



UNION INTERNATIONALE DES CINÉMAS
INTERNATIONAL UNION OF CINEMAS

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GOOD AFTERNOON EVERYONE!

ON BEHALF OF UNIC, THE INTERNATIONAL UNION OF CINEMAS, WELCOME TO CINEEUROPE 2025.

IT'S GREAT TO BE WITH YOU TO CELEBRATE OUR INDUSTRY TOGETHER.

WITH OUR PARTNERS AT THE FILM EXPO GROUP, WE'VE PUT TOGETHER A SCHEDULE THAT - IN ALL MODESTY - HAS IT ALL: SLATE PRESENTATIONS, SEMINARS, NETWORKING, AND A CUTTING-EDGE TRADE SHOW. THANK YOU ALL, OUR COLLEAGUES AND PARTNERS FROM ACROSS THE INDUSTRY, FOR YOUR SUPPORT. THIS SHOW WOULDN'T BE POSSIBLE WITHOUT YOU.

THIS MORNING, WE KICKED OFF WITH A SESSION FOCUSED ON THE LAND OF ABBA, IKEA AND VOLVO, THE WONDERFUL COUNTRY OF SWEDEN. WE THEN HEARD LEADING INDUSTRY EXECUTIVES FROM THE GLOBAL SECTOR SET OUT THEIR VISION FOR THE FUTURE OF OUR BUSINESS.

WE ALSO HOSTED A SESSION ON HOW TO TURN SOCIAL BUZZ INTO BOX OFFICE SALES.

TOMORROW WE CAN LOOK FORWARD TO THE FIRST OF TWO SEMINARS DELIVERED BY OUR HEADLINE SPONSOR - THE COCA-COLA COMPANY.

WE'LL ALSO BRING YOU PANELS ORGANISED BY THE I.C.T.A. ON CINEMA TECHNOLOGY.

ON WEDNESDAY, OUR FOCUS SESSIONS WILL CENTRE ON AI AND CINEMAS, ON THE WAR FOR TALENT AND ON HOW TO SELL MORE CINEMA TICKETS.

PLEASE DO VISIT THE TRADE SHOW FLOOR, WHICH WILL HAVE A SPECIAL OPENING TOMORROW – BUBBLES AND BOOZE.

AND CONGRATULATIONS TO ALL OF THOSE WHO WILL BE RECOGNISED DURING THE WEEK AND AT THE AWARDS CEREMONY ON THURSDAY, INCLUDING THE RECIPIENTS OF OUR NEW RETAIL AWARD.

OVER THE NEXT FOUR DAYS YOU'LL SEE NO FEWER THAN EIGHT EXCLUSIVE PRESENTATIONS. HUGE THANKS TO ALL OUR DISTRIBUTION PARTNERS!

BUT ABOVE ALL, WE'RE HERE IN BARCELONA TO CELEBRATE THE BIG SCREEN EXPERIENCE AND TO REFLECT ON ANOTHER YEAR OF EUROPEAN CINEMA.

IN 2024, CINEMAS ACROSS EUROPE RECORDED OVER 934 MILLION ADMISSIONS AND BOX OFFICE REVENUES CLOSE TO 7.1 BILLION EUROS.

QUITE AN ACHIEVEMENT GIVEN THE LINGERING IMPACT OF THE 2023 ACTORS' AND WRITERS' STRIKES AND ONCE AGAIN CLEAR PROOF OF THE ENDURING APPEAL OF THE BIG SCREEN.

THE EMEA REGION GENERATED 8.4 BILLION DOLLARS IN 2024, THAT'S 28 PER CENT OF THE GLOBAL BOX OFFICE.

2024 ADMISSIONS SURPASSED THE PREVIOUS YEAR IN FRANCE, UK, IRELAND, BULGARIA, GREECE, ALBANIA, LATVIA, LITHUANIA, POLAND, SLOVAKIA, TURKEY AND MONTENEGRO.

NO SMALL PART IN THAT SUCCESS WAS PLAYED BY THE CONTINUED INVESTMENT THAT OPERATORS OF ALL SIZES, WHO CONTINUE TO PROVIDE AUDIENCES WITH AN INCREDIBLY DIVERSE AND APPEALING OFFER OF BOTH FILM CONTENT AND BIG SCREEN EXPERIENCE. STRIVING TO INNOVATE, DRIVING LOCAL ECONOMIES WHILE REMAINING A CHERISHED COMMUNITY AND CULTURAL RESOURCE.

AS EVER, IN 2024 LOCAL TITLES WERE CRUCIAL TO THE EUROPEAN SECTOR'S SUCCESS. A SMALL SELECTION ON THE SCREEN SHOWCASE SOME OF EUROPE'S BEST. INCLUDING A LITTLE BEAR IN PERU, FLASHING BLADES IN FRANCE AND A TRICKY BE-QUEST IN LITHUANIA.

ITALY ENJOYED ITS BEST BOX OFFICE SUMMER EVER, WHILE CHRISTMAS ADMISSIONS SURGED 28 PER CENT, ITALIAN FILMS ACCOUNTING FOR AN INCREDIBLE 45 PER CENT OF TICKETS SOLD IN THE FESTIVE PERIOD.

BULGARIA SAW BOX OFFICE REVENUE INCREASE BY NEARLY 11 PER CENT, WITH ADMISSIONS UP OVER 4 PER CENT.

FRANCE RECORDED 181.5 MILLION ADMISSIONS, UP OVER 1 MILLION COMPARED WITH 2023. THE TOP 3 FRENCH FILMS SOLD OVER 25 MILLION TICKETS, BREAKING A DECADE-LONG RECORD. THE MARKET SHARE FOR FRENCH-MADE FILMS REACHED CLOSE TO 45 PER CENT, ONE OF ITS HIGHEST EVER LEVELS.

A BIG THANK YOU TO OUR FRIENDS AT COMSCORE, WHOSE SUPPORT HAS ALLOWED US TO MONITOR WEEKLY EUROPEAN BOX OFFICE RESULTS, HIGHLIGHTING THE VALUE OF NATIONAL, EUROPEAN AND INTERNATIONAL RELEASES ACROSS THE REGION.

A KEY HIGHLIGHT ACROSS THE ENTIRE EMEA REGION WAS DISNEY'S *INSIDE OUT 2*, THE HIGHEST-GROSSING US ANIMATED FILM OF ALL TIME AND THE QUICKEST TO BREAK THROUGH THE \$1-BILLION BARRIER GLOBALLY, IN JUST 19 DAYS.

UNIVERSAL'S DESPICABLE ME 4 AND WALT DISNEY'S DEADPOOL & WOLVERINE ALSO BOOSTED SUMMER ADMISSIONS, BEFORE THE SECOND HALF OF 2024 PICKED UP WITH A MORE ROBUST RELEASE CALENDAR THAT SAW MULTIPLE HITS INCLUDING WARNER BROS' BEETLEJUICE BEETLEJUICE, PARAMOUNT'S GLADIATOR II, UNIVERSAL'S 'WICKED, WALT DISNEY'S MOANA 2 AND SONY'S VENOM: THE LAST DANCE.

SO HOW IS 2025 SHAPING UP?

IN APRIL [GOWER STREET ANALYTICS](#) UPDATED ITS GLOBAL BOX OFFICE PROJECTION FOR THE YEAR TO \$34.1 BILLION, MORE THAN \$1 BILLION ABOVE ITS INITIAL ESTIMATE.

AFTER A CHALLENGING START TO THE YEAR, APRIL MARKED A TURNING POINT WITH THE RELEASE OF A *MINECRAFT MOVIE*.

COMBINED WITH THE SUCCESS OF TITLES SUCH AS *SINNERS*, THE 20TH ANNIVERSARY RELEASE OF *STAR WARS EPISODE III: REVENGE OF THE SITH* AND LOCAL PRODUCTIONS, 58 PER CENT OF INTERNATIONAL BOX OFFICE (EXCLUDING CHINA) WAS GENERATED IN THE EMEA REGION.

FOR COMPARISON, THAT FIGURE WAS 25 PER CENT ABOVE APRIL 2024.

AND IN MAY *LILO AND STITCH* AND *MISSION: IMPOSSIBLE – THE FINAL RECKONING* OPENED IN A RECORD-BREAKING WEEKEND AT THE BOX OFFICE.

IN MAY EMEA WAS + 19 PER CENT ABOVE THE SAME MONTH LAST YEAR AND RECORDED THE BEST OF THE DECADE.

HERE'S JUST A SMALL SELECTION OF THE EXCITING FILMS THAT WILL HIT OUR CINEMAS LATER THIS YEAR - NOT JUST BLOCKBUSTERS FROM THE US STUDIOS, BUT ALSO TOP LOCAL RELEASES.

ALL THAT WE HAVE SPOKEN OF SO FAR PROVIDES POSITIVE NEWS FOR OUR SECTOR OF FURTHER RECOVERY.

BUT UNIC STRONGLY BELIEVES THAT REALISING THE FULL POTENTIAL OF THE FILM SLATE FOR THE REMAINDER OF 2025 – AND WHAT LOOKS LIKE AN EXTRAORDINARILY STRONG SLATE INTO 2026 AND BEYOND – WILL REQUIRE US ALL – EXHIBITORS, STUDIOS AND DISTRIBUTORS ALIKE – TO RISE TO SOME KEY CHALLENGES.

CHIEF AMONGST THOSE IS A SHARED RECOGNITION THAT A CLEAR AND CONSISTENT PERIOD OF THEATRICAL EXCLUSIVITY – SUPPORTED BY MEANINGFUL MARKETING – IS THE BEST WAY OF ENSURING THE SUCCESS OF FILMS RELEASED ON THE BIG SCREEN.

WHETHER BY INTENTION OR NOT, WE HAVE CONFUSED THE CONSUMER AS TO WHICH FILM IS OUT WHEN, WHERE AND FOR HOW LONG.

THAT'S A PARTICULAR PROBLEM WHEN IT COMES TO THE CASUAL CINEMA-GOER.

THIS IS NOT A THEORETICAL POINT.

AS THE GRAPH HERE SHOWS, THERE IS A CLEAR RELATIONSHIP BETWEEN THE AVERAGE LENGTH OF THEATRICAL WINDOW AND THE RATE OF BOX OFFICE RECOVERY.

THE LONG-TERM SUCCESS OF OUR BUSINESS CANNOT BE ACHIEVED BY SHORT-TERM THINKING IN THIS OR ANY OTHER AREA.

HAND IN HAND WITH THE ISSUE OF THEATRICAL EXCLUSIVITY GOES THAT OF MARKETING.

NO ONE CAN DENY THE EXTRAORDINARY EFFORT AND INGENUITY THAT OUR COLLEAGUES IN DISTRIBUTION BRING TO DRIVING AWARENESS AND EXCITEMENT AROUND THEIR RELEASES IN AN INCREASINGLY CROWDED AND NOISY MEDIA MARKET.

THERE WAS IN TRUTH NEVER A TIME WHEN RAISING AWARENESS OF UPCOMING TITLES WAS SOLELY THE ROLE OF DISTRIBUTORS, AND IN RECENT YEARS CINEMA OPERATORS HAVE INCREASINGLY 'LEANED IN' TO THOSE EFFORTS.

YET DATA FROM A WIDE RANGE OF UNIC TERRITORIES SUGGESTS THAT SLATE AWARENESS REMAINS WORRYINGLY LOW AMONGST SOME KEY AUDIENCES.

SO IF ANYTHING, THERE IS A NEED TO REDOUBLE THAT PARTNERSHIP. FOR THE MESSAGE 'ONLY IN CINEMAS' TO BECOME THE NORM AND THE MARKETING FOR 'AT

HOME' OPTIONS LEFT FOR A TIME WHEN THOSE OPPORTUNITIES ARE GENUINELY ADDITIONAL TO BOX OFFICE RETURNS.

AND TO ENSURE THAT ALL SIZES, SHAPES AND FORMATS IN THE CINEMA LANDSCAPE ARE WELL-SERVED BY MARKETING CAMPAIGNS AND ASSETS.

CINEMAS RELY ON ONE PRODUCT TO ATTRACT AUDIENCES – CONTENT.

HAVING A GLUT OF FILMS TO SHOW DURING ONE PERIOD OF THE YEAR, AND NOT ENOUGH FILMS TO SHOW AT OTHER TIMES MAKES NO BUSINESS SENSE.

MORE IMPORTANTLY IT LEAVES OUR AUDIENCES UNSATISFIED AND 'MONEY ON THE TABLE'.

EXHIBITORS NEED A RELIABLE, CONSISTENT AND DIVERSE FLOW OF CONTENT ALL YEAR ROUND. DIVERSITY OF GENRE, FROM ROM-COMS TO HORROR TO ANIMATION; AND WHEN IT COMES TO SIZE WE NEED A MIX OF SMALLER NICHE TITLES TO MID-SIZE FILMS AND BLOCKBUSTERS.

THIS WAS ALSO CONFIRMED IN FINDINGS FROM A SURVEY OF 96,000 CINEMA-GOERS ACROSS THE WORLD BY THE GLOBAL CINEMA FEDERATION, THE HEADLINE RESULTS OF WHICH ARE SHOW HERE.

THESE SUGGEST THAT THERE ARE SOME FILM GENRES – AND SO SOME AUDIENCES – THAT REMAIN UNDERSERVED.

RELEASING MORE OF THE TYPES OF FILMS THAT CUSTOMERS WANT TO SEE INTO CINEMAS WILL MEET THOSE NEEDS AND DRIVE FREQUENCY.

DO VISIT THE GCF WEBSITE TO FIND OUT MORE ABOUT WHAT AUDIENCES WANT, ABOUT THE IMPACT OF PIRACY AND INNOVATION IN CINEMAS.

IN SHORT, WE NEED TO CONTINUE TO ENSURE THAT CINEMA-GOING REMAINS NOT JUST THE FAVOURITE WAY THAT PEOPLE WATCH FILMS, BUT THE FAVOURITE OUT-OF-HOME ACTIVITY.

AND THAT REQUIRES A FOCUS ON THE LONG-TERM SUCCESS OF THE BUSINESS RATHER THAN ONE THAT CHASES SHORT-TERM RETURNS.

AT THE END OF THE DAY, WE ALL DEPEND ON EACH OTHER AND WE'LL SUCCEED OR FAIL TOGETHER.

INVESTING IN A RELIABLE AND DIVERSE SLATE OF FILM CONTENT AND IN ALL ASPECTS OF THE BIG SCREEN EXPERIENCE.

ENSURING A STRONG AND DISTINCT PERIOD OF EXCLUSIVITY.

PROMOTING AND MARKETING EFFICIENTLY TOGETHER TO CONNECT WITH ALL AUDIENCES.

LATER THIS WEEK, WITH OUR PARTNERS AT BOXOFFICE PRO, WE WILL CELEBRATE CINEMA OPERATORS WHO ARE 'THE GIANTS OF EXHIBITION', RANKING THE TOP 50 EUROPEAN GROUPS BY SCREEN COUNT.

ODEON CINEMAS GROUP LEADS THIS YEAR'S LIST. CINEWORLD CINEMAS, VUE, PATHE CINEMAS AND CGR ROUND OUT THE TOP FIVE.



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THE 'GIANTS OF EXHIBITION' ARE HEADQUARTERED IN 21 COUNTRIES AND OPERATE ACROSS NEARLY 40 TERRITORIES.

THEY AND OTHER OPERATORS, LARGE AND SMALL, ARE WHAT MAKES EUROPE'S CINEMAS THE WORLD'S BEST.

WE CONTINUE TO ROLL OUT OUR UNIC PEOPLE PROGRAMME, AIMED AT SUPPORTING UNIC EXHIBITORS WHO ARE RISING TO THE CHALLENGE OF RECRUITING AND RETAINING OUR MOST PRECIOUS RESOURCE: THE PEOPLE WHO BRING THE BIG SCREEN EXPERIENCE TO THEIR LOCAL COMMUNITIES.

THANK YOU TO GRUVI, OUR STRATEGIC ADVISOR.

THIS BUILDS ON OUR WOMEN'S CINEMA LEADERSHIP MENTORING PROGRAMME – HERE THEY ALL ARE – 184 FANTASTIC WOMEN FROM 114 COMPANIES.

A HUGE THANKS TO IMAX, BARCO AND VISTA GROUP, OUR JOINT 'CHAMPIONS OF THE PROGRAMME', FOR SUPPORTING UNIC'S VISION OF A MORE DIVERSE AND INCLUSIVE CINEMA INDUSTRY.

BELGIUM. THE COUNTRY FAMED FOR FRIES, MAGRITTE, BEERS, SPIROU, AND BICYCLES.

IN 2024, WE WELCOMED A NEW EU COMMISSION AND NEW EU PARLIAMENT, OF WHICH MORE THAN 50 PER CENT ARE NEW MEPS. THEY HAVE NEW PRIORITIES, AMID A POLITICAL LANDSCAPE THAT HAS CHANGED CONSIDERABLY.

OUR PRIORITY IS TO EDUCATE AND INFORM COMMISSIONERS AND MEPS ABOUT THE SOCIAL, ECONOMIC AND CULTURAL VALUE OF CINEMAS. UNIC ENSURES THAT THE VOICE OF EXHIBITION IS HEARD AND UNDERSTOOD – AND THAT OUR SECTOR'S UNIQUE CONTRIBUTION IS REFLECTED IN EUROPE'S POLICIES.

SO, FINALLY, A HUGE THANKS TO ALL OUR MEMBERS, OUR PARTNERS, AND TO THE SMALL BUT MIGHTY UNIC TEAM – LAURE, SONIA, KAMIL, HELLEN AND LENA.

A HUGE THANKS ALSO TO ANDREW, ERICA, JORDAN AND ALL OF OUR FRIENDS AT THE FILM EXPO GROUP, FOR THEIR DEDICATION AND GREAT PARTNERSHIP.

LET'S CONTINUE TO DO WHAT WE DO BEST – BRINGING GREAT STORIES TO THE BIG SCREEN AND CREATING MAGICAL MEMORIES.

HAVE A FANTASTIC CINEEUROPE

THANK YOU.