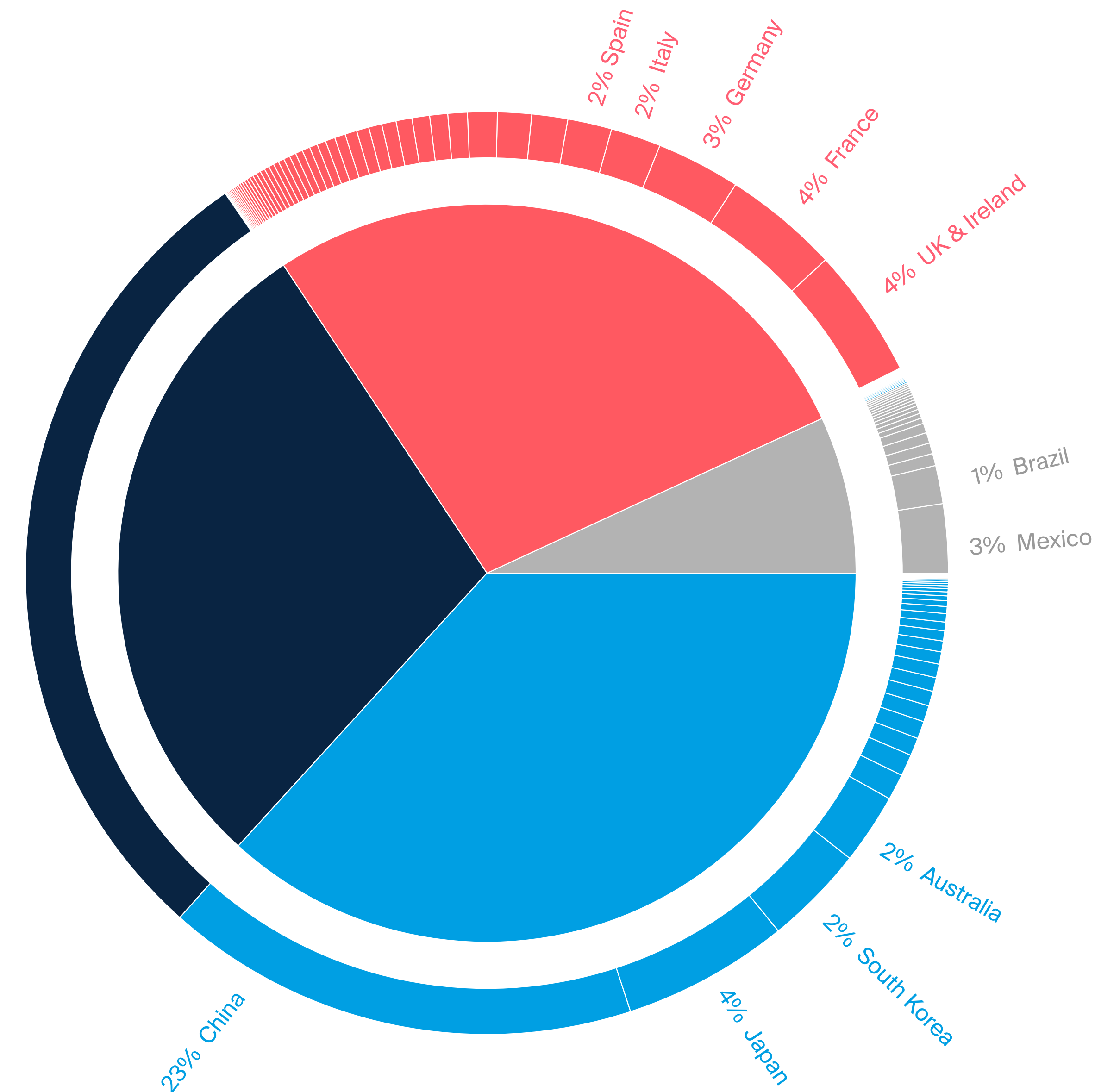
Breakdown of the total worldwide box office by region from 1 January to 31 December 2023

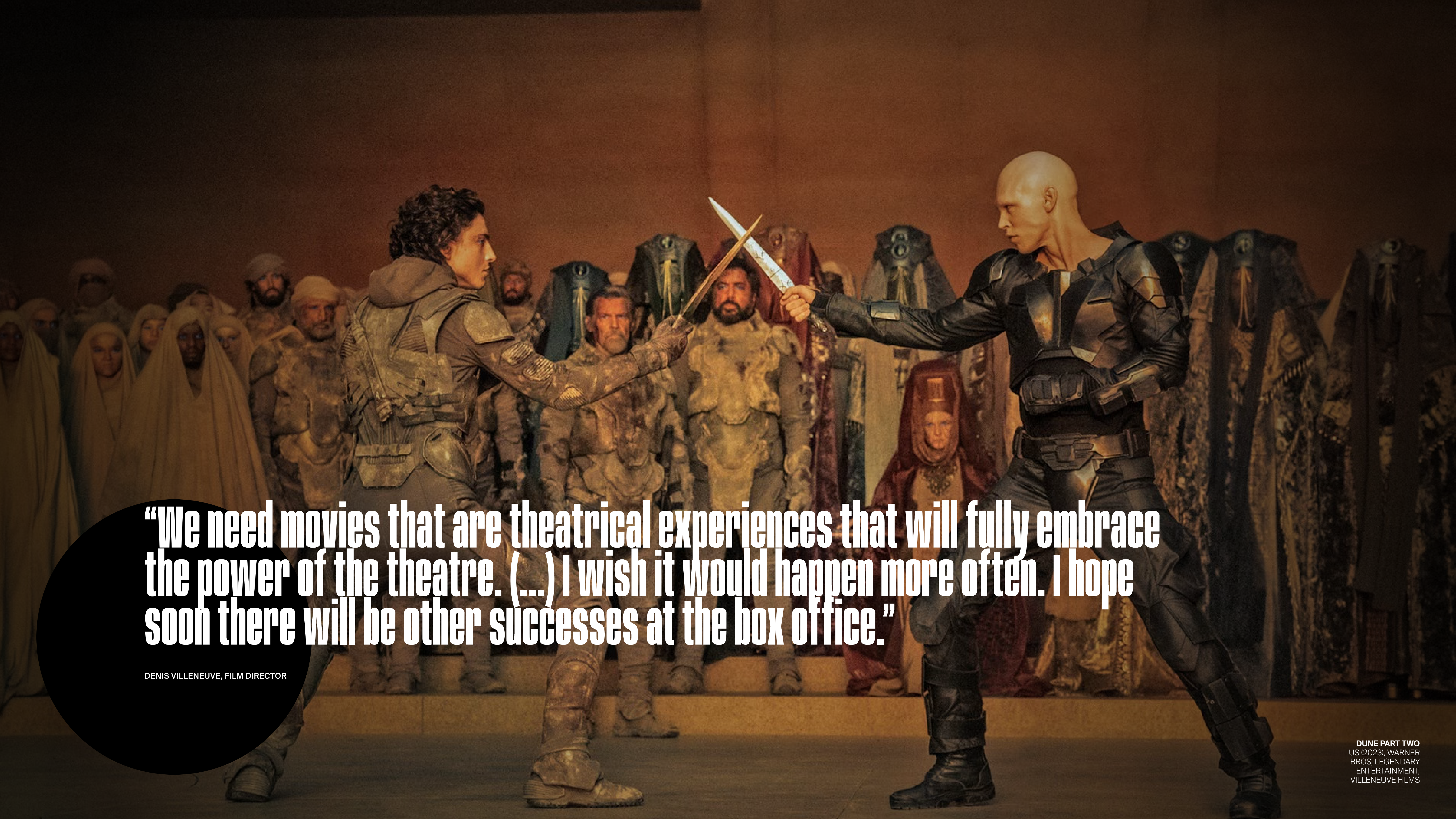
27% EUROPE,
MIDDLE EAST,
AFRICA

27% US/CANADA

8% LATIN
AMERICA

39% ASIA
PACIFIC





“We need movies that are theatrical experiences that will fully embrace the power of the theatre. (...) I wish it would happen more often. I hope soon there will be other successes at the box office.”

DENIS VILLENEUVE, FILM DIRECTOR

DUNE PART TWO
US (2023), WARNER
BROS., LEGENDARY
ENTERTAINMENT,
VILLENEUVE FILMS

National Cinema Days in Europe 2023: A Boost to Cinema Attendance

In 2023, the national Cinema Days continued to be a significant driver in boosting cinema attendance across Europe, with a diverse range of initiatives offering discounted tickets and special events to celebrate the cinema experience. National Cinema Days vary in duration, discounts and frequency across countries, showcasing their adaptability to cultural contexts. From a one-day event to a five day celebration, a yearly or a biannual event, organising special contests or involving talents, there is a different recipe for every market.

Portugal hosted two editions of *Festa do Cinema* in 2023, from 14 to 17 May and 22 to 25 October, with tickets priced at €3.50 and organised by APEC (Portuguese Association of Cinema Exhibitors) and supported by FEVIP/GEDIP and Instituto do Cinema e do Audiovisual. 500 cinemas took part.

Spain's *Fiesta del Cine* marked its twentieth edition from 15 to 19 May and a second edition from 2 to 5 October, with tickets at €3.50. The May edition attracted nearly 977,700 admissions, a 38% increase from May 2022, while the October edition recorded almost 1.2 million admissions, a 22% increase from May 2023.

Italy's *Cinema in Festa* had two five-day editions in June and September 2023, with tickets priced at €3.50. The June edition recorded 1.2 million admissions, a 6% increase from 2022, and the September edition registered 1.56 million admissions, a 35% increase from the first 2022 edition. Between the two, the new summer campaign Cinema Revolution took place, with an investment of €20 million by the Ministry of Culture. The campaign included the promotion of cinema-going and of the whole summer slate on radio, press, TV and ads. Furthermore, Cinema Revolution included tickets for all Italian and European films at €3.50 from mid-June to mid-September, with a state subsidy of €3 per ticket to the participating cinemas. This campaign, which has been reconfirmed for the Summer 2024, brought a 69% increase in the admissions of European and Italian films over the three-month period, with 1.1 million tickets sold for those films.

France's *La Fête du Cinéma* took place from 2 to 5 July with tickets priced at €5. Despite a 4% decrease from the 2022 edition, the event still attracted over 3.1 million attendees, performing 5% above the average for the three pre-pandemic editions.

Switzerland's *Allianz Cinema Day* on 3 September saw over 197,000 visitors, a 26% increase from 2022. Some cinemas were reported to be almost fully booked from morning until evening, filling up to 95% capacity.

The UK's *National Cinema Day* in September welcomed 1.56 million visitors, a 6% increase from 2022. Early findings from the nationwide survey of NCD visitors showed that 95% of attendees would happily recommend the cinema-going experience to friends and family. Three quarters of the respondents also said that they were now likely to return in the coming weeks.

In Poland, the eighth edition of *Święto Kina* (Cinema Fest) took place on 30 September, coordinated by Multikino and supported by the Polish Film Institute with sponsorship from InPost. The nationwide event saw 550,000 admissions across 250 participating cinemas. Tickets were priced at 12 PLN (€2.60), and the initiative was organised by the association of multiplex cinema chains, inviting smaller chains and arthouse cinemas to join in. During the event 40% of tickets sold for Polish films.

Germany, Belgium, Sweden, Greece, Norway, Slovakia and Finland also organised their national Cinema Days in 2023 and more European countries are considering launching their own similar celebratory events.

National Cinema Days are an opportunity for both cinemas and distributors, as a significant increase in attendance compensates for the reduced average ticket price. Consumer surveys in the UK and Germany proved that the reduced ticket price isn't the only reason for the audience to attend, but it's also an opportunity to rediscover cinemas, get family and friends together and make more experimental choices. In addition, over 20% of the visitors are infrequent which means that the national Cinema Days draw in a crowd that typically only goes to the cinema once or twice a year. Indeed, Filmstaden in Sweden proved that 60% of the Stora Biodagen's visitors that had not been to the cinema during the year returned at least once after the event.

National Cinema Days in Europe 2023



Cinemas as Inclusive and Democratic Entertainment Venues

Cinemas are widely regarded as among the most democratic and accessible cultural and entertainment venues, owing to their ubiquitous presence across territories, from remote villages to bustling metropolises. They play an indispensable role in the economic vitality of towns and cities alike. This holds true for city centres, where cinemas are integral components of vibrant high streets, as well as for suburban districts, where the establishment of a cinema acts as a catalyst for additional commerce and services.

Facilitating the opening of cinemas in underserved areas is crucial for their role in social rejuvenation and in providing access to culture and entertainment for all citizens, regardless of their educational background or social standing. Moreover, cinema exhibitors play an educational role by curating special programming that promotes civic values and fosters a sense of community.

According to a [study](#) by the BFI published in November 2023, cinema venues are valued by diverse users beyond the enjoyment of films alone, indicating an additional cultural and social value not captured in ticket prices. Respondents to this study declared that their willingness to pay for cinema venues ranges from £13.59 for cinemas with more ‘diverse programming’, to £14.56 for cinemas operating in a cinematic or cultural ‘cold spot’, and

£23.98 for cinemas that operate as a ‘social hub’. The study demonstrates that the positive value of cinemas remains consistent across different programming and ownership models – whether commercial or subsidised, part of a chain or independent – as they offer a vital source of value that communities would sorely miss if cinemas ceased to operate. Cinema-goers would be willing to pay an average annual donation of £19.20 per person per year to support the continued existence of the cinema site in question to ensure it is able to continue to provide its full range of services. This survey underscores the positive contribution of cinema venues to the well-being of their users, which can be understood in economic terms as the “consumer surplus” experienced by users beyond the market prices they pay.

Cinemas continue to be the most affordable out-of-home entertainment and cultural venues, providing access to art and culture for all citizens without barriers or discrimination. Across Europe, most cinemas offer reduced prices for young audiences, seniors, disabled individuals, and the unemployed, thereby overcoming economic barriers to cultural access. Special inclusion initiatives,

such as the “Ticket suspendu,” where visitors can buy an extra cinema ticket upfront to be given to someone in need, or sliding scale schemes, where visitors pay what they can afford for a film, further encourage attendance among economically disadvantaged citizens.

In Europe, cinema options cater to various tastes and budgets, ranging from community cinemas or municipal venues with affordable tickets to premium cinemas offering luxury amenities and premium-priced screenings. Additionally, within the same cinema, opportunities exist to pay reduced prices for off-peak showtimes, special deals, or through loyalty programmes.

Furthermore, as demonstrated in the 2023 UNIC Annual Report, cinema ticket prices have increased at a rate lower than inflation and the cost of living over the past decade, despite operators grappling with higher fixed costs associated with staffing and operations in recent years.



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 in Brussels during the 2023 edition of the UNIC Cinema Days, where workshops provided participants with an overview of social media strategies, marketing trends from other sectors, audience data and analytics, cinema-going campaigns and how to improve cinemas' online presence, among others. A dedicated Marketing Group meeting was also organised during CineEurope 2024 where current admissions results and audience trends were discussed.

UNIC Retail Group

The UNIC Retail Group involves retail and concession managers from leading European cinema circuits. The group aims to help exhibitors optimise their food and beverage offer by conducting research and sharing best practice. Withing this group, the Circular Economy Retail Group workshops on the topic of sustainability and circular economy, trying to find solutions to reduce and optimise packaging waste and recycling in cinemas. As part of this initiative, in March 2024 UNIC, The Coca-Cola Company and The Blue Stocking Partnership organised a Retail Group meeting at Apollo Kino in Tallinn, gathering professionals to discuss new experiences in retail and customer journeys.

UNIC Technology Group

The UNIC Technology Group brings together 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. In the past year, the UNIC Technology Group has regularly gathered in physical and online meetings and continued to actively engage with its partners within the cinema technology sector, including the European Digital Cinema Forum, the International Cinema Technology Association, the Cinema Technology Community and the Inter-Society Digital Cinema Forum. With the support of manufacturers and service providers, UNIC members have been able to ensure a smooth exchange on the latest technological innovation and share the latest updates. Within the UNIC Technology Group two working groups are focusing on laser projection and energy efficiency and a third one on cybersecurity has just been launched.

UNIC EXPERT GROUPS

UNIC PEOPLE PROGRAMME

METER I SEKUNDET
DENMARK (2023),
NORDISK FILM
PRODUCTION.

The UNIC People Programme was launched in June 2023. This new project aims to help the cinema industry maintain its position as an employer of choice, recognising that the ultimate competitive advantage of any organisation lies in its people. With new challenges emerging post-pandemic in particular in recruiting, developing, and investing in its workforce, the cinema industry must adapt to the ever-changing landscape of today's World. The initiative strives to ensure that the industry remains well-placed to attract and retain top talent.

To achieve its mission, the programme has identified five key work streams to ensure the industry is evolving to meet the needs of its employees and remains positioned as an attractive and premier employer that attracts and retains top talent:

Each workstream will be explored as the programme rolls out.

- Awareness of employment opportunities
- Training and career progression
- Leadership skills
- Internal culture and values
- Diversity, equity, and inclusion

The programme is led by an advisory board, chaired by Dee Vassili, Chief People Officer, Vue. Additional appointments include: Phil Clapp, President UNIC and CEO UK Cinema Association (Vice-Chair); Katharina Phebey, Head of Marketing & Content, Member of the Management Board, Kinopolis; Nevena Brasanac, Programming Manager for South-East Europe, Cineplex International; Zarah Doyle, European Talent Director and People Director UKI at ODEON Cinemas Group. Ferco Seating and Generation Media supported the new Programme in 2023/2024 as Strategic Advisors. Gruvi becomes the new Strategic Advisor from June 2024.

In Year 1, the initiative focused on Internal Culture and Values. Following the launch, various activities were carried out from September 2023 until May 2024. Surveys were circulated to the UNIC community, and newsletters were issued on a regular basis. Podcasts were recorded and a workshop took place in October 2023. Finally, a toolkit was published at CineEurope 2024. In Year 2, the Programme will tackle Leadership Skills.

More information [here](#).

GRUVI

UNIC
PEOPLE PROGRAMME

The Growing Success of Premium Cinemas

From state-of-the-art extra-large screens with immersive sound, to panoramic screens, as well as 4D and haptic seats, film releases in Premium Large Formats continue to be a major draw for audiences across the globe. The concept of premium also includes boutique cinemas with comfortable sofas, dine-in experiences with gourmet menus and drinks, as well as luxury seating with recliners, phone chargers and extra row spacing.

Cinemas across Europe continue to make significant investments to refurbish their venues to offer their audiences the highest picture, sound and seating quality and personalised hospitality. These exclusive amenities are well-liked by the audience looking for a distinctive cinema night.

Omdia estimates 5,650 premium large format screens globally (including both exhibitor-branded and global PLF branded screens), while 2,183 auditoriums are equipped with 4D or motion seating.

In the US, in their respective opening weekends, premium large formats cinemas contributed to 42% (\$61.2 million) of the box office of *Mission Impossible 7*; a little over a third (\$67 million) of that of *Fast X* and 35% (\$60 million) of that of the latest *Indiana Jones*.

In the EMEA region, 72% of the box office of *Avatar: The Way of Water* came from 3D or premium formats, specifically 57% from 3D and 15% from premium formats.

The success of this latest James Cameron film strongly boosted 3D technology. In Germany – where 89% of all ticket sales of *Avatar: The Way of Water* were for 3D – tickets for 3D screenings increased by 30.4% in 2023 compared to the previous year, with 3D market share accounting to 12% of the overall yearly admissions.

In the UK and Ireland, IMAX posted an impressive rise in new release box office of almost 30% year-on-year with £32.1 million from 54 new releases (vs £23.6 million from 41 new releases in 2022). *Oppenheimer* was the strongest result, grossing £11.8 million from its release on IMAX screens, representing 20% of the film's overall gross and 39% of IMAX's UK and Irish box office for the year.

Oppenheimer was a real phenomenon in PLF cinemas all over the World, also thanks to Christopher Nolan's own invitation to watch the film in PLF.

In France, 111 cinemas have at least one premium screen, representing 5.4% of active cinemas in 2023. Compared with 2019, the number of premium auditoriums has increased by 31.5%. *Fast X* saw 11% of its tickets sold in PLF cinemas, which generated 20% of its revenues, with €4 million against €16 million in traditional cinemas. For *The Super Mario Bros. Movie*, the percentages were lower since it targeted young audiences and families, but nevertheless 4.75% of tickets were sold in PLF cinemas, corresponding to 8.91% of takings.

Italy is one of the European top markets least equipped in PLF screens, with estimated 9 auditoriums in 2023. The existing PLF screens registered an increase of 30.6% in box office and 10.4% in admissions in 2023 compared to 2019. In the first half of 2024 *Dune: Part 2* drove large crowds to premium auditoriums, with PLF screens accounting for 6.8% of the total opening weekend revenues. Some comparisons with the performance of major blockbusters in similar markets show that the shortage of PLF screens in Italy represents missed revenues for those titles, which could have grossed more and attracted more visitors if screened in premium conditions.

Whilst premium format releases and their resultant box office often accompany Hollywood action, animation or sci-fi films, the variety of titles available for these formats is continually broadening. Concert films *Renaissance: A Film by Beyoncé* and *Taylor Swift: The Eras Tour*, dramas *Killers of the Flower Moon* and *Napoleon*; Indian cinema hits *Jawan* and *Pathaan*, and musicals like *The Little Mermaid* and *Wonka* all saw good business in UK and Irish premium auditoriums. Re-issues of classic films also added to the mix with *Gravity*, *Jurassic Park* and *Titanic*.

Cinemas across Europe continue to make significant investments to refurbish their venues to offer their audiences the highest picture, sound and seating quality and personalised hospitality.



Barbenheimer

'Barbenheimer' unquestionably emerged as the cinematic phenomenon of the year, if not the decade, featuring the most unexpected pairing – a bold and witty feminist exploration of gender stereotypes in *Barbie* alongside a dark and intricate biopic about the creator of humanity's deadliest weapon, *Oppenheimer*. Premiering in most countries on the same summer date and thus challenging long-standing industry customs, the 'Barbenheimer' phenomenon burst as an unstoppable buzz across social media.

On Instagram, TikTok and X (formally Twitter), posts, research and hashtags on Barbenheimer went exponential in a couple of days, with memes, videos and trends on the must-see double bill of the year, greatly benefiting both films' visibility and their box office.

These two films not only co-existed but also elevated each other's success, creating a memorable moment that brought widespread optimism across the whole industry.

Barbie was the first film solo directed by a woman to cross the \$1 billion dollar mark and to do so in just three weeks from its theatrical release. Currently sitting as the 14th highest grossing film of all-time worldwide, *Barbie* gave Gerwig, Robbie, Gosling and Warner Bros their biggest box office hit to date.

Barbie is the highest-grossing film ever directed by a woman.

UK, Ireland, Spain and a number of other European territories posted a record-breaking box office week with 'Barbenheimer'. *Barbie* was the no.1 film at the UK and Irish box office in 2023 – ranking first for 6 consecutive weeks – with £95.6 million box office and accounting for 9% of the year's entire theatrical box office. Greta Gerwig's film currently sits as the sixth highest grossing film of all-time in the territory and the biggest film ever in the Republic of Ireland.

Christopher Nolan's *Oppenheimer* is an epic film on the birth of the atomic age through the life of Manhattan Project leader J. Robert Oppenheimer played by Cillian Murphy. With a stellar supporting cast including Emily Blunt, Matt Damon and Robert Downey Jr., Christopher Nolan's 12th feature was his highest grossing film ever. In its opening week in the US the film played on 80% of PLF screens accounting for 47% of its box office, including 26% from IMAX, twice the format's usual average.

Oppenheimer ranked in the top 3 of 27 European territories.

According to Movio, 42.7% the audience for *Barbie* was comprised of infrequent cinema-goers (with less than 4 cinema visits per year) and 20% of frequent cinema-goers (1 to 4 cinema visits per month), while those figures for *Oppenheimer* amounted to 36.4% infrequent and 26% frequent. This shows

that the double bill succeeded in bringing a significant share of audiences who hadn't return to the cinema since the pandemic. The two films appealed to different audiences, with female viewers preferring *Barbie* (60%) and male viewers going for *Oppenheimer* (67%). 10% of viewers who chose Greta Gerwig's film then went on to see Christopher Nolan's film on the first weekend, while 17% of viewers who opted for *Oppenheimer* immediately went on to see *Barbie*. In terms of age groups *Oppenheimer* seemed to be preferred by the Baby-boomer generation (born between 1946 and 1964) whereas *Barbie* was more successful by Millennials (1981–1996) and Gen Z (1997 – 2012).

Cinemas across Europe were very creative in eventising the release of both *Barbie* and *Oppenheimer*, with props, costumes and cardboard cutouts of the main characters.

***Barbie* is the highest-grossing film ever directed by a woman.**

ONE OF THE CREATIVE BARBENHEIMER VISUALS SPREADING ON SOCIAL MEDIA.



**“It really was
a dream come
true to us to
see our work
go wide and
see so many
people see our
work around
the world.”**

CHRISTOPHER NOLAN, FILM DIRECTOR



Celebrating the Top 50 cinema companies in Europe

GIANTS OF EXHIBITION - EUROPE

For the third time, in 2024 UNIC and The Boxoffice Company collaborate on Giants of Exhibition: Europe, celebrating the largest cinema operators in the region by screen count. After two successful editions, UNIC renewed its partnership with Boxoffice in 2024 to disclose the third edition of the ranking with the largest cinema groups in Europe, which serves as an iconic industry reference. The Top 50 celebrates the range of diversity of the European exhibition community, representing over 19,200 screens and 2,600 venues across 38 European territories.

UNIC and Boxoffice Pro would like to specifically highlight Ireland's Omniplex Group, winner of the Fastest Moving Giant Award, which went from 265 screens in last year's ranking to 342 this year, and three Breakthrough Giant Award winners, given to chains that have broken into the Top 50 European chains this year: Cines ACEC (Spain), Reel Cinemas (United Kingdom), and NOE Cinémas (France).

As a statement of our solidarity with Ukrainian exhibitors as well as with the Ukrainian people, UNIC and The Boxoffice Company have jointly agreed this year again not to include the names and screen counts of the Russian companies that made it into the top 50.



UNION INTERNATIONALE DES CINÉMAS
INTERNATIONAL UNION OF CINEMAS

	COMPANY	TERRITORIES	SCREENS
1	ODEON Cinemas Group	UK, Ireland, Spain, Italy, Sweden, Germany, Finland, Norway, Portugal	2409
2	Cineworld Group	UK, Poland, Romania, Hungary, Czech Republic, Bulgaria, Slovakia	2232
3	Vue International	UK, Ireland, Italy, Germany, Poland, Netherlands, Denmark, Lithuania	1926
4	Pathé Cinémas	France, Belgium, Netherlands, Switzerland	1259
5	CJ CGV	Turkey	717
6	CGR	France	710
7	Kinepolis	Belgium, Netherlands, Luxembourg, France, Spain, Switzerland	668
8	Russian Cinema Chain		
9	UGC	France, Belgium	595
10	Cineplex	Germany	571
11	Cine Yelmo	Spain	518
12	Russian Cinema Chain		
13	Cineplexx	Austria, Albania, Bosnia and Herzegovina, Croatia, Greece, Italy, Kosovo, North Macedonia, Montenegro, Romania, Serbia, Slovenia	440
14	Cinestar	Germany	356
15	Omniplex Group	Ireland, UK	342
16	Helios	Poland	304
17	Nordisk Film Cinemas	Denmark, Norway, Sweden	261
18	Ocine	France, Spain	260
19	Russian Cinema Chain		
20	Russian Cinema Chain		
21	Svenska Bio	Sweden, Finland, Denmark	240
22	Megarama	France, Spain	240
23	National Amusements	UK	215
24	Cinemas NOS	Portugal	214
25	Mk2	France, Spain	196

Celebrating the Top 50
cinema companies in Europe

GIANTS OF EXHIBITION - EUROPE



26	Blitz CineStar	Croatia, Bosnia and Herzegovina, Kosovo, Serbia	182
27	Russian Cinema Chain	Russia	
28	CinemaPink	Turkey	169
29	IMC	Ireland, UK	160
30	Everyman Cinemas	UK	155
31	Russian Cinema Chain		
32	Multiplex	Ukraine	150
33	Kinopolis	Germany	149
34	Odeon Multicines	Spain	144
35	Russian Cinema Chain		
36	Cineville	France	129
37	Union Cine Ciudad	Spain	99
38	CineStar	Czech Republic	99
39	The Light Cinemas	UK	97
40	Filmpalast	Germany	96
41	Cinemax	Slovakia, Czech Republic, Romania	91
42	Apollo Cinemas	Estonia, Latvia, Lithuania	87
43	Cines ACEC	Spain	86
44	Grand Ecran	France	85
45	Blue Cinema	Switzerland	82
46	Cinemarine	Turkey	81
46	Avşar Sinema	Turkey	81
46	Giometti Cinema	Italy	81
46	Cineplace	Portugal	81
50	Reel Cinemas	UK	78
50	NOE Cinémas	France	78

THE OLD OAK

“I think it’s important that the cinema lives. However good the streamers are, you are watching it in isolation in your living room. That’s not the right way to experience films, it’s a collective experience.”

Because laughter is contagious, sadness is contagious, anger is contagious. And to experience something as a collective, that’s our real strength. The collective experience is what is great about cinema.”

KEN LOACH, FILM DIRECTOR

UNIC Brochure “Innovation & the Big Screen”

In April 2024, UNIC published its updated [Innovation Brochure](#) which delves into trends shaping the future of European cinemas and is addressed both to European policymakers and the broader film industry. You will find many great examples from all across Europe on innovation in content, audience engagement, technology and cinema spaces. The brochure covers best practices in inclusion and diversity, accessibility, social media strategies, ancillary content, concessions and dine-in options, event cinema, loyalty schemes, sustainability and premium concepts, among other topics.

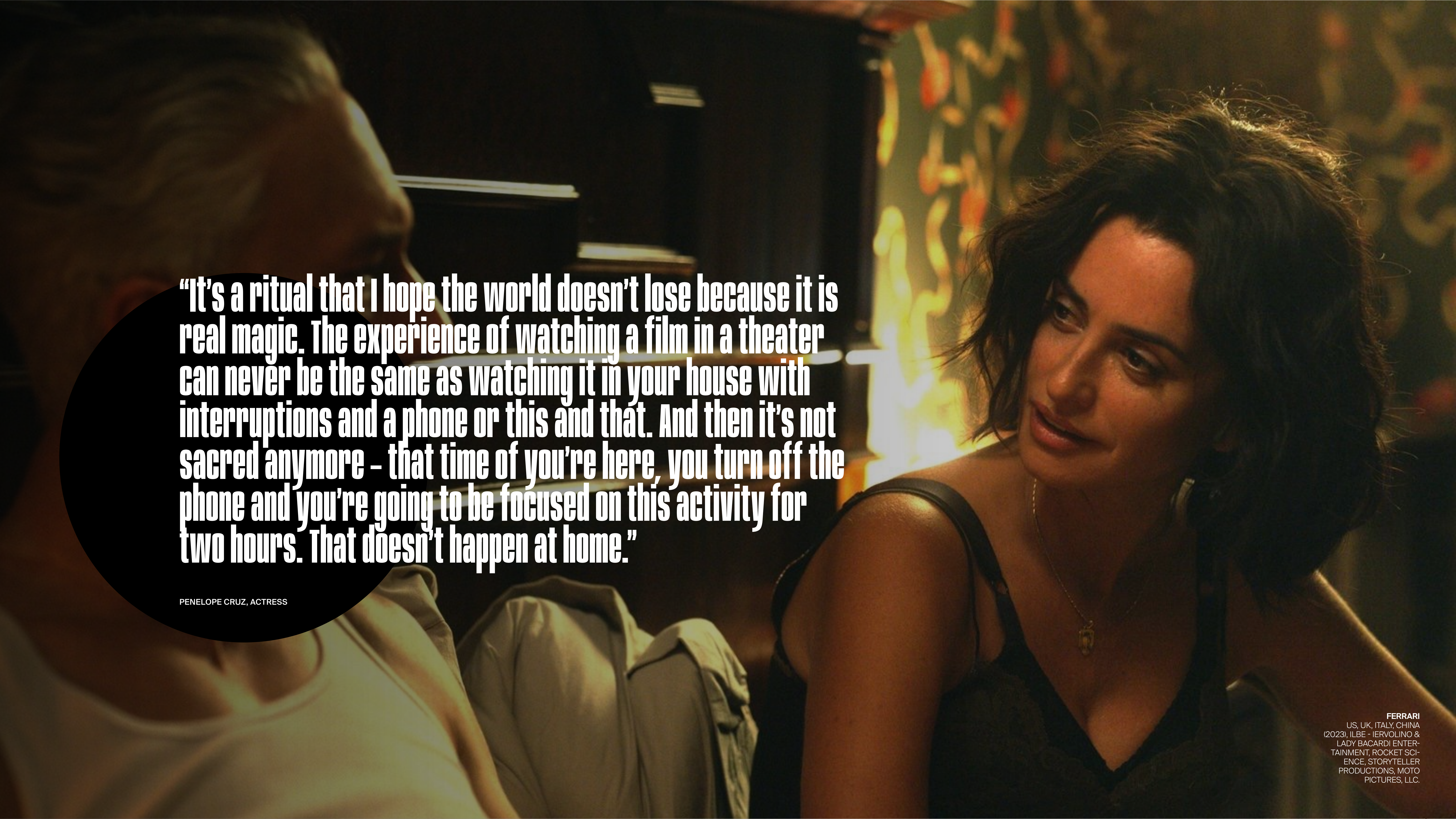


Report “Box Office and Beyond: the cultural, social and economic impact of cinema” by UNIC, Europa Cinemas and CICAÉ



Ahead of a new Parliament and a new Commission coming into office in 2024, UNIC, together with colleagues from Europa Cinemas and the CICAÉ, worked on a shared publication, unveiled in Cannes 2024. From their economic, social and cultural contributions to recent innovation trends and challenges facing the sector, the report offers a 360° vision on European cinemas.

More information [here](#).



“It’s a ritual that I hope the world doesn’t lose because it is real magic. The experience of watching a film in a theater can never be the same as watching it in your house with interruptions and a phone or this and that. And then it’s not sacred anymore – that time of you’re here, you turn off the phone and you’re going to be focused on this activity for two hours. That doesn’t happen at home.”

PENELOPE CRUZ, ACTRESS

FERRARI
US, UK, ITALY, CHINA
(2023), IL BE - IERVOLINO &
LADY BACARDI ENTERTAINMENT, ROCKET SCIENCE, STORYTELLER PRODUCTIONS, MOTO PICTURES, LLC.

Big Screen Feature

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.



3 Q's with Simone Gialdini

For this month's edition of Big Screen Feature – providing a behind-the-scenes look at the world of cinema exhibition through the eyes of professionals themselves – Simone Gialdini, General Director, ANEC, discusses the job itself and the value of the Big Screen.

Describe your typical day at work.

– Working in the national cinema exhibitor association (ANEC) as CEO means always managing something different, according to political and policy changes and business requests. First of all, I read the daily report of Cinetel, an Italian company which collects attendance and box office numbers every day, and then I read press reviews. I do both early in the morning. ANEC works on all cinema exhibition laws drafted and adopted by the Ministry. Our role is to encourage them to adopt the best measures for all our members and to improve the cinema-going experience. In addition, we organise many meetings, as well as panels during large festivals and cinema events, like Venice, Rome, MIA, etc. ANEC also promotes new activities like Aneclab and new projects like LED-Leader Esercenti Donne.

Subscribe to our newsletter!

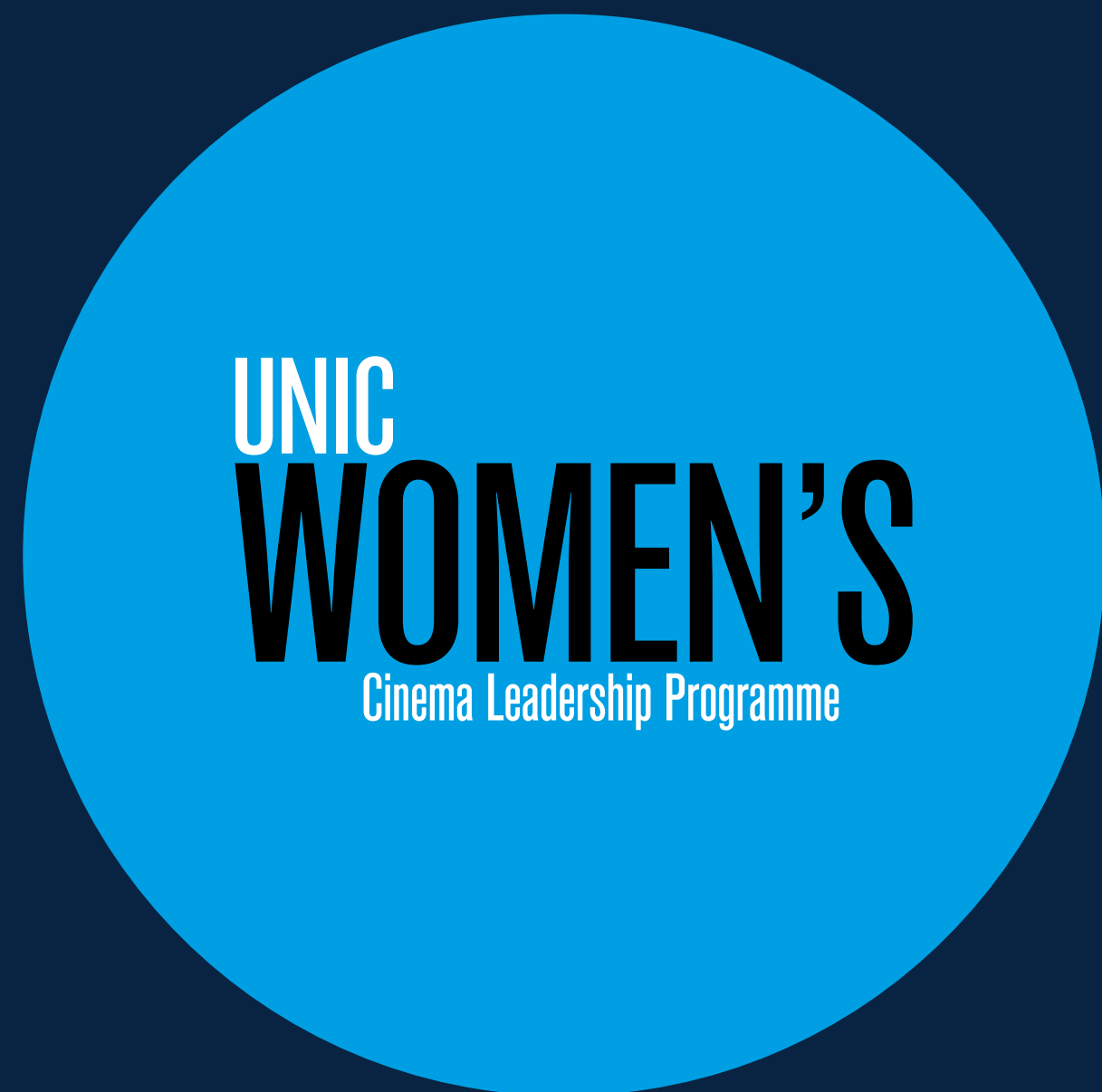
The moment you fell in love with the Big Screen?

– Well, my love for the Big Screen was born with me! My family has been in the cinema exhibition business since the Second World War and in my town, Lucca (Tuscany), we still manage cinemas. The love for the Big Screen offered me a lot of opportunities – I worked in international cinema companies for several years, and I'm now leading the national association. I always support the family-owned cinema – still one screen only! – with the best technologies and comfort that the industry can provide.

The best thing about the cinema experience?

– There's no other way to watch a film than in a cinema. Being seated with a room full of people, most of them strangers, sharing emotions, fear, laughter, sadness, happiness, sometimes clapping at the end, is something that can't be replicated anywhere. Cinema exhibitors must offer their audience the best place with the best technology, but often it's not enough. Cinemas must have an identity. People who choose cinemas to spend time in before or after the screening look for something more. The place needs to have a soul, the idea that the exhibitors are sharing their own place.

UNIC Women's Cinema Leadership Programme



UNIC launched the Women's Cinema Leadership Programme (WCLP) in June 2017 – a 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. This was, we believe, a unique initiative at the time, and one we are now delighted to see emulated by others.

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. In 2023 UNIC launched the seventh edition of the Programme, welcoming a new group of mentors and mentees representing 11 countries and 23 different companies. The eighth edition of the programme will be launched at CineEurope 2024 and will welcome 14 new pairs coming from 11 countries and 27 different companies.

The monthly newsletters feature interviews with current and past participants, programme updates and relevant information for the group.

In April 2024, we were delighted to announce that IMAX Corporation and Vista Group would renew their sponsorship and that Barco would join as an additional Champion of the Programme. They are the main supporters of UNIC's mission to achieve a more diverse and inclusive cinema industry.

In addition, UNIC continued its campaign "Why is mentoring important?" to encourage mentees to think about their personal goals, interests and aspirations, as well as inspire future participants to join the programme. The fifth video of the series is available [here](#).

UNIC has also been co-operating with the online publication Celluloid Junkie, which published a series of articles and interviews about the scheme. In addition, a few years ago, Celluloid Junkie launched an annual list of the "Top 50 Women in Global Cinema" to acknowledge the success and achievements of women in exhibition. Last year, Celluloid Junkie published the "[Top 50 Women in Global Distribution](#)" and will be back in 2024 with the Top 50 Women in Exhibition.

2024 CHAMPIONS
OF UNIC WOMEN'S
CINEMA LEADERSHIP
PROGRAMME



UNIC Women's Cinema Leadership Programme (WCLP) newsletter

RENATE SCHELIGA, GENERAL MANAGER - GERMANY AND AUSTRIA, MACCS AND NUMERO, VISTA GROUP (MENTOR), AND ELENA MARTÍNEZ PELÁEZ, HEAD OF DISTRIBUTOR RELATIONS - SPAIN, ODEON CINEMAS GROUP (MENTEE).



UNIC aims to provide its great community of mentors and mentees with a space to learn from each other, stay connected, inspire and get inspired. The UNIC WCLP newsletter is issued monthly and allows mentors and mentees to share articles, advice, events or any other information that might be of interest.

Here is a sneak peek at an interview between two pairs of the seventh edition (2023-2024) of the programme.

What was your motivation to join the programme?

Elena: I absolutely loved the idea of joining a mentoring programme. When you are a young professional starting a career in the industry, guidance becomes an essential aspect of your journey. Having a mentor is an absolute privilege and a fantastic opportunity to learn from someone with loads more experience than you. Mentors help you visualise your goals and navigate the professional landscape while teaching you how to build connections and improve specific skills to overcome challenges.

Renate: I've known about the programme for a while already. I've heard only really good feedback from a "pair" which was previously part of the programme! Both (mentor & mentee) were highly positive about their experience. So, the WoM (Word of Mouth) was motivating already. In addition, there is no doubt for me that knowledge transfer is key in our business. There are only very few options in Europe and beyond for young people to learn about what we are all doing. No university or film school is really dealing with the daily business of the Big Screen experience as it

might appear "too simple", "highly commercial", "less creative" to them. But it's actually just the contrary! So, even better when more of us can explain what our jobs are about! Apart from the knowledge transfer, it's great to get to know all these great young talents, assist them as best as possible in their daily jobs & routines and various challenges - professional & personal - which just come across.

How have the first sessions been for you?

Renate: Oh, that was a really great experience! We started with a first video call just before CineEurope - which was good as we felt even more comfortable when we later met there in person.

For the first encounter, I wanted to prepare somehow but most of it wasn't actually needed. After the first introduction, I was impressed by Elena's personal commitment, her obvious motivation and strong focus on her professional steps in the business. She appeared to me as highly professional, mature and ambitious from the very beginning. Her explicit aim for broadening her knowledge on

all segments of our industry made us develop a nice concept. [...]

Elena: The first session I had with my mentor, Renate, was excellent. I think it takes a while until you get to know your mentor well and feel comfortable enough to really open up and share with them the challenges you are facing at work. But I must say that with Renate, it has been pretty easy from the beginning. Our mentorship journey started while I was experiencing a significant transition at work, moving to a more senior role in a different country and a brand-new market for me. Renate quickly adapted to my new chapter and shared her professional experience when she had to go through a similar change in her career, which has helped me a lot.

Meet our community of mentors and mentees here!



17-20 JUNE 2024
CONVENTION & TRADE SHOW

CineEurope

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 convene in Barcelona once a year to network, reflect on and debate current issues, discover the latest innovative solutions for enhancing the cinema experience and celebrate the magic of the Big Screen together with US and European studio partners.

CineEurope 2023 took place on 19-22 June at CCIB in Barcelona and brought over 3,000 professionals from the industry together to network and celebrate the Big Screen Experience. Alongside studio presentations and film screenings, the 2023 show featured panels and seminars on engaging audiences through innovation, understanding consumer preferences – with a focus on Gen Z and their expectations towards sustainability, trends in new technologies and marketing innovations, driving commercial success and the launch of UNIC People Programme. Additionally, the tradeshow showcased the newest cinema enhancements.

At time of writing, CineEurope 2024 has an expected attendance of over 3,000 attendees for the latest cinema technology innovations, exclusive presentations and screenings from international studios and European distribution partners.

UNIC 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 engaging two days of debates, workshops and social activities.

UNIC organised its annual Cinema Days on 19–20 October 2023, bringing together around 180 experts from all over Europe to network and provide insights on a wide range of topics as part of a busy schedule of panel discussions, quick-fire sessions and interactive presentations and workshops.

The first day included panel debates on audience engagement through innovation and marketing, workshops on internal culture and values, and an internal mentoring meeting. The next day featured quick-fire sessions on loyalty programmes, cooperation and sustainability initiatives, as well as presentations and interactive workshops on technology and marketing.

The event would not have been possible without those generous sponsors who made it a success.

**UNIC is planning the next edition of its
UNIC Cinema Days on 24–25 October 2024.
[Find out more here!](#)**

Collaborate to Innovate

In 2024, UNIC was part of the selection committee for the 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. Collaborate to Innovate fosters innovative practices for a better circulation of European films, testing 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](#).



MUMMIES
SPAIN (2023), 4 CATS PICTURES, ATRESMEDIA CINE Y TELEVISION, MOVISTAR PLUS+, TELEVISIÓ DE CATALUNYA / TVC / TV3 / 3CAT.



policy update

Working out of its Brussels office, UNIC acts 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, united 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. UNIC wants to ensure that the right legal framework is in place to allow cinemas to thrive.

This also involves fostering relations with policy-makers and industry representatives in all EU Member States and beyond (including colleagues from the wider film and audiovisual value chain), bearing in mind the need for wholesome representation and influence. As and when necessary, UNIC 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 appropriate approach to culture and cinema is communicated as effectively as possible.

The 2019–2024 mandate is coming to an end at time of writing. This period was marked by two years of Covid which strongly influenced the lobbying and advocacy work of UNIC with focus moving on state aid, support to cinemas and ensuring that policy-makers were aware of the challenges faced by the industry. This mandate was also marked by significant work on territoriality of copyright, the adoption of the Digital Services Act, the implementation of the Audiovisual Media and Services Directive, the adoption of the AI Act, among other things.

SISU
FINLAND (2022),
SUBZERO FILM
ENTERTAINMENT,
GOOD CHAOS,
STAGE 6 FILMS



European elections

The European elections, held from 6 to 9 June 2024, led to the election of 720 Members of the European Parliament (MEPs). Following the elections, at the inaugural plenary session scheduled for July 16th, 2024, all MEPs will convene, and the new Parliament will elect its President. Subsequently, the Parliament will proceed to elect the President of the European Commission and later scrutinise and approve the entire College of Commissioners. This assembly and Commission will serve until the subsequent European elections in 2029.



UNIC has worked closely on the above-mentioned files and broader developments in its four key parliamentary Committees: Culture & Education (CULT), Legal Affairs (JURI), the Internal Market and Consumer Protection (IMCO) and Industry, Research and Energy (ITRE) but also with the Committee on Economic and Monetary Affairs (ECON) and the Environment Committee (ENVI).

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), Iliana Ivanova (Innovation, Research, Culture, Education and Youth, Commissioner) and Executive Vice-President Margrethe Vestager (Europe Fit for the Digital Age). On the Council side, UNIC meets regularly with representatives from all Member States in charge of these issues and liaises with the Council Presidency.

The European Commission continued rolling out the various actions under the Media and Audiovisual Action Plan (MAAP) (unveiled in December 2020, this Plan is supposed to guide the Commission's actions when it comes to audiovisual, news and video games), from the first practical guide to connect the film and audiovisual sector with EU funding (Action 1); to improving access to content (Action 7) – see below –, to MediaInvest (Action 2). On 18 May 2023, the European Media Industry Outlook, was unveiled. The report, published by the European Commission, will be updated every two years, and explores demand and supply trends in the audiovisual, video games and news media sectors, accompanied by a consumer survey. When it comes to audiovisual, its primary focus was on the relationship between streamers, broadcasters, and

UNIC endeavours to ensure that the social, economic and cultural relevance of cinema-going remains front-and-centre in relevant regulatory discussions.

producers. Nevertheless, UNIC submitted a contribution on behalf of UNIC, the International Confederation of Arthouse Cinemas (CICAE) and Europa Cinemas in October 2022, along with UNIC's February 2023 press release on preliminary box office results. The Media Outlook marginally acknowledged the role of cinemas which led UNIC to send an official comment to the European Commission, to MEPs and the Council. UNIC is currently working with partners throughout the sector to provide the Commission with data for the second edition of the Outlook due to come out in 2025.

On territoriality of copyright, the European Commission Stakeholder Dialogue on access to and availability of audiovisual content across the EU, first launched in November 2021, was concluded in December 2022. An official report will be prepared by the Commission and will feed into the stocktaking exercise on the Geoblocking Regulation. A coalition of film and audiovisual organisations prepared a roadmap to improve circulation of content, which was shared with the Commission.

The European Commission will publish the results of its stocktaking exercise in Q2 of 2024. The report will give recommendations on ways to improve its future action, in view of the 2025 review and possible revision of the Regulation.

A plenary vote took place on 13 December 2023 on the implementation of the 2018 Geo-blocking Regulation and saw MEPs voting to maintain the film and audiovisual exemption with a 70-vote margin, a monumental victory and a testament to the power of the sector speaking with one voice.



MIRACULOUS
THE FILM
FRANCE (2023),
THE AWAKENING
PRODUCTION,
FANTAWILD
ANIMATION, SND
GROUPE M6, SND
FILMS, ZAGTOON.

In the European Parliament, an own-initiative report on Geo-blocking was launched by the Committee on the Internal Market and Consumer Protection (IMCO) in early 2023. Although not legally binding, a parliamentary vote in favour of removing the film and audiovisual exemption to the Geo-blocking Regulation would have sent a negative signal to the next Commission and Parliament. Creativity Works!, a coalition representing Europe's cultural and creative sectors of which UNIC is a member, launched an impressive campaign “#Vote4Culture” which informed Members of the European Parliament about the importance of territoriality of copyright. The Audiovisual Coalition published a statement to support the exemption, gathering over 700 signatures by European companies, including UNIC members. The plenary vote took place on 13 December 2023 and saw MEPs voting to maintain the exemption with a 70-vote margin, a monumental victory and a testament to the power of the sector speaking with one voice.

In its April 2024 follow up to the European Parliament resolution on the implementation of the 2018 Geo-blocking Regulation in the digital single market, the Commission mentioned that it would look at removing obstacles to consumers' cross-border access to audiovisual content gradually and taking into account the impact on the overall dynamics of the sector, with a specific focus on linguistic minorities, gather further evidence on consumers' demand and on the impacts of a gradual approach to cross-border access to AV content. It will also focus on subtitling and dubbing as well as heritage films. It is clear that 2025 will be a critical moment to defend our continued exemption from the Geo-blocking Regulation.

On the Audiovisual Media and Services Directive (AVMSD), the European Parliament adopted an own initiative report on the implementation of the revised AVMSD on 9 May 2023. The Directive does not cover cinemas directly, but linear and non-linear providers of audiovisual services. The report mentions the diversity of positions when it comes to Article 13(2) – where Member States require media service providers under their jurisdiction to contribute financially to the production of European works, including via direct investment in content and contribution to national funds, they may also require media service providers targeting audiences in their territories, but

established in other Member States to make such financial contributions, which shall be proportionate and non-discriminatory. Some stated that the provision is fundamental to the objectives of promoting and diversifying the European film sector and stimulates cultural diversity, while, at the same time, other market players have stated that those derogations will lead to undesirable effects for the single market or could create additional costs. UNIC continues to support Article 13(2) – where levies on cinema tickets exist to support the national cinema sector, Member States should be allowed to also ask audiovisual online services based in other countries – to contribute.

The report asks for a comprehensive study to assess the possibility, added-value and impact on the European creative ecosystem of common EU wide minimum requirements for investment incentive schemes, as a way to complement the financial obligations provisions in the AVMSD. The Commission also published a [report](#) on the application of the AVMSD on 9 January 2024, for the period 2019–2022. The report confirms that the AVMSD remains an essential instrument to govern the Union-wide coordination of national legislation for all audiovisual media. By 19 December 2026 at the latest, the Commission will submit to the European Parliament and the Council an ex-post evaluation of the AVMSD, accompanied by proposals for its review, of the impact of this Directive and its added value.

On 22 September 2022, the European Commission proposed a [European Media Freedom Act](#), a novel set of rules to protect media pluralism and independence in the EU. This legislation's purpose is to promote a free and independent media landscape, ensuring that journalists and media publishers can work independently and harmonise existing rules. Among other things, the Commission identified barriers to the “media single market”, i.e national rules that are “disproportionate and inadequate”. These “regulatory burdens” and “obstacles to the exercise of economic activities” in the internal media market would create “legal uncertainty” that would weaken investments. Such measures include the limitation of ownership of media companies, the granting of licences or prior authorisations to broadcast.

This was the rationale behind Article 20 – Member States can only adopt rules that are justified and proportionate and Recital 39 specified that the Board's (this would be a new Board created by the Regulation, a “European Board for Media Services”) opinion would be required when there is a risk of “affecting the functioning of the internal market for media services” (for example, when a measure affects a media service present in several Member States or when “the media service concerned exercises a considerable influence on the formation of public opinion”). From this perspective, Article 20 could have been used by any service media provider to question measures transposing the AVMSD and all other national measures adopted by Member States to preserve cultural diversity if those providers consider them disproportionate and/or unjustified.

Such measures include financing obligations, all support measures covered by the exemption to State Aid and even measures covering media chronology. UNIC along with other film and audiovisual organisations worked with MEPs and member states to limit the scope. The compromise agreement found on 15 December 2023 by the Parliament and Council redefined the scope so as to avoid that any service media provider in the future can question national measures adopted by Member States to preserve cultural diversity and measures transposing the AVMSD. The European Media Freedom Act was adopted in the European Parliament on 13 March 2024.

The final version of the [Digital Services Act \(DSA\)](#) was published on 27 October 2022 in the Official Journal of the EU and is an update of the E-Commerce Directive. The DSA regulates online intermediaries and platforms such as marketplaces, social networks, content-sharing platforms, app stores, and online travel and accommodation platforms. Its main goal is to prevent illegal and harmful activities online and the spread of disinformation. The DSA falls short on take down – stay down for illegal content, Know Your Business Customer (KYBC) only for online marketplaces and a more challenging Trusted Flagger status to name a few. On 17 February 2024, the Digital Services Act obligations became obligatory to all hosting and platform services. Its full impact – especially on fighting film theft – remains to be seen.

MIAMI BICI 2
ROMANIA (2023),
WATCHME
PRODUCTIONS,
VIDRA PRO-
DUCTIONS



In addition to the DSA, on 4 May 2023, the Commission recommended actions to combat online piracy of sports and other live events which fell short of the film and audiovisual sector's need for strong legislation to quickly and effectively address piracy, especially of time sensitive content. As a result of the legislation the Commission will monitor, together with the European Union Intellectual Property Office (EUIPO), the effects of this Recommendation on the basis of KPIs which were published on 31 July 2023. The Commission will assess the effects of the Recommendation on unauthorised retransmissions of live sports and other live events by 17 November 2025 and then decide if stronger legislation is needed.

This is also the deadline by which the Commission will evaluate the way the DSA interacts with other legal acts, including copyright legislation. The Commission will then decide whether additional measures are needed at EU level, in view of technological developments, as well as the evolution of distribution channels and consumption patterns. The Commission is also evaluating the EU Directive on the enforcement of intellectual property rights (IPRED). The study will assess how certain measures provided by IPRED are used in the different Member States.

The Artificial Intelligence Act is the first-ever legal framework on AI, which addresses the risks of AI and positions Europe to play a leading role globally. The AI Act aims to provide AI developers and deployers with clear requirements and obligations regarding specific uses of AI. A broad coalition of organisations in Europe's creative and cultural sectors, including music, visual, audiovisual, and literary authors; press publishers of newspapers, magazines and specialised publications, book, music, academic publishers; recorded music, film and audiovisual producers; publishers of films and audiovisual content online and offline; distributors and photo agencies published a joint statement calling for greater transparency regarding the use of copyrighted works in both the input and output of AI models and emphasising the importance of AI respecting copyright rules.

The EU AI Act was adopted in the European Parliament on 13 March 2024. The agreement includes transparency obligations for general-purpose AI models' providers operating in the EU market as well as the obligation to respect EU copyright law. The final text also requires that when the content forms part of an evidently artistic, creative, satirical, fictional analogous work or programme "the transparency obligations are limited to disclosure of the existence of such generated or manipulated content in an appropriate manner that does not hamper the display or enjoyment of the work". UNIC, along with colleagues from the film and audiovisual sector, will be monitoring the implementation.

The European Commission confirmed in a conference on copyright in April 2024 that it would focus on buyout clauses between streamers/broadcasters and producers (with a study to be published in Q2 2024), on piracy – see above – and on the interaction between generative AI and copyright.

When it comes to the Creative Europe MEDIA Programme, the level of support for Europa Cinemas remains unchanged. Early 2023, the European Parliament launched an own-initiative report on the Implementation of the Creative Europe Programme 2021–2027, led

by MEP Massimiliano Smeriglio (S&D, Italy). The report was adopted by the European Parliament in plenary in January 2024. UNIC maintained that MEDIA should support cinemas as a central, vital and crucial component of the film value chain and therefore support all initiatives that engage people to go to the cinema, via the Europa Cinemas network and additional initiatives, such as film literacy schemes, training and mentoring activities to adapt to new market developments and digital technologies and promoting European works in industry events and fairs in Europe and beyond.

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REHRAGOUT
RENDEZVOUS
GERMANY (2023),
ARD DEGETO FILM
GMBH, BR BAYERI-
SCHER RUNDfunk,
CONSTANTIN FILM AG.

Amongst other things, the report requests better cooperation between the Commission and film and audiovisual stakeholders for example – the report includes a reference to cinemas as follows: “Underlines that in many European countries, there are no support schemes dedicated to the screening of cinematic works; highlights, in this regard, the importance of maintaining adequate funding for the Europa Cinemas network, a flagship initiative under the Media strand, which contributes to the circulation of European films in cinemas.”

UNIC has been working closely with its partners from the European film industry to ensure that cinemas remain front and centre when it comes to the future of the European film sector. It is in this spirit that UNIC has been leading an informal coalition focusing on the MEDIA Programme and is also part of a group of European film organisations that has come together

to organise events in a number of film festivals, including a joint publication with the International Confederation of Arthouse Cinemas (CICAE) and Europa Cinemas for Cannes which was released in April 2024.

In 2024, the Commission mentioned publicly that the Programme should evolve to be more innovative and focused on AI and VR. The Commission – both from DG CONNECT and DG Culture – also hinted that Creative Europe was likely to suffer budget cuts in the next Multi Annual Financial Framework (2027–2034) which will be an issue – given sky high inflation rates and the fact that the MEDIA Strand now includes video games and news, the same amount of money becomes more and more challenging to manage. At time of writing, the mid-term evaluation of the Programme is yet to be published.

UNIC recognises the importance of sustainability initiatives but emphasises the need for balanced implementation that considers the practical challenges faced by cinema operators. UNIC advocates for supportive measures and incentives to facilitate the transition to sustainable practices without imposing undue burdens. Additionally, UNIC is proactive in its approach, engaging in initiatives like and knowledge-sharing on sustainability within the industry. UNIC has worked for example on Regulation on Packaging and Packaging Waste.

This is only a selection of topics on which UNIC has been working on over the past year. With a new Parliament and a new European Commission, the organisation will focus on educating new policy-makers on the crucial role of cinemas in the film sector and in the social, economic and cultural fabric of the European Union.

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MANIFESTO

We Love
the Big Screen

UNIC

UNION INTERNATIONALE DES CINÉMAS
INTERNATIONAL UNION OF CINEMAS

UNIC Manifiesto & Postcards

European elections took place on 6–9 June, leading to a renewal of Members of the European Parliament. The European Commission and the President of the European Council will also change. All together, they will design new priorities for the 27 Member States, in a World that is drastically different to what it was in 2019, marked by a global pandemic, political uncertainty and wars.

In order to introduce cinemas to experienced and new policy-makers, UNIC prepared a manifesto and postcards, as displayed here.

ASISTENCIA A CINES EN EUROPA & ESPAÑA

977,3

Millones de espectadores en
Europa en 2023

489

Millones en taquilla en
España en 2023

75,1

Millones de
espectadores en
España en 2023

7,1

Millones en taquilla en toda
Europa en 2023



UNIC

UNION INTERNATIONALE DES CINÉMAS
INTERNATIONAL UNION OF CINEMAS

UNIC statements

UNIC releases statements on the legislation and may also cosign statements with other organisations. You will find some examples of such statements below.

In June 2023 UNIC co-signed an [Open Letter to European Institutions Regarding the Impact of European Media Freedom Act \(EMFA\) Regulation Proposal on Cultural Audiovisual Policies](#). The letter highlighted apprehensions that the EMFA's provisions could undermine ambitious cultural policies established by Member States. Of particular concern was Article 20 of the proposal, which could have introduced legal uncertainty and challenge existing cultural regulations by allowing media service providers to dispute measures deemed disproportionate or unjustifiable based on internal market criteria. The letter urged the European co-legislators to revise Article 20 to ensure the continued support for local audiovisual creation across Europe, emphasising its significance in maintaining cultural diversity within the European Union. The letter's concern was addressed positively in the final version of the EMFA.

In December 2023, with over 700 other members of the film and audio-visual sector, UNIC and its members co-signed a letter asking members of the European Parliament to [Vote for Culture in the European Parliament INI Report on the EU Geo-blocking Regulation](#). In the open letter the film, cinema, and audiovisual sector in Europe urged the European Parliament to reject the call for the future inclusion of audiovisual services in the EU Geo-blocking Regulation. Advocating for continued exclusion is seen as crucial for preserving Europe's cultural and linguistic diversity. The sector argued that banning Geo-blocking technology to uphold territorial exclusivity for film and audiovisual

content would greatly threaten both the creative and economic sustainability of the industry. It would lead to a reduction in the diversity of films and content produced, limiting distribution, exhibition and circulation across the EU and negatively impacting consumer welfare by reducing choice and increasing prices.

Our voice was heard by MEPs when on 13 December 2023 the [European Parliament Upheld Exclusion of Film and Audiovisual Sector from Geo-blocking Regulation](#).

PEASANTS
POLAND, SERBIA,
LITHUANIA (2023), CHŁOPI
SP Z OO, BREAKTHRU
FILMS, DIGITALKRAFT, ART
SHOT, CANAL+ POLSKA.



UNIC film screenings

In collaboration with colleagues from production and distribution, UNIC has been organising exclusive film premieres dedicated to EU policy-makers and cinema lovers.

We firmly believe that there is no better place to celebrate our passion for cinema-going than in the auditorium itself. These occasions give us a prime opportunity to do so, while also celebrating Europe's rich cultural diversity through a selection of powerful and memorable titles.

In March 2023, UNIC organised a screening in collaboration with the International Federation of Film Distributors' and Publishers' Associations (FIAD), of the French-Portuguese film *Alma Viva*, winner of several awards at CineEuphoria and Valladolid International Film Festival.

In December 2023, UNIC organised another screening, this time showing the Italian-French-German drama *Rapito*, by Marco Bellocchio, at Cinémas Galeries in Brussels. This European co-production was nominated 5 times at the Cannes Film Festival. UNIC partnered with Europa Distribution on this occasion.

A wide range of policy-makers and stakeholders from the European film value chain joined us, which also served as an opportunity to reiterate UNIC's position on a number of industry related issues. If you are interested in attending our next screening, please reach out!

RAPITO
ITALY, FRANCE, GERMANY
(2023), IBC MOVIE, KAVAC
FILMS, AD VITAM PRO-
DUCTIONS, THE MATCH
FACTORY PRODUCTIONS,
RAI CINÉMA, ARTE
FRANCE CINÉMA.

POLICY PARTNERS

Creativity Works!

Creativity Works! is a leading coalition established by UNIC and partners, representing Europe's cultural and creative sectors. UNIC held the chairmanship from 2019 to Q1 2024.

EAO EUROPEAN AUDIOVISUAL OBSERVATORY

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

EUIPO THE EUROPEAN OBSERVATORY ON INFRINGEMENTS OF INTELLECTUAL PROPERTY RIGHTS

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.

AV Coalition

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

Europa Cinemas

Europa Cinemas is the network of cinemas focusing on European non-national films, uniting more than 3,121 screens across 38 countries. Each year they select and finance stand-out innovative projects and approaches from their members with the Collaborate to Innovate scheme, with support from Creative Europe MEDIA.

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.


CICAÉ

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

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 here.

KEY AREAS OF INTEREST

- Media and Audiovisual Action Plan
- Territoriality of copyright
- Artificial Intelligence
- Rewarding investment and creativity, particularly in tackling piracy
- Audiovisual Media Services Directive (AVMSD)
- Creative Europe Programme / MEDIA Programme
- Sustainability
- Accessibility and inclusion
- Music rights



THE SUPER MARIO BROS MOVIE
US, JAPAN (2023), UNIVERSAL
PICTURES, NINTENDO,
ILLUMINATION ENTERTAINMENT,
DENTSU, FUJI TELEVISION
NETWORK, ILLUMINATION
STUDIOS PARIS.

Conclusion

The impressive admission and box office figures for 2023 show that the Big Screen has lost none of its allure for European audiences, with a mix of fantastic international films and superb national titles. The sheer diversity of programming and experience on offer means cinemas have something for every taste and every age group.

This is certainly an industry with an unparalleled record of innovation and which continues to deliver. Some challenges remain – the impact of the Hollywood strikes and increased operational costs among them – and as new policy-makers enter office, they have the power to support and celebrate cinemas, regardless of their size or location.

Cinemas must remain the first place where to watch films. This entails a clear recognition of the fundamental principles on which cinemas depend, such as territoriality and theatrical exclusivity, as well as the continuation of essential support programmes and fight against piracy.

It is by adhering to these principles that cinemas, along with the broader film value chain they wholeheartedly support, can confidently look forward to a bright future.

Members & Partners

Association members

Austria

Fachverband der Kino-, Kultur
und Vergnügungsbetriebe (WKO)

Belgium

Fédération des Cinémas de Belgique (FCB)

Bulgaria

Bulgarian Cinema Association

Czechia

Asociace Provozovatelů Kin

Denmark

Danske Biografer

Finland

Finnish Cinema Exhibitors'
Association (Suomen Filmikamari)

France

Fédération Nationale des
Cinéma Français (FNCF)

Germany

HDF KINO e.V.
(Hauptverband Deutscher Filmtheater)

Israel

Cinema Industry Association (Cinemaia)

Italy

Associazione Nazionale
Esercenti Cinema (ANEC)

Netherlands

Nederlandse Vereniging van
Bioscopen en Filmtheaters (NVBF)

Norway

Film & Kino

Poland

Polish Exhibitor's Association
(Polskie Stowarzyszenie Nowe Kina)

Spain

Federación de Cines de España (FECE)

Sweden

Sveriges Biografägarförbund

Switzerland

Schweizerischer Kino-Verband
- Association Cinématographique
Suisse (SKV-ACS)

Turkey

Turkish Cinema
Operators' Association (SISAY)
(Affiliate member)

Ukraine

United Ukrainian Cinemas

UK

UK Cinema Association (UKCA)

Members & Partners

Operator members

Apollo Kino

Estonia, Latvia, Lithuania

Blitz Cinestar

Croatia, Kosovo, Serbia, Bosnia and Herzegovina

Cinamon

Estonia, Latvia, Lithuania

Pathé Cinémas

Belgium, France, the Netherlands,
Switzerland, Tunisia

Cinemax

Czechia, Romania, Slovakia

Cavea Cinemas

Georgia

Cineplex

Germany

Cineplexx

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

Cineworld and Cinema City International

Israel, Hungary, Poland, Czechia, Romania,
Bulgaria, Slovakia, United Kingdom

Kinopolis Group

Belgium, France, Luxembourg,
the Netherlands, Poland, Spain, Switzerland,

Kinopolis

Germany

Kino Arena

Bulgaria

Movies@Cinemas

Ireland

Multiplex

Ukraine (Pilot period)

Nordisk Film Biografer

Denmark, Norway, Sweden

Cinemas NOS

Portugal

ODEON Cinemas Group

Finland, Germany, Italy, Ireland, Norway,
Portugal, Spain, Sweden, United Kingdom

Svenska Bio

Denmark, Finland, Sweden

UCC

Belgium, France

Vue

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

Cine Yelmo (Cinépolis Group)

Spain

Members & Partners

Partners of European Cinema
Exhibition Programme



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

Get in touch!

UNIC

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International Union of Cinemas
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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