Annual Report
2025

UNIC

UNION INTERNATIONALE DES CINÉMAS
INTERNATIONAL UNION OF CINEMAS

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Welcome & Executive Summary

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

Welcome to this, our 2025 Annual Report on key cinema trends in Europe – a region that remains one of the most diverse, innovative and dynamic in the World.

UNIC, the Union Internationale des Cinémas/ International Union of Cinemas, represents key European cinema operators and their national associations across 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.

Cinemas came into 2024 facing a new challenge, specifically the impacts of the screenwriters' and actors' strikes which had taken place in the second half of 2023, but which had longer-term impacts on the available film slate.

Nevertheless, with local content continuing to make a strong contribution in many UNIC territories, and some strong US titles, 2024 saw a flat box office with 2023 and a relatively small decrease in admissions (-2.5%) across the year. Total admissions reached over 947.4 million, with box office close to €7.2 billion.

€7.2 BILLION

at the box office across UNIC territories in 2024

+0.1 per cent vs 2023
box office across UNIC territories

on par with 2023
box office in Europe

2024 proved that when a diverse and constant flow of films is on offer, audiences are there too. 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 Innovation and the Big Screen published in 2024. In March 2025, industry analysts 'Gower Street Analytics' increased their forecast on the global box office for 2025 to $34.1 billion, up from the original projection of $33.0 billion published in December 2024.

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

39 TERRITORIES
represented by UNIC

43,500 SCREENS
across UNIC territories in 2024

Cinema-going in 2024

Cinema-going in Europe in 2024 Facts and figures

770 MILLION ADMISSIONS
in EU & UK in 2024
-1.9 per cent on 2023

€7.1 BILLION AT THE BOX OFFICE
in Europe in 2024
on par with 2023

While the first half of the year was impacted by the effects of the longest Hollywood industrial disputes since the 1960s, the overall picture for cinema-going in Europe remained almost on a par with 2023. Despite the tough context, box office remained stable compared with 2023 across UNIC territories, while admissions decreased by 2.5%. Total admissions reached over 947 million, with box office close to €7.2 billion.

While the Hollywood strikes primarily affected US titles, audiences returned once the slate strengthened. Indeed, 2024 admissions surpassed the previous year in France, UK, Ireland, Bulgaria, Greece, Albania, Latvia, Lithuania, Poland, Slovakia, Turkey and Montenegro.

France recorded 181.5 million admissions, up over 1 million compared with 2023. The market was propelled by domestic hits *Un P'tit Truc En Plus*, *Le Comte de Monte-Cristo* and *L'Amour Ouf*, which together sold over 25 million tickets, breaking a decade-long record. The market share by admissions for French-made films reached 44.8%, one of its highest ever levels. France recorded 18.7 million admissions in July, the best July since 2011 thanks to local and US blockbusters. That result put July's admissions 2.2% ahead of 2023, when the month was powered by the releases of *Barbie* and *Oppenheimer*, and 12.1% above the pre-pandemic 2017–2019 average of 16.7 million.

The UK maintained solid box office revenue, surpassing £978 million, while admissions grew by 2.3%. November and December saw particularly strong growth, with admissions up 77% and 36% respectively year-on-year, thanks to titles including *Wicked*, *Mufasa: The Lion King*, *Moana 2* and *Sonic the Hedgehog 3*, as well as British co-productions *Paddington in Peru* and *Conclave*. Q4 was indeed 2024's strongest box office period, featuring the release of five of the top 10 films of the year.

Italy reported €494 million in box office revenue, selling 69.7 million tickets. Summer 2024 was the best in Italy's box office history, exceeding the previous year's record, while Christmas admissions surged 28%, with Italian films accounting for 45% of tickets sold in the festive period, such as *Il ragazzo dai pantaloni rosa* and *Diamanti*.

Denmark witnessed a minimal decline of only 2.7% in attendance. Family films dominated the cinema market, and Danish films maintained a 24% market share, quite an achievement with only 20 local films released in 2024, compared to 35 the year before. Subscription schemes such as Biografklub Denmark helped maintain attendance for local and international films.

Bulgaria saw box office revenue increase by 10.8%, with admissions up 4.1%, thanks to a higher number of releases (up from 175 in 2023 to 199 in 2024) and new cinema openings (up from 76 to 80 active cinemas).

A key highlight across the EMEA region was Walt Disney's *Inside Out 2*, the highest-grossing US animated film of all time and the quickest to surpass the $1-billion benchmark globally, reaching that landmark in just 19 days. In Italy the film became the third highest-grossing non-local release of the decade within 11 days, contributing two-thirds of June's box office. In Spain the film broke all box office records, contributing to an increase in 2024 attendance from -13% in the first semester to +1.5% in the second half of the year.

INSIDE OUT 2
UNITED STATES (2024), WALT DISNEY PICTURES, PIXAR ANIMATION STUDIOS

32.8%

MARKET SHARE

of European films in 2024 in the EU compared to 27.7 % in 2023, and 26.1 % in 2019*

*Source: European Audiovisual Observatory

Universal's *Despicable Me 4* and Walt Disney's *Deadpool & Wolverine* also boosted summer admissions across the continent, before the second half of 2024 picked up with a more robust release calendar that saw multiple hits including Paramount's *Gladiator II*, Universal's *Wicked*, Walt Disney's *Moana 2*, Sony's *Venom: The Last Dance* and Warner Bros' *Beetlejuice Beetlejuice*. These titles helped bring the EMEA region back to pre-pandemic box office levels in the fourth quarter.

According to data from the European Audiovisual Observatory, while the number of European films released in Europe in 2024 has exceeded 2019 levels, the number of US releases is still lagging behind, with 168 new US titles in 2024 compared to 200 in 2019.

In March 2025, Gower Street Analytics revised its Global box office projection for 2025 to $34.1 billion, an increase on the original projection of $33.0 billion published in December 2024.

TOP 5

Most successful European films released in 2024 (in million admissions)

1 Un p'tit truc en plus

France / 11.7M

2 Le Comte de Monte-Cristo

France / 10.6M

3 Poor Things

UK, Ireland, US / 6.5M

Considered by the EAO as 'Eur inc', i.e. European film produced with incoming investment from US studios.

4 Paddington in Peru

UK, France, US / 5.2M

5 L'amour ouf

France / 5.1 M

*Source: European Audiovisual Observatory. Admissions data refers to Europe.

Success of local titles

Local productions played a pivotal role in 2024's overall success.

In Bulgaria, *Gundi: Legend of Love* – about the country's legendary footballer Georgi Asparuhov – contributed to a record-breaking 24.4% market share for national titles, three times higher than in 2023. Admissions to Bulgarian films were 1,147,676 in 2024 compared to 410,785 in 2023, with another domestic film, *The Vacation*, also making it into 2024's top 10.

In France, local productions accounted for three of the top 5 films in 2024. Featuring a cast of mostly disabled non-professional actors, the inclusive comedy *Un P'tit Truc en Plus* took the first spot, generating an impressive 11 million admissions, the best-attended French film in a decade. The second-best local title was the adaptation of *Le Comte de Monte-Cristo*, bringing in over 9 million admissions, whilst musical romance *L'Amour Ouf* capped the top 5 with almost 5 million admissions, giving its distributor StudioCanal their biggest hit to date in the territory. 10 French films surpassed 1 million admissions, including the biopic *Monsieur Aznavour* and the comedy *Cocorico,* each bringing in around 2 million admissions and all finishing in the territory top 20. France's arthouse cinemas saw solid admissions results from local productions too, including Oscar-winning musical *Emilia Pérez* (1.08 million admissions) and the family film *Le Dernier Jaguar* (1 million admissions).

In the UK and Ireland, despite a dip in the number of local feature films and co-productions released (189 in 2024 vs 217 in 2023), revenue from domestic productions increased significantly to reach £215.1 million (vs. £123.6 million in 2023) and accounted for almost 22% of all 2024 box office in the territory. The family film *Paddington in Peru*, the music biopic *Back to Black*, the drama *One Life* and the comedy *Wicked Little Letters* did particularly well.

Lithuania also experienced significant growth, with box office revenue and admissions increasing by 9.8% and 5.8% respectively. Two local productions, comedy *Milijonieriaus palikimas* and *Irklais per Atlantą*, a documentary about Aurimas Valujavicius and his solo crossing of the Atlantic in a rowing boat, ranked first and second respectively in the country's top 10 for 2024, while the market share for national titles jumped to 20.2% from 14.6% the previous year.

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

In Poland, along with a rise in box office revenue, national market share increased by over 4 percentage points to 23.9%, with two home-grown films in the top 5 titles: *Akademia Pana Kleksa* and *Listy do M. Pożegnania i powroty*.

Finland experienced an unprecedented 30.4% national market share, with over 2 million admissions for local films, the highest level since 2017. The most watched film of the year was *Myrskyluodon Maija*, with almost 470,000 viewers. Other local films recorded over 100,000 tickets, such as *Luottomies-elokuva: All in* (324,485 admissions), *Kyllä isä osaa – elokuva* (223,051), *Heinähattu, Vilttitossu ja kana* (181,955), *Mielensäpahoittajan rakkaustarina* (176,171) *Niko ja myrskyporojen arvoitus* (109,570). 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 27.6% above even the 2017–2019 average box office.

Netherlands saw local films achieving the highest attendance results in 8 years, with 5.1 million tickets sold and a 16.5% market share. In 2023, Dutch films had accounted for 4 million tickets and 14% local market share. Among the top local films of 2024 there were *Loverboy: Emoties Uit, Bon Bini: Bangkok Nights* and *Verliefd op Bali*.

In Spain, the national market share rose to 19% – two points higher than in 2023 – thanks to domestic hits such as *Padre no hay más que uno 4*, thriller *La Infiltrada* and children's film *Buffalo Kids*.

MAIJA OF MYRSKYLUOTO
FINLAND (2024), SOLAR FILMS

TOP 5

European territories in terms of admissions

FRANCE
181.5 million

UK
126.5 million

GERMANY
90.1 million

SPAIN
73.0 million

ITALY
69.7 million

TOP 5

European territories in terms of market share for national films*

TURKEY
50 per cent

FRANCE
42.3 per cent

ALBANIA
32.3 per cent

FINLAND
30.4 per cent

CZECH REPUBLIC
28 per cent

*by box office

Serbia released strong local hits again in 2024, with three domestic titles in its top 10, contributing to a local market share of 25.9%: the Serbian music biopic *Nedelja*, directed by Nemanja Ćeranić, which topped the 2024 chart with 347,622 admissions, above all US blockbusters, *Jorgovani* with 146,761 admissions, while *Isolation*, came tenth.

Turkey recorded a national market share of 50% by box office, with 211 Turkish productions released in cinemas. Local films sold more tickets than foreign films in five months in 2024. Three Turkish titles featured in the yearly top 5 and 13 in the top 20. The highest grossing film of the year was the local animation *Rafadan Tayfa: Hayrimatör*, with over 2.8 million tickets sold.

In Switzerland, the national market share increased by 38.5% compared to 2023, round to 9%. This represents the highest share since 2020, thanks to successful Swiss productions like *Bon Schuur Ticino* (306,396 admissions) ranking fifth in the yearly top 10 and *Tschugger – Der lätscht Fall*, with over 90,000 tickets sold.

Hungary witnessed a surge of successful local titles between the end of 2024 and beginning of 2025. Hungarian films dominated the national box office for weeks in this period, marking a rare phenomenon in decades. In the third and fourth week of 2025, the top 3 was occupied entirely by Hungarian films. The independent film *Futni mentem*, released in November 2024, broke records for domestic films since 1990, ranking fifth in 2024's top 10 and continuing its roll-out in 2025. It was followed by *Hogyan tudnék élni nélküled?*, released in December, with 626,706 admissions. Another notable milestone came on 16 January 2025 with the release of *Véletlenül írtam egy könyvet*, with 93,029 admissions, marking the return of domestic family films.

FUTNI MENTEM
HUNGARY (2024),
VERTIGO MÉDIA KFT.

“We need to put people in the movie theatre to give them the opportunity to engage.”

EDWARD BERGER, DIRECTOR

CONCLAVE
UNITED KINGDOM, UNITED STATES (2024), INDIAN PAINTBRUSH, ACCESS ENTERTAINMENT, FILMNATION ENTERTAINMENT, HOUSE PRODUCTIONS

Animation and children's films drove admissions in 2024

2024 was the only year of the last decade when animated films made up three of the top 5 grossing titles of the year globally: *Inside Out 2*, *Despicable Me 4* and *Moana 2*. Often crafted with both children and families in mind, the regular production and release of such features remains integral to the ongoing health and prosperity of the ecosystem. These films are often based on existing intellectual property, adding to the broadening cultural impact of books, videogames or film IPs.

In the UK and Ireland, animated features enjoyed a significant improvement in earnings across 2024, grossing £232.5 million at the box office with 71 new releases (vs £195.9 million/60 new titles in 2023). From major studio pictures and franchise favourites to independent productions and the growing appetite for Japanese anime, animated films generated the genre's best results since 2019.

The top animated and children's films included also the domestic co-production *Paddington in Peru* and the mid-tier animations *Migration* and *The Wild Robot*.

In Germany, 65.2% more tickets were sold for children's films and 36.9% more for animation films compared to the previous year. In the yearly top 10, five films were US animations, while two were local family franchises, *Die Schule der magischen Tiere 3* (the best local film of the year with 2.9 million admissions) and *Chantal Im Märchenland* (2.7 million admissions).

In Denmark, children's and family films accounted for 29% of the market in 2024, thanks to US blockbusters like *Inside Out 2*, *Kung Fu Panda 4*, *Despicable Me 4* and *Moana 2* and the Danish production *Børnene fra Sølvgade*.

In Switzerland, three animation films ranked in 2024's top 4: first was *Inside Out 2* (534,323 admissions), second *Despicable Me 4* (420,945 admissions) and at the fourth spot *Moana 2* (338,704 admissions).

In the Netherlands, six of the top 10 films were children's films, led again by *Inside Out 2* and *Despicable Me 4*, both with over 1 million admissions.

In Turkey, the top film of 2024 – all nationalities and genres included – was the local animation *Rafadan Tayfa: Hayrimatör*, followed by 10 other animation titles in the top 30. Among the six titles that exceeded the 1 million admissions benchmark in 2024, three were animation features.

THE WILD ROBOT
UNITED STATES, JAPAN (2024), DENTSU, DREAMWORKS ANIMATION

FLOW
LATVIA, BELGIUM, FRANCE (2024), DREAM WELL STUDIO, SACREBLEU PRODUCTIONS, TAKE FIVE

2025 welcomed China's record-smashing animated blockbuster *Ne Zha 2*, which earned $2.03 billion in China only and $2.1 billion globally to date – the first non-Hollywood film to cross the $2 billion threshold.

The Chinese animation sequel, released for 2025 Lunar New Year, smashed virtually every box office record that exists for an animated feature: the highest-grossing animated film of all time (overtaking *Inside Out 2* at $1.7 billion) and the top-earning film ever in a single market.

Other high-profile animated sequels will be released in 2025 – at time of writing – such as Disney's *Zootopia 2*, DreamWorks' *The Bad Guys 2*, Nickelodeon/Paramount's *The SpongeBob Movie: Search for Square Pants* and *Smurfs*, as well as Crunchyroll/Sony Pictures' much-anticipated anime *Demon Slayer: Infinity Castle.* 2025 will also offer a wide number of original productions, such as Pixar's sci-fi *Elio*, DreamWorks' *Dog Man* and *Gabby's Dollhouse.*

In Europe, the Latvian independent co-production *Flow*, by Gints Zilbalodis, received two Oscar nominations for Best Animated Feature and Best International Feature and it won the Golden Globe for Best Animated Feature, the Oscar for the Best Animated Feature and the 2025 LUX Audience Award – an unprecedented success for a Latvian film. The dialogue-free low-budget animation was distributed in approximately 50 international markets and has grossed around $40 million to date.

UNIC weekly box office reports

comscore

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.

RAFADAN TAYFA: HAYRIMATÖR
TURKEY (2023), TRT, ISF STUDIOS
(PIC FROM BOXOFFICE TURKEY)

CINEMA-GOING ACROSS UNIC TERRITORIES IN 2024

Country (Currency)	Box Office in local currency (in million) 2024	Box Office 2023	Box Office Change from 2023 in %	Admissions (in million) 2024	Admissions 2023	Admissions Change from 2023 in %	National films' share 2024 (by box office)	Screens 2024
Albania (ALL)	295.0	288.3	2.3%	0.5	0.4	9.0%	32.3%	18
Austria (EUR)	112.3	125.4	-10.5%	10.5	11.6	-9.7%	5.0%	569
Belgium (EUR)	160.4	167.2	-4.1%	15.5	16.0	-3.1%	5.2%	480
Bosnia and Herzegovina (BAM)	8.4	9.2	-8.3%	1.1	1.3	-14.9%	2.7%	81
Bulgaria (BGN)	58.9	53.2	10.8%	4.6	4.5	4.1%	24.4%	216
Croatia (HRK)*	19.9	21.0	-5.4%	3.4	3.8	-10.7%	3.1%	229
Cyprus (EUR)	4.8	5.4	-10.3%	0.5	0.6	-16.5%	11.0%	32
Czech Republic (CZK)	2,255.1	2,275.2	-0.9%	13.0	13.3	-2.2%	28.0%	919
Denmark (DKK)	948.2	1,005.9	-5.7%	9.8	10.1	-2.7%	23.0%	499
Estonia (EUR)	18.4	21.0	-12.4%	2.5	2.8	-12.4%	12.5%	94
Finland (EUR)	89.6	93.6	-4.3%	6.8	7.2	-5.5%	30.4%	379
France (EUR)	1,347.8	1,333.9	1.0%	181.5	180.4	0.6%	42.3%	6354
Georgia (GEL)	19.7	19.0	3.5%	1.5	1.5	-5.8%	0.3%	44
Germany (EUR)	868.4	929.1	-6.5%	90.1	95.7	-5.8%	20.6%	4842
Greece (EUR)	54.8	52.1	5.1%	7.6	7.4	3.0%	10.8%	464
Hungary (HUF)	24,481.3	22,518.8	8.7%	10.5	11.1	-5.4%	13.5%	396
Ireland (EUR)	102.3	101.7	0.6%	11.8	11.5	2.6%	4.7%	554
Israel (ILS)	424.0	402.3	5.4%	13.2	12.2	8.1%	10.1%	413
Italy (EUR)	494.0	495.8	-0.4%	69.7	70.7	-1.3%	24.6%	3392
Latvia (EUR)	13.5	13.5	0.2%	2.1	2.0	3.2%	13.3%	64
Lithuania (EUR)	23.5	21.4	9.8%	3.6	3.4	5.8%	20.5%	142
Luxembourg (EUR)	10.2	10.9	-6.4%	0.9	1.0	-10.4%	n/a	N/A

Source: UNIC members.
Complementary information from Comscore, European Audiovisual Observatory, 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), UA (Planeta Kino).

Russia: 2023 and 2024 data are estimates from Comscore and do not cover the whole market.

Ukraine: Cinema screens are estimates.

CINEMA-GOING ACROSS UNIC TERRITORIES IN 2024

Country (Currency)	BOX OFFICE in local currency (in million) 2024	2023	change from 2023 in %	ADMISSIONS (in million) 2024	2023	change from 2023 in %	National films' share 2024 (by box office)	Screens 2024
Montenegro (EUR)	1.3	1.2	11.1%	0.3	0.3	4.3%	3.4%	14
Netherlands (EUR)	308.7	333.3	-7.4%	29.1	31.3	-7.0%	16.5%	1083
North Macedonia (MKD)***	84.7	90.3	-6.2%	0.3	0.3	-3.2%	1.3%	45
Norway (NOK)	1,109.8	1,226.7	-9.5%	8.2	9.4	-12.7%	24.8%	476
Poland (PLN)	1,127.3	1,039.7	8.4%	50.8	50.4	0.7%	23.9%	1555
Portugal (EUR)	73.3	72.9	0.5%	11.9	12.3	-3.6%	4.2%	563
Romania (RON)	292.9	308.8	-5.2%	11.2	13.0	-13.8%	22.0%	473
Russia (RUB)	37,710.9	29,519.0	27.8%	90.8	99.9	-9.1%	74.3	6235
Serbia (RSD)	2,338.2	2,271.1	3.0%	4.1	4.2	-3.5%	25.9%	188
Slovakia (EUR)	38.7	34.6	11.7%	5.4	5.0	8.3%	23.7%	248
Slovenia (EUR)	12.1	12.8	-5.7%	1.7	1.9	-7.8%	9.0%	98
Spain (EUR)	489.0	504.5	-3.1%	73.0	77.8	-6.2%	19.0%	3560
Sweden (SEK)	1,422.1	1,548.3	-8.1%	10.3	11.2	-7.9%	20.3%	957
Switzerland (CHF)	170.9	176.6	-3.2%	10.6	10.9	-2.2%	9.0%	615
Turkey (TRY)	4,994.0	2,812.1	77.6%	33.2	31.4	5.8%	50.0%	2181
UK (GBP)	978.7	979.3	-0.1%	126.5	123.6	2.3%	11.1%	4557
Ukraine (UAH)	2,294.5	2,196.9	4.4%	13.8	14.6	-5.4%	9.0%	470
European Union (EUR)	7,171.10	7,164.3	0.1%	947.4	971.53	-2.5%		28,162
EU + UK (EUR)	6,185.37	6,252.2	-1.1%	769.8	785.0	-1.9%		32,719
Europe (EUR)	7,065.18	7,063.4	0.0%	934.2	959.3	-2.6%		43,041

Source: UNIC members.
Complementary information from Comscore, European Audiovisual Observatory, 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), UA (Planeta Kino).

Russia: 2023 and 2024 data are estimates from Comscore and do not cover the whole market.

Ukraine: Cinema screens are estimates.

TOP 5 FILMS ACROSS UNIC TERRITORIES IN 2024

	TOP 1	TOP 2	TOP 3	TOP 4	TOP 5
Albania	Dy gisht mjaltë 2	Njerëz dhe fate 2	Falli	Troubleshooters	Gladiator II
Austria	Inside Out 2	Deadpool & Wolverine	Despicable Me 4	Dune: Part Two	Moana 2
Belgium	Inside Out 2	Moana 2	Despicable Me 4	Deadpool & Wolverine	Dune: Part Two
Bosnia And Herzegovina	Nedelja	Deadpool & Wolverine	Gladiator II	Inside Out 2	Venom: The Last Dance
Bulgaria	Gundi: Legend of Love	Despicable Me 4	Inside Out 2	Deadpool & Wolverine	Dune: Part Two
Croatia	Deadpool & Wolverine	Inside Out 2	Dune: Part Two	Gladiator II	Despicable Me 4
Cyprus	Inside Out 2	Deadpool & Wolverine	Karma	Despicable Me 4	Stelios – Yparho
Czech Republic	Inside Out 2	Vlny	Deadpool & Wolverine	Despicable Me 4	Dune: Part Two
Denmark	Inside Out 2	Deadpool & Wolverine	Despicable Me 4	Dune: Part Two	Kung Fu Panda 4
Estonia	Despicable Me 4	Inside Out 2	Tulnukas 2 ehk Valdise tagasitulek 17 osas	Deadpool & Wolverine	Kung Fu Panda 4
Finland	Myrskyluodon Maija	Inside Out 2	Luottomies-elokuva: All in	Dune: Part Two	Deadpool & Wolverine
France	Un p'tit truc en plus	Le Comte de Monte-Cristo	Inside Out 2	Moana 2	L'Amour Ouf
Georgia	Despicable Me 4	Kung Fu Panda 4	Deadpool & Wolverine	Moana 2	Dune: Part Two
Germany	Inside Out 2	Despicable Me 4	Dune: Part Two	Deadpool & Wolverine	Moana 2
Greece	Inside Out 2	Poor Things	Stelios - Yparho	Despicable Me 4	Deadpool & Wolverine
Hungary	Deadpool & Wolverine	Inside Out 2	Despicable Me 4	Dune: Part Two	Futni mentem
Ireland	Inside Out 2	Despicable Me 4	Deadpool & Wolverine	Wicked	Gladiator II
Israel	Inside Out 2	Despicable Me 4	Moana 2	Deadpool & Wolverine	Anyone but you
Italy	Inside Out 2	Moana 2	Deadpool & Wolverine	Despicable Me 4	Mufasa: The Lion King
Latvia	Straume	Despicable Me 4	Inside Out 2	Deadpool & Wolverine	Kung Fu Panda 4

National films

European/national qualified productions

Complementary information from Comscore, European Audiovisual Observatory, 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), UA (Planeta Kino).

TOP 5 FILMS ACROSS UNIC TERRITORIES IN 2024

	TOP 1	TOP 2	TOP 3	TOP 4	TOP 5
Lithuania	Milijonieriaus palikimas	Irklais per Atlantą	Inside Out 2	Despicable Me 4	Moana 2
Luxembourg	Inside Out 2	Dune: Part Two	Deadpool & Wolverine	Moana 2	Despicable Me 4
Montenegro	Nedelja	Jorgovani	Zivi i Zdravi	Inside Out 2	Gladiator II
Netherlands	Inside Out 2	Despicable Me 4	Deadpool & Wolverine	Dune: Part Two	Moana 2
North Macedonia	Deadpool & Wolverine	Inside Out 2	Gladiator II	Despicable Me 4	Dune: Part Two
Norway	Inside Out 2	Despicable Me 4	Deadpool & Wolverine	Dune: Part Two	Moana 2
Poland	Inside Out 2	Akademia pana Kleksa	Despicable Me 4	Listy do M. Pożegnania i powroty	Moana 2
Portugal	Inside Out 2	Deadpool & Wolverine	Despicable Me 4	Moana 2	It Ends With Us
Romania	Inside Out 2	Deadpool & Wolverine	Buzz House: The Movie	Tati Part Time	Dune: Part Two
Russia	Kholop 2	Bremenskie muzykanty	Master i Margarita	Lyod 3	Sto let tomu vperyod
Serbia	Nedelja	Inside Out 2	Dune: Part Two	Deadpool & Wolverine	Despicable Me 4
Slovakia	Miki	Inside Out 2	Despicable Me 4	Kavej	Jedeme na teambuilding
Slovenia	Despicable Me 4	Kung Fu Panda 4	Deadpool & Wolverine	Inside Out 2	Dune: Part Two
Spain	Inside Out 2	Deadpool & Wolverine	Despicable Me 4	Gladiator II	Moana 2
Sweden	Inside Out 2	Despicable Me 4	Dune: Part Two	Deadpool & Wolverine	Den sista resan
Switzerland	Inside Out 2	Despicable Me 4	Dune: Part Two	Moana 2	Bon Schuur Ticino
Turkey	Rafadan Tayfa: Hayrimatör	Inside Out 2	Lohusa	Kolpaçino: 4 4'lük	Deadpool & Wolverine
UK	Inside Out 2	Deadpool & Wolverine	Wicked	Despicable Me 4	Dune: Part Two
Ukraine	Inside Out 2	Deadpool & Wolverine	Dune: Part Two	Despicable Me 4	Venom: The Last Dance

National films

European/national qualified productions

Complementary information from Comscore, European Audiovisual Observatory, 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), UA (Planeta Kino).

Celebrating European diversity

The number of titles released in cinema has increased in 2024, but the number of US titles is not yet back to 2019 levels.

TOTAL THEATRICAL RELEASES IN EUROPE

2019: 2,932 RELEASES
including 200 US productions

2024: 3,115 RELEASES
including 168 US productions

38 EUROPEAN TITLES

made it to the box office top five across UNIC territories in 2024 compared to 26 in 2023 and 24 in 2019.

Looking forward

Evolving Cinema Trends: A Look Ahead

BRIDGET JONES: MAD ABOUT THE BOY UNITED KINGDOM, FRANCE, UNITED STATES (2025), UNIVERSAL PICTURES, STUDIOCANAL, MIRAMAX

2024 was a challenging year for European cinemas due to the lingering impacts of the 2023 actors' and writers' strikes on the first half of the year, but takings remained on par with 2023 despite the tough context. With almost 7.2 billion euros at the box office and 947 million admissions across UNIC territories, and a last quarter of the year – with films for all demographics – generating strong revenues, audiences have shown that once the films are there, so are they. While a good deal of this success was driven by strong US titles – such as *Inside Out 2*, *Despicable Me 4*, *Deadpool & Wolverine, Gladiator II* and *Wicked* – most European territories also benefited from very successful national releases as highlighted above.

The overall number of cinema screens in the EU and the UK in 2024 continued to remain comparatively stable, increasing by about 350 screens from 2022 to 33,215 operational screens, according to data from the European Audiovisual Observatory. Based on overall data from Omdia, the number of screens between 2023 and 2024 grew by 0.8 per cent in Central Eastern Europe and by 0.5 per cent in Western Europe.

2024 also showed the existence of a clear appetite amongst audiences for a wide range of cinematic experiences, with the record-breaking performances of a number of releases demonstrating the continuing relevance of the Big Screen. The year saw highly successful titles catering to specific age groups, such as family comedies, children's animations or genre films, like horrors or science fiction. The performance of such a broad range of titles demonstrates that cinemas need all types of content, all year around – from international blockbusters to arthouse titles and event cinema productions, local, European and international – to offer the best to all audiences. All cinemas are committed to show a diversity of titles and as an increasing trend, arthouse cinemas now turn to more mainstream titles while commercial cinemas show increasing amounts of independent and arthouse titles. A constant and consistent slate of well-marketed films is key to attract audiences, and cinemas welcome companies like Amazon entering the market with a diverse slate.

In addition, cinema operators have continued to invest significantly to improve the cinema-going experience. From premium large formats to dine-in cinemas, 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 operators strive constantly to innovate and ensure that their venues remain as cherished social and cultural hubs, as well as driving local economies and providing local jobs.

In March 2025, Gower Street Analytics revised its 2025 Global box office projection to $34.1 billion, an increase on its original 2025 projection of $33.0 billion published in December 2024. A $34.1 billion Global box office in 2025 would represent an approximate +13% increase year-on-year (a +10% increase at current exchange rates) from 2024.

The first months of 2025 were marked by a number of long-awaited US titles attracting large crowds to the Big Screen, such as *A Minecraft Movie*, *Captain America: Brave New World*, *Mufasa: The Lion King* (released in December 2024), *Lilo & Stitch* and *The Brutalist*. Original titles with unexpected results also positively impacted the first half of 2025, such as *Sinners*. The remainder of 2025 will feature promising tentpoles such as *Jurassic World: Rebirth*, *Wicked: For Good*, *Zootopia 2* and *Avatar: Fire and Ash*, among many others. European titles have also performed well in the first half of 2025, including *Bridget Jones: Mad About the Boy*, *Paddington in Peru*, *God Save the Tuche* and *FolleMente*.

In January 2025, 59% of the international box office (excluding China) was generated in the EMEA region. Portugal performed +12% above the pre-pandemic benchmark and +31% above the same period last year. In addition to the strong numbers for *Mufasa: The Lion King*, the Brazilian Oscar-nominated and Venice Best Screenplay-winner *I'm Still Here* contributed €800,000 to the box-office in just two weeks, becoming the number three Portuguese-language film of the decade.

Europe is an incredibly diverse cinema landscape, in what it can offer from both a content and experience perspective. All operators strive constantly to innovate and ensure that their venues remain as cherished social and cultural hubs, as well as driving local economies and providing local jobs.

BEETLEJUICE BEETLEJUICE
UNITED STATES, FRANCE (2024), WARNER BROS., DOMAIN ENTERTAINMENT II, PLAN B ENTERTAINMENT

FOLLE MENTE
ITALY (2025), LOTUS PRODUCTION, RAI CINEMA

The Netherlands also continued to perform strongly at the beginning of 2025, +3% above the three-year average, although slightly below 2023 and 2024. *Babygirl* by Dutch director Halina Reijn ranked second in January, grossing €3.6 million.

Italy ended the first quarter of 2025 9.4% above 2024 in box office and 8% up on admissions, thanks to successful local titles. The local comedy *FolleMente* by Paolo Genovese collected 2.4 million admissions and €17.4 million at the box office, followed by *Diamanti*, the best performing title ever from the director Ferzan Ozpetek. Both films positively impacted the local market share of the first quarter, at 40% vs 24% in 2024.

UK and Ireland were amongst the top markets in the EMEA region in February 2025, boosted by local favourite *Bridget Jones: Mad About The Boy*, which delivered €36.7 million and accounted for a 33% local market share.

In China, the market enjoyed a $3.37 billion Q1 2025, thanks to the record-breaking Chinese New Year, fuelled by *Ne Zha 2*, which accounted for more than three quarters (77%) of China's February total. The quarter was +46% ahead of the same period in 2024 and +54% ahead of Q1 2023. In February, China delivered over 58% of the month's global market share with $2.2 billion, thanks to this single film.

Thanks to the global success of *A Minecraft Movie*, April 2025 was 36% up on April last year and just 13% below the same month in 2023, when *The Super Mario Bros. Movie* hit big. The gaming IP film generated over a third (36%) of the global box office of the month with approximately $831 million. This brought the estimated worldwide cume to $10.8 billion after the first four months of 2025, which is the highest total in that period since 2019, tracking 10% ahead of 2024 and 2% up on 2023 at the same stage.

Combined with the success of titles such as *Sinners*, *The Accountant 2*, the twentieth anniversary release of *Star Wars Episode III: Revenge of the Sith* and local productions, to name a few, 58% of the global box office was generated by the EMEA sub-region. And in May *Lilo & Stitch* and *Mission: Impossible – The Final Reckoning* opened as two of the biggest films of the year in a record-breaking weekend at the box office.

This demonstrates that cinemas continue to set records and create unparalleled excitement around films – the theatrical experience 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, which cannot be replicated at home and cinemas will remain a unique, event-driven shared experience.

The whole industry should support a strong, diverse, reliable and well-marketed supply of film content to cinemas, with a significant window. A clear, consistent period of exclusivity is essential for films released in cinemas to be successful. Windows that are too short, or inconsistent, only lead to confusion for the audiences who might not know where and when a film is available. Europe, which by and large, has a longer period of exclusivity, has recovered better than other parts of the world. Ensuring that cinema exhibitors can also guarantee their return on investment – via this period of exclusivity – is also crucial to give them the confidence to invest in the experience.

In addition, and especially with challenges that cinemas continue to face, policymakers 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 to watch films, whether US blockbusters or European arthouse titles.

“I think there’s something so special about going to a movie theater and experiencing a film in that way, with a group of strangers.”

ZENDAYA, ACTRESS

DUNE: PART TWO
UNITED STATES (2024),
WARNER BROS.,
LEGENDARY
ENTERTAINMENT,
VILLENEUVE FILMS

THE VALUE OF CINEMAS

Cinema is economy

A study released in November 2023 by the British Film Institute (BFI) states that cinema attendance drives footfall and spending in other venues, demonstrating that cinemas can make an important contribution to revitalising high streets, and that they foster local pride in 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) or even a local park.

Cinemas are crucial to the economic well-being 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.

Beacon Economics conducted an economic impact study on the US cinema industry in 2023. Among its main findings, the study shows that every dollar spent on film nights contributes approximately $1.50 in additional economic activity. More than 408,000 jobs are supported by the cinema economic activity. Cinema United (formerly NATO) estimates that $5.7 billion were spent in food and beverage sales in US cinemas in 2023 and $20.9 billion were generated by additional activities linked to cinema-going. In total, $34.8 billion in GDP were added to the US economy by cinemas.

Cinema contributes to audience's well-being

Box office and Beyond: the cultural, social and economic impact of cinema lists items of research showing that sharing a cinema experience enhances its intrinsic value, even if participants do not communicate about the experience itself.

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.

The UK charity MediCinema is a unique organisation that builds and manages cinemas in hospital settings, screening films to patients of all ages. MediCinema's research shows that watching a film makes patients feel less anxious, less isolated, and in less pain: 93% of patients reported a reduction in stress and anxiety and 86% said MediCinema helped them cope and supported their mental health.

THE VALUE OF CINEMAS

Cinema is inclusive and accessible

According to the 2024 study by the BFI "Social and cultural value of cinema venues: Qualitative analysis" cinemas were considered as accessible by research participants due to their easy-to-reach locations, despite some limits linked to travel time and availability of public transport. While there were some concerns about the perceived increase in the cost of cinema tickets, participants confirmed that affordable ticket prices and special deals ensured a broader accessibility to cinemas, as it was cheaper than alternative forms of cultural infrastructure. Respondents felt that the cinema venues analysed in the research were important to their local communities as a key feature of the local area, as well as being inclusive for all audiences, with a specific offer to their community. Cinemas were viewed as inclusive social spaces which can be enjoyed with family, friends, or alone, providing experiences, entertainment and comfort to groups and individuals.

All cinemas included in the research, whether in a 'cold spot', considered as a 'social hub' or offering more 'diverse programming', provided specialist screenings that open up the cinema experience to people for whom inclusion at a 'regular' screening might be challenging, including parents with babies, neurodiverse, hearing or visually impaired audiences.

Cinema is society

Cinema venues contribute to social and cultural value by providing accessible spaces that can be used by a range of different people to contribute to achieving social goals. Cinema venues also provide a hub, or focal point, around which people engage with the wider area. Viewing a film in the company of others can contribute to people's sense of connection. This was felt both when going to the cinema with friends or family, but also as solo cinema-goers in the presence of other viewers in the auditorium.

According to the above-mentioned 2024 study by BFI, cinemas can be considered as places of social infrastructure, as physical places existing as part of the built environment in which people can gather, congregate and build connections with one another.

"We are all here tonight because we love movies. Where did we fall in love with movies? At the movie theater. In a time in which our world can feel very divided, this is more important than ever: It's a communal experience you simply don't get at home. Filmmakers keep making films for the big screen, I know I will. Distributors, please focus first and foremost on the theatrical releases of your films. Parents, introduce your children to feature films in movie theaters and you will be molding the next generation of movie lovers and filmmakers. And for all of us, when we can please watch movies in a theater and let's keep the great tradition of the moviegoing experience alive and well."

SEAN BAKER, DIRECTOR, AT THE ACADEMY AWARDS CEREMONY

ANORA
UNITED STATES (2024),
CRE FILM, FILMNATION
ENTERTAINMENT

The value of the theatrical window

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.

A clear, consistent period of exclusivity, supported by meaningful nationwide marketing from both distribution and exhibition, is essential for all theatrically-released films to be successful, to the benefit of the sector and audiences.

The whole industry should support a strong, diverse, reliable and well-marketed supply of film content to cinemas, with a significant window. A clear, consistent period of exclusivity is essential for films released in cinemas to be successful. Windows that are too short, or inconsistent, only lead to confusion for the audiences who might not know where and when a film is available.

The perception that most films will be available on other platforms in a matter of weeks undercuts the sustainability of the entire industry by negatively impacting the frequency of audiences going to the cinema. Shorter windows reduce the number of people who head to the cinema in the opening weeks of a release and might undermine the ability of medium or smaller-budget films to build an audience through word-of-mouth.

Europe, which by and large has a longer period of exclusivity, has recovered quicker than other parts of the world, and within the region there is a clear correlation between the average length of window in each territory and the level of recovery. Ensuring that cinema exhibitors can also guarantee their return on investment – via this period of exclusivity – is also crucial to give them the confidence to invest in the experience.

GUNDI: LEGEND OF LOVE
BULGARIA (2024), MEDIUM STATION

> “Now is the time to invest in the theatrical experience, have faith, double down, take risks and chase success.”

NIELS SWINKELS, EVP & MD AT UNIVERSAL PICTURES INTERNATIONAL

Longer windows, supported by marketing, would benefit all types of films and create more revenue across the industry. If windows continue to shorten, at the detriment especially of small and medium-sized films, audiences will get the impression that the only reason to go to the cinema are the big block-busters, therefore compromising diversity and creativity.

Additionally, accelerated digital releases have an impact on international piracy. As proved by recent reports by the global piracy intelligence and audience measurement company MUSO, once a film is available online in one market in a high-quality version, the piracy demand for this film increases exponentially across all markets, even where the film hasn’t been released theatrically yet. This reflects a potentially significant loss of revenue in cinemas and on streaming platforms due to piracy.

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 works and supporting distributors and producers.

A number of EU studies confirm that films with a theatrical release have higher chances of being later available on multiple VOD platforms and TV channels. The European Audiovisual Observatory report from October 2024 “How are theatrical films distributed on TV and on VOD in the EU?” mentions that 63% of theatrical films released in 2022 were available on TV, TVOD, or SVOD in at least one EU country in 2022, with TVOD and SVOD offering each about 50% of theatrically released films. For European films, theatrical success increases TV and VOD availability: 66% of European films with admissions between 500,000 and 1 million and 68% of European films with admissions over 1 million were available on TV/VOD.

Another study from November 2024 by the European Audiovisual Observatory, “The impact of cinema admissions on SVOD usage”, showed that films theatrically released in a country overperform in terms of SVOD viewing. For all the EU countries analysed, films theatrically released accounted for 46% of films on SVOD but 57% of film view time. This means that films released in cinemas in a country are more likely to be above the SVOD view time median than titles which were not released there.

NE ZHA 2
CHINA (2025), BEIJING ENLIGHT MEDIA CO., BEIJING ENLIGHT PICTURES, CHENGDU COCO CARTOON, CHENGDU ENLIGHT ANIMATION, HORGOS COLOROOM PICTURES

Most Hollywood studios understand the value of theatrical, as shown by the Exhibition Outlook of the Cinema Foundation from August 2024, which states that since 2023 nearly $350 million was generated by films such as *Mean Girls* and *Alien: Romulus*, that switched from a streaming launch to a theatrical release. *Moana 2*, one of the major releases of 2024, was switched from streaming to theatrical by Walt Disney. And companies such as Apple, Amazon and MUBI are embracing the value that cinemas provide. Apple will release *F1* – starring Brad Pitt and directed by Joseph Kosinski – in June 2025. At CinemaCon 2025, Amazon announced that they would by 2027 release 15 feature films a year in cinemas.

“For the last two years, I’ve been coming to CinemaCon, promising you that Amazon MGM is fully committed to theatrical [...]. Our job tonight is to convince you the commitment is real.”

KEVIN WILSON, HEAD OF THEATRICAL DISTRIBUTION AT AMAZON MGM

European titles often need time to perform, with premieres at international film festivals providing increased visibility and creating anticipation in audiences to watch them on the Big Screen. The French musical crime drama *Emilia Pérez*, which won the Best Actress Award and Jury Prize at 2024 Cannes Film Festival followed by four Golden Globes awards, toured in around 30 festivals around the World. It was first released in France in August 2024 and subsequently in over 40 international markets. As of May 2025, the film had grossed over $16.3 million at the global box office, demonstrating the long-term value and strength of the theatrical release model.

EMILIA PEREZ
FRANCE, MEXICO, BELGIUM (2024), WHY NOT PRODUCTIONS, PAGE 114, PATHÉ FILMS, FRANCE 2 CINÉMA

Film Slate and Marketing

Cinemas rely on one product – content. This became even more obvious with the lingering impact of the 2023 actors' and writers' strikes, which continued to impact the slate in 2024 and even in the first quarter of 2025, with delayed production and promotion.

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 rom-coms to horror to animation; when it comes to size, from small niche films to mid-size titles and blockbusters; and geographic diversity.

In the last quarter of 2024, a wide variety of content was available on the Big Screen, attracting very diverse crowds. From musical films from Broadway like *Wicked* to auteur horrors like *Nosferatu* or children's franchises like *Moana 2* or *Mufasa: The Lion King*, all contributed to the successful performance of the quarter catering to specific audience targets.

Cinemas cannot build success on a sporadic calendar – films need to be released on a regular basis and 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 wealth of data that they process. Cinemas have been innovating continuously to fine-tune their own campaigns in order to entice people out of their home. But more needs to be done to increase the films' visibility and connect with audiences, from an early stage, together with partners from distribution. From out-of-home advertising to more traditional outlets, while also using social media channels – all media should be used to promote content and raise awareness with all demographics.

That's something that also applies to European titles. With 2,514 feature films produced in 2024, there is a real need to look at the commercial potential of these films, who they are targeted at 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 roll-outs, 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. The "Only in Cinemas" should be made clear.

AVATAR THE WAY OF WATER
UNITED STATES (2022), 20TH CENTURY STUDIOS, TSG ENTERTAINMENT, LIGHTSTORM ENTERTAINMENT

Waiting for Avatar: Fire and Ash

The highly anticipated third instalment of *Avatar: Fire and Ash* is scheduled to premiere in cinemas on 19 December 2025. The production company Lightstorm Entertainment will continue to push the boundaries of technical specifications for Avatar 3, including 3D, high frame rate and high dynamic range. The studio anticipates producing over 30 different image versions to cater to various screen formats and to produce multiple versions in scope, flat, 2D, 3D and 4D, 24 and 48 frames per second, HFR, different light levels, combined with different subtitling and dubbing versions.

In order to provide the most suitable version of the film to each screen, distributing studio Walt Disney began in 2024 a thorough process to collect screen and equipment data from cinemas from all across the EMEA region through dedicated portals. Director James Cameron is committed to ensuring that every cinema – large or small – receives the appropriate version, so the film can be screened at the highest possible technical quality.

SINNERS
UNITED STATES, AUSTRALIA, CANADA (2025), WARNER BROS., DOMAIN ENTERTAIN-MENT II, PROXIMITY MEDIA, THE WESTERN AUSTRALIAN FILM COMPANY, BRITISH COLUMBIA FILM COMMISSION

"I had the gift of the opportunity of making a film inspired by my family and my ancestry but it was always a film that we wanted to make for audiences, in theaters. We always had our minds on you, the audience, and felt a deep responsibility to entertain you, and move you in the way only cinema can. I believe in cinema. I believe in the theatrical experience.
I believe it is a necessary pillar of society. It's why me and so many of my colleagues have dedicated our lives to the craft.
We don't get to do what we do if you don't show up."

RYAN COOGLER, DIRECTOR

Accessibility, Diversity and Inclusion

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

BON SCHUUR TICINO, SWITZERLAND (2023), SPOTLIGHT MEDIA PRODUCTION AG

A 2024 report by the Inevitable Foundation Research Institute, titled "The Adaptive Cinema Opportunity" and based on a survey to 107 self-identified disabled people in the US, discovered that 65% of disabled cinema-goers would rather see a film in a cinema than watch it at home, proof that the underlying demand exists.

In Poland, the project Cinema Without Barriers, initiated in 2022, was expanded to other Central and Eastern European countries in 2024. Cinemas from Romania, Slovakia, Slovenia and Hungary joined the project as partners and started implementing accessible film screenings in their venues. This includes the purchase of audio-description equipment and an induction loop in Slovenia, the organisation of the first accessible screenings for hearing and visually impaired audiences in Slovakia, the installation of equipment for deaf audiences in Hungary and training for regional audio-visual professionals on accessible screenings in Romania. Cinema Without Barriers also includes a conference dedicated to accessibility in cinemas and a research report "Accessibility of film culture for persons with sensory and motor disabilities in selected Central and Eastern European countries".

The UK Cinema Association (UKCA) 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 UKCA recently supported the Autism Friendly 'Classic' Film Festival, organised by the association Dimensions during World Autism Acceptance Month (WAAM) in April 2025. The Autism Friendly Classic Film Festival marked nearly 750,000 visits to relaxed screenings and acknowledged the growing demand for a broader range of films, including classics, as guests age and their tastes widens. It also marks 15 years of Dimension's supported Autism Friendly Screenings, which were pioneered and initially delivered by Picturehouse and ODEON Cinemas Group and a range of smaller operator sites across the UK and then followed by many others afterwards.

Sustainability Initiatives across Europe

Measures to improve 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.

The Fédération Nationale des Cinémas Français in France officially launched a Sustainability Committee at the 2023 Deauville Congress, composed of seven members, representing exhibition companies of different sizes and business models. The Committee worked in collaboration with the Centre National du Cinéma (CNC) and with the sustainability consulting firm La Base to develop a tool generating guidelines that cinemas can follow to go green, tailored to their business model, venues, financial resources etc. The generator creates personalised 'road maps' setting goals to achieve within one, five and ten years, ranked by priority and focusing on energy, waste, water, food, skills, communication and mobility. The CNC also held a series of training programmes about sustainable cinema management that cinema staff can attend on a voluntary basis and free of charge in each French region throughout 2025.

In Spain the Audiovisual Alliance for Sustainability (AAS), launched in 2023 by the Federación De Cines De España together with representatives of the wider value chain, developed a common carbon calculator to be used by the whole industry to monitor carbon emissions. The calculator is already in use by cinemas and allows the measurement of emissions by category, by film or by period. The AAS is now planning for this carbon calculator to analyse emissions of a film all along its value chain, with a pilot test already being developed.

The UK Cinema Association is collaborating with Zero Carbon Forum on the project "Routes to Net Zero", a framework outlining actionable steps that cinema operators can take today, along with long-term plans leading to the target of achieving net zero emissions by 2050 if not before, across all aspects of operations, including supply chains and engagement with governmental bodies. The project includes a study on cinema emissions across all three 'scopes', a suite of carbon reduction pathway options for cinemas and some wider information about the challenges that the sector is facing.

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

© Centre National du Cinéma et de l'Image Animée

Audience Profile & Behaviour

According to a study published by the CNC in France in September 2024, cinema-going remains a collective experience, with 78.7% of French people going to the cinema in groups in 2024. This habit is even more prevalent among young audiences, while frequent cinema-goers do not mind going to the cinema on their own. Cinemas remain the favourite place to discover new films, despite an increased VOD offer, both for younger and older audiences.

Cinema-goers tend to plan their cinema visits in advance, with 71.9% of respondents deciding one or more days ahead to go to the cinema, especially occasional visitors. This trend is reflected in booking practices: 36.7% of the audience who booked in advance purchased their ticket via a mobile app in 2024 – a growing share compared to previous years – with the 35–49 age group being the most active with this booking mode (40.1%).

82.7% of visitors choose to watch a film in the 15 days after its release. However, 30% of senior audiences, who usually watch a film later in the release period, think that films are not screened long enough on the Big Screen.

Trailers at the cinema are mentioned as the first source of information to discover the upcoming slate, according to 59.5% of the respondents, followed by Internet research with 42.1% (trailers online, film reviews and social media promotion) which is especially popular for the 25–34 age group. Social media and video sharing platforms like YouTube are a very important source of information about cinema releases for the 15–24 years old. Snapchat, Instagram and TikTok were the most quoted platforms by this age group.

Events at the cinema are growing in popularity, with 36.2% of respondents declaring that they have attended at least one special event in 2024. When looking only at the frequent cinema-goers, 55.7% of them enjoyed an event at the cinema.

The choice of a cinema mainly depends on geographical proximity (72.4%), followed by comfort of the venue (26.9%) and accessibility (24.5%), especially for seniors. Ticket price is not a priority criterion by itself, but having an unlimited card or similar subscription scheme has an impact on venue choice.

In Italy, CinExpert publishes regular reports on the socio-demographic profile of the Italian audience. 2024 was characterised by the growth of young audiences, with a 31% increase of the 3–14 age group and a 13% increase of the 15–24, reflected in the success of US children's and family films in the second half of the year. On the other hand, local productions attracted older audiences, both male and female.

In the UK, the cross-industry body Cinema First tries to understand the latest consumer habits and attitudes towards cinema-going through its Entertainment and Attitudes Tracker. In the latest round of surveys from September 2024 there have been further improvements among the returning 55+ audience, who are up 7 percentage points compared to November 2023. There has been a significant rise in the respondents who increased their attendance frequency compared to pre-pandemic. Financial concerns have eased, which could be boosting cinema-goers' expectations around spending more in the future at the cinema compared to 2023. In fact, significantly fewer people feel the need to cut back on spending on treats and outings compared to last year. Slate awareness has significantly improved since last year, mostly driven by an improvement for teens and families, due to an appealing offer for these target audiences in the fourth quarter of 2024.

Figures from ODEON Cinemas Group show that the proportion of single tickets has skyrocketed in recent years, proving that more and more people choose to go to the cinema alone. In the first four months of 2025, single tickets account for 17% of sales in the group, an increase from 5% in 2019. Nordisk Film Kino has seen a similar uptick in recent years, from 7% in 2022 to 10% in the first months of 2025. It has become trendy to be someone who does things alone, not needing to coordinate film nights with others, and being able to choose exactly the film you want to see.

Cinemas remain the favourite place to discover new films, despite an increased VOD offer, both for younger and older audiences.

TWISTERS
UNITED STATES, JAPAN (2024), UNIVERSAL PICTURES, WARNER BROS., AMBLIN ENTERTAINMENT

“When I was a kid, during the summer I begged my parents to stay in the movie theater all day. Not just ‘cause it had the best air conditioning in Texas, but because summer movies were designed to give you your money’s worth. And I always got to share that cinematic experience with a theater full of people who were on the same ride with me and left with the same rush. So seeing the universal response to ‘Twisters’ has really been a dream come true.”

GLEN POWELL, ACTOR

Global trends

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.

2024 ended with a global box office of approximately $30 billion, with the international market (excl. China) generating $15.4 billion, domestic (US & Canada) $8.8 billion and China $.8 billion. Given the limited release calendar of 2024, caused by the long-running actors' and writers' strikes in Hollywood in 2023, this can be seen as a significant success and testament of the industry's resilience.

In March 2025, Gower Street Analytics revised its 2025 Global box office projection to $34.1 billion. The revision is an increase on Gower Street's original 2025 projection of $33.0 billion published in December 2024. A $34.1 billion Global box office in 2024 would represent an approximate +13% increase year-on-year (a +10% increase at current exchange rates) from 2024.

Global Cinema Federation

GCF GLOBAL CINEMA FEDERATION

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

To address these and raise the profile of cinema with global regulatory bodies and industry partners, twelve leading cinema operators – AMC Theatres, CGV, Cinemark, Cineplex, Cinépolis, Cineworld and Regal Cinemas, Event Cinemas, Kinepolis, Pathé Cinémas, PVR INOX Limited, Toho Cinemas Ltd. and Vue International – as well as the two most internationally active trade bodies – Cinema United 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 Kinepolis and Jane Hastings (Event Cinemas) was elected as the new Chair following a seven year mandate by Alejandro Ramirez (Cinépolis). Sean Gamble (Cinemark) was elected Chair for 2025–2026 and Eddy Duquenne (Kinepolis) Vice-Chair at CinemaCon 2025.

In 2025, the Executive Committee organised a round of meetings with studios – Warner Bros Discovery, Paramount, Sony, 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, advocate for more and diverse content and robust windows.

In order to position itself as the centralised source of knowledge for the international market, pooling and sharing resources and presenting how cinemas innovate around the world, the GCF launched a new website in H2 2024.

One of the most recent GCF initiatives has been to launch a global movie-goer survey, generating more than 96,000 responses across 14 countries including the key regions; Asia/Pacific, Europe and North America – the results were published in December 2024. The second wave of global customer research received over 68,000 responses across 15 markets. Key findings include:

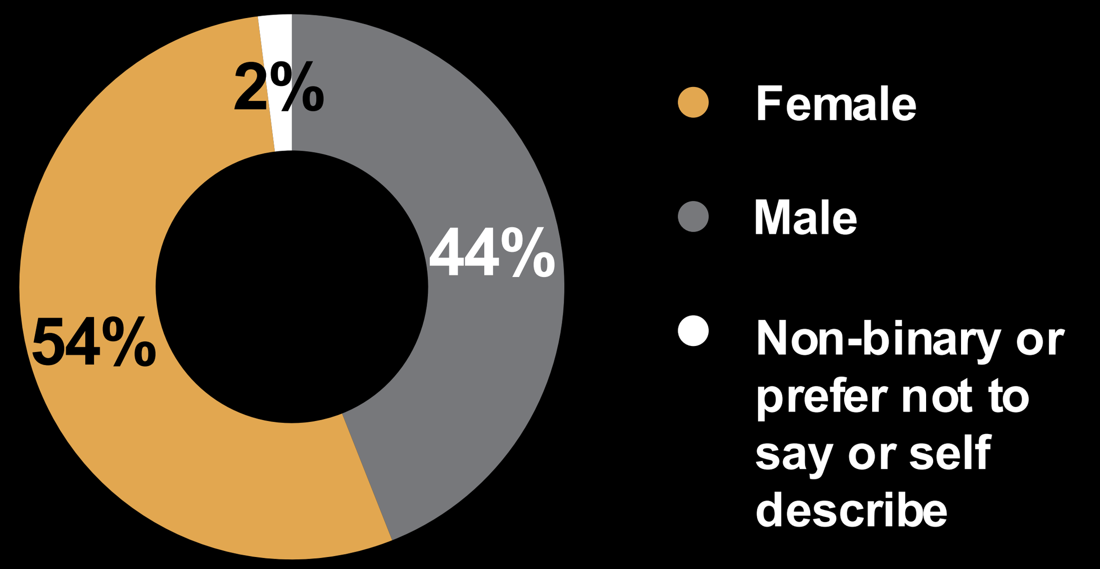
- 72% of customers agree or strongly agree that a visit to the cinema is good value for money. 64% don't see any barriers to cinema visitation when there is a movie they want to watch, and customers largely prefer watching movies in cinemas, with only 6% preferring to wait to watch a movie on streaming.
- While customers are generally spending less on entertainment than six months ago, cinema spend is holding stable relative to other 'out-of-home' entertainment. Customers below 44 years are spending more on cinema than six months ago. The Net Promoter Score across all age groups is 37, indicating great engagement with the cinema experience. The younger demographic is even more satisfied, with a stronger 'Net Promoter Score' of 48.
- The primary obstacle to global cinema attendance and frequency is a lack of appealing films. However, on an unprompted basis, 68% of customers are excited by the upcoming film line-up, with this figure being materially higher at 83% among customers aged 34 years and younger. There is less appeal for audiences over 45 who have indicated that while they have both the time and desire to attend the cinema, an insufficient volume of films that are compelling to them is a hold back.
- 55% of customers want more action/adventure movies released in cinemas, despite a solid line-up of action/adventure movies on the film slate.
- Additionally, 51% of customers want more comedies in cinemas, and 46% want more suspense/thriller movies, which are currently under-represented on the film slate.
- Several international markets have outperformed the USA domestic box office recovery. A lower dependence on Hollywood film supply and a greater volume and variety of local films in these markets is the most notable difference.
- Other lesser barriers to cinema attendance included the appeal of a customer's local cinema (7%) and lack of awareness of what is on at the cinemas (6%). While both are materially lower barriers, more marketing to improve awareness and continued investment in the cinema experience, present opportunities.

Another current focus for the GCF is film theft and the wider impact on the industry. The GCF is working with global piracy intelligence and audience measurement company MUSO, to better track the impact of windows in relation to piracy. It is recognised that investing in anti-piracy is not only about stopping illegal streams or downloads. It is about understanding the financial impact of piracy and supporting the industry to adjust strategies to protect revenue effectively. Notably, there is a significant surge in piracy activity on the day of or immediately following a film's VoD release, coinciding with the availability of high-quality versions for illegal consumption. The shorter the theatrical window, the faster high-quality versions are available to drive a spike in piracy. Whilst window policies and lengths can vary by country, a shorter theatrical window for a film in one country drives a spike in piracy for that film globally, likely impacting the full potential commercial performance of that film.

WE SPOKE TO OVER 68,000 GLOBAL CUSTOMERS ACROSS 15 COUNTRIES

AGE

Under 24	25-34	35-44	45-54	55-59	60+
9%	18%	20%	21%	10%	21%



ONLY 6% WOULD PREFER TO WAIT AND WATCH ON STREAMING PLATFORMS

72% AGREE A CINEMA VISIT IS GOOD VALUE FOR MONEY

COMPARED TO 6 MONTHS AGO...

24% ARE SPENDING LESS ON ENTERTAINMENT

19% ARE SPENDING MORE ON ENTERTAINMENT

OUT OF HOME ACTIVITIES BEHAVIOUR

	Less	The same	More	*NET Change*
Watching movies at the cinema	26%	47%	26%	=
Dining out at restaurants	33%	49%	18%	-15%
Going out with friends	33%	52%	15%	-28%
Going on holidays	39%	47%	14%	-25%
Going to concerts / events	44%	42%	14%	-30%
Going to entertainment venues (exc. cinema)	39%	49%	12%	-27%

Less ● The same ● More

WATCHING MOVIES AT THE CINEMA

	Less	The same	More	NET Change
Under 45	24%	42%	34%	+10%
Over 45	29%	52%	19%	-10%

64% DON'T SEE ANY BARRIERS TO VISITING THE CINEMA WHEN THERE IS A MOVIE THEY WANT TO SEE

CINEMA BARRIERS TO VISIT

There is nothing that would stop me from visiting the cinema if there is a film I want to see	64%
There are no movies that appeal to me	21%
I do not have enough time	14%
I am happy to wait and watch movies on streaming services	13%
I do not enjoy the experience (e.g. audience behaviour)	9%
My nearest cinema is not appealing	7%
I am not aware of what is on at the cinemas	6%

The Global Cinema Federation (GCF), representing global cinema exhibition, was created to support a healthy global cinema industry. Its Executive Committee includes CEOs of the top 12 exhibition companies and two leading industry bodies globally, supported by an Advisory Board which includes 75 exhibition companies and 29 associations. Collectively, the GCF represents approximately 65 -70% of global box office. Source: Online survey conducted in January 2025 amongst n=68,000+ global GCF customers. Members were invited to participate in a study to track sentiment This infographic represents the key survey results. Note: Responses have been weighted to ensure appropriate population representation.

GCF GLOBAL CINEMA FEDERATION

218,318 SCREENS

globally in 2024

2.1% increase on 2023

8.6% increase on 2019

2024 WORLDWIDE BOX OFFICE

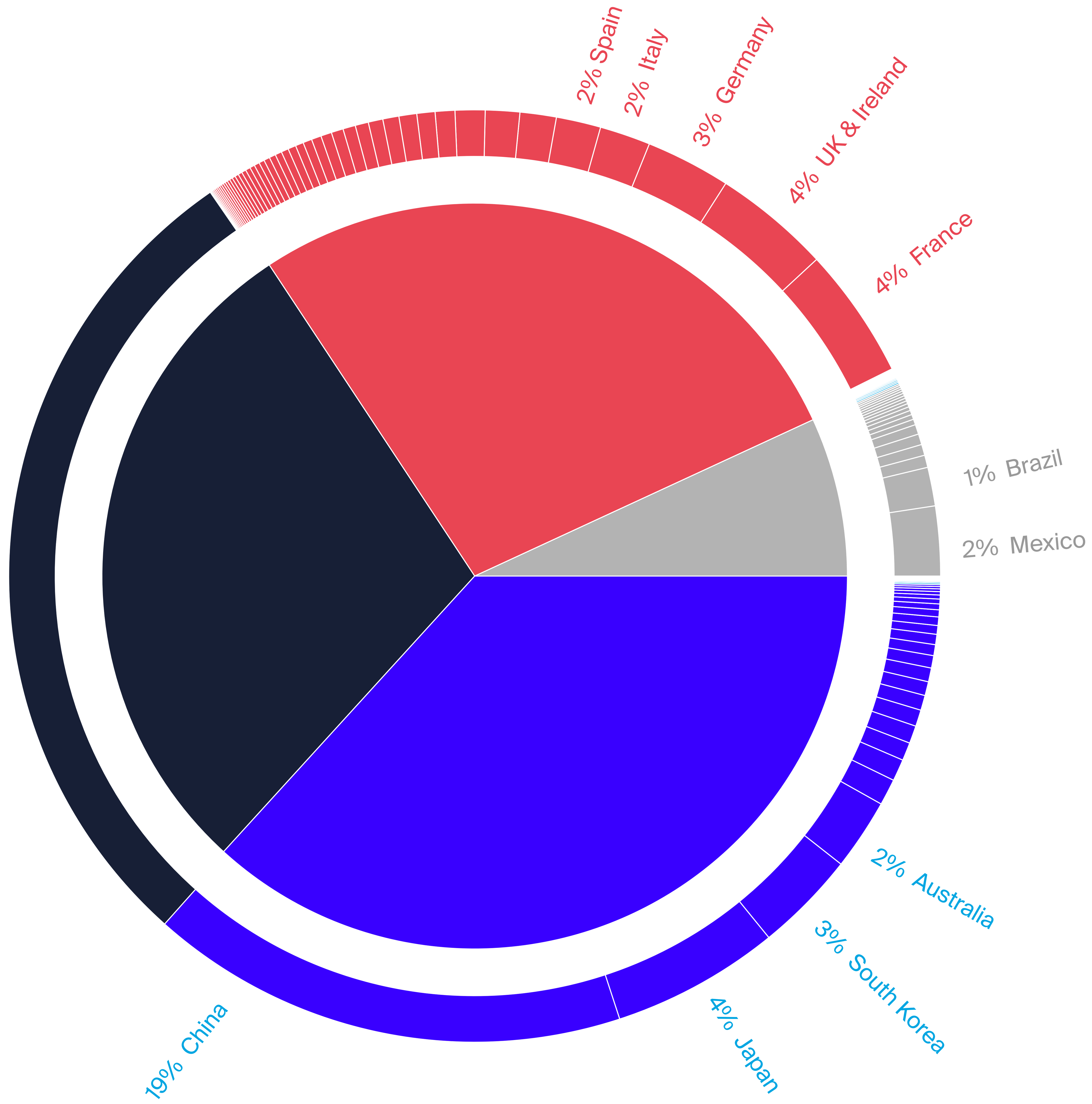
Breakdown of the total worldwide box office by region from 1 January to 31 December 2024

28% EUROPE, MIDDLE EAST, AFRICA

29% US/CANADA

7% LATIN AMERICA

35% ASIA PACIFIC



Investments in cinemas

Large and smaller circuits across Europe continue to make significant investment in their venues to improve comfort, image and sound quality and the overall cinematic experience.

AMC, also owner of ODEON Cinemas Group in Europe and the world's largest exhibition group, developed the AMC Go Plan. This aims to invest up to $1.5bn over 4–7 years on premium experiences in the US and Europe, including investment into Premium Large Format, Extra Large Format, IMAX, Dolby Cinema, and branded laser projection. The goal is to triple the Prime at AMC locations to 100, potentially tripling the Laser at AMC screens (over 2,000 now) and adding up to 250 new XL screens in the US on top of the 68 in Europe already, growing IMAX Laser from 42 to 150 screens as well as growing the number of Dolby Cinema locations.

Regal Cineworld Group, the world's second largest cinema chain with cinemas in seven European countries, recently announced a new initiative to install 4,000 laser projectors in cinemas across the US, UK and other European markets by 2030. This will not only improve the picture contrast, provide more vivid colours, brightness and increased light levels, but also represents an opportunity to present films with less waste, including the elimination of consumables such as xenon lamps and a significant reduction in energy usage. Regal is also involved in the staged rollout of HDR projectors in three locations in the US.

Vue, Europe's largest privately-owned cinema operator, signed an expansive deal to install an estimated 1,000 laser projectors over the next four years in all the eight countries where it maintains cinemas. The laser technology will complement the group's investments in luxury recliner seats, as well as the recently unveiled Vue Your Way, an innovative customer journey in foyers including self-checkouts for concessions.

In Poland, the cinema circuit Helios will convert its entire screen estate of 300 screens to RGB laser solution over the next two years.

The Netherlands has witnessed new cinema openings in 2024. The towns of Gorinchem, Wageningen, Harlingen, Maassluis, Heiloo and Geldrop saw new cinema openings or reopening of closed venues. Existing cinemas added new screens. The innovative private on-demand cinema AnyThing added three new auditoriums to its location in Wijk bij Duurstede. Other existing multiplexes invested in luxury wide recliners or relax seats.

In Spain, the investment made in cinema upgrades between 2020 and 2024 is estimated to total €150 million. The sector estimates that it will need to invest €170 million in the period 2025–2028 to cope with the need for upgrading projection equipment, adaptation to sustainability regulations and other refurbishments and upgrades.

Major investment in cinema equipment upgrades have been announced also outside Europe. Cinema United (formerly NATO) announced in September 2024 that eight of the top cinema chains in North America were committed to invest a combined $2.2 billion in modernising and upgrading their cinemas over the next three years. Investments include the latest laser projection technology and immersive sound systems, more comfortable seating, enhanced food and beverage offerings, family entertainment options such as arcades and bowling, and upgrading core site elements like state-of-the-art air conditioning, lighting, signage and carpeting.

The refreshed website for the Global Cinema Federation features innovative investment in cinemas across the world, from enticing venue entrances, to new seating concepts including living room set-ups, recliners and beds, boutique and VIP auditoriums, design foyers, proprietary and exhibitor- branded PLF screens, as well as kids-friendly corners, among others.

> **"Walking into a movie theater and settling into your seat with anticipation of the story waiting to unfold on screen in front of you is why we do what we do."**
>
> DONNA LANGLEY, CHAIRMAN OF NBCUNIVERSAL ENTERTAINMENT AND STUDIOS

The ongoing success of premium cinemas

Premium experiences can be very diverse, from Premium Large Formats (PLF), either proprietary or exhibitor-branded, to immersive experiences (3D, 4D, motion seating, dine-in, kids screens and luxury auditoriums) but also venue-oriented, such as entertainment centres or hybrid venues.

Omdia estimated that in 2024 there were 7,967 premium format auditoriums globally, including PLF, 4D and immersive seating offerings. When looking at the EMEA region, PLF screens only – both proprietary and exhibitor-branded – are estimated to be 978.

Capabilities such as high dynamic range (HDR) and high frame rate (HFR) continue to push the boundaries of high-end cinema, whether these are part of a PLF screen or part of a wider existing screen infrastructure.

Design-based auditoriums, such as Ōma Cinema, present further opportunities to tap into the growing demand for experience-based cinema. The first Ōma Cinema opened in April 2024 at CineWest Mougins in the south of France, and after six months it is the auditorium with the highest occupancy rate of the French circuit. Other Ōma Cinema auditoriums are opening in 2025, such as at the VOX Cinemas in Dubai and at Les Enfants du Paradis in Chartres, France.

In July 2024, Pathé Palace opened its doors, offering a unique concept of premium cinema. Pathé Palace hosts seven screens including state-of-the-art LED screens, an auditorium equipped with Dolby Vision and Dolby Atmos sound system, boutique cinemas, an event area, a vintage cocktail bar, wine self-service bar and a conciergerie service, among other things. At the

PHOTO OF PATHÉ PALACE
(CREDIT: PATHÉ)

end of April 2025 Pathé reopened another Parisian cinema, Pathé BNP Paribas, with the financial backing of the French bank BNB Paribas, long-time supporter of the cinema industry. The cinema hosts five screens all equipped with laser projectors and recliners.

In April 2025, Kinopolis opened Hamburg's largest cinema with 10 screens and almost 2,200 seats, Kinopolis HafenCity. The new premium multiplex cinema is equipped with state-of-the-art projection and sound technology, spacious premium seats and two-seater sofas, as well as the immersive sound system. It also hosts Hamburg's first Dolby Cinema, dynamic motion seats and numerous lounge areas.

In Spain there are currently 66 PLF screens, 155 laser-equipped auditoriums, 66 with the latest generation immersive sound, 424 having premium reclining seats and 17 decorated with children-friendly themes.

PHOTO OF OMA CINEMA AT CINEWEST MOUGINS (CREDIT: BOXOFFICE PRO)

Omdia estimates that over one-third of the box office of 2023 titles in North Americal was derived from premium formats on opening weekend, showing the resonance of these experiences with audiences. They are often the first screens to sell out, indicating potential hotspots for further investment, although this will depend on location, existing provision and appetite for entertainment spend.

In Switzerland 12.3% of the total admissions for *Kung Fu Panda 4* were recorded in 4DX format, while for *Moana 2* and *Deadpool & Wolverine* the share was above 7%. *Dune: Part Two* collected 11.7% of its admissions on IMAX screens, while for *Bad Boys: Ride or Die* and *Gladiator II* IMAX accounted for over 7%.

In the UK and Ireland *Dune: Part II* grossed £8.8 million from its early year run on IMAX screens, accounting for 22% of the film's overall gross and 28% of IMAX's total box office in the territory in 2024. Five other IMAX releases passed the £1 million box office mark: *Deadpool & Wolverine*, *Gladiator II*, *Alien: Romulus*, *Wicked* and *Mufasa: The Lion King*, closely followed by *Furiosa: A Mad Max Saga* and *Beetlejuice Beetlejuice*. Motion seat 2D screenings saw revenues of £8.2 million whilst motion seat 3D shows grossed £6.7 million, with their respective top titles, *Twisters* and *Deadpool & Wolverine*, both surpassing the £1m mark. Expanded screens screenings banked £3.3 million with *Deadpool & Wolverine* being their top performer.

IMAX, 3D, 4DX, Dolby Vision/Atmos, D-BOX and Screen X, alongside the other proprietary and exhibitor-branded PLF screens, as well as ongoing upgrades to cinema seating and concessions, all help make a film night an unmissable experience. These premium entertainment experiences often come with a corresponding price tag attached and many exhibitors have looked to complement this by offering off-peak reduced tickets and promotional deals.

National Cinema Days in Europe 2024: A Boost to Cinema Attendance

In 2024, fourteen countries all across Europe celebrated their National Cinema Days, these playing a crucial role in increasing cinema attendance by creating excitement around the Big Screen 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, to organise special contests or involving sponsors, there is a different recipe for every market.

In France, the 39th Fête du Cinéma took place from 30 June to 3 July 2024 and was a record-breaking edition. It recorded 4.65 million admissions, 50% above 2023, becoming the best-attended edition since its creation in 1985. This result was achieved thanks to French titles like *Le Comte de Monte-Cristo* and *Un p'tit truc en plus*, as well as US blockbusters like *Inside Out 2*.

In Germany, the third edition of Kinofest was held on 7 and 8 September 2024. 1.2 million visitors attended the event, the best result so far and the most visited weekend of the year. Over 700 cinemas took part in the initiative, corresponding to a market share of over 90%.

In Spain, 1,394,058 spectators participated in the second edition of 2024's Fiesta del Cine, held from 4 to 7 November, this marking the best attendance of the initiative since 2019. Therefore, the week of 1 to 8 November became the second-best week of the year in terms of admissions.

In Poland the ninth edition of Święto Kina involved 273 cinemas, more than half of which were local and arthouse cinemas, for the first time widely represented in this initiative. During the last weekend of September, approximately 600,000 tickets were sold by the cinemas joining Święto Kina.

For the second edition of Finland's Suuri leffapäivä on 9 November, the mental health organisation Mieli participated in the campaign. The goal was to highlight the mental health of young people and the beneficial effect of film on mental well-being. It turned out to be a very successful edition, with 75,197 visitors, 5,000 more than the first edition in Spring 2023 and 2.6 times more than on the Saturday before Suuri leffapäivä.

In Greece, the Cinema Day Fest took place for the third consecutive year on Thursday 31 October, offering a special admission price of €2 at all cinemas nationwide, for both matinees and evening screenings. The event boosted total attendance for the long weekend (31 October to 3 November) to 210,396 total viewers.

Portugal, Italy, the UK, Switzerland, Slovakia, Belgium, Norway and Sweden also organised their National Cinema Days in 2024 and more European countries are considering launching their own similar celebratory events.

These nationwide initiatives are instrumental in attracting not only regular but also infrequent cinema-goers, when a strong and diverse offer of films is available, catering to all audiences. It's all about celebrating cinema-going together!

National Cinema Days in Europe 2024

UNIC EXPERT GROUPS

UNIC Marketing Group

The UNIC Marketing Group brings together marketing executives from major European cinema operators. It shares insights and opinions regarding key audience trends across Europe and examines the latest engagement opportunities in cinema as well as in other industries. The group met in Brussels during the 2024 edition of the UNIC Cinema Days, where workshops dived into digital advertising strategies, audience data and analytics, Search Engine Optimisation, using Net Promoter Score to improve customer experience and how to attract solo cinema-goers.
A dedicated Marketing Group meeting was also organised during CineEurope 2024 where admission results and audience trends were discussed. The next Marketing Group meeting will be held at CineEurope 2025.

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, as well as exchange best practices around circular economy and waste management. The Retail Group met in London in March 2025 in an event co-organised by The Coca-Cola Company and The Blue Stocking Partnership, where professionals discussed new retail experiences, with field visits around frictionless retail and shared some updates around sustainability initiatives for cinema concessions.
At CineEurope 2025 a new Retail Award will be launched, rewarding the cinema circuit with the most innovative retail concept.

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 2024, the UNIC Technology Group 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 and the Cinema Technology Community. 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, a new working group has been launched in 2024 to focus on cybersecurity in cinemas. The group met in Brussels during the 2024 edition of the UNIC Cinema Days, where energy efficiency, accessibility solutions, software trends, technical staff training, sound quality, light loss of laser projectors and the future of premium cinema were discussed. The group also met at CineEurope 2024, focusing on challenges around KDM delivery, non-standard releases and other cinema technology priorities. The Technology Group will next meet at CineEurope 2025.

UNIC PEOPLE PROGRAMME

NEDELJA
SERBIA (2024), PELICULA PRODUCTION, TELEKOM SRBIJA (PIC FROM TMDB)

UNIC PEOPLE PROGRAMME

The UNIC People Programme continues to drive initiatives that strengthen the cinema industry's workforce. In June 2024, the Programme published its Internal Culture and Values Toolkit, a practical resource designed to help organisations assess and improve workplace culture. The toolkit, launched at CineEurope 2024, provides actionable guidance for identifying cultural strengths and areas for growth, ensuring cinemas remain attractive employers.

Building on this foundation, the Programme shifted focus to its next priority strand: Leadership Skills. This new phase, introduced at CineEurope 2024 through a session featuring McKinsey & Co. and industry leaders, explores strategies to develop future-ready leaders capable of inspiring teams and navigating industry challenges.

At UNIC's Cinema Days an interactive leadership session was led by Joanne Hession, CEO of LIFT Ireland. She explored value-based leadership and actionable strategies, encouraging cinema leaders to embrace reflective and intentional practices. The UPP also publishes newsletters regularly which can be found here. The UPP will also organise a webinar on leadership skills in July 2025. Led by Monica Chadha, Senior Media Executive, Adviser, Facilitator and Coach, this exclusive one-hour session will offer the opportunity to hone the leadership skills of attendees.

The UNIC People Programme Podcast has expanded its library with insightful episodes, including conversations with Malin Lundstedt on authentic leadership and Clare Binns on career growth in cinema. These discussions offer valuable perspectives for professionals at all levels and can be found on UNIC website here.

Looking ahead, the Programme will launch its leadership toolkit during CineEurope in June 2025.

More information here.

GRUVI

Celebrating the Top 50 cinema companies in Europe

GIANTS OF EXHIBITION – EUROPE

After three successful editions, UNIC renewed its partnership with The Box Office Company in 2025 to disclose the fourth edition of the Giants of Exhibition: Europe ranking, celebrating the largest cinema operators in the region by screen count.

The Top 50 celebrates the range of diversity of the European exhibition community, representing over 18,600 screens and 2,300 venues across 38 European territories. UNIC and Boxoffice Pro would like to specifically highlight France's Cineville, winner of the Fastest Moving Giant Award, which increased its screen count by 18.3% from 2023 – from 129 to 158, and the two Breakthrough Giant Award winners, given to chains that have broken into the top 50 this year: Artesiete (Spain) and CineWest (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	2348
2	Cineworld Group	UK, Poland, Romania, Hungary, Czech Republic, Bulgaria, Slovakia	2110
3	Vue International	UK, Ireland, Italy, Germany, Poland, Netherlands, Denmark, Lithuania	1964
4	Pathé Cinémas	France, Belgium, Netherlands, Switzerland	1271
5	CGR	France	710
6	Kinepolis	Belgium, Netherlands, Luxembourg, France, Spain, Switzerland	678
7	Paribu Cineverse	Turkey	633
8	Russian Cinema Chain	Russia	
9	UGC	France, Belgium	595
10	Cineplex	Germany	577
11	Yelmo Cines	Spain	530
12	Cineplexx	Austria, Albania, Bosnia and Herzegovina, Croatia, Greece, Italy, Kosovo, North Macedonia, Montenegro, Romania, Serbia, Slovenia	425
13	Omniplex	Ireland, UK	360
14	Cinestar	Germany	329
15	Helios	Poland	304
16	Ocine	Spain, France	277
17	Megarama	France, Spain	264
18	Nordisk Film Cinemas	Denmark, Norway, Sweden	261
19	Russian Cinema Chain	Russia	
20	Russian Cinema Chain	Russia	
21	Svenska Bio	Sweden, Finland, Denmark	241
22	Cinemas NOS	Portugal	218
23	Showcase	UK	214
24	Mk2	France, Spain	197
25	Blitz CineStar	Croatia, Bosnia and Herzegovina, Kosovo, Serbia	179

Celebrating the Top 50 cinema companies in Europe

GIANTS OF EXHIBITION – EUROPE

26	Everyman Cinemas	UK	164
27	IMC	Ireland, UK	160
28	Multiplex	Ukraine	158
28	Cineville	France	158
30	Russian Cinema Chain	Russia	
31	Russian Cinema Chain	Russia	
31	Odeon Multicines	Spain	152
33	Kinopolis	Germany	149
34	CinemaPink	Turkey	145
35	Russian Cinema Chain	Russia	
36	Grand Ecran	France	104
37	Union Cine Ciudad	Spain	100
38	The Light Cinemas	UK	99
38	CineStar	Czech Republic	99
40	Filmpalast	Germany	96
41	Apollo Kino	Estonia, Latvia, Lithuania	93
42	Cinemax	Slovakia, Czech Republic, Romania	91
43	Cinemarine	Turkey, Kosovo	90
44	CineWest	France	86
45	Giometti Cinema	Italy	85
45	Cines ACEC	Spain	85
45	NOE Cinemas	France	85
48	Artesiete	Spain	84
49	Blue Cinema	Switzerland	82
49	Reel Cinemas	UK	82

UNION INTERNATIONALE DES CINÉMAS
INTERNATIONAL UNION OF CINEMAS

Big Screen Feature

Subscribe to our newsletter!

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

3 Q's with Shona Gold

For this month's edition of Big Screen Feature – providing a behind-the-scenes look at the world of cinema and distribution advocacy through the eyes of professionals themselves – Shona Gold, Executive Director of Brand, Marketing & PR at Vue International, discussed the job itself and the value of the Big Screen.

Describe your typical day at work.

— I'm famously in back-to-back meetings all day, which sounds awful I know! And while I should probably get a grip on that and run my day differently, because there is still an entrepreneurial heart to Vue, those meetings are as varied as can be. In one morning's meetings I can be coming up with names for a new cinema concept, designing a cinema bar, reviewing creator content for TikTok, trying to adjust something that's not on brand, planning a conference speech, hanging out on Zoom with all the Heads of Marketing across Europe, averting a potential comms crisis, interviewing candidates, editing a brand sizzle or pitching for more budget. I'm lucky enough to get the odd agency lunch somewhere fancy to break the day now and again, often spending that time discussing how many more lunches we used to have back in the day – it feels so much busier now! My team also know that a favourite part of any work trip is airport drinks on the way home when all the meetings are done.

The moment you fell in love with the Big Screen?

— I cannot recall my first cinema trip, it wasn't a staple of my childhood (I remember picnics, ... so... many...picnics – which perhaps explains why I have pretty much avoided sandwiches since.) But I have a strong memory of the excitement and thrill of managing to get into *Interview with a Vampire* in 1994 with my best friend when we were possibly a few years too young – eek sorry! As a marketer in the making I just loved the cinema ads back then – I remember them vividly and can still say the lines and sing the jingles from ads for Bacardi, Studio Line, Wrigley's, Levi's and many more which were made for cinema first and foremost. The most iconic ads, on the biggest screens, with the best sound – there is still no better showcase.

The best thing about the cinema experience?

— It's got EVERYTHING! It's aspiration for teens who imagine themselves as the stars they see on screen, it's a well-earned break for parents (I may have had a few sleeps on our lux recliner seats), it's the close up details when watching NT Live theatre productions, it's a lifeline to necessary escapism for Medicinema patients, it's sitting next to a group of lads jumping out of their skin in *A Quiet Place* and laughing at their own fear, it's offering tissues to grown men in business suits weeping at *WWWW* in CinemaCon (a personal favourite moment!) It's having to wait for opening night and real anticipation rather than everything on demand. It's what you talk about in bars, at school, at home. It simply connects.

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, enabling the industry to realise its full potential. At the time, this was, we believe, a unique initiative, and we are pleased to see it being emulated by others. Since its launch, interest of the sector in the programme and the numbers of its participants has been growing steadily.

Each year, the programme offers rising female leaders an exclusive opportunity to receive one-to-one mentoring, participate in tailored networking activities, and learn from an outstanding group of senior women executives – along with a number of men taking part as switch mentors – from across the cinema landscape. In 2024, UNIC launched the eighth edition of the Programme, welcoming a new group of 14 mentors and mentees representing 12 countries and 25 different companies. The ninth edition will be launched at CineEurope 2025 and will welcome 14 new pairs coming from 11 countries and 27 different companies. To date, the programme has welcomed 184 participants.

In 2024, UNIC launched a new ambassador initiative, with one contact point in each region responsible for organising local gatherings and promoting the programme through 'word of mouth' whenever possible.

In addition, UNIC has expanded networking opportunities for both current and former participants, including regular meet-ups at key industry events.

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

In April 2025, we were delighted to announce that Barco, IMAX Corporation and Vista Group had renewed their sponsorship as Champions of the Programme. As main supporters of UNIC's mission to build a more diverse and inclusive cinema industry, their continued commitment plays a key role in the success and sustainability of the initiative.

In addition, UNIC continued its campaign "Why is mentoring important?" to encourage mentees to reflect on their personal goals, interests and aspirations, as well as inspire future participants to join the programme. The sixth 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.

2025 CHAMPIONS OF UNIC WOMEN'S CINEMA LEADERSHIP PROGRAMME

IMAX

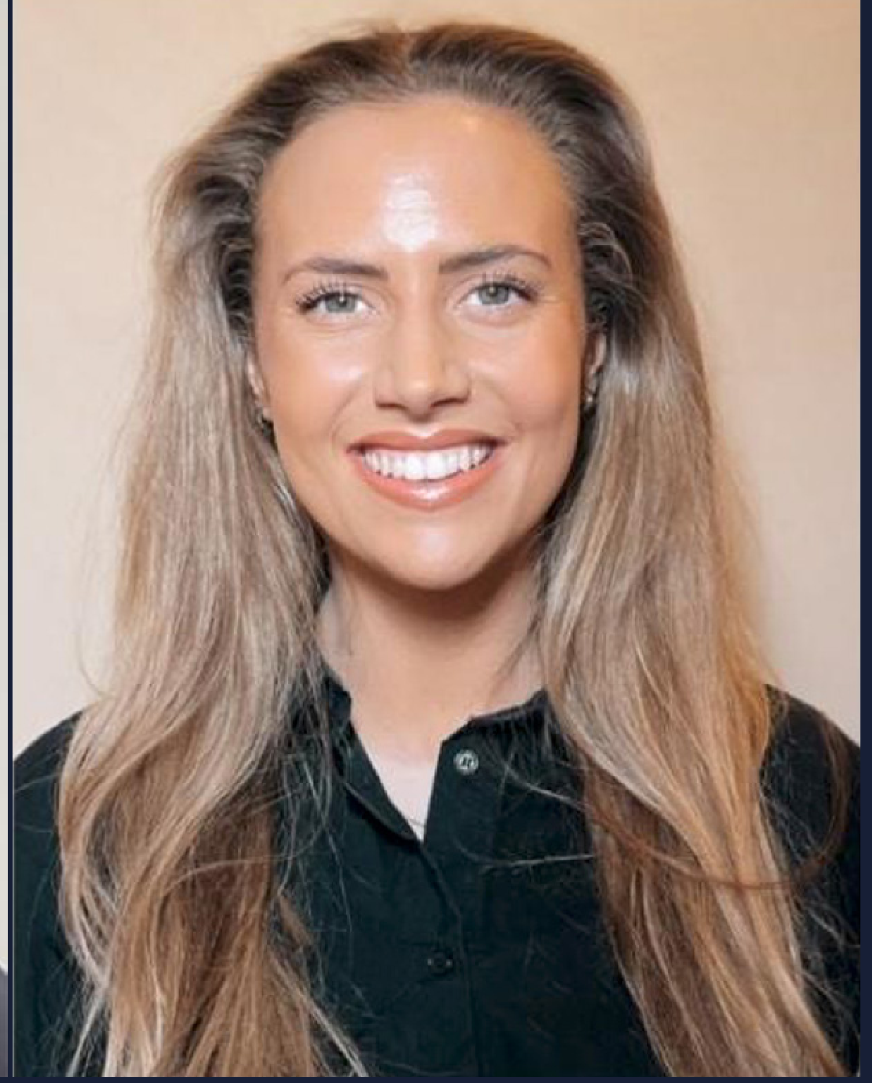
BARCO

VISTA GROUP

UNIC Women's Cinema Leadership Programme (WCLP) newsletter

BENEDIKTE SCHUITEMA, FORMER SALES & MARKETING MANAGER RECENTLY PROMOTED COO, FRAM KINO, NORWAY (MENTEE, AND UNIC AMBASSADOR FOR NORWAY, FINLAND AND SWEDEN), AND

TANIA CINQUINO, DIRECTOR, EXHIBITION BRAND AND EXPERIENCES, CINEPLEX, CANADA (MENTOR)



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 one pair of the eighth edition (2024–2025) of the programme.

What was your motivation to join the programme?

Benedikte: My motivation to join the WCLP programme was to gain an opportunity to reflect on my career path so far – and beyond – from a fresh perspective, guided by an experienced woman in the industry. It meant a great deal to me to be able to share my thoughts, challenges, highlights and future aspirations with someone who shares my passion and love for the industry, but who's not directly involved in my everyday life.

Having a mentor who only wishes you the best and genuinely wants to share her experiences to help others grow is quite unique. I'm forever grateful to my mentor, who has taken me in the way she has. Our conversations vary from hands-on-practical advice to how to juggle everyday challenges as a career-focused mum working in an ever-changing industry.

The network that comes with the programme is something I never expected, and I truly appreciate it. The opportunity to connect with and be supported by truly powerful women – both seniors (mentors) and mentees – in the industry is amazing. You can find many mentors among your fellow mentees. There's a true feeling of belonging and mutual respect in our group.

How have the first sessions been for you?

Tania: I am thoroughly enjoying getting to know my mentee Benedikte, and learning about the cinema industry in her home country, as well as hearing about her career goals and aspirations. As both marketing professionals in the cinema industry, we understand each other's opportunities and challenges, allowing us to better support one another. We have already developed a wonderful friendship, and I always look forward to our regular discussions! I am eager to continue to contribute in any way I can to help her achieve her professional & personal goals.

Meet our community of mentors and mentees here!

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 2024 took place on 17–20 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 2024 show featured panels and seminars on audience building and insights, optimising cinemas' digital presence, and designing the next generation of cinemas. Further seminars explored unattended retail, the power of partnerships, and leadership skills via the UNIC People Programme. Additionally, the tradeshow showcased the newest cinema enhancements.

At time of writing, CineEurope 2025 again 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 24–25 October 2024, bringing together over 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 featured panel debates on the role of cinemas in community building and how to strengthen their position as cultural and social hubs. It also included an internal mentoring session and workshops on leadership skills. Additionally, further sessions discussed the rise of unattended retail and its potential impact on cinemas.

The second day saw participants dive into two separate labs – the Cinema Marketing Lab and the Cinema Technology Lab – each focusing on targeted industry challenges and innovations, via engaging masterclasses and interactive workshops. A comprehensive report was shared to all attendees.

The event would not have been possible without the generous sponsors who contributed to its success.

UNIC is planning the next edition of its Cinema Days on 20–21 November 2025.
Find out more here!

Collaborate to Innovate

In 2025, 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.

Innovation 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, amongst other topics.

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 policymakers, 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 policymakers 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 2024–2029 mandate of the European Parliament is now fully underway, with competitiveness, security, and democracy emerging as central themes for the legislature. Following the June 2024 elections, a marked political shift to the right has redefined the institutional landscape, most notably within the Parliament itself. The "Identity and Democracy" group has rebranded as the "Patriots for Europe" and now stands as the third-largest political force. Nevertheless, the European People's Party (EPP) and the Progressive Alliance of Socialists and Democrats (S&D) remain the two dominant political groups.

THE BOY WITH PINK TROUSERS
ITALY (2024), EAGLE PICTURES (PIC FROM BOXOFFICE ITALY)

With more than 50% of MEPs new to the Parliament, there is a pressing need for sector stakeholders to engage and brief policymakers on key issues affecting film and audiovisual policy. This presents both a challenge and an opportunity for UNIC to raise awareness and ensure that the cinema sector remains firmly on the EU policy agenda on policy areas such as Creative Europe MEDIA, Territoriality, the Digital Services Act (DSA), Artificial Intelligence (AI), the Audiovisual Media Services Directive (AVMSD) as well as sustainability (on issues like Deforestation).

The new European Commission officially began its mandate on 1 December 2024, with Ursula von der Leyen continuing as President. Henna Virkkunen was appointed Executive Vice-President for Tech Sovereignty, a newly created position of significant relevance for the digital and technological landscape which places her in charge of film and audiovisual issues. The European Parliament endorsed the new Commission on 27 November with 51% of the majority.

The European Commission's Work Programme for 2025 reflects a continued emphasis on strategic autonomy, competitiveness, and digital transformation, with culture, film and audiovisual policy woven into broader priorities.

When appropriate, 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 cinemais communicated as effectively as possible.

WICKED
UNITED STATES (2024), UNIVERSAL PICTURES, MARC PLATT PRODUCTIONS

UNIC has worked closely with the following 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).

In line with the recommendations of the Draghi report on the future of European competitiveness, the Commission is re-evaluating the structure and focus of EU funding and regulatory frameworks across sectors – including film.

In this context, the future of the Creative Europe MEDIA programme has become a critical discussion point. As part of the broader review of the next Multiannual Financial Framework (MFF 2028–2034), the Commission is exploring options for streamlining EU programmes. In January 2025, Ministers of Culture across the EU called for the preservation of a dedicated Creative Europe programme with significant resources, a move supported by UNIC.

UNIC advocated for continued and enhanced support for the theatrical sector, stressing the importance of maintaining MEDIA as a distinct strand within Creative Europe.

UNIC contributed to two consultations and sent a letter ahead of the Culture Council held on 13 May 2025, reaffirming its commitment to championing the role of cinemas in Europe. In its response to the EU's Culture Compass for Europe consultation, UNIC underscored the cultural, social, and economic value of cinemas, calling for their explicit inclusion in the Commission's vision for culture. Through its submission to the European Commission's consultation on the future of the Creative Europe MEDIA programme, UNIC advocated for continued and enhanced support for the theatrical sector, stressing the importance of maintaining MEDIA as a distinct strand within Creative Europe. In parallel, UNIC joined a joint industry letter urging EU institutions to strengthen the MEDIA programme in the next Multiannual Financial Framework, ahead of its 35th anniversary in 2026. The letter highlighted MEDIA's crucial role in supporting independent European content and safeguarding cultural diversity across the film and audiovisual sector.

MEDIA backs the Europa Cinemas network, provides funding for film literacy, training and market access, as well as theatrical distribution of works. As cinemas face a new wave of modernisation and energy-efficiency needs, MEDIA has a key role to play in helping all cinemas remain competitive, accessible and future-ready. A well-funded programme is essential to the resilience and sustainability of the European cinema sector.

The second edition of the Media Outlook report is expected to be published in June 2025 and will provide an overview of trends across the European media sector, including specific insights into cinema. Based on recent consultations and survey data, including a study on young audiences presented at Berlinale 2025, the report will reflect on changes in media consumption and the broader dynamics affecting the sector. It is also likely to address issues such as cinema deserts and the role of cinemas within the wider attention economy.

IRKLAIS PER ATLANTĄ
LITHUANIA, LATVIA, UNITED STATES, SPAIN (2024), AURIMAS VALUJAVIČIUS

About the upcoming 4 Beatles films: “We need big cinematic events to get people out of the house. [It will be] the first bingeable theatrical experience”.

SAM MENDES, DIRECTOR

PADRE NO HAY MÁS QUE UNO 4
SPAIN (2024),
BOWFINGER INTERNATIONAL PICTURES

Geo-blocking continues to be one of the most politically crucial debates for the European film and cinema sector. In December 2023, the European Parliament adopted its own-initiative report on the implementation of the Geo-blocking Regulation. Thanks to coordinated advocacy efforts – including a joint campaign from Creativity Works!, extensive outreach by UNIC and its members, and a sector-wide letter signed by over 720 organisations – MEPs ultimately voted to maintain the exemption for film and audiovisual services. This outcome was a significant milestone, reaffirming the importance of territorial licensing and cultural diversity in Europe's film and audio-visual sector.

In June 2024, the European Commission published its formal response to the European Parliament's report, expressing concern over "mixed signals" – recognising Parliament's call to preserve the exemption while noting parallel demands to enhance cross-border access to film and audiovisual content.

In its January 2025 report, the European Court of Auditors struck a cautious tone. While recognising the essential role of territorial exclusivity in funding and distribution, it also floated the possibility of either extending the scope of the Regulation to film and audiovisual services or amending sector-specific legislation.

In March 2025, the Commission launched a call for evidence on the future of the Geo-blocking Regulation. UNIC and its members took part and submitted contributions. Nearly 600 submissions were received – more than 67% from businesses and trade associations, most of which supported the current film and audiovisual exemption.

The potential removal of geo-blocking would have a direct and damaging impact on cinema exhibition. Cinemas rely on the principle of territorial exclusivity to secure licences to screen films in specific markets and timeframes. These territorial rights underpin the practice of staggered, locally adapted release strategies – crucial for maximising a film's visibility and audience reach. Theatrical windows, or periods of time when a film is shown exclusively in cinemas before becoming available on other platforms, are a cornerstone of the film ecosystem. Undermining these windows by allowing simultaneous or early cross-border access on digital platforms would devalue theatrical rights, discourage investment in film acquisition, and disrupt marketing strategies. Smaller, independent and European films – which often rely on gradual rollouts across territories – would be disproportionately affected. For exhibitors, the loss of time exclusivity could result in reduced attendance, lost revenue and a diminished ability to reinvest in the discovery, promotion and presentation of diverse content. These effects would ripple through the value chain, threatening the economic model that supports the creation and distribution of European films.

A formal review of the Regulation is expected by December 2025. UNIC will continue to highlight the potential consequences of removing territorial licensing and remains fully engaged with institutions, policymakers, and coalition partners.

The Audiovisual Media Services Directive (AVMSD) remains the cornerstone of EU-wide coordination of national rules on audiovisual services. While it does not cover cinemas directly, the Directive is crucial to the film and audiovisual ecosystem in which cinemas operate – particularly through Article 13.2, which allows Member States to impose financial obligations on audiovisual media service providers, including those targeting a national market from another EU country. UNIC has consistently supported this provision, in territories where its members contribute to film funds themselves so as to ensure a level playing field. This specific provision is continuously challenged.

In January 2024, the European Commission published its latest implementation report on the Directive, covering the period from 2019–2022. The report reaffirmed the Directive's relevance but noted the challenges in implementation across Member States. By December 2026, the Commission is expected to conduct a full evaluation of the Directive and propose potential revisions.

The Polish EU Council Presidency adopted Council Conclusions on the on assessment of the legal framework for audiovisual media services and video-sharing platform services, at the Council of Ministers for Culture on 12–13 May 2025. In its conclusions, the Council highlights the crucial role of the AVMSD in providing a legal framework to safeguard and promote a diverse, fair, safe, trustworthy and competitive market for audiovisual media in the EU, as well as ensuring independent, trustworthy and culturally diverse audiovisual content.

Meanwhile in Belgium, Netflix and Walt Disney have launched legal challenges to financing obligations, including a Belgian decree requiring a 9.5% levy on turnover. This has triggered broader discussions on the Directive's enforcement and scope. On 17 March 2025, 53 Members of the European Parliament signed a letter defending the Directive against pressure from US interests. In the same month, the Motion Picture Association sent a report to the US Office of the Trade Representative which identified national AVMSD transpositions as trade barriers.

A study to inform the 2026 review is currently underway, tasked with evaluating the Directive's fitness for the digital age. Among other areas, the study will consider tightening the definition of "European works", addressing platform obligations and enhancing content prominence.

UNIC continues to work with partners across the sector to ensure the cinema perspective is fully reflected in the AVMSD's future.

The Digital Services Act (DSA) officially entered into force for all intermediary services on 17 February 2024, marking a major milestone in the EU's regulation of the online environment. Intended to modernise the E-Commerce Directive, the DSA introduces new obligations for online intermediaries and platforms – including marketplaces, social networks, and content-sharing services – with the goal of ensuring safer digital spaces and protecting users from illegal and harmful content. For cinemas and the broader film and audiovisual sector, the impact of the DSA remains closely tied to the effectiveness of enforcement measures against online piracy and illegal content distribution.

The European Commission has launched proceedings against several major platforms, including X, TikTok, AliExpress, Meta, and Google, for alleged non-compliance with risk management, content moderation, and transparency obligations. In April 2025, fines were imposed on Meta and Apple for breaches of digital anti-trust rules, a combined €700 million, marking the Commission's first significant enforcement under the Digital Markets Act. A high-profile investigation into X remains open, as the platform is under scrutiny for violations related to illegal content, disinformation, and transparency under the Digital Services Act. While preliminary findings indicated X's non-compliance on several fronts, a fine has not yet been issued, and the investigation is ongoing. The Commission has signalled its intent to intensify enforcement, with a larger team dedicated to upholding these regulations.

UNIC continues to call for more ambitious EU-level efforts to fight piracy,particularly of newly released and time-sensitive films, as this remains a critical threat to the sustainability of cinema and the entire film value chain.

In parallel, tensions with the US have intensified. The U.S. Trade Representative's annual report (March 2025) flagged the DSA, alongside the Digital Markets Act (DMA) and film and audiovisual rules, as regulatory barriers. Internally, the Commission is preparing for the evaluation of the DSA's interaction with other EU legislation, due by November 2025. This includes a potential review of how the DSA interfaces with copyright enforcement, AVMSD, and the AI Act, among others.

In May 2023, the European Commission adopted a Recommendation aimed at tackling the unauthorised retransmission of live events, including sports and other time-sensitive content. While non-binding, the Recommendation encourages prompt removal of illegal streams, the use of dynamic injunctions, and wider availability of legal offers. It builds on existing EU legislation, including the Enforcement Directive and the Digital Services Act, and its impact is being monitored by the EU Intellectual Property Office (EUIPO) Observatory ahead of a formal evaluation in November 2025.

Since mid-2024, concerns have grown that the Recommendation is failing to curb piracy. A study presented at the European Parliament in March 2025 revealed over 5.3 million unauthorised retransmissions in just the first half of 2024, with the vast majority not removed in time. The European Commission has acknowledged the need to consider stronger legislative tools if these trends persist. UNIC has submitted a response to the call for evidence on combating online piracy of sports and other live events calling for Europe to protect its world-leading creative and cultural industries – including cinema – from the economic, social and cultural harm caused by piracy. UNIC continues to call for more ambitious EU-level efforts to fight piracy, particularly of newly released and time-sensitive films, as this remains a critical threat to the sustainability of cinema and the entire film value chain.

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, have continuously called 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".

In parallel to the implementation of the Artificial Intelligence Act, discussions intensified around the AI Code of Good Practices, a voluntary set of commitments designed to guide the application of the AI Act, particularly for providers of General Purpose AI (GPAI) systems and the AI template. Developed by independent experts and coordinated by the Commission's AI Office, the Code seeks to provide a practical framework for how GPAI providers should comply with new transparency and copyright obligations.

Rights holders are calling for clearer obligations, including full traceability of datasets and stronger mechanisms to enforce rights reservations. At the same time, tech companies argue that many proposed measures are unworkable or threaten trade secrets. With the European Commission mediating, final negotiations on the Code are underway, but publication has been postponed. UNIC continues to support copyright in AI developments.

In the context of the upcoming own-initiative report on AI and copyright, German MEP Axel Voss (EPP) has outlined an early two-step approach to ensure fair compensation for rights holders in the face of generative AI technologies.

In an effort to curb global deforestation, the European Union adopted a renewed Deforestation Regulation that will make it illegal to place products linked to deforestation or forest degradation on the EU market. The Regulation targets commodities such as coffee, cocoa, palm oil, cattle, wood, rubber, and soya, and applies to both raw materials and finished goods that incorporate them (e.g., chocolate). Businesses of all sizes will be required to demonstrate full supply chain traceability and undertake due diligence before placing these products on the market. Initially set to apply from December 2024 for large companies and June 2025 for SMEs, the Commission postponed implementation by 12 months following stakeholder pressure, now setting deadlines for December 2025 and June 2026 respectively. As things stand, it looks like cinemas which are not SMEs would likely qualify as traders, ie "any person in the supply chain other than the operator who, in the course of a commercial activity, makes relevant products available on the market". This would imply quite a complex due diligence process.

While UNIC supports the Regulation's environmental goals, it has urged policymakers to ensure that the implementation doesn't impose disproportionate regulatory, financial and administrative burdens on cinemas.

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 is focused on educating new policymakers on the crucial role of cinemas in the film sector and in the social, economic and cultural fabric of the European Union.

PADDINGTON IN PERU
UNITED KINGDOM, FRANCE, JAPAN, UNITED STATES (2024), STUDIOCANAL, COLUMBIA PICTURES

UNIC Outreach Days: Bridging Cinemas and Policymakers in Brussels

In November 2024, UNIC hosted a successful Belgian Outreach Day, bringing together cinema professionals with EU policymakers from all three of that country's linguistic communities. These discussions covered pressing industry issues including combating piracy, understanding AI's impact, promoting sustainability initiatives, and safeguarding copyright frameworks. The event provided a valuable platform for direct dialogue between cinema operators and decision-makers at the European level.

Building on this momentum, UNIC organised dedicated Italian and Polish Outreach Days in April 2025. Leading industry representatives from Italy's ANEC and Poland's Helios, Cinema City Poland and MULTIKINO engaged with Members of the European Parliament to discuss critical sector challenges. These high-level meetings focused on key policy areas such as theatrical exclusivity, copyright protection, and the future of the Creative Europe MEDIA Programme, while also addressing digital innovation and sustainable cinema operations.

Outreach Days are an effective mechanism for ensuring the cinema sector's voice is heard in European policy discussions. Looking ahead, UNIC plans to hold more Outreach Days with other EU member state members, further strengthening the connection between cinema operators and policymakers across Europe.

UNIC film screenings

In collaboration with colleagues from production and distribution, UNIC has been organising exclusive film premieres dedicated to EU policymakers and cinema lovers.
UNIC firmly believes 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 celebrating Europe's rich cultural diversity through a selection of powerful and memorable titles.

To engage with newly elected Members of the European Parliament (MEPs), UNIC organised a screening in collaboration with the International Federation of Film Distributors' and Publishers' Associations (FIAD), of the French biopic *Niki* by Céline Sallette, selected in Un Certain Regard selection at the Cannes Film Festival. The event took place in October 2024 at UGC De Brouckère in Brussels.

On 28 January 2025, UNIC, FIAD, the Motion Picture Association (MPA), and Universal Pictures came together to host an exclusive screening at UGC De Brouckère of *The Brutalist* by Brady Corbet – which won the Silver Lion at the 2024 Venice Film Festival, three Golden Globes and three Oscar awards.

On 24 March 2025, UNIC organised another screening in collaboration with Eurocinema and Europa Distribution, of the Belgian-Dutch-Romanian film *Traffic* by Teodora Mihai at Cinéma Palace in Brussels.

Each one of these events brought between 80–150 policymakers and stakeholders from across the film sector, offering a unique opportunity to reiterate UNIC's position on a number of policy-related issues.
If you are interested in attending our next screening, please reach out!

UNIC STATEMENTS

UNIC continued proactively to engage with EU institutions throughout 2024–2025, contributing to several key consultations and submitting evidence to support a regulatory framework that nurtures the cultural, economic and social value of cinema across Europe. You'll find here a small selection of such statements.

In early 2025, UNIC submitted a detailed response to the European Commission's Call for Evidence on the Geo-blocking Regulation. The submission reaffirmed the vital role that territorial exclusivity, contractual freedom and release windows play in financing and distributing European films. UNIC strongly opposed any move to include audiovisual content in the Regulation, warning that such a step would fundamentally undermine the business model of the European cinema sector, leading to reduced investment in European films, diminished consumer choice, and the erosion of cultural diversity.

UNIC also provided input to the Creative Europe MEDIA mid-term evaluation on 30 April 2025, drawing on extensive box office and admissions data to highlight the continued resilience, economic, social and cultural value of cinema across Europe. UNIC called on the Commission to preserve and enhance MEDIA's dedicated support for cinema exhibition. UNIC also reiterated the importance of theatrical release to the success of European content across all platforms and urged MEDIA to support projects that boost circulation, foster innovation, and promote cultural diversity across all types of cinemas.

Ahead of the EU Culture Council meeting on 13 May, UNIC joined leading organisations from across the European film and audiovisual sector in co-signing a joint statement calling for the strengthening of the Creative Europe MEDIA programme. The statement highlights MEDIA's vital role in supporting cultural diversity, innovation, and the competitiveness of Europe's film and audiovisual ecosystem. It urges the Council and the European Parliament to maintain MEDIA as a distinct strand within Creative Europe under the next Multiannual Financial Framework, ensuring a strong balance between cultural and industrial objectives.

UNIC also co-signed a letter led by Creativity Works! urging EU co-legislators to ensure that the implementation of the AI Act – particularly the forthcoming General-Purpose AI (GPAI) Code of Practice – fully respects the agreed copyright provisions. The letter raises concerns over insufficient transparency around training data, weak commitments to lawful data sourcing, and the inadequate protection against the use of infringing content. It calls on the European Commission to uphold the AI Act's obligations and safeguard the rights of creators and Europe's cultural and creative sectors.

POLICY PARTNERS

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

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 3,192 screens across 39 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.

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 2024.

CICAE

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

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).

EAO

EUROPEAN AUDIOVISUAL OBSERVATORY

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

WIPO

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

KEY AREAS OF INTEREST

- Territoriality of copyright
- Rewarding investment and creativity, particularly in tackling piracy (Digital Services Act, Copyright, Piracy of Live Events)
- Audiovisual Media and Services Directive
- Creative Europe/MEDIA programme
- Music rights
- Sustainability
- Artificial intelligence
- Accessibility and inclusion

AKADEMIA PANA KLEKSA
POLAND (2023), OPEN MIND PRODUCTION, BAJKA PANA KLEKSA, MAZOWIECKI I WARSZAWSKI FUNDUSZ FILMOWY, NEXT FILM, IBRA, JAKE VISION DGA STUDIO, PLATINUM TOWERS MANAGEMENT, FLAME NATALIA SIWIEC

Conclusion

2024 numbers show that the Big Screen has lost none of its allure for European audiences, when a constant mix of strong international films and driving national titles is there. 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 lingering impact of the Hollywood strikes on the first quarter of 2025, the shortage of wide releases all year long and increased operational costs among them – and the recently appointed policymakers 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)
Federatie van Cinema's van België

Bulgaria
Bulgarian Cinema Association

Czechia
Asociace Provozovatelů Kin

Denmark
Danske Biografer

Finland
Suomen Filmikamari

France
Fédération Nationale des
Cinémas Français (FNCF)

Germany
HDF KINO e.V.

Israel
Cinema Industry Association

Italy
Associazione Nazionale
Esercenti Cinema (ANEC)

Netherlands
Nederlandse Vereniging
van Bioscoopexploitanten (NVBF)

Norway
Film & Kino

Poland
Polskie Stowarzyszenie Nowe Kina

Spain
Federación de Cines de España (FECE)

Sweden
Sveriges Biografägareförbund

Switzerland
Schweizerischer Kino-Verband
Association Cinématographique Suisse
Associazione Svizzera dei Cinema

Ukraine
United Ukrainian Cinemas

UK
UK Cinema Association (UKCA)

Members & Partners

Operator members

Apollo Kino
Estonia, Latvia, Lithuania

Blitz CineStar
Bosnia and Herzegovina, Croatia, Serbia, Kosovo

Cavea Cinemas
Georgia

Cinamon
Estonia, Latvia, Lithuania

Cinemax
Czech Republic, Slovakia, Romania

Cineplex
Germany

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

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

Kinepolis Group
Belgium, Canada, France, Luxembourg, the Netherlands, Poland, Spain, Switzerland, United States

Kinopolis
Germany

Movies @ Cinemas
Ireland

Multiplex
Ukraine

MUVI Cinemas
Saudi Arabia (pilot period)

Nordisk Film Biografer
Denmark, Norway, Sweden

Cinemas NOS
Portugal

Odeon Cinemas Group (AMC Group)
Finland, Germany, Italy, Ireland, Norway, Portugal, Spain, Sweden, United Kingdom

Pathé Cinémas
Belgium, France, the Netherlands, Switzerland, Tunisia

Svenska Bio
Denmark, Finland, Sweden

UGC
Belgium, France

Village Cinemas
Greece (pilot period)

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

World Cinezone
Turkey (pilot period)

Yelmo Cines (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!

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WE LOVE THE BIG SCREEN

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

UNIC

UNION INTERNATIONALE DES CINÉMAS
INTERNATIONAL UNION OF CINEMAS