Annual Report 2019

KEY TRENDS IN EUROPEAN CINEMA

UNIC
UNION INTERNATIONALE DES CINÉMAS
INTERNATIONAL UNION OF CINEMAS

1.26

BILLION ADMISSIONS IN 2018
ACROSS UNIC TERRITORIES

Campeones, Spain (2018), Universal Pictures España

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Welcome & Executive Summary

from Phil Clapp

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

Welcome to this, our 2019 annual report, detailing the key cinema trends in Europe – one of the most diverse, innovative and dynamic regions in the World.

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

Across the region, cinema-going continues to flourish and remains firmly at the centre of the European film ecology.

Last year marked the fourth consecutive year that cinemas across UNIC territories welcomed over 1.25 billion admissions, equating to €8.1 billion at the box office. These figures illustrate the continued value attached to the Big Screen experience across Europe and, more broadly, represent almost a quarter of the global theatrical market for films – cementing Europe's position as a key player within the international cinema exhibition sector.

A key contributor to the region's standing on the global stage is its uniquely diverse cultural landscape, reflected in Europe's exciting and varied cinema community, fuelling audiences' strong appetite for a broad range of film content.

In cities, towns and rural areas throughout the region, European cinemas provide spaces in which the expression of local, national and European identity can flourish. Now more than ever, through reaching out to different demographics and enabling hundreds of millions of cinema-goers to engage with stories from across Europe and further afield, cinemas' importance in terms of cultural expression, exchange and mutual understanding cannot be overstated.

38 TERRITORIES
REPRESENTED BY UNIC

42,000 SCREENS
ACROSS UNIC TERRITORIES

To build on this, European cinema operators continue to invest massively to enable these stories to find an audience in the most engaging way and through the highest quality experience. This investment extends far beyond the screening room and, as cinema-going becomes an increasingly eventful and digitally-connected experience, operators now strive more than ever to engage with their audiences and tailor their offers to best meet demand.

Whilst the sector's continued success forms an integral component of the health of the wider European film industry, cinemas' noticeable multiplier effects on both national and local economies, along with the people that live within them, is also key. They contribute to both national and European GDP, boost employment and represent a highly valued and trusted resource for a broad range of local communities.

Looking ahead, UNIC will continue in its efforts to remain abreast of the fast-paced world of cinema exhibition in the interest of showcasing the benefits of cinema-going on the European stage, supporting its members and ensuring a bright and prosperous future for our industry.

As we welcome a new European Parliament and Commission to Brussels, we very much hope to bolster our existing relationships and forge new ones at European, local and international level to convey the value of cinema-going for Europe today.

We very much hope that you find this report interesting and informative.

Cinema-going in 2018 European update

1.29 BILLION ADMISSIONS
3.4 PER CENT DECREASE ON 2017

€ 8.1 BILLION BOX OFFICE REVENUE
5.6 PER CENT DECREASE ON 2017

Journal 64, Denmark/Germany (2018), Zentropa Entertainments

European cinema-going in 2018

Almost 1.3 billion cinema tickets were sold across UNIC territories in 2018, with EU Member States alone welcoming more than 950 million visitors. Amassing close to €8.1 billion at the box office, European cinema operators experienced another strong year, although several factors – including a particularly warm summer and the FIFA World Cup – contributed to mixed performances in several leading European territories and an overall dip of 3.4 per cent in admissions.

Box office was mainly driven by international titles including, but not limited to, *Avengers: Infinity War*, *Bohemian Rhapsody*, *The Incredibles 2, Mamma Mia! Here We Go Again* and *Hotel Transylvania 3: Summer Vacation*. That said, a broad range of European productions enjoyed great results in several UNIC territories, highlighting once again the importance of local content for the region.

Record performances in the UK, Poland and Turkey

UK exhibitors enjoyed a record-breaking year with over 177 million admissions, the highest level of cinema-going since 1970. Similarly, Polish cinemas attracted almost 60 million cinema-goers, a 5.5 per cent year-on-year increase, bolstered by three local productions leading at the box office including *Kler* and *Kobiety Mafii*. In addition, Turkish cinemas attracted over 70 million cinema-goers for the second year in a row, with a record-breaking 62.9 per cent national films' market share led by the local production *Müslüm*.

Balanced results in France, Spain and Russia

While France experienced a 4.0 per cent fall in attendance, French exhibitors still attracted over 200 million cinema-goers and enjoyed a record market share for national films of almost 40 per cent, with three local films in the box office top five. The same trend could be observed in Spain (box office -2.0 per cent / admissions -2.0 per cent), finishing just shy of the symbolic 100 million admissions mark. Russia – after outperforming France in 2017 as the leading European territory in terms of cinema admissions – experienced its second-best year ever, despite a 5.5 per cent decrease in admissions, as local film *Dvizhenie vverkh* led at the box office.

TOP 5 UNIC TERRITORIES IN TERMS OF ADMISSIONS

FRANCE	201.1 MILLION
RUSSIA	200.5 MILLION
UK	177.0 MILLION
GERMANY	105.4 MILLION
SPAIN	97.7 MILLION

Lacklustre year in German-speaking territories and Southern Europe

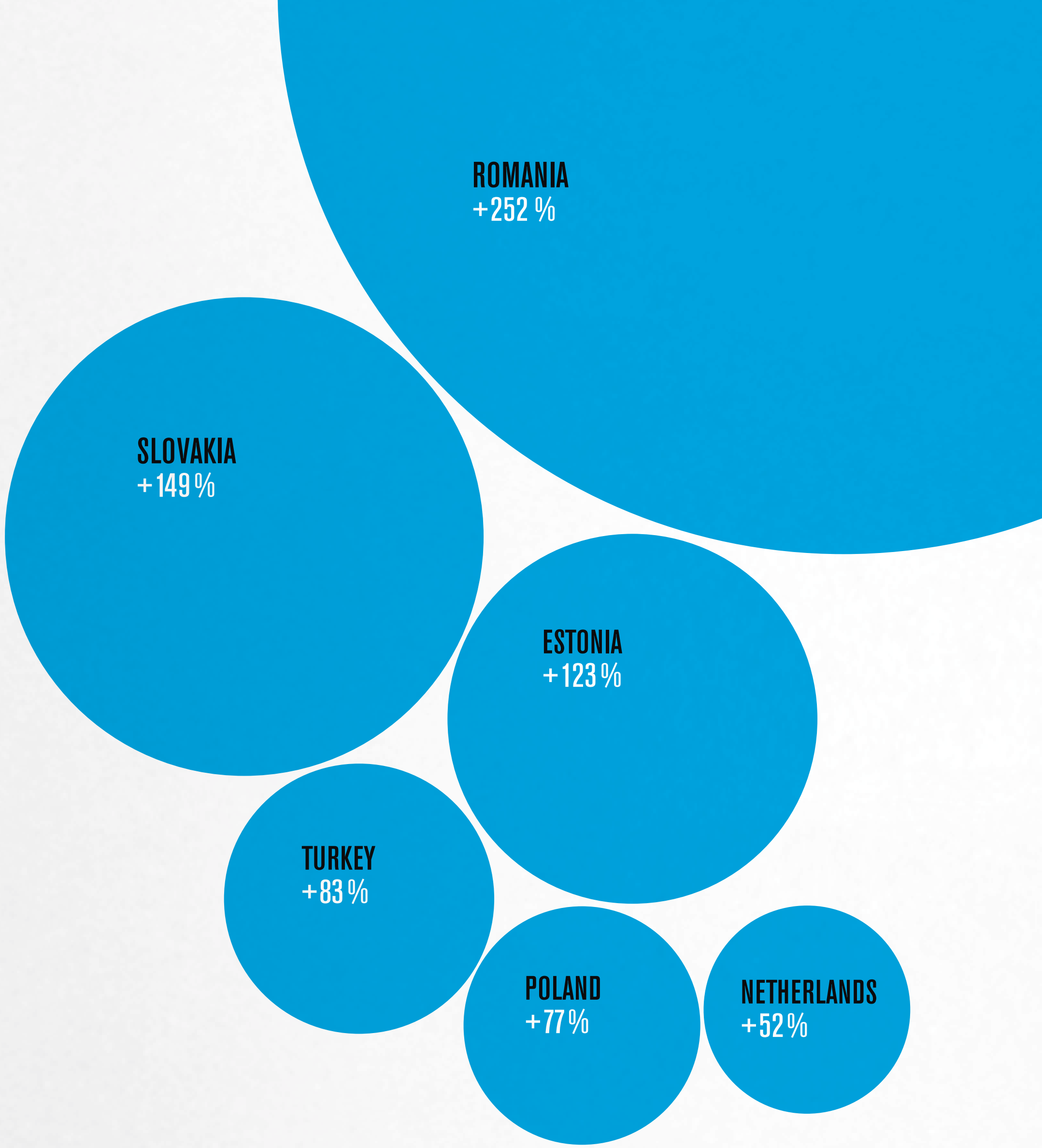
Germany (box office -14.8 per cent / admissions -13.9 per cent), Austria (box office -9.5 per cent / admissions -11.4 per cent) and Switzerland (box office -12.5 per cent / admissions -12.9 per cent) all suffered from a lack of successful local and international content in 2018. Decreases were also witnessed in Italy (box office -5.0 per cent / admissions -6.9 per cent), Greece (box office -7.7 per cent / admissions -7.4 per cent) and Portugal (box office -3.7 per cent / admissions -5.3 per cent).

Mixed fortunes in Scandinavia

Denmark (box office +5.1 per cent / admissions +4.0 per cent) and Norway (box office +9.1 per cent/admissions +3.0 per cent) enjoyed positive results, with several local productions making it into the box office top five, including the Danish film *Journal 64*. Following a record-setting 2017 and despite a 23.6 per cent market share for national films, Finland experienced an 8.2 per cent decline in admissions, while Swedish cinema operators had stable results with box office and admissions declining by 1.0 per cent.

Outstanding performances for the Baltic States

The Baltic States experienced impressive cinema-going levels in 2018, as Estonia (box office +6.3 per cent / admissions +3.4 per cent), Latvia (box office +3.4 per cent / admissions +1.9 per cent) and Lithuania (box office +11.1 per cent / admissions +6.3 per cent) all enjoyed growing admissions and box office, and a combined eight local productions made it to the box office top five in the three territories.



THERE ARE STILL OPPORTUNITIES FOR GROWTH IN THE SECTOR, EVIDENT THROUGH INCREASING ADMISSIONS IN SEVERAL EUROPEAN TERRITORIES OVER THE LAST DECADE (2008–2018)

BULGARIA	+74 %
HUNGARY	+65 %
RUSSIA	+62 %
CROATIA	+45 %

ANNUAL VISITS TO THE CINEMA IN 2018

1.5	ACROSS UNIC TERRITORIES
3.1	FRANCE
2.1	SPAIN
1.4	RUSSIA
0.9	TURKEY

Continued growth in CEE and the Balkans

With the exception of territories such as Slovakia (box office -4.3 per cent / admissions -10.9 per cent) and Bulgaria (box office -9.2 per cent / admissions -12.1 per cent) – both after breaking their all-time box office records in 2017 – the majority of territories in Central and Eastern Europe enjoyed another year of growth, including the Czech Republic (box office +13.2 per cent / admissions +7.3 per cent) and Hungary (box office +4.9 per cent / admissions +2.0 per cent). The same upward trend was experienced across the Balkans, with positive results in Croatia (box office +7.8 per cent / admissions +1.4 per cent) and Serbia (box office +19.9 per cent / admissions +18.0 per cent). Despite a slight decline of 3.8 per cent in admissions, Romania experienced its second-best performance ever with 13.3 million cinema-goers.

1.5 annual visits

Admissions per capita for all UNIC territories remained stable at 1.5 visits per year. France and Ireland (at 3.1 and 3.3 respectively) again experienced the highest rates of cinema-going in Europe, while there remains opportunities for growth in a number of territories including Romania (0.7) and Ukraine (0.6).

Strong European and local content

The market share of European films increased slightly across the region in 2018, reaching 29.4 per cent.* Continuing its recent success in terms of national productions, Turkey experienced a record 62.9 per cent rate, followed by France (39.5 per cent) and Poland (35.5 per cent).

* Source: European Audiovisual Observatory

TOP 5 UNIC TERRITORIES IN TERMS OF MARKET SHARE FOR NATIONAL FILMS

TURKEY	62.9 %
FRANCE	39.5 %
POLAND	35.5 %
DENMARK	28.0 %
LITHUANIA	27.5 %

MARKET SHARE OF EUROPEAN FILMS IN 2018 IN THE EU

29.4 %*

Growing screen count

The total number of cinema screens across UNIC territories continued to increase in 2018, with 42,000 screens in the region alone. EU Member States averaged 55 screens per million inhabitants, a figure which has remained stable in recent years. Ireland (108), France (91) and Norway (89) have the highest screen density in Europe, while we continue to witness impressive screen growth in Eastern European territories such as in Bulgaria, which went from 95 screens in 2008 to 218 in 2018.

A record-breaking year ahead?

The industry looks forward to a particularly busy and promising release schedule in 2019, packed with highly anticipated European as well as international titles. The first half of the year has already brought us the record-breaking *Avengers: Endgame*, which took only 11 days to reach $2 billion at the global box office and might even surpass *Avatar* as the highest-grossing film of all time. And releases such as *The Lion King* and *Star Wars: The Rise of Skywalker* are certain to attract millions of avid film fans of all ages to cinemas around the World.

SCREEN DENSITY IN 2018

55	THE EUROPEAN UNION
108	IRELAND
89	NORWAY
58	GERMANY
31	BULGARIA

Celebrating Europe's diverse film slate

A wide range of local productions made it to the box office top five across UNIC territories in 2018, illustrating the strength and diversity of the European film sector.

Johnny English Strikes Again, UK/France/US (2018), Universal Pictures; ***Dvizhenie vverkh***, Russia (2018), Central Partnership; ***De Superjhemp retörns***, Luxembourg/Belgium (2018), Samsa Film; ***Les Tuche 3***, France (2018), Pathé; ***Journal 64***, Denmark/Germany (2018), Zentropa Entertainments; ***Lyod***, Russia (2018), Art Pictures Studio; ***Den 12. mann***, Norway (2017), Nordisk Film; ***Klassikokkutulek 2***, Estonia (2018), Taska Film; ***Ilosia aikoja, Mielensäpahoittaja***, Finland (2018), Nordisk Film; ***La Ch'tite famille***, France (2018), Pathé; ***Seltsimees Laps***, Estonia (2018), Amrion; ***Campeones***, Spain (2018), Universal Pictures España; ***Po čem muž i touží***, Czech Republic (2018), Fénix Film; ***Tarp pilkų debesų***, Lithuania (2018), Acme Film; ***Lykke Per***, Denmark (2018), Nordisk Film; ***Arif V 216***, Turkey (2018), CGV Mars D.; ***Skjelvet***, Norway (2018), Nordisk Film; ***Så længe jeg lever***, Denmark (2018), Nordisk Film; ***Kler***, Poland (2018), Kino Swiat; ***Južni vetar***, Serbia (2018), Archangel Studios; ***Planeta Singli 2***, Poland (2018), Gigant Films; ***Müslüm***, Turkey (2018), CGV Mars D.; ***Le Grand Bain***, France (2018), StudioCanal; ***Homo Novus***, Latvia (2018), Film Angels Studio; ***Kriminalas ekselences fonds***, Latvia (2018), COMETE Films.

NUMBERS ON CINEMA-GOING
FOR UNIC TERRITORIES IN 2018

	BOX OFFICE IN LOCAL CURRENCY		ADMISSIONS				
	2018	CHANGE	2018	CHANGE	PER CAPITA	NATIONAL FILMS' SHARE	SCREEN DENSITY
ALBANIA (ALL)	211.8	+17.7 %	0.4	+7.7 %	0.1	1.5 %	5
AUSTRIA (EUR)	117.8	-9.5 %	12.8	-11.4 %	1.5	4.5 %	66
BELGIUM (EUR)	160.0	-0.7 %	18.8	-4.0 %	1.6	11.0 %	44
BOSNIA AND HERZEGOVINA (BAM)	6.1	+7.1 %	1.2	+7.9 %	0.3	0.5 %	11
BULGARIA (BGN)	46.0	-9.2 %	4.9	-12.1 %	0.7	6.7 %	31
CROATIA (HRK)	147.4	+7.8 %	4.7	+1.4 %	1.1	1.3 %	43
CYPRUS (EUR)	6.5	+1.0 %	0.8	+1.0 %	0.9	0.0 %	39
CZECH REPUBLIC (CZK)	2,268.9	+13.2 %	16.3	+7.3 %	1.5	20.0 %	50
DENMARK (DKK)	1,136.1	+5.1 %	13.0	+4.0 %	2.3	28.0 %	81
ESTONIA (EUR)	20.6	+6.3 %	3.6	+3.4 %	2.8	17.9 %	61
FINLAND (EUR)	90.3	-8.4 %	8.1	-8.2 %	1.5	23.6 %	62

SEE ALL TERRITORIES

If you are looking for more figures about the European cinema industry, please contact us at

communications@unic-cinemas.org

NUMBERS ON CINEMA-GOING

FOR UNIC TERRITORIES IN 2018

	Box office in local currency		Admissions				
	2018	Change	2018	Change	Per capita	National films' share	Screen density
ALBANIA (ALL)	211.8	+17.7 %	0.4	+7.7 %	0.1	1.5 %	5
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FINLAND (EUR)	90.3	-8.4 %	8.1	-8.2 %	1.5	23.6 %	62
FRANCE (EUR)	1,336.1	-3.2 %	201.1	-4.0 %	3.1	39.5 %	91
GERMANY (EUR)	899.3	-14.8 %	105.4	-13.9 %	1.3	23.5 %	58
GREECE (EUR)	60.0	-7.7 %	9.4	-7.4 %	0.9	7.1 %	49
HUNGARY (HUF)	21,947.7	+4.9 %	15.5	+2.0 %	1.6	6.1 %	38
IRELAND (EUR)	117.3	+3.1 %	15.8	-2.1 %	3.3	2.0 %	108
ISRAEL (ILS)	533.4	-8.4 %	16.7	-8.5 %	1.9	5.9 %	49
ITALY (EUR)*	555.7	-5.0 %	85.9	-6.9 %	1.4	23.0 %	67
LATVIA (EUR)	13.3	+3.4 %	2.5	+1.9 %	1.3	22.1 %	34
LITHUANIA (EUR)	22.4	+11.1 %	4.3	+6.3 %	1.5	27.5 %	24
LUXEMBOURG (EUR)	7.5	-8.6 %	1.1	-9.1 %	1.8	4.9 %	62
NORTH MACEDONIA (MKD)	87.9	+7.2 %	0.4	-3.0 %	0.2	1.0 %	6
MONTENEGRO (EUR)	1.1	+2.4 %	0.3	+1.4 %	0.5	0.4 %	17
NETHERLANDS (EUR)	312.4	+3.5 %	35.7	-0.8 %	2.1	10.5 %	56
NORWAY (NOK)	1,376.0	+9.1 %	12.1	+3.0 %	2.3	23.7 %	89
POLAND (PLN)	1,123.3	+4.7 %	59.7	+5.5 %	1.6	35.5 %	37
PORTUGAL (EUR)	78.7	-3.7 %	14.8	-5.3 %	1.4	1.5 %	57
ROMANIA (RON)	263.0	-1.4 %	13.3	-3.8 %	0.7	2.8 %	21
RUSSIA (RUB)	50,299.0	-5.6 %	200.5	-5.5 %	1.4	27.4 %	36
SERBIA (RSD)	1,602.8	+19.9 %	4.1	+18.0 %	0.6	21.0 %	21
SLOVAKIA (EUR)	33.0	-4.3 %	6.0	-10.9 %	1.1	3.7 %	49
SLOVENIA (EUR)	12.6	+8.3 %	2.4	+6.0 %	1.2	3.4 %	56
SPAIN (EUR)	585.7	-2.0 %	97.7	-2.0 %	2.1	17.5 %	75
SWEDEN (SEK)	1,940.7	-1.0 %	16.4	-1.0 %	1.6	16.9 %	93
SWITZERLAND (CHF)	183.6	-12.5 %	12.1	-12.9 %	1.7	6.4 %	71
TURKEY (TRY)	896.8	+3.0 %	70.4	-1.1 %	0.9	62.9 %	34
UK (GBP)	1,277.1	-0.1 %	177.0	+3.8 %	2.7	11.7 %	66
UKRAINE (UAH)	2,430.0	+2.1 %	27.0	-3.6 %	0.6	8.0 %	12

All box office and admissions figures are in million.

Source: UNIC members

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

*Cinetel data: 95 per cent of the market

TOP 5 FILMS ACROSS UNIC TERRITORIES

	TOP 1	TOP 2	TOP 3	TOP 4	TOP 5
ALBANIA	Jumanji: Welcome to the Jungle	Aquaman	Avengers: Infinity War	Fifty Shades Freed	Black Panther
AUSTRIA	Avengers: Infinity War	Mamma Mia! Here We Go Again	Fifty Shades Freed	Fantastic Beasts: The Crimes of Grindelwald	Bohemian Rhapsody
BELGIUM	The Incredibles 2	Jurassic World: The Fallen Kingdom	Avengers: Infinity War	Fantastic Beasts: The Crimes of Grindelwald	Fifty Shades Freed
BOSNIA AND HERZEGOVINA	Južni vetar	Fifty Shades Freed	Avengers: Infinity War	Venom	Deadpool 2
BULGARIA	Hotel Transylvania 3: Summer Vacation	Avengers: Infinity War	Bohemian Rhapsody	Venom	The Grinch
CROATIA	Bohemian Rhapsody	Avengers: Infinity War	A Star is Born	Deadpool 2	The Grinch
CYPRUS	Johnny English Strikes Again	Avengers: Infinity War	Hotel Transylvania 3: Summer Vacation	The Grinch	Aquaman
CZECH REPUBLIC	Bohemian Rhapsody	Avengers: Infinity War	Po čem muži touží	Fantastic Beasts: The Crimes of Grindelwald	Hotel Transylvania 3: Summer Vacation
DENMARK	Journal 64	Så længe jeg lever	Lykke-Per	The Incredibles 2	Avengers: Infinity War
ESTONIA	Klassikokkutulek 2	Bohemian Rhapsody	Eia Jõulud Tondikakul	Seltsimees Laps	The Incredibles 2
FINLAND	Mamma Mia! Here We Go Again	Ilosia aikoja, Mielensäpahoittaja	Bohemian Rhapsody	Avengers: Infinity War	BlacKkKlansman
FRANCE	The Incredibles 2	Les Tuches 3: Liberté Egalité Fraternituche	La Ch'tite famille	Avengers: Infinity War	Le Grand Bain

La Ch'tite famille, France (2018), Pathé

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ALBANIA	Jumanji: Welcome to the Jungle	Aquaman	Avengers: Infinity War	Fifty Shades Freed	Black Panther
AUSTRIA	Avengers: Infinity War	Mamma Mia! Here We Go Again	Fifty Shades Freed	Fantastic Beasts: The Crimes of Grindelwald	Bohemian Rhapsody
BELGIUM	The Incredibles 2	Jurassic World: The Fallen Kingdom	Avengers: Infinity War	Fantastic Beasts: The Crimes of Grindelwald	Fifty Shades Freed
BOSNIA AND HERZEGOVINA	Južni vetar	Fifty Shades Freed	Avengers: Infinity War	Venom	Deadpool 2
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ESTONIA	Klassikokkutulek 2	Bohemian Rhapsody	Eia Jõulud Tondikakul	Seltsimees Laps	The Incredibles 2
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FRANCE	The Incredibles 2	Les Tuches 3: Liberté Egalité Fraternituche	La Ch'tite famille	Avengers: Infinity War	Le Grand Bain
GERMANY	Fantastic Beasts: The Crimes of Grindelwald	Avengers: Infinity War	Fifty Shades Freed	The Incredibles 2	Hotel Transylvania 3: Summer Vacation
GREECE	Avengers: Infinity War	The Nun	Hotel Transylvania 3: Summer Vacation	Deadpool 2	Fifty Shades Freed
HUNGARY	Avengers: Infinity War	Bohemian Rhapsody	Mamma Mia! Here We Go Again	Jurassic World: The Fallen Kingdom	Deadpool 2
IRELAND	Mamma Mia! Here We Go Again	A Star is Born	Avengers: Infinity War	The Incredibles 2	Jurassic World: Fallen Kingdom
ISRAEL	The Incredibles 2	Hotel Transylvania 3: Summer Vacation	Avengers: Infinity War	Bohemian Rhapsody	Mission Impossible: Fallout
ITALY	Bohemian Rhapsody	Avengers: Infinity War	Fifty Shades Freed	Fantastic Beasts: The Crimes of Grindelwald	Hotel Transylvania 3: Summer Vacation
LATVIA	Hotel Transylvania 3: Summer Vacation	Homo Novus	Nameja gredzens	Kriminalas ekselences fonds	The Grinch
LITHUANIA	Tarp pilkų debesų	Klasės susitikimas: berniukai sugrįžta!	Bohemian Rhapsody	The Grinch	Hotel Transylvania 3: Summer Vacation
LUXEMBOURG	Superjhemp retörns	Avengers: Infinity War	Bohemian Rhapsody	Black Panther	n/d
NORTH MACEDONIA	Avengers: Infinity War	Aquaman	Black Panther	Jumanji: Welcome to the Jungle	Fifty Shades Freed
MONTENEGRO	Južni vetar	Fifty Shades Freed	Johnny English Strikes Again	Ferdinand	Venom
NETHERLANDS	Bohemian Rhapsody	Fantastic Beasts: The Crimes of Grindelwald	Avengers: Infinity War	Mamma Mia! Here We Go Again	Jurassic World: Fallen Kingdom
NORWAY	Mamma Mia! Here We Go Again	Skjelvet	Mission Impossible: Fallout	Den 12. mann	Avengers: Infinity War
POLAND	Kler	Kobiety Mafii	Planeta Singli 2	Fifty Shades Freed	The Incredibles 2
PORTUGAL	The Incredibles 2	Bohemian Rhapsody	Hotel Transylvania 3: Summer Vacation	Fifty Shades Freed	Avengers: Infinity War
ROMANIA	Venom	Avengers: Infinity War	Aquaman	Bohemian Rhapsody	Black Panther
RUSSIA	Dvizhenie vverkh	Venom	Avengers: Infinity War	Fantastic Beasts: The Crimes of Grindelwald	Lyod
SERBIA	Južni vetar	Hotel Transylvania 3: Summer Vacation	Fifty Shades Freed	Avengers: Infinity War	The Grinch
SLOVAKIA	Bohemian Rhapsody	Hotel Transylvania 3: Summer Vacation	A Star is Born	Avengers: Infinity War	Fifty Shades Freed
SLOVENIA	Bohemian Rhapsody	Hotel Transylvania 3: Summer Vacation	Mamma Mia! Here We Go Again	The Grinch	Fifty Shades Freed
SPAIN	Jurassic World: The Fallen Kingdom	Bohemian Rhapsody	The Incredibles 2	Avengers: Infinity War	Campeones
SWEDEN	Mamma Mia! Here We Go Again	Avengers: Infinity War	A Star is Born	Black Panther	Bohemian Rhapsody
SWITZERLAND	Bohemian Rhapsody	Avengers: Infinity War	Fantastic Beasts: The Crimes of Grindelwald	Mamma Mia! Here We Go Again	A Star is Born
TURKEY	Müslüm	Arif v 216	Ailecek Şaşkınız	Yol Arkadaşım 2	Deliha 2
UK	Avengers: Infinity War	Mamma Mia! Here We Go Again	The Incredibles 2	Black Panther	Bohemian Rhapsody
UKRAINE	Avengers: Infinity War	Aquaman	Venom	Fantastic Beasts: The Crimes of Grindelwald	Hotel Transylvania 3: Summer Vacation

NATIONAL FILMS NON-NATIONAL EU FILMS EU/NATIONAL QUALIFIED PRODUCTION

Source: UNIC members

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

Looking forward

Müslüm, Turkey (2018). CGV Mars D.

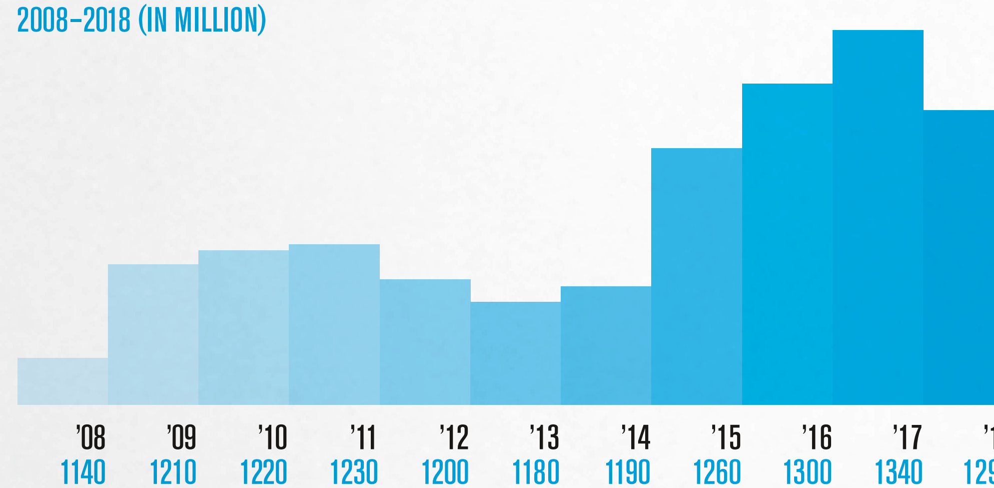
As illustrated by growing admissions in Europe over the last decade, cinema operators continue to successfully adapt to the changing needs and preferences of their audiences. While this ongoing positive trend highlights the well-being and strength of the 42,000 screens represented by UNIC and the wider European cinema industry, recent business developments have brought several new challenges and opportunities to the sector.

The value of cinema

Cinemas are an essential component of Europe's cultural and creative fabric. They play a central role in the promotion of a vibrant and diverse cinema-going culture across the region. Regardless of size or location, they are local hubs of creativity, sharing and community and have incredibly positive effects on our local economies.

In a market characterised by cultural and linguistic differences, cinemas provide an opportunity for people to understand and express their sense of local, national and European identity, reaching out to young and old and those from different backgrounds, ultimately celebrating European diversity. Cinemas are modern meeting places that help stimulate dialogue on a range of important issues, combat social exclusion, revitalise interest in culture and foster innovation and creativity. They help create awareness around and interest in both European and international films and enable hundreds of millions of visitors to discuss stories that entertain us, make us think and reflect on everyday life.

CINEMA ADMISSIONS ACROSS UNIC TERRITORIES
2008–2018 (IN MILLION)



Cinemas create value for the entire European film industry – revenues from cinema tickets are redistributed, contributing to the creation and promotion of a vast range of content and the overall well-being of the European cultural sector. Cinemas contribute to each country's GDP and have above-average multiplier effects on neighbouring commercial activities, boosting urban regeneration by creating new jobs and attracting investors, small businesses and new residents. They are essential to the development of the creative industries, a cornerstone of modern knowledge-based economies.

Fuelled by its appetite for innovation and engagement with audiences – including digitally – the sector confidently competes with the myriad of online entertainment options available to consumers today. European cinema operators are global leaders in terms of cutting-edge technology, a result of substantial investment and continued innovation.

Nowadays, the cinema-going experience starts days before stepping into the lobby and operators are experimenting with new techniques to connect with potential guests before, during and after screenings. Digital engagement strategies are multifaceted and can include online ticketing, automated social media engagement and innovative customer loyalty schemes, to name but a few examples. These initiatives are underpinned by sophisticated data analytics programmes that help reach individual cinema-goers in a more personalised manner.

In recent years, cinema operators have been experimenting with innovative and creative solutions both inside and outside of the screening room to deliver audiences the most engaging, diverse and immersive experience possible. These efforts help ensure that audiences continue to attach great value to seeing films together in cinemas and are ready to reward creativity as well as the investments made into providing exclusive, state-of-the-art audiovisual experiences.

Industry collaboration

Cinemas offer their audiences unique cultural and social experiences, at the same time allowing films to truly do justice to their director's vision and, through their exclusive nature, creating unparalleled excitement around their release.

This fair and transparent business model of longstanding and proven benefit ensures that the film and cinema sector continues to respond to evolving audience tastes and preferences.

UNIC EXPERT GROUPS

UNIC Technology Group

The UNIC Technology Group is composed of senior cinema technology executives from more than 20 member territories. As continuous innovation and change are today central elements of the cinema business, the Group's main objective is to monitor and evaluate technology trends while at the same time ensuring interoperability and access to films for all types of cinemas.

UNIC Marketing Group

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

UNIC Retail Group

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

VOD platforms are asserting themselves as major players in the film industry. Bringing renewed competition to the marketplace, Walt Disney Studios announced this year the launch of its own streaming platform, Disney+, while NBCUniversal, WarnerMedia and Apple are in the process of developing their own streaming services – all of which will be competing to attract the most subscribers and the best content. In addition, Netflix has joined the Motion Picture Association of America (MPAA), alongside the major US film studios.

Cinema and streaming can not only co-exist but can further complement each other. Many of the most frequent cinema-goers are also significant consumers of films online. Furthermore, cinema operators welcome anyone who brings quality film content to their screens, as proven by the hundreds of new films being released every year in cinemas throughout Europe.

The cinema exhibition sector firmly believes that the interests of both the audience and the wider film industry itself are best served by the existence of a clear and sustainable "window" between the release of films in cinema theatres and on other platforms. This system is both a reflection of and an engine for Europe's rich cultural diversity and allows the industry to tailor content to a range of local audiences, with inherently unique tastes and preferences.

Ultimately, meaningful theatrical exclusivity creates value, which in turn enables guests to enjoy films on the Big Screen – as originally intended by their directors – and helps maximise their social reach and financial returns, to the benefit of the industry and cinema-lovers alike. Shorter releases – or no windows at all, sequential or otherwise – will ultimately lead to less choice across all platforms.

Audiences have always sought diversity – of content as much as of experience. Preserving their ability to choose can only strengthen the sector and encourage European creators to experiment and deliver content of unparalleled quality. Cinemas provide windows into the lives of others through the stories they showcase and enable audience access to a vast range of top-quality films, as well as offering a shared out-of-home experience. The unique relationship between cinemas and their community is one that is both intimate and reciprocal and it would be somewhat short-sighted to destroy the principles that make this possible for the sake of immediate, individual and at-home consumption of content.

Global Cinema Federation

In June 2017, the World's leading cinema operators announced the establishment of the Global Cinema Federation, a worldwide grouping intended to represent cinema exhibition's global interests. Operators involved recognise the extent to which the business opportunities and policy challenges they face are shared by counterparts across territories. To address these and raise the profile of cinema with global regulatory bodies and industry partners, eleven leading cinema operators and the two most internationally-active trade bodies have come together to found the Global Cinema Federation, a federation of interests intended to inform, educate and advocate on behalf of the sector worldwide.

GLOBALCINEMAFEDERATION.ORG

Tarp pilkų debesų, Lithuania (2018), Acme Film

This is precisely why, when it comes to the more specific issue of festival selections, we believe that given their position as key generators of awareness and prestige, leading film festivals should only consider films that receive a full theatrical release. The inclusion of films in their official selection that are within everyone's reach and not just that of streaming platform subscribers would benefit the audience as a whole. Should films be available solely on these platforms or receive only a limited "technical" release in another window – yet still benefit from festival selection as a marketing tool in addition to their considerable resources – most of their potential audience would be denied access to a wealth of great content.

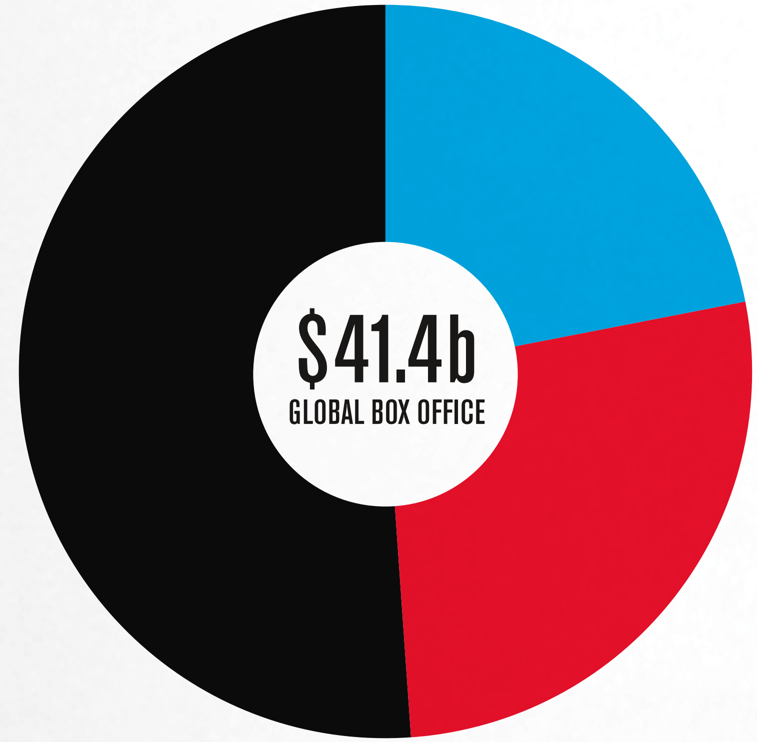
As proven time and time again, cinema remains the prime space to showcase quality films – programmed by true film-lovers, cinema operators themselves – and create memories that last long after the credits roll. We trust that colleagues from the film value-chain recognise the value of exclusive theatrical windows and their integral role in providing over a billion cinema-goers across Europe with the opportunity and means to see hundreds of films of all genres, year after year.

Global trends

Reflecting the wider audiovisual sector itself, cinema has evolved into an increasingly global business. While Europe remains a key building block of the global film industry, accounting for almost a quarter of total box office revenues, growing admissions around the World have redefined our historic conception of the film business. Countries such as Mexico, Brazil, Nigeria, Indonesia, Vietnam, South Korea and in particular China are today making headlines not only in terms of audience growth, but also technical developments and innovative marketing approaches.

Consolidation is a prime illustration of such globalisation, as we continue to witness the development of a growing number of international cinema groups that benefit from increased efficiencies and economies of scope and scale. However, the existence of these international groups has not hindered the continued existence of a large tier of highly successful independent and local cinemas in many territories, particularly in Europe.

This trend has also affected other strands of the cinema industry, most notably in distribution with Walt Disney Studios' acquisition of 20th Century Fox – a merger recently approved by the European Commission. This development is certainly a game-changer for the entire media landscape, as the combined market share of both studios will potentially provide Disney with significant additional bargaining power in negotiations with exhibitors.



EUROPEAN BOX OFFICE VS. B.O. IN THE US AND THE REST OF THE WORLD IN 2018

EUROPE 22%
US 27%
REST OF THE WORLD 51%

SCREENS GLOBALLY IN 2018

188,091

Source: IHS Markit

The increasingly global nature of the cinema industry has overarching effects on a vast range of other business opportunities and policy challenges – including international trade, piracy, theatrical exclusivity and accessibility – that are of relevance to cinema operators worldwide. Understanding these global trends while at the same time developing local business strategies has become one of the greatest challenges for our sector today and UNIC will support European cinema operators in this endeavour. In collaboration with local bodies, we will continue to advocate for the support of local production and distribution activities with the objective of developing and sustaining a diverse and competitive cinema ecosystem throughout Europe.

Innovation and diversity

To respond to this international and interconnected landscape, European cinema operators have been proactively experimenting and innovating, adapting their offer to the changing needs and preferences of their audiences.

Recent box office successes in Europe and around the World over the last 12 months have once again highlighted the value of diversity when it comes to content. With the help of digital technology, cinema operators have been programming an unparalleled offer of international, European and local films – not to mention other types of content, such as screenings of live events and video game competitions. The role of cinemas in increasing awareness of, and providing access to, a curated selection of these titles is essential in order to maintain diverse offers and investment in local production.

It has become even more crucial for the sector to understand its audiences and their expectations. In order to make the cinema offer more-fine grained and personalised, cinema operators delve into the use of data analytics in close collaboration with partners from the industry. Through employing innovative marketing tools and in partnership with some of the leading companies in the digital world, exhibitors have been able to engage with their customers long before – and after – their visit to the cinema.

Cinemas continue to reinvent themselves and deliver state-of-the-art experiences. They invest massively in innovation – both inside and outside of the screening room – to offer the very best “Big Screen” experience and customer journey to cinema-goers in theatres large and small. From Premium Formats to moving seats, virtual reality arcades to laser projection, cinema-goers can today choose between a vast range of cutting-edge and ever more immersive experiences. Furthermore, the sector continues to improve access to cinema for all, as digitisation has facilitated the greater use of subtitling and audio-description technologies for deaf and visually-impaired customers inside the screening room.

Installed in cinemas worldwide in 2018:

27 CINEMA LED DISPLAYS

1,696 4D AND IMMERSIVE MOTION SEATING SYSTEMS

3,651 PREMIUM LARGE SCREENS

6,000 IMMERSIVE SOUND INSTALLATIONS

Source: IHS Markit

EUROPE 29.4 %
US 63.2 %
EU INCLUDING US 5.4 %
REST OF THE WORLD 2.1 %

EU MARKET SHARE OF FILMS
IN CINEMAS IN 2018 (BY COUNTRY OF ORIGIN)*

* Source: European Audiovisual Observatory

NUMBER OF FILMS SCREENED IN
EUROPEAN CINEMAS HAS ALMOST DOUBLED
IN PAST 15 YEARS (2003–2018)

GERMANY +60 %
POLAND +102 %
UK +112 %
ESTONIA +175 %

The cinema offer has never been as diverse, dynamic and flexible as it is today, catering to changing and increasingly fragmented preferences. The future growth and sustainability of the industry depends on the ability of cinemas and their partners in film distribution to attract, retain and grow attendance amongst all audience groups, which can only be achieved through delivering a broad range of high-quality content to the Big Screen.

Achieving gender balance

In many UNIC territories, women make up over half of the cinema audience, yet are not equally represented in the boardroom. Although limited data is available, estimates suggest that women are underrepresented at almost all leadership levels in the European cinema industry.

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

Mentoring scheme

In June 2017, UNIC launched its Women's Cinema Leadership Programme – a ground-breaking mentoring scheme for women in cinema exhibition – aiming to provide an opportunity for talented women from the sector to receive one-to-one career advice, network and learn from outstanding women executives across the cinema landscape. The initiative was warmly welcomed by the industry and has proved to be a great success as it entered its third edition involving new mentors and mentees in 2019.

UNIC WOMEN'S CINEMA LEADERSHIP PROGRAMME

The key long-term objective is to broaden and deepen the talent pool for leadership in the sector and to further raise business awareness around the importance of more gender-balanced leadership.

UNIC will continue to raise awareness of these issues and encourage the industry to redouble its efforts to encourage and empower emerging female professionals.

UNIC also believes that it is equally important to bring the industry together more frequently to discuss how we can stimulate change. This is why in 2017 UNIC launched the UNIC's Women's Cinema Leadership Programme, of which it has since rolled out three editions to provide "up and coming" female cinema professionals with a unique opportunity to receive one-to-one career advice and guidance from a senior female industry executive recognised for her leadership and business success across the wider cinema landscape. UNIC is also involved with a number of European Commission projects dedicated to gender balance in the industry.

Looking ahead, in 2019 UNIC will also welcome a new European Parliament, a new European Commission and a whole new set of priorities which will help define our work for the next five years. We are eager to share our knowledge of the cinema industry, how it operates and what could potentially affect it – positively or negatively – with policy-makers, and are confident that together we can safeguard the well-being of our sector.

CineEurope

Official Convention of the International Union of Cinemas

17–20 June 2019
22–25 June 2020

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

Kler, Poland (2018), Kino Swiat

Policy update

UNIC's principal objective is to represent the interests of cinema operators and their national associations in discussions with policy-makers and to provide support to its members across Europe.

The association engages both with the European institutions and the industry to provide a strong, unified voice for cinema exhibition. Through regular meetings with high-level policy-makers (both on specific policy issues and more generally to present our sector), organising events, participating in seminars, panels and conferences (both policy and industry-led) and producing publications, UNIC strives to convey the social, economic and cultural relevance of cinema-going, along with the industry perspective on key policy issues.

A further key objective is to strengthen UNIC's relations with policy-makers and industry representatives in all EU Member States. More specifically, establishing stronger relationships with national associations, operators and informal cinema networks in Central and Eastern Europe is a key priority, given UNIC's relative lack of representation in certain territories and the influence the region has in shaping EU decisions. This of course goes hand-in-hand with the need for even closer collaboration with all film and cinema organisations based in Brussels.

On occasion, UNIC engages with national governments and regulators to ensure that cinemas are placed at the heart of national growth strategies for film and take the right approach to culture and cinema.

2019 began with all eyes turning towards the European elections. UNIC started raising awareness of its key messages concerning legislation affecting the sector and the significant cultural, social and economic contributions cinemas make in discussions with representatives from all three EU institutions early on, with a specific focus on incoming MEPs and Commission officials.

Looking back, the 2014-2019 mandate was certainly a busy period and one that challenged the key principles on which our industry relies, such as windows, the territoriality of copyright and contractual freedom. A high number of proposals put on the table tried to weaken these cornerstones, including day-and-date release projects, cross-border access to content and so on.

The industry experienced some success (the exclusion of audiovisual services from the Regulation on Geo-blocking and the new Article 13 of the Audiovisual Media Services Directive) and UNIC is currently monitoring Member State implementation on a number of policies. The Creative Europe MEDIA Programme has also been a priority for UNIC, in terms of ensuring that the audiovisual sector could build on its already sizeable achievements on both a European and global scale but also to cement the crucial impact of EU legislation in allowing cinemas and the wider European audiovisual industry to flourish regardless of the challenges they face.

Cannes and our collaboration with the European Film Contest

UNIC is a supporter of the EU Film Contest, a competition organised by the Creative Europe MEDIA Programme to promote the cultural diversity of European film to young audiences in an accessible manner. The 10 winners were invited to Cannes to have a behind-the-scenes look at the festival and the wider European film industry and met with representatives from cinema exhibition.

UNIC film premières

UNIC – in collaboration with European producers and distributors – organises a programme of exclusive film premières dedicated to EU policy-makers and cinema lovers. This allows us to share our passion for the Big Screen as well as promoting the beautiful storytelling of European films that also carry a strong social message.

On a positive note regarding the Satellite and Cable Directive, the audiovisual industry managed to reduce the scope to a minimum. However, in the meantime the recent commitments offered by a number of Hollywood studios and Sky on the Pay-TV case and the Commission's consequent acceptance – preceded by the dismissal of a court case in which Canal+ questioned the validity of the commitments – have sent a mixed message to the industry.

On copyright, after a positive signal sent by the European Commission on the inclusion of a new Article 17 in the proposed revised Directive, we unfortunately witnessed a complete weakening of the text during negotiations in the Parliament and Council, which led to a final Directive that is far from satisfactory and of which UNIC will closely monitor transposition and implementation. From an enforcement point of view, and even though the European Commission and the European Parliament moved towards a position asking for more responsibility from online platforms, it would be a fair assessment to say that very little was done due to most of the proposals being non-legally binding.

Moving on to environmental issues, UNIC followed the swift negotiation and adoption of a Directive on the reduction of the impact of certain plastic products on the environment, which includes bans and reductions of the top ten plastic items most commonly found in plastic litter on European beaches – some of which, including plastic straws, feature prominently in cinema concession sales. UNIC therefore plans to monitor the transposition of the Directive at national level and provide research and useful information to its members in this transitional period.

At the time of publication, a new European Parliament will have been elected and a new Commission will be on its way, both of which will help shape the association's work for the years to come. It will certainly be interesting to see if the new Commission will pursue the Digital Market Strategy with the same zeal as its predecessor, or whether it will be more aware of the potentially negative impacts that any attempts towards enabling cross-border access could have on exclusivity, the theatrical window and – more broadly – the health of the entire European film sector.

Perhaps the most pertinent question is: what will future policy bring? It is of course difficult to say, as each new Parliament and each new Commission enters into office with a new set of priorities and issues that they want to tackle during their five year mandate, in addition to the ongoing implementation and transposition of a number of recent policies.

The Geo-blocking Regulation – which so far excludes audiovisual services – will be reviewed in 2020 with a view to possibly expand its scope. The cultural and creative sectors have already engaged in discussions on the matter to ensure that – especially for audiovisual content – the unique nature of the sector is understood and it therefore remains excluded from the scope.

On portability – the Regulation which ensures that users who subscribe to watch films in their home country can access them when temporarily travelling in another Member State –, a review of the implementation is scheduled for 2021. The objective of the audiovisual sector as a whole will be to fight any attempts to extend the scope of the Regulation and avoid pure and simple cross-border access to content.

EU Outreach days

Members of the European Parliament and Commission officials value insights from and exchanges with senior executives from the European cinema industry to develop solid policies for the wider film sector. UNIC therefore organises EU outreach days, both for UNIC member associations and CEOs of key European cinema chains.

European Film Forum at CineEurope

The European Film Forum is a platform launched in 2015 to create structured dialogue between policy-makers and the audiovisual sector. Although policies regarding audiovisual works rely mostly on national laws, the EU can support the industry through financing programs. UNIC is a co-organiser of the European Film Forum session taking place in Barcelona at CineEurope. In 2019, the European Commission was also present on the CineEurope trade show floor, where it showcased a broad range of innovative start-ups from the cinema sector.

Le Grand Bain, France (2018), StudioCanal

We will also monitor the implementation of the new Copyright Directive extremely closely to see how its Article 17 will be interpreted at Member State level and which consequences it will have from an enforcement perspective. The sector will also keep a close eye on the upcoming decision from the European Court of Justice on the liability of YouTube when it comes to the infringement of Intellectual Property Rights. The case, involving a music producer seeking compensation from both the uploader of his work and the platform itself, could provide the industry with a useful tool to fight illegal content.

Member States now have until the end of 2020 to implement the new changes included in the Audiovisual Media Services Directive (AVMSD) and, by December 2022 at the latest, the European Commission will have to submit a report on its application. The new Article 13.2, supported by UNIC, enables Member States to request financial contributions from media service providers to their national funds, even if located in other Member States.

UNIC will also follow the implementation of the Satellite and Cable Directive at national level. Whilst extending the time limit of the review clause to 6 years was certainly a positive step, the implication that the scope of the Directive will be re-addressed does raise a number of concerns.

In addition, UNIC will also monitor the adoption of the final text for the new Creative Europe MEDIA Programme, hoping that more projects dedicated to cinemas will be funded and that the Commission will avoid efforts towards day-and-date releases.

These upcoming milestones do not include all of the new proposals yet to be tabled and we very much look forward to the challenges that will accompany the European Commission's new strategy and the European Parliament's new priorities.

Cinema – along with the arts and cultural and creative sectors in general – can play a key role in re-establishing a positive and forward-looking narrative for the European project, at the same time strengthening cultural diversity, social cohesion and economic development across all Member States.

Policy partners

UNIC manages the exhibition sector's relations with the European Commission, the European Parliament and the Council of the European Union. It also represents cinemas' interests when dealing with other international bodies. The association is a member of several coalitions and industry associations. Please find below a list of our main policy partners.

Creativity Works!

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

AV Coalition

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

MEDIA Coalition

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

CICI

UNIC is member of CICI, a group of major companies and trade bodies from across the creative industries.

Netopia – Forum for the Digital Society

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

Europa Cinemas

Europa Cinemas is the network of cinemas focusing on European non-national films, uniting more than 2,700 screens across 34 MEDIA countries. Each year they recognise stand-out innovative projects and approaches from their members with the Innovation Prize, with support from Creative Europe MEDIA.

CICAE

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

EAO

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

EUIPO

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

WIPO

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

Key areas of interest

- DIRECTIVE LAYING DOWN RULES ON THE EXERCISE OF COPYRIGHT AND RELATED RIGHTS APPLICABLE TO CERTAIN ONLINE TRANSMISSIONS OF BROADCASTING ORGANISATIONS AND RETRANSMISSIONS OF TELEVISION AND RADIO PROGRAMMES
- DIRECTIVE ON COPYRIGHT IN THE DIGITAL SINGLE MARKET
- DIRECTIVE ON THE REDUCTION OF THE IMPACT OF CERTAIN PLASTIC PRODUCTS ON THE ENVIRONMENT
- REGULATION ON ADDRESSING UNJUSTI-FIED GEO-BLOCKING
- RESPONSIBILITY OF ONLINE PLATFORMS
- REGULATION ON CROSS-BORDER PORTA-BILITY OF ONLINE CONTENT
- AUDIOVISUAL MEDIA SERVICES DIRECTIVE
- REGULATION ESTABLISHING HORIZON EUROPE
- COPYRIGHT ENFORCEMENT
- REGULATION ESTABLISHING THE CREATIVE EUROPE PROGRAMME/MEDIA PROGRAMME
- DIRECTIVE ON CERTAIN ASPECTS CONCERNING CONTRACTS FOR THE SUPPLY OF DIGITAL CONTENT AND DIGITAL SERVICES
- TRANSATLANTIC TRADE & INVESTMENT PARTNERSHIP (TTIP)

Ilosia aikoja, Mielensäpahoittaja, Finland (2018), Nordisk Film

Conclusion

As European cinema operators continue to attract and amaze audiences across the region, UNIC's role is to ensure that the foundations of this thriving business are protected and strengthened, to the benefit of the wider European film sector.

In the coming months, our team in Brussels will focus its efforts on meeting and engaging in dialogue with the European Parliament and the Commission. We will at the same time work closely with our industry and association partners at Member State level to fully engage with UNIC's membership and better understand territory-specific legislative environments.

Together, we hope to continue to enable cinema operators to provide audiences with unparalleled and diverse film-viewing experiences, while at the same time promoting a fair, competitive and culturally diverse cinema ecosystem.

Like millions of cinema-goers across Europe, we love the Big Screen and very much look forward to a bright future for our industry.

Cinemas need your support in:

Recognising and supporting the value of the key principles of theatrical exclusivity, territoriality of copyright and contractual freedom;

Helping European cinemas bolster their vital role at both the heart of the European film value-chain and of wider society; and

Ensuring that the industry is invited to the negotiation table when legislation and practices that directly impact the sector are being discussed.

Our key positions:

Preserving theatrical exclusivity, territoriality of copyright and contractual freedom;

Rewarding creativity and investment into cinemas, particularly in tackling piracy;

Supporting digital opportunities and pushing the boundaries of innovation;

Allowing culture to flourish, boosting business and establishing communities;

Ensuring accessibility and that all film-lovers can enjoy the Big Screen experience;

Ensuring fair and proportionate taxation that reflects cultural, social and economic value.

Južni vetar, Serbia (2018), Archangel Studios

Members and partners

Association members

AUSTRIA
Fachverband der Kino-,
Kultur und Vergnügungsbetriebe

BELGIUM
Fédération des Cinemas de Belgique
Federatie van Cinemas van België

DENMARK
Danske Biografer

FINLAND
Suomen Filmikamari

FRANCE
Fédération Nationale
des Cinémas Français

GERMANY
HDF KINO e.V.

ISRAEL
Cinema Industry Association

ITALY
Associazione Nazionale Esercenti Cinema
Associazione Nazionale Esercenti Multiplex

NETHERLANDS
Nederlandse Vereniging van
Bioscoopexploitanten

NORWAY
Film & Kino

POLAND
Polish Exhibitor's Association

RUSSIA
Russian Association of
Cinema Owners

SPAIN
Federación de Cines de España

SWEDEN
Sveriges Biografägareförbund

SWITZERLAND
SKV – ACS Association
Cinématographique Suisse

TURKEY
Turkish Cinema
Operators' Association

UKRAINE
United Ukrainian Cinemas

UK
UK Cinema Association

Operator members

CINAMON
Estonia, Latvia, Lithuania, Finland

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

CINEMAX
Romania, Slovakia

CINEPLEX
Germany

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

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

KARO FILM
Russia

K CINEPLEX
Cyprus

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

KINOPOLIS
Germany

KINO ARENA
Bulgaria

MARS ENTERTAINMENT (CJ-CGV GROUP)
Turkey

MOVIES@CINEMAS
Ireland

NORDISK FILM BIOGRAFER
Denmark, Norway

ODEON & UCI CINEMAS (AMC GROUP)
Austria, Estonia, Finland, Germany, Italy, Ireland, Latvia, Lithuania, Norway, Portugal, Spain, Sweden, United Kingdom

OMNIPLEX CINEMAS
Ireland, Northern Ireland

SVENSKA BIO
Denmark, Finland, Sweden

UGC
Belgium, France

VUE INTERNATIONAL
Denmark, Germany, Ireland, Italy, Latvia, Lithuania, Poland, United Kingdom

YELMO CINES (CINÉPOLIS GROUP)
Spain

Partners of European Cinema Exhibition Programme

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

Should you wish to join UNIC, please get in touch via:

communications@unic-cinemas.org

Early Man, UK (2018), StudioCanal

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*Board elections will be held in June 2019.

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