

EUROPEAN CINEMA FACTS AND FIGURES

Placing cinemas at the
centre of Europe's cultural
and creative ambitions

Cinema-going in Europe

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

ADMISSIONS IN 2017

1.34
BILLION

+2.5% FROM 2016

CHANGE FROM 2016

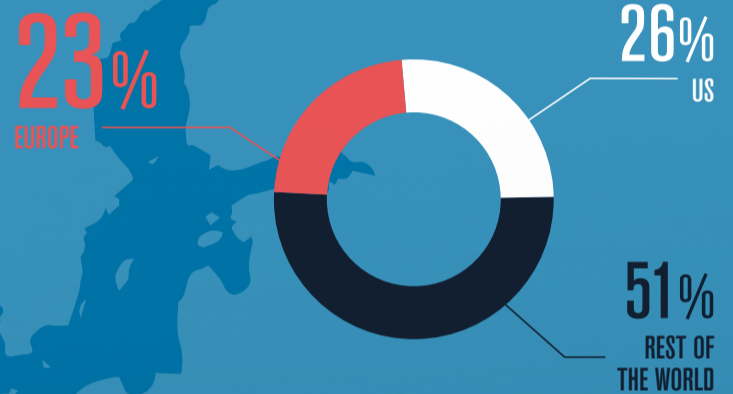
+10.0%
IN RUSSIA

-1.8%
IN FRANCE

+1.0%
IN GERMANY

+18.1%
IN SLOVAKIA

EUROPEAN VS. US AND REST OF THE WORLD BOX OFFICE IN 2017



Europe is a key building block of an increasingly connected and international industry, representing a quarter of the global theatrical market for films

SOURCE: IHS MARKIT

BOX OFFICE IN 2017

€ **8.6**
BILLION

+1.8% FROM 2016

CHANGE FROM 2016

+2.5%
IN THE UK

-0.7%
IN SPAIN

+25.9%
IN TURKEY

ANNUAL VISITS TO THE CINEMA

1.5

ACROSS UNIC
TERRITORIES

3.4

IN IRELAND

2.2

IN DENMARK

1.4

IN THE CZECH
REPUBLIC

EU5* CULTURAL ACTIVITY SATISFACTION RATES
(AVERAGE IN 2016)

CINEMA: 92.9%

CONCERTS: 90.2%

MUSEUMS/EXHIBITIONS: 90.2%

THEATRE: 88.9%

AMUSEMENT PARKS: 87.6%

PERFORMING HALLS: 83.8%

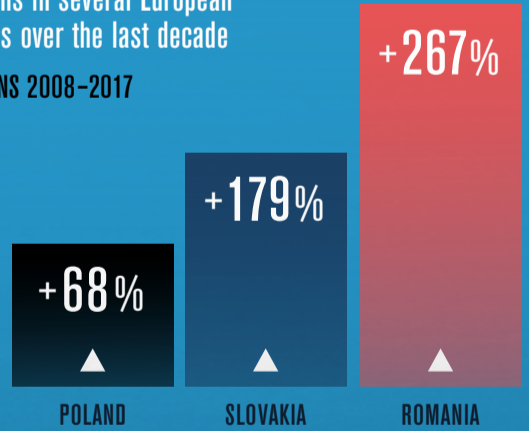
OPERA: 81.4%

55
SCREENS

PER MILLION INHABITANTS
IN THE EUROPEAN UNION
IN 2017

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

ADMISSIONS 2008-2017



THE INTERNATIONAL
UNION OF CINEMAS

UNIC

IS THE EUROPEAN GROUPING
OF CINEMA TRADE ASSOCIATIONS
AND KEY OPERATORS

► 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

► UNIC expert groups on marketing, retail and technology bring together executives from major European operators to monitor and examine recent trends, share best practice and conduct research to make the Big Screen experience even more engaging

TERRITORIES REPRESENTED

37

SCREENS ACROSS UNIC TERRITORIES

40,500

FOR MORE INFORMATION ABOUT UNIC,
PLEASE GET IN TOUCH VIA:

communications@unic-cinemas.org

Tel: +32 2 880 99 39

f /UNIC.Cinemas

t @UNIC_Cinemas

Innovation

Cinema operators are engaging with modern audiences through creative and collaborative marketing approaches

96%

DIGITISED SCREENS IN EUROPE IN 2017

The sector continues to invest in and experiment with innovative and creative solutions to offer ever more engaging, diverse and immersive experiences

INTERACTIVE SCREENINGS

IMMERSIVE SOUND, IMAGE AND MOTION

SMART VENUES

INNOVATIVE THEATRE DESIGN

ALTERNATIVE CONTENT

VR AND AR

10-20% INCREASE

IN ADMISSIONS EXPECTED IF DATA ANALYTICS TOOLS ARE EFFECTIVELY USED TO MAKE CINEMA MARKETING MORE FINE-GRAINED AND PERSONALISED

€1.5 BILLION

INVESTED IN DIGITAL CINEMA BY EUROPEAN EXHIBITORS BETWEEN 2005-2015

Learn more about the topic in the UNIC "Innovation and the Big Screen" report, available online in English, French, German and Italian.

Economic

Cinema theatres are an essential component of Europe's cultural and creative industries, employing 7 million people and generating 4.2 % of EU GDP

Cinemas create value for the European film industry

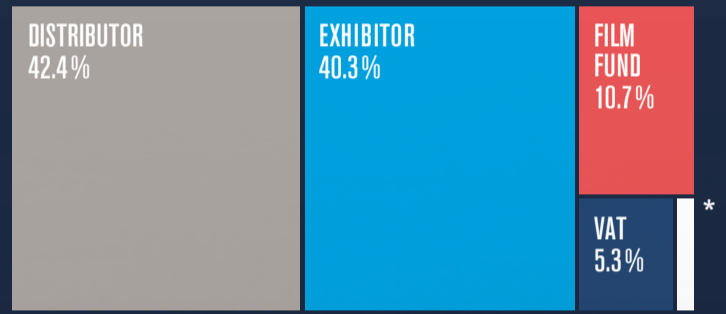
Whereas the average revenue per view on a subscription-based VOD service is around € 0.20, the average price for a cinema ticket in the EU is € 6.74

Furthermore, revenues from cinema tickets are redistributed between cinema operators, distributors, national film funds and artists, contributing to the production of local content and the overall well-being of the European cultural sector

A visit to the cinema has above-average multiplier effects on neighbouring commercial activities, contributing to urban regeneration by creating new jobs and attracting investors, small businesses and new residents

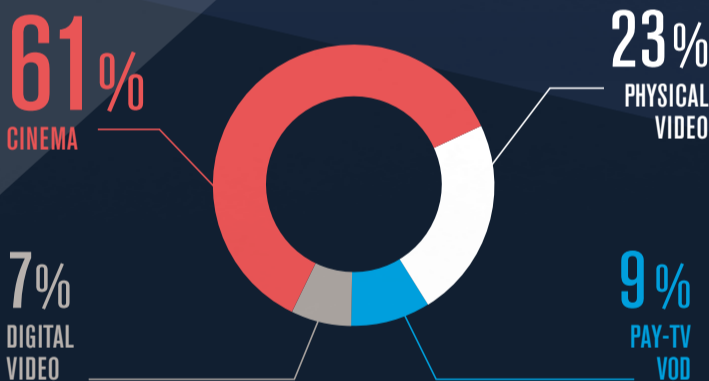
Europeans attach great value to the shared experience of seeing a film on the Big Screen and are ready to reward creativity and investments into state-of-the-art cinematic experiences

HOW A CINEMA TICKET IS REDISTRIBUTED IN FRANCE (ON AVERAGE IN 2016, WITH A TICKET PRICE OF € 6.5)



AVERAGE TICKET PRICE
EUROPEAN UNION: € 6.7 / DENMARK: € 11.6 / ITALY: € 6.3 / POLAND: € 4.5 / UK: € 8.5

EU10* BOX OFFICE VS. HOME ENTERTAINMENT REVENUE IN 2016



* THE CZECH REPUBLIC, DENMARK, FRANCE, GERMANY, ITALY, POLAND, PORTUGAL, SPAIN, SWEDEN AND THE UK



In 2017, UNIC launched a pioneering mentorship scheme for female cinema professionals in order to increase gender balance in senior management positions, an imperative for business growth and better governance in the industry

Community

Whether located in large cities or in 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 play a key role in raising awareness of and providing access to a broad film offer, maintaining competitiveness and diversity across the industry

Digital technology has facilitated the use of subtitling and audio description inside the screening room for those with visual or hearing impairments. Exhibitors also offer special screenings to enable all film fans to enjoy the Big Screen experience

TOP 3 UNIC TERRITORIES IN TERMS OF NATIONAL FILMS' MARKET SHARE

TURKEY 56.8%

FRANCE 37.4%

FINLAND 28.0%

x2

THE NUMBER OF FILMS SCREENED IN CINEMAS HAS ALMOST DOUBLED IN 15 YEARS

FILMS SCREENED IN CINEMAS FROM 2002-2017

+58%

GERMANY

+143%

UK

+173%

ESTONIA

The sector continues to innovate and transform its relationship with modern audiences, adapting its offer to meet the changing needs and preferences of young cinema-goers through digital engagement, attractive events and creative partnerships with outside brands

Film education programmes across Europe enable schools and youth groups to set up their own film clubs to watch films, learn about filmmaking and experience films in cinemas. They enable young people to develop a critical understanding of film culture and encourage them to become loyal cinema-goers in the future