ANN REUAL PORT 2022

UNIC

UNION INTERNATIONALE DES CINÉMAS
INTERNATIONAL UNION OF CINEMAS

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WELCOME
& EXECUTIVE SUMMARY

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

Welcome to this

Our 2022 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. 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.

Following a very challenging 2020, last year's strong performance by the European cinema sector sent a clear signal that audiences were eager to return to the Big Screen – particularly where a diverse range of new films was available – and that cinemas were more than ready to re-take their position at the heart of local communities.

European cinema admissions increased during the year by an estimated 36.4 per cent, with 590 million visits across the region. Box office reached close to € 3.7 billion, an increase of 40.8 per cent on the previous year. At EU level – including the UK – almost 400 million tickets were sold, worth an estimated € 3 billion. All this when most screens across the region were shut for the first six months of the year and operating for the remainder with limited occupancy and/or additional restrictions.

The relevance of local European releases was never so clear as during this challenging period. Indeed, it is only with the support of local as well as international distributors that cinema operators will be able to confidently recover from this period of unprecedented challenge. A strong and diverse film slate remains key to attracting audiences back to the Big Screen.

Above all, the past two years have proven beyond doubt the resilience of the theatrical model, whereby cinemas enjoy a period of exclusivity for each title before it is made available on other formats, and the inherent dangers of day-and-date and other early in-home release models, all of which put valuable film titles at risk from cannibalisation of revenues and film theft.

These remain challenging times for the European cinema sector. As a consequence, all industry stakeholders and policy-makers need to continue to pursue efforts aimed at ensuring the survival of local cinemas, whatever their size and location.

Of course, for some European territories the challenges are not just economic, and all UNIC members are horrified by the current terrible experiences of our friends and colleagues in Ukraine. We stand ready to do all we can when required to support the rebuilding of Ukrainian cinemas so that their audiences can once again enjoy the inclusive Big Screen experience.

2022 will be a pivotal year for the industry. Leading industry analysts Gower Street Analytics have tentatively forecast 48 per cent growth in global box office compared to the previous year. UNIC members are confident that the cinema industry will come back stronger from this crisis, and that as before we will continue to enjoy films together, on the Big Screen.

We very much hope you will find this report to be of interest and look forward to seeing you soon.

€3.7 BILLION AT THE BOX OFFICE
ACROSS UNIC TERRITORIES IN 2021

-70.4% AT THE BOX OFFICE FROM 2019
ACROSS UNIC TERRITORIES IN 2020

+42.4% AT THE BOX OFFICE FROM 2020
ACROSS UNIC TERRITORIES IN 2021

+62% PREDICTED GROWTH FROM 2021
AT THE EMEA BOX OFFICE IN 2022*

*GOWER STREET ANALYTICS APRIL 2022 FORECAST

43,000 SCREENS
ACROSS UNIC TERRITORIES IN 2021

39 TERRITORIES
REPRESENTED BY UNIC

CINEMA ADMISSIONS
ACROSS EUROPE 2000–2021
(MILLIONS)

+34% GROWTH BETWEEN 2000 AND 2019

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

SOURCE: UNIC, EUROPEAN AUDIOVISUAL OBSERVATORY AND MEDIA SALLES DATA

CINEMA-GOING IN 2021

CINEMA-GOING IN EUROPE IN 2021

FACTS AND FIGURES

120 DAYS OF CLOSURE
ACROSS THE EU
IN 2021 ON AVERAGE

178 DAYS IN LATVIA
176 DAYS IN SLOVAKIA
174 DAYS IN THE NETHERLANDS
163 DAYS IN BELGIUM

2021 was another challenging year for the European cinema industry. On average, cinemas across the region were fully closed for at least 100 days, rising to 120 days at EU level. It was not until early July 2021 that over 80 per cent of the European market was operating again. Some countries such as Latvia (178 days of closure), Slovakia (176 days), Belgium (163 days) and France (138 days) experienced particularly long periods of shutdown. Occupancy limits, COVID-19 certificates and related restrictions were broadly enforced in Europe until early 2022, further impacting the pace of the recovery.

Moreover, as was the case in 2020, there were significantly fewer films titles available to cinemas throughout the year. There were approximately 270 new cinema releases in 2021 on average across Europe, compared to 250 in 2020 and 480 in 2019. Major release territories such as the UK (from 896 new releases in 2019 to 503 in 2021), France (from 746 to 455), Germany (from 606 to 429) and Italy (from 495 to 353) in particular had to adapt to significant reductions in the number of available titles. Given that a strong and diverse film slate is key to attracting audiences to the Big Screen, this inevitably had a major impact.

€3.7 BILLION AT THE BOX OFFICE
IN EUROPE IN 2021
+40.8% INCREASE ON 2020

589 MILLION ADMISSIONS
IN EUROPE IN 2021
+36.4% INCREASE ON 2020

In spite of these challenges, European cinema admissions increased by an estimated 36.4 per cent in 2021, with almost 590 million visits across the region. Box office reached € 3.7 billion, an increase of 40.8 per cent on the previous year. At EU level – including the UK – close to 400 million tickets were sold in cinemas, worth an estimated € 3 billion at the box office – an increase of 31.1 per cent and 38.4 per cent respectively. These positive results amply illustrate the industry's resilience and the eagerness of European audiences to return to the Big Screen.

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

The impact of the COVID-19 pandemic on the European cinema industry remains significant. Compared to results for Europe in 2019, a particularly successful year for the sector, 2021 admissions were still lagging 56.3 per cent behind, while box office was down by an estimated 57.3 per cent. At EU level, including the UK, admissions were 60.4 per cent and box office 59.1 per cent behind pre-pandemic levels.

The recovery in truth only began in the second half of the year, as cinemas re-opened and major international and European films returned to the Big Screen. Comparing results for the second half of 2019 with the same period in 2021, box office revenues for the territories where data was available were on average 34 per cent below pre-pandemic levels. Major territories such as France (-22 per cent for H2 2021 compared to H2 2019), the UK (-26 per cent) or Poland (-24.3 per cent) serve to demonstrate the strength of the sector's recovery towards the end of the year.

As has always been the case, there were significant differences in box office performance across Europe. While most territories enjoyed double-digit growth, a few experienced smaller gains or even reductions in admissions and box office in 2021, usually related to particular local circumstances.

In Denmark, where box office grew by only 4.4 per cent in 2021, cinemas were closed for almost 140 days in 2021 compared to 85 in 2020. Despite this, the territory, which experienced the smallest drop in box office of any European country in 2020 at only 42.4 per cent, effectively managed to do better in a more dire situation, bolstered by the highly successful local titles *Ternet Ninja 2* and *Margrete den Første*.

— HYTTI NRO 6 FINLAND (2021) AAMU FILM COMPANY, AMRION, ACHTUNG PANDA! MEDIA, CTB FILM COMPANY

LOCAL DIFFERENCES

GERMANY AND THE UK

Cinemas across Europe were confronted by varying and constantly evolving requirements, with different re-opening dates depending on local factors. The two examples below serve to illustrate these broad differences and their impact on the recovery pace.

In Germany, cinemas were closed on average for 180 days in 2021. Because COVID-19 safety guidelines and related rules were enforced at Land level, there were 16 different sets of rules, with different re-opening timelines. The second, nation-wide lock-down effectively closed all German cinemas from 2 November 2020. Länder started announcing different re-opening dates, ranging between May and July 2021, bringing confusion to the relaunch process and potentially impacting the local release calendar. As a show of unity, German exhibitors, with the support of their national association HDF-Kino, decided to all re-open on 1 July with the support of a national audience engagement campaign. A third round of closures unfortunately followed in the last two months of 2021, again with highly varying rules and timelines from one Land to another. Cinemas were progressively allowed to re-open between December and mid-January 2022, but had to adapt to a complex range of highly specific localised rules, impacting for instance the understanding of COVID-19 certificate requirements – with different obligations in terms of testing and recovery periods, audience age, etc. All of this contributed to a relatively weak box office growth in 2021 of 17.4 per cent compared to 38.4 per cent for the EU and the UK.

In the UK, cinemas were closed for approximately 140 days in 2021, with re-opening timelines and related safeguards depending on governments across England, Scotland, Wales and Northern Ireland respectively. What was to be the second and final lock-down in the country resulted in the closure of all UK cinemas between December 2020 and May 2021. All restrictions were lifted from mid-May, with COVID-19 certificates only briefly enforced in Wales but not across the rest of the country. Many restrictions were scrapped across the UK through July and August 2021, allowing cinemas to mostly operate as normal. Carried by the hugely successful release of *No Time to Die* in October, UK cinemas managed to gross over 557 million pounds / 648 million euros at the box office in 2021, a 87.7 per cent growth on 2020, attracting over 76 million visitors.

— **DIE SCHULE DER MAGISCHEN TIERE** GERMANY, AUSTRIA (2021) KORDES & KORDES FILM GMBH

In Italy, the first country to enforce a lock-down and close its cinemas in 2020, box office fell by 7.2 per cent in 2021 compared to the previous year, while admissions were down by 11.9 per cent. Cinemas were closed for approximately 60 days fewer in 2021 than in 2020, but continued to face strict restrictions throughout the year and experienced particularly weak Summer results, hampered by a slower supply of new releases than neighbouring European countries.

Across the Baltics, Latvia (-39.2 per cent box office), Estonia (-23.4 per cent box office) and Lithuania (-8.5 per cent box office) all experienced weak performances, something which could be explained by particularly long periods of closure in 2021 – 178 days in the case of Latvia – or strict restrictions – such as the 50 per cent occupancy limit, curfew and COVID-19 vaccination or recovery certificate enforced in Estonia.

In Turkey, box office fell by 5.7 per cent and admissions by 28.9 per cent in a year marked by increases in ticket price, around 180 days of closure and local production challenges which resulted in a 23 per cent market share for national titles – compared to 79.8 per cent in 2020 and 54 per cent in 2019.

Major territories like the UK (+87.7 per cent box office), France (+55.4 per cent box office), Poland (+48.6 per cent box office) or Spain (+46.1 per cent box office) enjoyed successful results in 2021, firmly establishing themselves as on the road to recovery. We also witnessed incredible growth in smaller markets such as Bosnia-Herzegovina (+224.8 per cent box office) and Serbia (+143.4 per cent box office) in the Balkans, or even more impressively in Israel, where after a year of almost complete closure, 2021 brought a massive 255.5 per cent increase in box office and 295.6 per cent in admissions.

TOP 5
EU TERRITORIES
IN TERMS OF ADMISSIONS

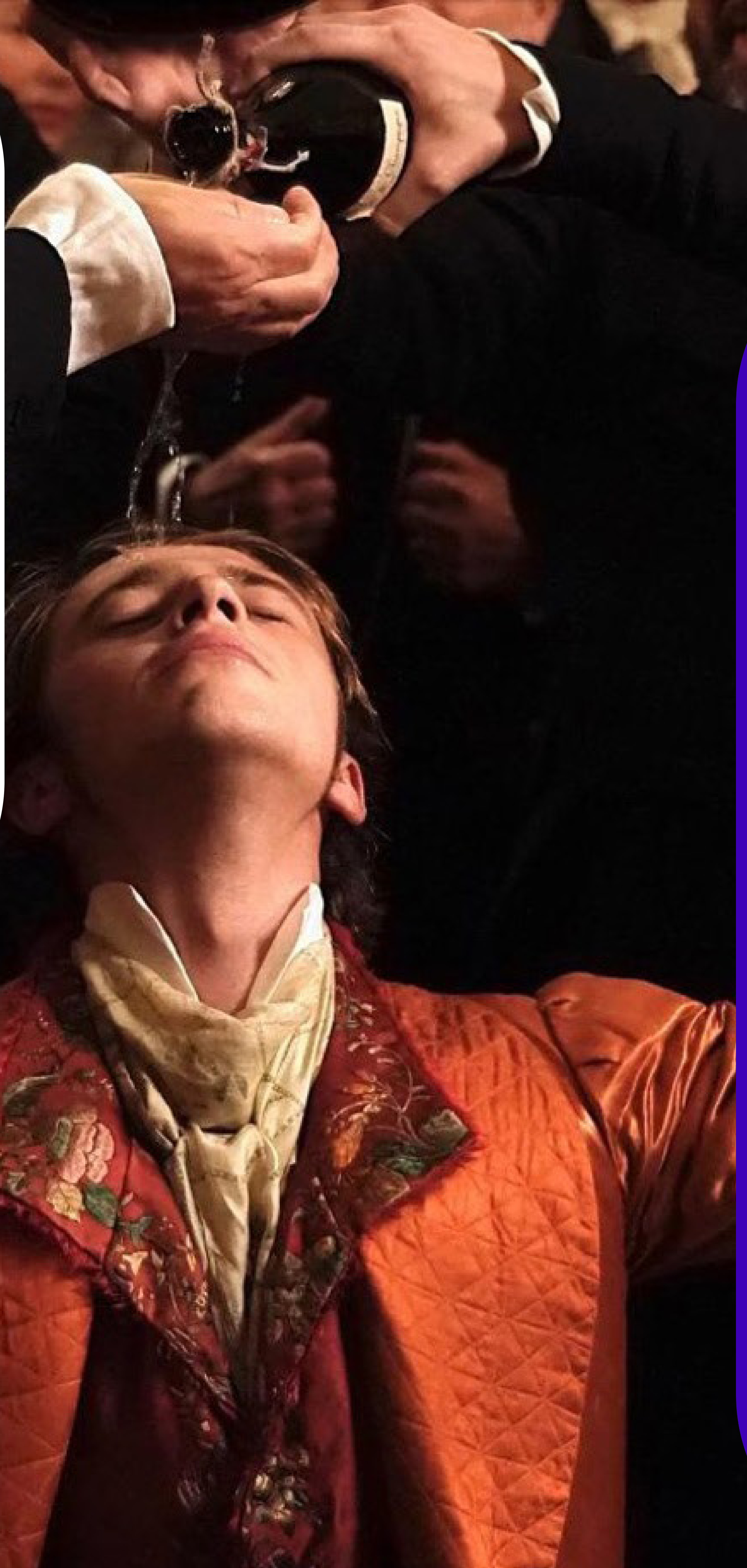
FRANCE
95.5 MILLION

UK
76.2 MILLION

GERMANY
42.1 MILLION

SPAIN
41.4 MILLION

POLAND
29.0 MILLION



— **ILLUSIONS PERDUES** FRANCE (2021) GAUMONT, CURIOSA FILMS

26.5%

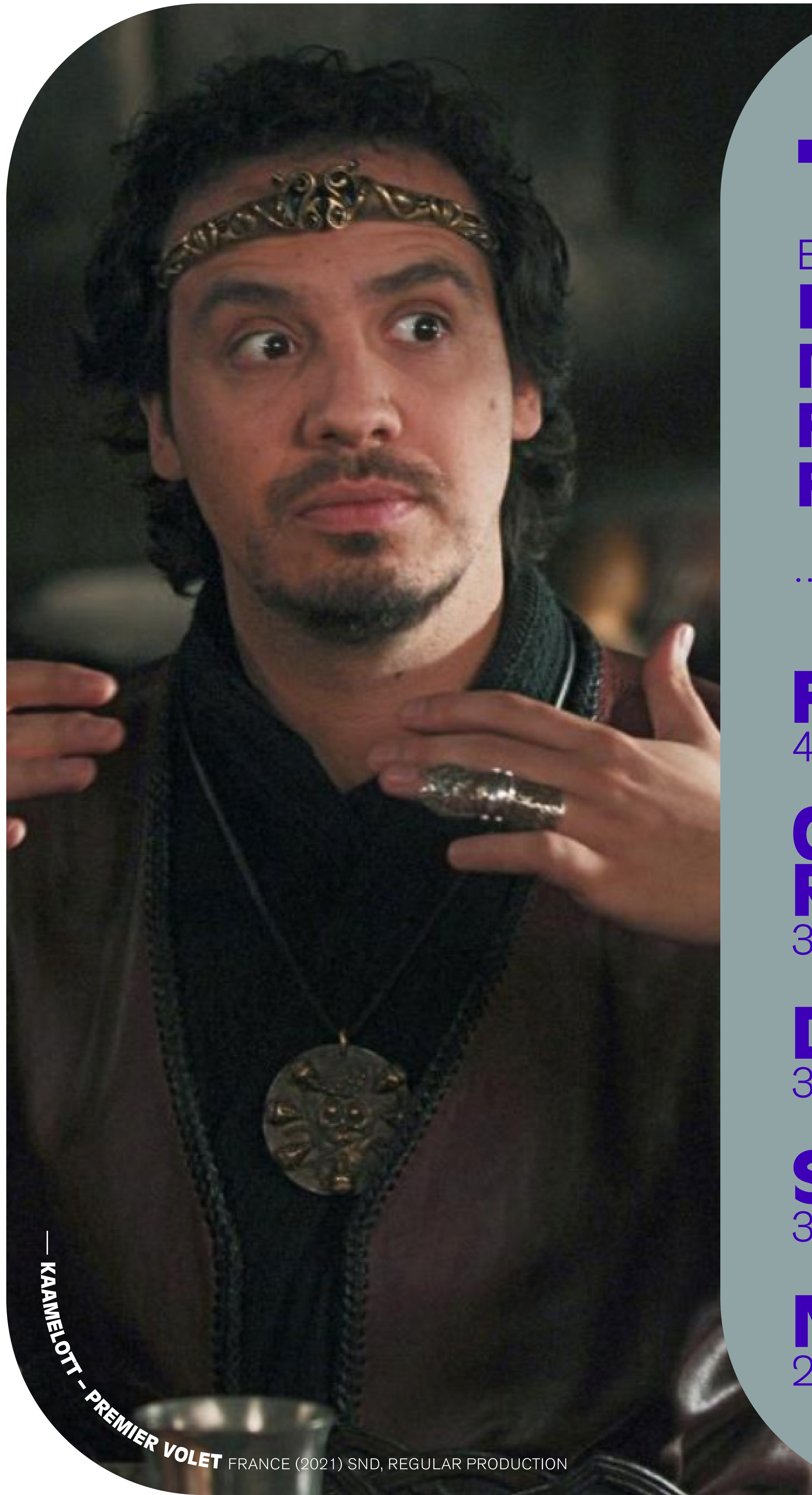
MARKET SHARE OF EUROPEAN FILMS IN 2021 IN THE EU

COMPARED TO 39.5 PER CENT IN 2020 AND 25.7 PER CENT IN 2019*

The relevance of local European releases has never been clearer than during these challenging years. Because of the staggered nature of the re-opening process at a global level, with cinemas re-opening at a different pace in Europe, Asia and North America, we again saw throughout the year a continuing postponement of major releases, in particular from the major US studios. While over 130 US titles were released on average across European markets in 2019, that figure was down to 95 in 2021.

Following 2020, where national films' market share reached record heights across the region, we experienced a return to normal in 2021 with a European films' market share of 26.5 per cent across the EU and the UK according to data from the European Audiovisual Observatory – down from 39.5 per cent in 2020. Countries such as France (40.6 per cent), the Czech Republic (38.3 per cent), Serbia (37 per cent), Denmark (37 per cent) and Norway (28.1 per cent) led the way in terms of national films' market share. Local titles fuelled the recovery in these territories and others, most impressively across the Balkans where the Serbian titles *Toma* and *Juzni Vetar 2* effectively contributed to triple digit growth in Serbia, Montenegro and Bosnia and Herzegovina.

*SOURCE: EUROPEAN AUDIOVISUAL OBSERVATORY



— KAAMELOTT – PREMIER VOLET FRANCE (2021) SND, REGULAR PRODUCTION

TOP 5

EUROPEAN TERRITORIES **IN TERMS OF MARKET SHARE FOR NATIONAL FILMS**

FRANCE
40.6 %

CZECH REPUBLIC
38.3 %

DENMARK
37%

SERBIA
37 %

NORWAY
28.1 %

TOP 5
EU TERRITORIES IN TERMS OF **BOX OFFICE RECOVERY RATE IN 2021** COMPARED TO 2019

DENMARK
-39.9%

CROATIA
-43.6%

BULGARIA
-49.7%

LUXEMBOURG
-52.2%

FRANCE/ POLAND
-53.6%

Released in January, the UK/US co-production *No Time to Die* was the leading title of 2021 in terms of admissions, with over 34 million tickets sold across the EU and the UK according to data from the European Audiovisual Observatory. Highlighting the importance of US blockbusters for the European cinema industry, the other leading films of 2021 were *Spider-Man: No Way Home*, *Dune*, *F9* and *Venom: Let There Be Carnage*. Together, these films attracted 98 million visitors in the EU and the UK, underlining the fundamental importance of new content for European audiences.

Several of these titles managed to break a number of box office records at national and international level, all the more astonishing knowing their challenging release context. In October in the UK, *No Time to Die* set a new record for the highest opening weekend for a *Bond* title and became the third highest-grossing film ever in the country. The film went on to gross $774 million globally, edging close to the top 100 most successful titles in the history of cinema. In December, *Spider-Man: No Way Home* did even better, hitting a multitude of milestones on its opening weekend, including recording the third biggest worldwide box office debut of all time and the second biggest opening of all time in the US. It grossed over $1.89 billion at the global box office, making it the sixth highest-grossing film ever.

Several films released in 2021 managed to break all-time box office records.

— **TOMA** SERBIA (2021) COBRA FILM DEPARTMENT, FILMSKI CENTAR SRBIJE, MINACORD

Even as *Spider-Man* dominated at the European box office, many local titles also performed well into the new year. In December 2021, the French comedy *Les Tuche 4* even reached the global box office top 10. Local films were also included in national top five listings at the beginning of 2022 in France, Italy, Finland, Czech Republic, Norway, Spain and Poland.

Having faced the unprecedented challenges of the COVID pandemic, 2021 saw cinemas across the globe move swiftly along the road to recovery, with all signs suggesting that 2022 will be a pivotal year for the industry. In April 2022, Gower Street Analytics forecast a tentative $8.1 billion (+62 per cent on 2021) and $31.5 billion (+48 per cent) for EMEA and global box office respectively.

These hugely impressive figures – and the predictions for 2022 – provide ample demonstration of the resilience of the cinema sector, underpinned by the insatiable public appetite for the cinema-going experience. With the cinema industry now firmly set on the path of recovery, we are confident that it will soon get back to the record-breaking results of 2019.

There is an insatiable public appetite for the cinema-going experience.

INDUSTRY MONITORING

UNIC has been closely monitoring the impact of the COVID-19 outbreak on the cinema industry across Europe from March 2020, regularly updating a publicly available research on the topic throughout the past two years. This exhaustive research includes detailed information on national closure processes, support mechanisms, measures relating to employment, taxation as well as rent and related costs. UNIC also shared information on audience engagement initiatives during (as exhibitors engaged with their audiences even during lock-downs) as well as after closure, including large scale re-opening campaigns. In addition, UNIC made available a document listing EU financial initiatives of relevance to European cinema operators.

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

UNION INTERNATIONALE DES CINÉMAS
INTERNATIONAL UNION OF CINEMAS

CELEBRATING EUROPEAN DIVERSITY

Significantly fewer titles were available to European cinema operators in 2020 and 2021

THEATRICAL RELEASES IN EU CINEMAS

(AVERAGE ESTIMATE)

2019: 480
INCLUDING 130 US PRODUCTIONS

2020: 250
INCLUDING 80 US PRODUCTIONS

2021: 270
INCLUDING 95 US PRODUCTIONS

29

local European titles made it to the box office top five across UNIC territories in 2021

COMPARED TO 57 IN 2020 AND 24 IN 2019

DE SLAG OM DE SCHELDE THE NETHERLANDS (2020) LEVITATE FILM, CAVIAR, **LES TUCHE 4** FRANCE (2021) ESKWAD, PATHÉ FILMS, **A TODO TREN. DESTINO ASTURIAS** SPAIN (2021) ATRESMEDIA CINE, BOWFINGER INTERNATIONAL PICTURES, **TOMA** SERBIA (2021) COBRA FILM DEPARTMENT, FILMSKI CENTAR SRBIJE, MINACORD, **KAAMELOTT - PREMIER VOLET** FRANCE (2021) SND, REGULAR PRODUCTION, **EMĪLIJA. LATVIJAS PRESES KARALIENE** LATVIA (2021) MISTRUS MEDIA, **NORDSJØEN** NORWAY (2021) FANTEFILM, NORDISK FILM, **BOÎTE NOIRE** FRANCE (2021) 2425 FILMS, WY PRODUCTIONS, **ALINE** FRANCE, CANADA (2021) RECTANGLE PRODUCTIONS, GAUMONT, **MADRES PARALELAS** SPAIN (2021) EL DESEO, REMOTAMENTE FILMS AIE, **DIE SCHULE DER MAGISCHEN TIERE** GERMANY, AUSTRIA (2021) KORDES & KORDES FILM GMBH, **LE LOUP ET LE LION** FRANCE, CANADA (2021) MAI JUIN PRODUCTIONS, GALATÉE FILMS, LES PRODUCTIONS WEMATIN, STUDIOCANAL, M6 FILMS, **LAST NIGHT IN SOHO** UK (2021) FILM4 PRODUCTIONS, WORKING TITLE FILMS, COMPLETE FICTION PICTURES, **ILLUSIONS PERDUES** FRANCE (2021) GAUMONT, CURIOSA FILMS, **EIFFEL** FRANCE (2021) PATHÉ FILMS, VVZ PRODUCTION, **TERNET NINJA 2** DENMARK (2021) A. FILM, DANISH FILM INSTITUTE, LEVELK, NORDISK FILM, **DRUK** DENMARK, NETHERLANDS, SWEDEN (2020) ZENTROPA ENTERTAINMENTS, **THE FATHER** FRANCE, UK (2020) F COMME FILM, TRADEMARK FILMS, CINE@, **KAREL** CZECH REPUBLIC (2020) KAREL GOTT AGENCY, BONTONFILM, **ZATOPEK** CZECH REPUBLIC (2021) LUCKY MAN FILMS, **PRVOK, ŠAMPON, TEĪKA A KAREL** CZECH REPUBLIC (2021) BONTON FILM, **KAISERSCHMARRNDRAMA** GERMANY (2021) CONSTANTIN FILM, **JUZNI VETAR 2 - UBRZANJE** SERBIA (2021) REZIM, **ZNÁMI NEZNÁMI** CZECH REPUBLIC, SLOVAKIA (2021) ANDAL PRODUCTION, **GOLATA ISTINA ZA GRUPA ZHIGULI** BULGARIA (2021) CONCEPT STUDIO, NOEM PRODUCTION, WRITE AND PLAY, **ME CONTRO TE - IL MISTERO DELLA SCUOLA INCANTATA** ITALY (2021) COLORADO FILM PRODUCTION, **TRE NØTTER TIL ASKEPOTT** NORWAY (2021) STORM FILMS, FRILAND PRODUKSJON, **SUNE - UPPDRAG MIDSOMMAR** SWEDEN (2021) UNLIMITED STORIES

TOP 5 MOST SUCCESSFUL EUROPEAN FILMS

RELEASED DURING RE-OPENING PERIODS IN 2021 IN THE EU AND UK (IN MILLION ADMISSIONS)*

1

KAAMELOTT – PREMIER VOLET
FRANCE / **2.8M**

2

THE FATHER
UK & FRANCE / **2.4 M**

3

BAC NORD
FRANCE / **2.2M**

4

DRUK
DENMARK, SWEDEN & THE NETHERLANDS / **2.0M**

5

LES TUCHE 4
FRANCE / **2.0M**

*SOURCE: EUROPEAN AUDIOVISUAL OBSERVATORY AND COMSCORE

IMAGES SOURCE (LEFT TO RIGHT, TOP TO BOTTOM): **KAAMELOTT - PREMIER VOLET** FRANCE (2021) SND, REGULAR PRODUCTION, **THE FATHER** FRANCE, UK (2020) F COMME FILM, TRADEMARK FILMS, CINE@, **BAC NORD**FRANCE (2021) CHI-FOU-MI PRODUCTIONS, FRANCE 2 CINÉMA, STUDIOCANAL, **DRUK** DENMARK, NETHERLANDS, SWEDEN (2020) ZENTROPA ENTERTAINMENTS, **LES TUCHE 4** FRANCE (2021) ESKWAD, PATHÉ FILMS

UNIC DIGITAL EVENTS IN 2021

Throughout 2021, UNIC continuously engaged with its membership via a series of virtual events, allowing cinema operators and industry colleagues to share learnings and best practice in the absence of physical gatherings. Amongst other events, we organised in June 2021 a virtual session focusing on the recovery of the European cinema industry, with a series of presentations and panels focusing on content, audience behaviours and future trends, as well as local re-opening stories from UNIC members. We not only focussed on the impact of COVID-19 during these sessions, for instance also organising seminars on sustainability in April 2021, focusing on the relevance of the topic for all key areas of cinema operations, from waste management to energy efficiency.

These events were only made possible thanks to the invaluable support of industry partners, in particular our colleagues at The Boxoffice Company and Celluloid Junkie, who helped us host some of these virtual reunions.

RE-OPENING PERFORMANCES IN 2021

From the moment cinemas were allowed to re-open across Europe, and in particular during the second half of 2021, we witnessed the resilience of the film sector and its capacity to adapt to challenging circumstances. As had been the case in 2020, we also saw the invaluable role of local and European productions in bolstering the recovery process and bringing admissions closer to pre-pandemic levels.

Spider-Man: No Way Home and *No Time to Die* undoubtedly dominated the European and global box office last year. Across Europe, *No Time to Die* led at the box office in 20 markets while *Spider-Man* dominated in another 10. Three other US titles – *Venom: Let There Be Carnage*; *F9*; and *House of Gucci* – managed to lead in four markets. But two local European films did manage to do even better than these giants.

— **PRVOK, ŠAMPON, TEČKA A KAREL** CZECH REPUBLIC (2021) BONTON FILM

ACCELERATED BOX OFFICE RECOVERY
IN THE SECOND HALF OF 2021

FRANCE:
-53.6 % IN 2021 FROM 2019
-22 % IN H2 2021 FROM H2 2019

POLAND:
-53.6 % IN 2021 FROM 2019
-24.3 % IN H2 2021 FROM H2 2019

GERMANY:
-63.6 % IN 2021 FROM 2019
-34.9 % IN H2 2021 FROM H2 2019

In the Balkans, the Serbian biopic *Toma* – about renowned local singer Toma Zdravkovic – was the most successful film of 2021 in Serbia, Montenegro and Bosnia and Herzegovina, repeating the success of the Serbian title *Juzni Vetar*, which had achieved the same feat in 2018 in these three countries. Its sequel *Juzni Vetar 2*, released in 2021, also ranked in the top three in these territories, as well as in neighbouring Croatia and North Macedonia.

In the Czech Republic, a country which experienced a 47 per cent growth in admissions between 2009 and 2019, the local comedy *Prvok, Šampon, Tečka a Karel* was the most successful film of 2021, marking the third year in a row that a local film had led at the Czech box office, with two other titles – *Zátopek* and *Karel* – also making it into the top five.

Several other European titles are worth highlighting, including the French productions *Kaamelott*, *BAC Nord* and *Les Tuche 4* – representing together almost 7 million admissions in 2021 according to data from the European Audiovisual Observatory. There were seven French productions or co-productions amongst the ten most successful European titles of 2021.

Also worthy of praise was the Danish, Swedish and Dutch co-production *Druk*. The film, which won Best International Feature Film at the 93rd Academy Awards, was already amongst the five most successful European titles of 2020, with over 1.04 million admissions following its release on 24 September. In 2021, it attracted an additional 1.99 million visits across 26 EU territories, further demonstrating the long-term strength and potential of the theatrical release model. Also in Denmark, the family animation *Ternet Ninja 2* attracted close to 1 million visitors and recorded the best opening weekend for a Danish film ever upon its release in August.

The Spanish title *¡A todo tren! Destino Asturias*, the German and Austrian co-production *Die Schule der magischen Tiere*, the Polish *Dziewczyny z Dubaju*, the Italian *Me contro te – Il mistero della scuola incantata,* the Norwegian *Tre Nøtter til Askepott*, the Czech and Slovak co-production *Známí neznámi* and the Dutch *Alles op tafel* – both local versions of the 2016 Italian film *Perfetti sconosciuti*, which now counts a record 21 remakes – are just other examples of successful local films that have helped attract audiences of all ages back to the Big Screen.

COMSCORE & UNIC EUROPEAN BOX OFFICE UPDATES

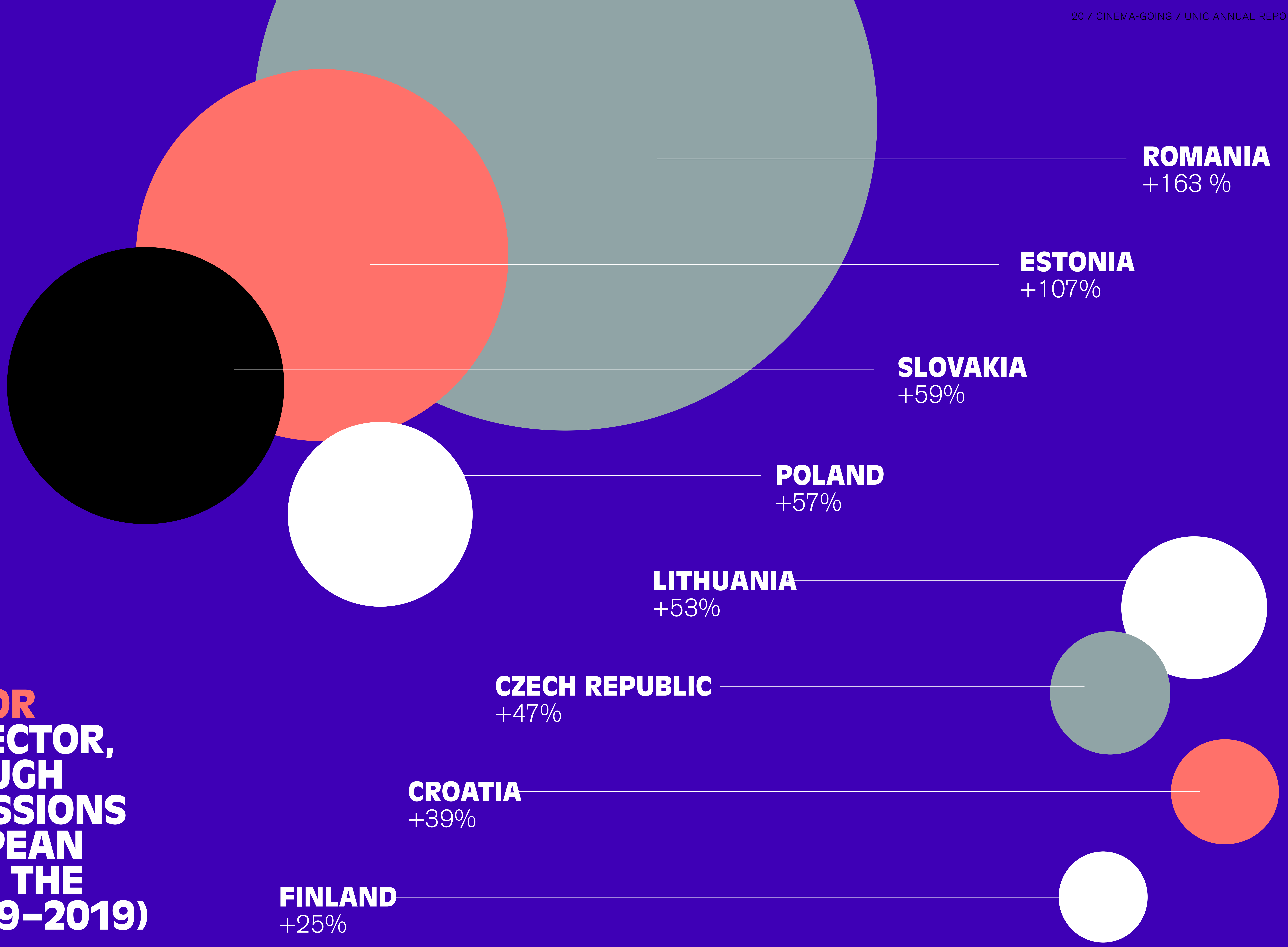
UNIC has been collaborating with our partners at Comscore, the leading industry media measurement and analytics company, to produce weekly box office analysis for UNIC members. This analysis provides a weekly overview of box office results globally and across Europe, including a box office chart for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

comscore

When I make a film, I imagine people watching it in a room with no interruptions and no other light. That affects what kind of lens I use, what kind of story I tell, what the pacing is like, the music. Also, is it a film that means something different if you see it in a room with strangers and experience it together? Is it that kind of story?"

– CHLOE ZHAO
in an interview for the British Film Institute (Guy Lodge, December 2021)

— **NOMADLAND** US (2020) COR CORDIUM PRODUCTIONS, HEAR/SAY PRODUCTIONS, HIGHWAYMAN FILMS



THERE ARE STILL OPPORTUNITIES FOR GROWTH IN THE SECTOR, AS EVIDENT THROUGH INCREASING ADMISSIONS IN SEVERAL EUROPEAN TERRITORIES OVER THE LAST DECADE (2009–2019)

CINEMA-GOING
ACROSS UNIC TERRITORIES IN 2021

COUNTRY (CURRENCY)	BOX OFFICE IN LOCAL CURRENCY (IN MILLION) 2021	2020	CHANGE FROM 2020 IN %	CHANGE FROM 2019 IN %	ADMISSIONS (IN MILLION) 2021	2020	CHANGE FROM 2020 IN %	CHANGE FROM 2019 IN %	NATIONAL FILMS' SHARE 2021	SCREENS 2021
ALBANIA (ALL)	105.0	80.7	30.2%	-70.4%	0.2	0.1	24.0%	-73.5%	9.2%	19
AUSTRIA (EUR)	52.7	34.6	52.0%	-59.3%	5.2	3.8	35.6%	-61.9%	n/a	565
BELGIUM (EUR)	70.6	45.9	54.0%	-58.7%	7.6	5.4	42.7%	-60.9%	n/a	487
BOSNIA AND HERZEGOVINA (BAM)	6.8	2.1	224.8%	-0.8%	1.1	0.4	186.4%	-14.2%	3.6%	72
BULGARIA (BGN)	24.7	12.7	94.5%	-49.7%	2.6	1.3	90.9%	-49.1%	14.2%	210
CROATIA (HRK)	88.3	44.6	98.1%	-43.6%	2.5	1.4	77.1%	-49.5%	7.2%	226
CYPRUS (EUR)	2.1	1.5	42.6%	-67.9%	0.3	0.2	44.1%	-68.6%	0.0%	39
CZECH REPUBLIC (CZK)	1,088.9	906.0	20.2%	-58.4%	7.1	6.4	11.9%	-61.0%	38.3%	566
DENMARK (DKK)	654.6	627.2	4.4%	-39.9%	6.8	7.2	-4.4%	-43.8%	37.0%	473
ESTONIA (EUR)	8.2	10.7	-23.4%	-62.3%	1.4	1.8	-23.0%	-62.4%	14.2%	89
FINLAND (EUR)	43.5	43.6	-0.3%	-54.7%	3.4	3.9	-11.7%	-59.3%	25.5%	356
FRANCE (EUR)	672.4	432.8	55.4%	-53.6%	95.5	65.3	46.2%	-55.2%	40.6%	6,193
GEORGIA (GEL)	6.3	2.3	170.8%	N/A	0.6	0.2	136.0%	n/a	1.1%	40
GERMANY (EUR)	373.2	318.0	17.4%	-63.6%	42.1	38.1	10.4%	-64.5%	21.7%	4,931
GREECE (EUR)	19.5	19.9	-2.2%	-68.1%	3.1	3.1	-2.2%	-68.1%	17.3%	547
HUNGARY (HUF)	9,706.9	6,508.4	49.1%	-56.2%	6.2	4.3	45.1%	-58.8%	9.0%	415
IRELAND (EUR)	47.2	29.9	57.6%	-59.8%	5.8	3.8	51.7%	-61.4%	1.5%	533
ISRAEL (ILS)	275.9	77.6	255.5%	-50.0%	8.4	2.1	295.6%	-51.6%	20.6%	411
ITALY (EUR)*	169.4	182.5	-7.2%	-74.6%	24.8	28.1	-11.9%	-76.2%	21.5%	3,482
LATVIA (EUR)	3.1	5.1	-39.2%	-79.3%	0.5	0.9	-44.0%	-81.5%	15.8%	69
LITHUANIA (EUR)	7.8	8.5	-8.5%	-65.5%	1.3	1.5	-12.8%	-67.7%	6.2%	71
LUXEMBOURG (EUR)	4.9	3.1	57.1%	-52.2%	0.5	0.3	43.9%	-54.7%	2.6%	37

Source: UNIC members
Complementary information from Comscore, Omdia, CH (ProCinema), 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), IT (Cinetel/SIAE), LT (Lietuviu Filmu Centras & Baltic Films Co-operation Platform), LU (Centre National de l'Audiovisuel), LV (Nacionàlais kino centrs & Baltic Films Co-operation Platform), ME (Filmski centra Crne Gore), MT (National Statistics Office), PT (Instituto do Cinema e do Audiovisual), RO (Centrul National al Cinematografiei), RU (Nevafilm Research), SK (Únia filmových distribútorov), UA (Media Resources Management), UK (British Film Institute).

CINEMA-GOING
ACROSS UNIC TERRITORIES IN 2021

COUNTRY (CURRENCY)	BOX OFFICE IN LOCAL CURRENCY (IN MILLION) 2021	2020	CHANGE FROM 2020 IN %	CHANGE FROM 2019 IN %	ADMISSIONS (IN MILLION) 2021	2020	CHANGE FROM 2020 IN %	CHANGE FROM 2020 IN %	NATIONAL FILMS' SHARE 2021	SCREENS 2021
MALTA (EUR)	2.0	1.1	82.4%	-60.3%	0.3	0.2	62.6%	-64.0%	4.4%	25
MONTENEGRO (EUR)	0.7	0.3	111.4%	-40.1%	0.2	0.1	98.1%	-40.4%	0.2%	14
NETHERLANDS (EUR)	142.0	151.6	-6.3%	-59.2%	14.2	16.8	-15.4%	-62.7%	21.6%	1,021
NORTH MACEDONIA (MKD)	41.0	24.6	67.0%	-60.0%	0.2	0.1	46.8%	-62.5%	2.0%	18
NORWAY (NOK)	678.4	557.7	21.6%	-48.0%	5.7	4.9	16.7%	-49.9%	28.1%	478
POLAND (PLN)	530.9	357.2	48.6%	-53.6%	29.0	19.7	47.2%	-52.3%	20.7%	1,511
PORTUGAL (EUR)	30.6	20.6	48.9%	-63.2%	5.5	3.8	44.1%	-64.7%	2.6%	547
ROMANIA (RON)	101.7	63.8	59.3%	-66.1%	4.7	3.1	52.5%	-67.2%	4.6%	443
RUSSIA (RUB)	40,700.0	22,900.0	77.7%	-26.6%	145.7	88.8	64.1%	-33.6%	25.0%	5,700
SERBIA (RSD)	1,489.3	611.9	143.4%	-17.9%	3.4	1.6	115.9%	-25.0%	37.0%	181
SLOVAKIA (EUR)	12.4	14.0	-11.6%	-66.9%	2.0	2.4	-13.8%	-68.8%	8.0%	259
SLOVENIA (EUR)	4.1	2.9	41.1%	-67.7%	0.7	0.5	34.4%	-69.0%	1.0%	102
SPAIN (EUR)	252.3	172.3	46.4%	-59.6%	41.4	28.6	44.7%	-60.8%	16.6%	3,563
SWEDEN (SEK)	802.5	676.3	18.7%	-57.6%	6.0	5.7	6.4%	-61.4%	11.0%	939
SWITZERLAND (CHF)	87.9	69.3	26.8%	-55.7%	5.6	4.5	23.7%	-56.7%	4.0%	605
TURKEY (TRY)	285.3	302.6	-5.7%	-70.9%	12.5	17.5	-28.9%	-79.0%	23.0%	2,200
UK (GBP)	557.0	296.8	87.7%	-55.5%	76.2	44.0	73.2%	-56.7%	4.2%	4,628
UKRAINE (UAH)	1,749.5	992.8	76.2%	-39.3%	15.8	10.0	58.1%	-48.4%	n/a	663
EUROPEAN UNION (EUR)	2,320.0	1,810.0	28.1%	-59.8%	322.1	259.8	24.0%	-61.2%	26.5%	27,900
EU + UK (EUR)	2,970.0	2,150.0	38.4%	-59.1%	398.3	303.7	31.1%	-60.4%	n/a	32,500
EUROPE (EUR)	3,690.0	2,620.0	40.8%	-57.3%	589.1	432.0	36.4%	-56.3%	n/a	42,600

Source: UNIC members
Complementary information from Comscore, Omdia, CH (ProCinema), 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), IT (Cinetel/SIAE), LT (Lietuviu Filmu Centras & Baltic Films Co-operation Platform), LU (Centre National de l'Audiovisuel), LV (Nacionàlais kino centrs & Baltic Films Co-operation Platform), ME (Filmski centra Crne Gore), MT (National Statistics Office), PT (Instituto do Cinema e do Audiovisual), RO (Centrul National al Cinematografiei), RU (Nevafilm Research), SK (Únia filmových distribútorov), UA (Media Resources Management), UK (British Film Institute).

TOP 5 FILMS
ACROSS UNIC TERRITORIES IN 2021

COUNTRY	TOP 1	TOP 2	TOP 3	TOP 4	TOP 5
ALBANIA	Spider-Man: No Way Home	No Time To Die (UK/US)	Shkembimi	F9	Venom: Let There Be Carnage
AUSTRIA	No Time To Die (UK/US)	Spider-Man: No Way Home	F9	Dune	Kaiserschmarrndrama (DE)
BELGIUM	No Time To Die (UK/US)	Spider-Man: No Way Home	Dune	F9	Venom: Let There Be Carnage
BOSNIA AND HERZEGOVINA	Toma (RS)	Juzni Vetar 2 (RS)	Spider-Man: No Way Home	No Time To Die (UK/US)	Deset u pola
BULGARIA	F9	Spider-Man: No Way Home	Golata istina za grupa Zhiguli	No Time To Die (UK/US)	Bai Ivan - The Movie
CROATIA	No Time To Die (UK/US)	Spider-Man: No Way Home	Juzni Vetar 2 (RS)	Dune	F9
CYPRUS	Spider-Man: No Way Home	No Time To Die (UK/US)	F9	Venom: Let There Be Carnage	Man of God (GR)
CZECH REPUBLIC	Prvok, Šampon, Tečka a Karel	Spider-Man: No Way Home	No Time To Die (UK/US)	Zátopek	Karel
DENMARK	No Time To Die (UK/US)	Ternet Ninja 2	Margrete den Første	Pagten	Dune
ESTONIA	No Time To Die (UK/US)	F9	Dune	Spider-Man: No Way Home	Luca
FINLAND	No Time To Die (UK/US)	Dune	Luokkakokous 3 - sinkkuristeily	Spider-Man: No Way Home	Hytti nro 6
FRANCE	Spider-Man: No Way Home	No Time To Die (UK/US)	Dune	Kaamelott	Encanto
GEORGIA	Spider-Man: No Way Home	F9	Venom: Let There Be Carnage	Dune	The Boss Baby: Family Business
GERMANY	No Time To Die (UK/US)	Spider-Man: No Way Home	F9	Dune	Paw Patrol: The Movie
GREECE	Spider-Man: No Way Home	No Time To Die (UK/US)	Man Of God	Luca	Dune
HUNGARY	Spider-Man: No Way Home	No Time To Die (UK/US)	Venom: Let There Be Carnage	Dune	Black Widow
IRELAND	No Time To Die (UK/US)	Spider-Man: No Way Home	Peter Rabbit 2: The Runaway	Dune	Shang Chi & the Legend of the Ten Rings
ISRAEL	Saving Shuli	Spider-Man: No Way Home	F9	Luca	No Time To Die (UK/US)
ITALY	Spider-Man: No Way Home	Eternals	No Time To Die (UK/US)	Dune	Venom: Let There Be Carnage
LATVIA	No Time To Die (UK/US)	Spider-Man: No Way Home	House of Gucci	Dune	Emīlija. Latvijas preses karaliene

NATIONAL FILMS · NON-NATIONAL EU FILMS · EUROPEAN/NATIONAL QUALIFIED PRODUCTIONS

Source: UNIC members
Complementary information from Comscore, Omdia, CH (ProCinema), 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), IT (Cinetel/SIAE), LT (Lietuviu Filmu Centras & Baltic Films Co-operation Platform), LU (Centre National de l'Audiovisuel), LV (Nacionàlais kino centrs & Baltic Films Co-operation Platform), ME (Filmski centra Crne Gore), MT (National Statistics Office), PT (Instituto do Cinema e do Audiovisual), RO (Centrul National al Cinematografiei), RU (Nevafilm Research), SK (Únia filmových distribútorov), UA (Media Resources Management), UK (British Film Institute).

TOP 5 FILMS
ACROSS UNIC TERRITORIES IN 2021

COUNTRY	TOP 1	TOP 2	TOP 3	TOP 4	TOP 5
LITHUANIA	House of Gucci	Spider-Man: No Way Home	Dune	No Time To Die (UK/US)	The Addams Family 2
LUXEMBOURG	No Time To Die (UK/US)	Spider-Man: No Way Home	Dune	F9	Encanto
MALTA	No Time To Die (UK/US)	Spider-Man: No Way Home	F9	Venom: Let There Be Carnage	Shang Chi & the Legend of the Ten Rings
MONTENEGRO	Toma (RS)	Juzni Vetar 2 (RS)	Spider-Man: No Way Home	No Time To Die (UK/US)	House of Gucci
NETHERLANDS	No Time To Die (UK/US)	F9	Dune	De Slag om de Schelde	Luizenmoeder – De Film
NORTH MACEDONIA	No Time To Die (UK/US)	Spider-Man: No Way Home	Juzni Vetar 2 (RS)	Toma (RS)	F9
NORWAY	No Time To Die (UK/US)	Tre Nøtter til Askepott	Dune	Nordsjøen	F9
POLAND	No Time To Die (UK/US)	Spider-Man: No Way Home	Paw Patrol: The Movie	Dune	Dziewczyny z Dubaju
PORTUGAL	No Time To Die (UK/US)	Spider-Man: No Way Home	F9	Dune	Venom: Let There Be Carnage
ROMANIA	F9	Spider-Man: No Way Home	Luca	Dune	House of Gucci
RUSSIA	Venom: Let There Be Carnage	Posledniy bogatyr. Koren' Zla	Spider-Man: No Way Home	Dune	Soul
SERBIA	Toma	Juzni Vetar 2	Spider-Man: No Way Home	No Time To Die (UK/US)	Dune
SLOVAKIA	No Time To Die (UK/US)	Známi neznámi	Paw Patrol: The Movie	Dune	The Croods: New Age
SLOVENIA	No Time To Die (UK/US)	Spider-Man: No Way Home	Luca	Sing 2	F9
SPAIN	Spider-Man: No Way Home	F9	Venom: Let There Be Carnage	A todo tren. Destino Asturias	Dune
SWEDEN	No Time To Die (UK/US)	Spider-Man: No Way Home	Dune	F9	Sune – Uppdrag midsommar
SWITZERLAND	No Time To Die (UK/US)	Spider-Man: No Way Home	F9	Dune	The Croods: New Age
TURKEY	Spider-Man: No Way Home	F9	Aykut Enişte	Venom: Let There Be Carnage	Akif
UK	No Time To Die (UK/US)	Spider-Man: No Way Home	Dune	Shang Chi & the Legend of the Ten Rings	Peter Rabbit 2: The Runaway
UKRAINE	Spider-Man: No Way Home	Venom: Let There Be Carnage	Dune	F9	House of Gucci

NATIONAL FILMS NON-NATIONAL EU FILMS EUROPEAN/NATIONAL QUALIFIED PRODUCTIONS

Source: UNIC members
Complementary information from Comscore, Omdia, CH (ProCinema), 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), IT (Cinetel/SIAE), LT (Lietuviu Filmu Centras & Baltic Films Co-operation Platform), LU (Centre National de l'Audiovisuel), LV (Nacionàlais kino centrs & Baltic Films Co-operation Platform), ME (Filmski centra Crne Gore), MT (National Statistics Office), PT (Instituto do Cinema e do Audiovisual), RO (Centrul National al Cinematografiei), RU (Nevafilm Research), SK (Únia filmových distribútorov), UA (Media Resources Management), UK (British Film Institute).

THE RECOVERY

OF THE EUROPEAN CINEMA INDUSTRY

“I believe that the very experience of cinema is at its best a timeless classic – human beings around the projector light, attending to stories that are part of the rebuild of our shared human experience and its particular size and scale and sound and vision, and in the company of others it remains unique.”

– KENNETH BRANAGH
at the UK Cinema Association Conference (April 2022)

— **BELFAST** UK (2021) TKBC, NORTHERN IRELAND SCREEN

THE IMPACT OF COVID-19 ON EUROPEAN CINEMAS

No one could have predicted the duration and the severity of the unprecedented social and economic challenges brought about by the COVID-19 pandemic. For two years, many cinemas were required to remain closed for prolonged periods and, even when open, were often mandated to operate under safety measures that significantly restricted audience numbers.

As highlighted in the previous section of this report, in 2021 restrictions varied widely from one country to another, constantly evolving across the year. In a few territories, cinemas were in fact closed for longer periods than they were during 2020, including major markets such as Germany, Denmark and the Netherlands. When some countries experienced two periods of lock-downs, others had to face three or even four, as was the case in the Netherlands. In Belgium, in a confusing political U-turn following a public outcry, cinemas were required to close for just three days in late 2021. New restrictions impacting cinema-going such as COVID-19 certificates were introduced broadly across Europe in the second half of 2021, further slowing down the recovery process for many. Moreover, various countries briefly enforced bans on food and drink sales or even introduced localised curfews, further limiting the return of audiences to the Big Screen. It was only in fact by February–March 2022 that most restrictions on cinema-going were scrapped around Europe, allowing cinemas to operate almost as normal for the first time since March 2020.

Compared to 2019, box office results for the past two years accounted for a total revenue loss of €6.2 billion in 2020 and another €5.1 billion in 2021. But even these figures do not provide a full picture of the impact of COVID-19 on the sector. Box office represents only a share of each exhibitor's income, with significant revenues also arising from in-theatre sales, private events as well as B2B and screen advertising. Estimates from the European Audiovisual Observatory evaluate losses from other revenue sources than box office as being over €3.1 billion in the EU alone in 2020 – which would equate to over €4.5 billion for Europe in 2020. Following the same logic, additional revenue losses for 2021 would account for at least €3 billion, bringing total revenue losses for the European cinema operators in the past two years close to €19 billion.

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

TOTAL REVENUE LOSSES FOR EUROPEAN CINEMAS
FOR 2020 AND 2021 ESTIMATED AT LEAST AT

€19 BILLION

TURNOVER LOSSES FOR THE FILM + AV SECTOR
ESTIMATED AT
€26 BILLION
IN 2020

NOT ACCOUNTING FOR THE SIGNIFICANT FIXED COSTS THAT HAD TO BE COVERED

CULTURAL AND CREATIVE INDUSTRIES
AMONG THE MOST AFFECTED SECTORS IN EUROPE WITH AN ESTIMATED
31% LOSS
OF TURNOVER IN 2020

A NET DROP OF
€199 BILLION
FROM 2019

SOURCE: EY REPORT REBUILDING EUROPE, JANUARY 2021

OVER 1 MILLION CCIs JOBS PUT AT RISK
IN EUROPE IN 2020

CLOSE TO **100,000 PEOPLE** EMPLOYED IN CINEMAS IN FRANCE, GERMANY, SPAIN, ITALY AND THE UK

The social impact of the pandemic on the industry was equally severe, threatening the livelihoods of the hundreds of thousands of dedicated staff members. The closure of cinemas also had an impact on other businesses, from cinema equipment manufacturers to retail and other services located close to or inside cinema complexes themselves. Estimates from Ernst & Young have highlighted that cultural and creative industries were among the most affected sectors in Europe with an estimated 31 per cent loss of turnover in 2020, representing a net drop of €199 billion in turnover from 2019, jeopardizing over 1 million jobs across the region.

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

Throughout the past two years, we have witnessed the resilience of the film sector and its capacity to adapt to challenging circumstances. Cinema operators spared no effort in restoring their business and adapting to these unprecedented times, working alongside national authorities and health experts to ensure that everything was being done to offer the safest experience possible to their customers and staff. Multiple scientific reports have specifically identified cinemas as being one of the safest indoor spaces in terms of COVID-19 infections. A German survey conducted in October 2021 to trace individuals infected with COVID-19 using the local Luca app system highlighted that only 1.7 per cent identified cinemas as potential sources of infection. Over the past two years, not a single outbreak of COVID-19 anywhere across the globe has been traced to a cinema, multiplex or public screening venue.

1.36 BILLION ADMISSIONS
ACROSS UNIC TERRITORIES IN 2019

€ 8.8 BILLION AT THE BOX OFFICE
ACROSS UNIC TERRITORIES IN 2019

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

SOURCE: EY REPORT REBUILDING EUROPE, JANUARY 2021

— QU'EST-CE QU'ON A TOUS FAIT AU BON DIEU? FRANCE (2022) UGC

FRENCH CINEMAS WELCOMED 153 MILLION VISITORS
BETWEEN MAY 2021 AND MAY 2022

THIS REPRESENTS **75% OF AVERAGE ADMISSIONS** FOR 2011–2019

National cinema associations, along with industry partners from distribution and production, launched multiple national campaigns to celebrate the Big Screen experience and encourage cinema-goers to return. Individual operators also launched a wide range of audience engagement initiatives – during and following closure – reminding their audiences of the unique experience of enjoying a film on the Big Screen. While these public and private campaigns had helped kick-start the recovery process in 2020 and 2021, large scale audience campaigns like *Les Printemps du Cinéma* in France or *La Fiesta del Cine* in Spain have made successful come-backs in 2022, as film festivals returned in physical form in response to the rallying calls of European and international creators celebrating the return of cinema-going globally.

The broad range of support mechanisms that have been made available at EU and national level have played an essential role in securing the survival of the industry and the future of as many jobs as possible within it. But as soon as cinemas were allowed to re-open and even when strict restrictions on occupancy were still enforced, many existing support schemes were abruptly ceased in a number of territories. It goes without saying that the impact of the COVID-19 pandemic on the European cinema industry remains significant, as months of closures have significantly hampered the sector's capacity to invest and innovate. While the COVID-19 pandemic might hopefully soon be behind us, the current social, economic and political context continues severely to impact the recovery process. Recent audience surveys have highlighted that one of the main reasons for not returning to the Big Screen is related to the increased cost of living, with European citizens seeing a massive 'spike' in their energy bills as well as those for other necessities. So now is certainly not the time for industry stakeholders and policymakers alike to ease those efforts aimed at ensuring the survival of local cinemas, whatever their size and location.

As we publish this report, most European cinemas have been able to welcome visitors again without interruption for almost 12 consecutive months. The positive box office results of 2021, with European cinema admissions increasing by an estimated 36.4 per cent and box office by 40.8 per cent, more than demonstrate the strength of the sector's recovery in recent months. In France, cinemas have welcomed 153 million visitors between May 2021 and May 2022, representing 75 per cent of the average admissions for 2011–2019. In the UK, audience surveys conducted at the end of 2021 have highlighted that over half of those aged below 24 years old had already returned to

— **EIFFEL** France (2021) Pathé Films, VVZ Production — — **JUJUTSU KAISEN 0** Japan (2021) MAPPA, Toho — **SPIDER-MAN: NO WAY HOME** US (2021) Columbia Pictures, Marvel Studios, Pascal Pictures

— **MARGRETE DEN FØRSTE** Denmark, Sweden, Norway, Iceland, Czech Republic, Poland (2021) SF Studios — **NO TIME TO DIE** UK, US (2021) Metro-Goldwyn-Mayer, Eon Productions

the cinema, with 90 per cent expecting to do so in the weeks and months to come. These recent numbers and surveys, alongside the incredible results of certain international and European titles described in the previous section of this report, illustrate how European audiences have missed the unique, common experience of enjoying a film together, on the Big Screen.

These same positive trends could be observed globally, as three of the five most successful films of 2021 were released in the fourth quarter of the year. In China, the local title *The Battle at Lake Changjin* grossed over $913 million at the box office, becoming the highest-grossing non-English film ever. In Japan, three anime titles released in 2021 ranked in the top 25 of highest-grossing Japanese films of all time, with *Jujutsu Kaisen 0* collecting over $183 million globally. And these widely positive international results continued in early 2022, with the Indian releases *K.G.F: Chapter 2* and *RRR* respectively becoming the third and fourth highest-grossing films ever in the country.

Across Europe, the 2021 recovery – particularly in the second part of the year – was much faster than was witnessed in 2020, with audiences returning more quickly and in larger numbers, attracted by a more solid slate of new releases. At the beginning of 2022, we witnessed several highly successful titles catering to specific age groups, such as family, young women or older demographics, as well as wildly popular live events screenings. In March 2022, the live concert *BTS Permission to Dance on Stage – Seoul* became the highest-grossing event cinema title ever with over $32.6 million box office globally. These performances demonstrate that cinemas will have to rely on all types of content – from international blockbusters, to art-house titles and event cinema productions, local, European and international – to cater to all tastes and all audiences in order to confidently recover from this incomparable period of challenge.

Even in a challenging financial context, cinema operators have continued to invest in the Big Screen experience, bringing state-of-the-art sound and image technology to film fans around the world. Recent blockbuster releases have recorded great box office when it comes to premium screenings, with for instance the 3D version of *Doctor Strange In The Multiverse Of Madness* making as much as 24 per cent of its opening weekend box office in France and 50 per cent in Germany. We have also seen audiences spending more on food and drinks as they returned to the cinema, further demonstrating how they have missed the cinema-going experience and everything that comes with it.

We may have to wait for 2023 to witness full recovery, bringing us ever closer to pre-pandemic results – but we can be proud and happy that cinemas of all sizes and all locations have been able to welcome audiences back. Most positively, and unlike in some other major film regions, we have not witnessed a significant number of permanent closures across Europe. Last year, there were 0.02 per cent fewer screens across Europe, with many of those relating to screens that did not operate in 2021 but might hopefully operate again in 2022. Around the World, the total number of screens in fact *increased* by 5 per cent – mostly because of China, where more than 2,000 screens were built in the first two months of 2021 alone.

UNIC will continue to call on its industry partners to remain united and ensure that the sector fully recovers. More than ever, decisions across the industry need to be made with a long-term perspective. All who depend on the success of the film industry should commit to ensuring the future health of the whole sector. By doing so, they will ensure that the wider film industry and European cinemas – from one-screen venues to art-houses and multiplexes – will recover and return from this crisis stronger and more resilient than ever.

All who depend on the success of the film industry should commit to ensuring the future health of the whole sector.

UNIC FILM SCREENINGS

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

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

After a two year hiatus, UNIC organised a screening of the Danish comedy *Riders of Justice* in January 2022. A wide range of policy-makers and stakeholders from the European film value-chain joined us for this event in Brussels, which also served as an opportunity to celebrate the re-opening of cinemas in the country. This screening was followed by another organised in collaboration with the International Federation of Film Distributors' and Publishers' Associations (FIAD) in June, with the 2022 winner of the Spanish Goya Award, *El Buen Patrón*.

If you are interested in attending our next screening, please reach out!

THE VALUE OF CINEMA AND THE THEATRICAL WINDOW

— **DRUK** DENMARK, NETHERLANDS, SWEDEN (2020) ZENTROPA ENTERTAINMENTS

A 'window' of exclusivity for cinema operators is vital for the health of the film and cinema industry and a proven business model that ultimately benefits the entire film value chain, from financing to marketing to distribution throughout each film's life-cycle. It provides an opportunity for the widest possible audience to discover and enjoy as broad a range of film content as possible, offering unique cultural and social experiences for audiences and creating unparalleled excitement around releases.

Cinemas are also recognised as the best starting point for a film to gain visibility before, during and after its time on the Big Screen. Box office revenues in turn drive performance and audience awareness across all other platforms and markets, contributing significantly to the financing and diversity of European works and supporting European distributors and producers. This is also thanks to the transparency that exists in the cinema exhibition industry when it comes to box office figures, in stark contrast to the position on streaming data and actual revenue created by VOD platforms, who mostly base success on subscriptions.

Any move to establish a very short window – or to eradicate it entirely – would put hundreds of thousands of jobs at risk and inevitably lead to a reduced rather than greater diversity of films and cinemas.

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

The three highest-grossing film of 2021 were released in cinema first and exclusively.

The three most pirated films of 2021 were released simultaneously on VOD and in cinema.

The Danish film *Druk* was released in Denmark on 24 September 2020. Following its critical success, it was released in dozens of international markets, including Germany in July 2021 and South Korea in January 2022. In the EU, it attracted 1 million visitors in 2020 and 2 million in 2021. As of May 2022, the film has grossed over $21.7 million at the global box office internationally, for a budget of $5.2 million, demonstrating the long term value and strength of the theatrical release model.

Business practices and their results in the context of a pandemic should not represent benchmarks for what the future holds, and the industry should commit to create the best conditions for the whole sector to recover as soon as possible. Online platforms will continue to have their place in the film ecology, but when decisions are made which result in these being seen as a substitute for the theatrical experience, that invariably only results in disappointed cinema audiences, rampant piracy and – crucially – reduced overall revenues.

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

Today we call on all of those involved in the cinema ecology, but in particular content providers and the creative talent and investors behind them, to recognize the economic as well as cultural value of our proven business model, and to redouble their efforts to support a strong, diverse and reliable supply of film content to cinemas.

"I make movies for the big screen. Cinema is my love, my passion. I always go to movies when they come out. I'll put my cap on and sit in the audience with everyone."

– TOM CRUISE
at the Cannes Film Festival 2022

— **TOP GUN: MAVERICK** US (2022) PARAMOUNT PICTURES

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

THE VALUE OF CINEMA

CINEMA IS CULTURE

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

THE ECONOMIC ROLE OF CINEMA

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

CINEMA IS INNOVATION

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

CINEMA IS COMMUNITY

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

INNOVATION, DIVERSITY AND SUSTAINABILITY

— **TERNET NINJA 2** DENMARK (2021) A. FILM, DANISH FILM INSTITUTE, LEVELK, NORDISK FILM

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

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

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

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

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

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

DIGITAL CINEMA SCREENS GLOBALLY

208,037

> 4% INCREASE ON 2020

SOURCE: MPA 2021 THEME REPORT AND OMDIA

CINEEUROPE

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

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

CineEurope 2022 will take place in Barcelona from 20–23 June.

CineEurope
Official Convention of the International Union of Cinemas

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 exciting two days of debates, workshops and social activities. The UNIC Cinema Days 2020 took place online on 12 and 13 October, with the aim to provide an opportunity to our members and partners to discuss the latest trends in the ever-changing cinema business and explore the “new normal” for our sector.

Throughout the first half of 2021, UNIC organised a series of virtual events to engage with its members and share updates on the state of the European cinema industry – with the invaluable support of industry partners at Celluloid Junkie, the BoxOffice Company, Comscore and many others.

After a two-year break, UNIC was delighted to resume its annual UNIC Cinema Days in March 2022. More than 150 colleagues from across the cinema industry joined us in Brussels for two days of insightful panel discussions, interactive workshops and networking.

UNIC is planning another edition of its UNIC Cinema Days in Autumn 2022 – stay tuned!

GLOBAL IMPACT

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

NATO CINEMA FOUNDATION

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

While many of its announced workstreams are specific to North America, UNIC stands ready to work with the Foundation in areas of shared interest, to the overall benefit of our industry.

GLOBAL CINEMA FEDERATION

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

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

The GCF met again in person in 2021 and 2022 and decided to continue its work on a number of key priorities, including but not limited to film theft, theatrical release practices and the highly valued relationship with partners in film distribution.

$21.3 BILLION

AT THE GLOBAL BOX OFFICE IN 2021

+ 81% INCREASE ON 2020
+ 105% IN THE US AND CANADA
+ 53% IN EUROPE, MIDDLE EAST & AFRICA
+ 89% IN ASIA PACIFIC
+ 72% IN LATIN AMERICA

SOURCE: MPA 2021 THEME REPORT AND OMDIA

GLOBAL BOX OFFICE

2019: **$42.3 BILLION**
2020: **$11.8 BILLION**
2021: **$21.3 BILLION**
2022 FORECAST: **$31.5 BILLION**

SOURCE: GOWER STREET ANALYTICS, APRIL 2022 FORECAST

GOWERSTREET

— **DUNE** US (2021) LEGENDARY PICTURES, WARNER BROS. PICTURES

"Movie theaters need a reasonable amount of time to preserve that original language. I absolutely believe there is room for both [the theatrical experience and the streaming services] to exist, but theaters need our love right now. Otherwise, we may lose something even more fundamental as human beings. We need the accumulated experience. There is nothing like the feeling that we are one, together."

– DENIS VILLENEUVE
at the Harold Lloyd Award (March 2022)

CELEBRATING THE TOP 50 CINEMA COMPANIES IN EUROPE

Giants of European cinema exhibition — 2022 edition

For the first time in 2022, UNIC and The Boxoffice Company have collaborated on a project celebrating the largest cinema operators in the region by screen count. The top 50 Giants of European Exhibition celebrates the range of diversity of the European exhibition community, representing a total of 19,440 screens and 2,646 locations across 35 European territories.

RANK	COMPANY	TERRITORIES	SCREENS
1	ODEON CINEMAS GROUP	UK, Ireland, Spain, Italy, Sweden, Germany, Finland, Norway, Portugal	2,493
2	CINEWORLD	UK, Ireland, Poland, Romania, Hungary, Czech Republic, Bulgaria, Slovakia	2,142
3	VUE INTERNATIONAL	UK, Ireland, Italy, Germany, Poland, Netherlands, Denmark, Lithuania	1,972
4	LES CINÉMAS PATHÉ GAUMONT	France, Netherlands, Belgium, Switzerland	1,305
5	CJ CGV	Turkey	848
6	CGR CINEMAS	France	705
7	RUSSIAN CINEMA CHAIN		n/a
8	KINEPOLIS	Netherlands, Belgium, France, Spain, Switzerland, Poland, Luxembourg	608
9	UGC	France, Belgium	586
10	CINEPLEX	Germany	562
11	YELMO CINES	Spain	533
12	RUSSIAN CINEMA CHAIN		n/a
13	CINEPLEXX	Austria, Italy, Albania, Bosnia, Croatia, Greece, Kosovo, Montenegro, North Macedonia, Romania, Serbia, Slovenia	446
14	CINESTAR	Germany	376
15	HELIOS	Poland	291
16	RUSSIAN CINEMA CHAIN		n/a
17	NORDISK FILM CINEMAS	Denmark, Norway, Sweden	258
18	RUSSIAN CINEMA CHAIN		n/a
19	OMNIPLEX	UK, Ireland	255
20	NATIONAL AMUSEMENTS	UK	241
21	SVENSKA BIO	Sweden, Finland, Denmark	222
22	MK2	France, Spain	211
23	MEGARAMA	France, Spain	209
24	CINEMAS NOS	Portugal	208
25	OCINE	Spain	204

CELEBRATING THE TOP 50 CINEMA COMPANIES IN EUROPE

As a statement of our solidarity with Ukrainian exhibitors as well as with the Ukrainian people, UNIC and The Boxoffice Company have jointly agreed not to include the names and screen counts of the Russian companies that made it into the top 50. While we cannot stand by and remain silent on the attack by Russian forces, in doing so we note with huge respect the statements and positions taken by some Russian colleagues in opposition to the war.

RANK	COMPANY	TERRITORIES	SCREENS
26	MULTIPLEX CINEMAS	Ukraine	181
27	CINEMAPINK	Turkey	173
28	RUSSIAN CINEMA CHAIN		n/a
29	BLITZ CINESTAR	Serbia, Bosnia, Croatia	161
30	RUSSIAN CINEMA CHAIN		n/a
31	KINOPOLIS	Germany	143
32	IMC CINEMAS	UK, Ireland	140
33	EMPIRE CINEMAS	UK	137
33	ODEON MULTICINES	Spain	137
35	RUSSIAN CINEMA CHAIN		n/a
36	CINEVILLE	France	122
37	EVERYMAN CINEMAS	UK	119
38	UNION CINE CIUDAD	Spain	118
39	CINEMARINE	Turkey, Kosovo	110
40	FILMPALAST	Germany	102
41	PRESTIGE	Turkey	101
42	CINESTAR	Czech Republic	98
43	AVSAR SINEMA	Turkey	96
44	CINEMAX	Slovakia, Czech Republic, Romania	91
45	CINES ACEC	Spain	90
46	GIOMETTI CINEMA	Italy	87
47	LIGHT CINEMAS	UK	86
48	ARTESIETE	Spain	85
49	CINEPLACE	Portugal	85
50	GRAND ECRAN	France	85

“There is not one thing for me; there are many things that make cinema special!”

The moment you fell in love with the Big Screen?

When I saw the first Star Wars film at the age of 10. The big screen with the great sound was a completely new experience. And because of Luke Skywalker, who I fell in love with immediately.

The best thing about the cinema experience?

There is not one thing for me; there are many things that make cinema special. The Big Screen, the smell of popcorn, a special movie, the community experience, and the particular atmosphere in the cinema that triggers a Hollywood feeling in me.

I also love being able to enjoy a film without distraction and experience such intense emotions together with other people in the cinema.

Christine Berg
(Managing Director, HDF Kino, Germany)

Fernando Evole
(Country Manager, Yelmo Cines, Cinépolis Group, Spain)

“The cinema experience is about sharing unique feelings in a unique moment with people we don’t know!”

The moment you fell in love with the Big Screen?

I was born and raised in a movie theatre. My dad launched his first cinema when I was 2 years old and since then I remember spending my time at the movies. I remember going from the box office to the lobby and then to the concession stand and inside the auditoriums watching movies several times and eating all type of sweets and a lot of popcorn and enjoying watching satisfied customers who cherished their experience at the movies.

The best thing about the cinema experience?

The best thing about the cinema experience is how we can all share unique feelings in a unique moment with people we don’t know. Every show is a different show, and that is because the customers are different every time and this makes the experience very special. Another very special thing is how you can travel in space and time when you go to the Big Screen. And this can’t be compared to any experience you can imagine at home.

BIG SCREEN FEATURE

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

Sign up online on unic-cinemas.org to subscribe to our newsletter!

DIVERSITY AND INCLUSION

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

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

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

UNIC WOMEN'S CINEMA LEADERSHIP PROGRAMME

In June 2017, we launched the Women's Cinema Leadership Programme – UNIC's flagship initiative to broaden and deepen the talent pool for leadership in our sector and to empower female professionals in order for the industry to realise its full potential. This was we believe a unique initiative at the time, and one we are now delighted to see emulated by others.

Each year, the Programme provides rising female leaders with an exclusive opportunity to receive one-to-one mentoring and networking opportunities, and to learn from an outstanding group of women executives from across the cinema landscape. Following the success of the first four editions, in 2021 UNIC launched the fifth edition of the Programme, welcoming a new group of mentors and mentees representing 19 countries and 22 companies. The sixth edition of the programme will be launched at CineEurope 2022.

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

In February 2022, we were delighted to announce that IMAX and Vista Group would take on the role of principal sponsors of the Programme. As joint sponsorship partners, they became "Champions of the Programme", supporting UNIC's mission to achieve a more diverse and inclusive cinema industry.

In addition, UNIC launched its campaign "Why is mentoring important?", shining the light on the importance of mentoring to ensure more diversity in the industry. The first video of the series is available here.

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

2022 PROGRAMME CHAMPIONS

UNIC WOMEN'S CINEMA LEADERSHIP PROGRAMME NEWSLETTER

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 Women's Cinema Leadership Programme newsletter is issued every month 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 Hannele Marjavaara and Natalia Mackiewicz, two pairs of the fifth edition (2021–2022) of the programme.

What was your motivation to join the programme?

Natalia: Once I found out about the UNIC's programme and its mentoring scheme I immediately felt it was a great opportunity to meet experienced professionals in the industry from whom I could learn – and I was right. It is a great programme to grow professionally and, as it turned out, also personally, to participate in a one-year training based on regular sessions with a chosen mentor and also live networking meetings with industry representatives. I greatly appreciate the female aspect of the program that gathers women leaders, who are an inspiration to me.

Hannele: I was so honoured when I was recommended to take part as a mentor. I felt that perhaps everything I have done in building my arthouse cinema from its beginnings in 2010 to the successful, beautiful venue it is now could actually be of use to someone, especially as everything about running a cinema was new to us, and I really learned by doing, by developing all aspects of the business bit by bit. When I started, there were hardly any young women running cinemas. I felt I received so much help from everyone in our industry, and thus I have always worked towards cultivating this approach, that there are no stupid questions, that information and experiences are to be shared and nourished. I have many female colleagues in the industry now, and we form a wonderful network that always advises and supports, so taking part in the programme felt a very natural next step to take.

How have the sessions so far been for you?

Natalia: I feel that it is a great match with Hannele! Our sessions are based on very open conversations on daily cinema routine and are also well organized and structured, based on goals I want to achieve, which were set at the very beginning of our work together. Discussions with Hannele are both a pleasure and a motivation to dig deeper into a selection of topics. It has been half a year since we have started our mentoring sessions, and I already feel I have greatly benefitted from them.

Hannele: I have found the sessions very enjoyable as Natalia and I are both running arthouse cinemas. We can talk about everything in a very open and honest, yet realistic way, as we understand each other's businesses so well, all that balancing the day-to-day operational side with developing new ideas and events. The sessions have proceeded in an organic way, flowing from one topic to another, and we have also made more detailed plans to focus on certain topics chosen by Natalia. It has been very inspirational to think back and take stock and share my experiences with someone who is facing so many of same issues and who understands the realities completely. I can only hope it has been as useful for Natalia too! I cannot wait to meet her in person and visit her cinema.

MEET OUR COMMUNITY OF MENTORS AND MENTEES HERE!

Hannele Marjavaara
Managing Director, Kino Tapiola, Finland (mentor)

Natalia Mackiewicz
Programme Manager, Kinokawiarnia Stacja Falenica, Poland (mentee)

ACCESSIBILITY

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

In the UK, the UK Cinema Association Technology Challenge Fund was established in 2018 to explore new ways of delivering 'closed captions' only to those who needed them, but potentially for all cinema screenings, massively widening the range of films available to deaf customers, and their ability to enjoy the Big Screen experience with friends and family. While the pandemic necessarily introduced a pause in the development of the Fund, it is hoped to be able to present a potential solution to the industry later in 2022.

In late 2021, the UK Cinema Association also launched Accessible Screenings UK, the first ever searchable database of subtitled and audio described screenings, as well as autism- and dementia- friendly shows. It is hoped that this will in time become a 'one stop shop' for those looking for information on accessible cinema.

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

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

— PAGTEN DENMARK (2021) MOTOR, NORDISK FILM & TV FOND, SF STUDIOS

UNIC EXPERT GROUPS

UNIC MARKETING GROUP

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

The group met virtually several times throughout 2020 and 2021 to discuss key audience trends as well as engagement opportunities and challenges related to the ongoing COVID-19 pandemic and the recovery of the European cinema industry.

UNIC RETAIL GROUP

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

UNIC TECHNOLOGY GROUP

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

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

We also had the opportunity in early 2022 to update the handbook on *How to design a cinema auditorium*, written by our Norwegian colleague and cinema technology expert Rolv Gjestland, to reflect recent technical developments. The book is available for free on the UNIC website.

UNIC EXPERT GROUPS

UNIC CIRCULAR ECONOMY RETAIL GROUP

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

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

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

More information about the project as well as recent meetings of the group can be found on the UNIC website.

"It was so inspiring to see the public's need to watch movies on the big screen. I'm not talking about mainstream movies; I'm talking about auteur cinema. There was a real hunger from those audiences to see specialty films. I regained a lot of confidence at those two festivals. It gave me hope that the type of movies we make – art house movies – are still very much in demand."

– PEDRO ALMODOVAR
about the 2021 Cannes Film Festival,
in an interview for BoxOffice Pro (January 2022)

— **MADRES PARALLELAS** SPAIN (2021) EL DESEO, REMOTAMENTE FILMS AIE

POLICY UPDATE

POLICY UPDATE

Working out of its Brussels office, UNIC's principal objective is to act as the voice of European cinema operators and their national associations on the European stage. In doing so, the association engages both with the European institutions and the industry to provide a strong, unified voice for cinema exhibition.

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

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

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

The cultural and creative sector had been earmarked by the Commission as one of the key 14 ecosystems that had been the most impacted by the pandemic and that should therefore be a priority for the recovery under the Next Generation EU budget. UNIC, together with several organisations, advocated for dedicated support to cultural and creative industries (CCIs) under the national Recovery and Resilience Plans (RRPs). Unfortunately, while the Commission instructed Member States to dedicate at least 30 per cent of their national Recovery and Resilience Plans (RRP) to sustainability measures and 20 per cent to digitisation, no indications were given to support CCIs. Therefore, many national RRPs did not include a single reference to the sector. This was questioned by the European Parliament Culture Committee who contributed to the European Parliament report on the implementation of the Recovery and Resilience Facility.

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

— **ZNÁMI NEZNÁMI** CZECH REPUBLIC, SLOVAKIA (2021) ANDAL PRODUCTION

The Creative Europe Programme received a final envelope of €1.642 billion and was officially launched in early 2021 with the first calls for applications. To support the industry post-COVID-19, the 2021–27 budget was front-loaded, with a third of the budget to be committed in the first two years of the programme. In 2021, the Creative Europe programme benefitted from an overall increase of €60 million compared to 2020, a budget increase of 25 per cent compared to the previous year.

On 30 November 2020, the European Commission also published its long-awaited assessment of the Geo-blocking Regulation. While it excluded audiovisual services from the scope, for now, another review is scheduled for 2022.

The European Commission launched its Stakeholders Dialogue on access to and availability of audiovisual content across the EU in October 2021. UNIC took part in three ensuing meetings, which gathered European film and audiovisual organisations as well as consumers' organisations. In the meantime, the European Audiovisual Observatory published a new study "Circulation of European films on VOD and in cinemas", which confirms a wide, market-driven evolution in the growing availability and circulation of European film titles in cinemas and online, and further highlights the interlinked and interdependent creative and business interests in the film and audiovisual value chain. The study finds that European audiences have on average access to over 8,500 European films on VOD in their countries. Of these, 82 per cent (ca. 7,000) originate in other European countries. The study also highlights the crucial role played by cinemas in the circulation of content. UNIC co-signed a statement following the publication of the study.

The Portability Regulation – allowing EU citizens to "carry" their online subscription when travelling to another EU Member State – has also been evaluated and is not going to be re-opened at this stage. Although territoriality is under pressure at the European Parliament, it has been strongly supported by the Member States via their various Council conclusions throughout 2020 and 2021.

Commissioner Breton – in charge of issues related to cinemas and audiovisual – published the "Media and Audiovisual Action Plan" in December 2020. The plan is guiding the European Commission in its actions to support the film and audiovisual sector, particularly via the MEDIA Programme and is built on three pillars: recover, transform, enable & empower. The European Commission is rolling out the various other actions listed, from the first practical guide to connect the media sector with EU funding (Action 1), to access to content (Action 7), its Stakeholders Dialogue on sustainability and its Stakeholders Dialogue on diversity (actions 6 and 8) to MediaInvest (Action 2), which was unveiled in Cannes 2022. With funds coming from InvestEU and the Creative Europe MEDIA programme, Media Invest is expected to leverage €400 million of investments over a 7-year period. It is open to production, distribution and cinema exhibition.

EUROPA CINEMAS COLLABORATE TO INNOVATE

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

Awardees can be found on the Europa Cinemas website.

COLLABORATE TO INNOVATE

EUROPA CINEMAS
CREATIVE EUROPE - MEDIA SUB-PROGRAMME

— **VERDENS VERSTE MENNESKE** NORWAY, FRANCE, DENMARK, SWEDEN (2021) OSLO PICTURES, MK2 PRODUCTIONS, FILM I VÄST, SNOWGLOBE, BRF, ARTE FRANCE CINÉMA, MEMENTO DISTRIBUTION

CONFERENCE AT THE CANNES FILM MARKET 2022

UNIC, in partnership with the European Audiovisual Production Association (CEPI); Eurocinema; Europa Distribution; Europa International; the International Federation of Film Producers Associations (FIAPF); the International Federation of Film Distributors' and Publishers' Association (FIAD); the Federation of European Screen Directors (FERA); the Federation of Screenwriters in Europe (FSE) and the International Video Federation (IVF), organised a conference in Cannes on 23 May 2022. *Constant Gardeners: The Realities of Today's Film Sector in Europe* gathered professionals from the value chain to talk about film, the impact of COVID, resilience, and diversity. Following the conference, the organisations published a co-statement highlighting key principles to ensure that the European film industry will continue to thrive.

On the Digital Services Act and the Digital Markets Act, both the European Parliament and Council worked at a record speed. After they adopted their respective positions, Trilogues started in January 2022. The Digital Markets Act common approach was adopted in March 2022, and the last Trilogue on the Digital Services Act (DSA) took place on 23 April during which Council and Parliament reached a provisional political agreement. At time of writing, a vote in the Internal Market committee was scheduled for 16 June and a vote in plenary in July 2022. The DSA will enter into force 7 months (for very large platforms)/15 months (for other intermediaries) after its publication in the Official Journal.

The implementation of the Audiovisual Media Services Directive (AVMSD) is also ongoing, but a number of Member States have failed to do so. The European Parliament Culture Committee will work on an own-initiative report regarding the implementation of the Directive.

The Copyright in the Digital Single Market Directive is also under implementation. On 26 April, the European Court of Justice dismissed the action brought by Poland against Article 17 of the Directive. Poland argued that the 2019 Directive – yet to be implemented in a number of Member States – violated freedom of expression due to "upload filters" and requested the annulment of that provision. The Court considered that the liability regime established under Article 17(4) represented a restriction on freedom of expression/information BUT that "several procedural safeguards" included in Article 17 were sufficient to "protect the right to freedom of expression and information of users".

And on 4 April 2022, EU Member States adopted conclusions on a European strategy for the cultural and creative industries ecosystem, sending a signal about their ambitions and strategy for the cultural and creative sectors.

UNIC has been working closely with its partners from the European film industry to ensure that cinemas remain front-and-centre when it comes to the future of the European film sector. It is in this spirit that UNIC has been leading an informal coalition focusing on the MEDIA Programme and is also part of a group of European film organisations that has come together to organize events in a number of film festivals, starting with Cannes 2022.

UNIC continues to work closely on the above-mentioned files and broader developments in its four key parliamentary Committees: Culture & Education (CULT), Legal Affairs (JURI), the Internal Market and Consumer Protection (IMCO) and Industry, Research and Energy (ITRE). On the Commission's side, this involves liaising with and following the work of the Commissioners responsible for key portfolios for cinemas, namely Thierry Breton (Internal Market), Mariya Gabriel (Innovation, Research, Culture, Education and Youth) and Executive Vice-President Margrethe Vestager (Europe Fit for the Digital Age). On the Council side, UNIC meets regularly with representatives from all Member States in charge of these issues.

UNIC will redouble its efforts to ensure that cinemas remain at the heart of policy-makers' decision-making when it comes to support, rules and guidance for the entire film value-chain, both in light of COVID-19 and more generally.

— LES TUCHE 4 FRANCE (2021) ESKWAD, PATHÉ FILMS

MY FAVOURITE CINEMA

The idea behind My Favourite Cinema centres on the magic of the Big Screen. Cinemas across Europe offer audiences a shared experience like no other, creating memories that last long after the credits roll. We all have a particularly memorable trip to the cinema – a first visit, a film that sticks in our minds or fond recollections of the people we were with. To celebrate this, and to help celebrate the Big Screen UNIC launched "My Favourite Cinema", inviting Members of the European Parliament to share a video of themselves, answering the following three questions:

1. Tell us about your favourite cinema.
2. What was your most memorable trip to the cinema?
3. What's your favourite thing about going to the cinema?

UNIC officially kicked-off the campaign on 1 June 2022 with a video featuring Spanish MEP Iban García del Blanco, available here.

IBAN GARCIA DEL BLANCO
Member of the European Parliament

UNIC will redouble its efforts to ensure that cinemas remain at the heart of policy-makers' decision-making when it comes to support, rules and guidance for the entire film value-chain, both in light of COVID-19 and more generally. Doing so includes recognition of the key principles on which cinemas rely – such as territoriality, theatrical exclusivity and fight against piracy. It is only by bearing these in mind and refraining from pursuing short-term gains over long-term prosperity that the sector – along with the wider film value-chain it greatly contributes to – can count on a bright future once we emerge from the pandemic.

In March 2022, UNIC published an updated version of its manifesto, highlighting the cultural and economic importance of cinema-going and providing cinema operators' perspective on key policy issues to policy-makers and industry partners. First published in 2019, the new version includes additional details on the impact of the pandemic on our sector, with adapted policy positions. Please find the UNIC Manifesto 2022 here for an overview of our key priorities.

POLICY PARTNERS

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

Creativity Works!

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

AV Coalition

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

MEDIA Coalition

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

Netopia

Forum for the Digital Society

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

Europa Cinemas

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

CICAE

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

EAO

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

EUIPO

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

WIPO

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

KEY AREAS OF INTEREST

MEDIA AND AUDIOVISUAL ACTION PLAN

TERRITORIALITY OF COPYRIGHT

COPYRIGHT IN THE DIGITAL SINGLE MARKET DIRECTIVE AND DIGITAL SERVICES ACT

AUDIOVISUAL MEDIA SERVICES DIRECTIVE (AVMSD)

CREATIVE EUROPE PROGRAMME / MEDIA PROGRAMME

RECOVERY AND RESILIENCE FACILITY

SUSTAINABILITY

ACCESSIBILITY AND INCLUSION

MUSIC RIGHTS

— **ANNETTE** FRANCE, GERMANY, BELGIUM, US, JAPAN, MEXICO, SWITZERLAND (2021) CG CINÉMA, TRIBUS P FILM, ARTE FRANCE CINÉMA, THÉO FILMS, UGC, DETAILFILM, SCOPE PICTURES, WRONG MEN NORTH, RTBF, EURO SPACE, PIANO, GARIDI FILMS

CONCLUSION

The last two years have undeniably been the most challenging faced by European cinemas in their long history. COVID-19 has dealt the sector a devastating blow, one from which the industry will take some time to recover. But strong box office performances around the world in 2021 and the first half of 2022 served as further evidence of cinemas' capacity to attract audiences and create global events even during challenging times.

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

Now is not the time for policy-makers to ease those efforts aimed at ensuring the survival of local cinemas, whatever their size and location. Cinemas must remain at the heart of policy-makers' decision-making when it comes to the future of the European film industry. This includes clear recognition of the key principles on which cinemas rely – such as territoriality and theatrical exclusivity – and also the continuation of vital support schemes. It is only by bearing these in mind that the sector – along with the wider film value-chain it so fundamentally supports – can count on a bright future once we emerge fully from the pandemic.

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

MEMBERS & PARTNERS

ASSOCIATION MEMBERS

Austria
Fachverband der Kino-, Kultur und Vergnügungsbetriebe

Belgium
Fédération des Cinémas de Belgique

Denmark
Danske Biografer

Finland
Finnish Cinema Exhibitors' Association

France
Fédération Nationale des Cinémas Français

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

Israel
Cinema Industry Association

Italy
Associazione Nazionale Esercenti Cinema

Netherlands
Nederlandse Vereniging van Bioscoopexploitanten

Norway
Film & Kino

Poland
Polish Exhibitor's Association

Spain
Federación de Cines de España

Sweden
Sveriges Biografägareförbund

Switzerland
SKV – ACS Association Cinématographique Suisse

Turkey
Turkish Cinema Operators' Association

Ukraine
United Ukrainian Cinemas

UK
UK Cinema Association

MEMBERS & PARTNERS

OPERATOR MEMBERS

Cinamon
Estonia, Latvia, Lithuania

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

Cinemax
Slovakia, Romania

Cineplex
Germany

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

Cineworld and Cinema City International
Israel, Ireland, Hungary, Poland, Czech Republic, Romania, Bulgaria, Slovakia, United Kingdom, United States

Karo Film
Russia

K Cineplex
Cyprus

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

Kinopolis
Germany

Kino Arena
Bulgaria

Movies@Cinemas
Ireland

Nordisk Film Biografer
Denmark, Norway

Odeon & UCI Cinemas (AMC Group)
Austria, Estonia, Finland, Germany, Italy, Ireland, Latvia, Lithuania, Norway, Portugal, Spain, Sweden, United Kingdom

Omniplex Cinemas
Ireland, Northern Ireland

Svenska Bio
Denmark, Finland, Sweden

UGC
Belgium, France

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

Yelmo Cines (Cinépolis Group)
Spain

MEMBERS & PARTNERS

PARTNERS OF EUROPEAN CINEMA EXHIBITION PROGRAMME

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

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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