

Europa Cinemas

Network Review #37

Cannes 2021



**Statistical
Yearbook
2020
Cinema
Reopening
in Europe**



Europa Cinemas Network Review

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Founded in 1992, Europa Cinemas is the first international film theatre network for the circulation of European films.

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Film theatres will ensure the future of cinema!

2020

When film theatres are forced to shut their doors almost everywhere across the globe, cinema disappears not just from the big screen, but also from the media, the billboards across our towns and cities, our everyday conversations, our dreams and our shared enthusiasms.

Several months later, when theatres reopen, films reclaim their position and cinema is reborn. The public has not forgotten!

2021

Season 2: things take a turn for the worse, platforms reign supreme and cinema starts to question itself. Is this the end for the shared cinema experience? This time, though, modern medicine works miracles and we can once again start to imagine a post-pandemic world. As restrictions are gradually relaxed and we can meet up again, it is cinema in theatres that helps us forget the nightmare and reignites a real passion that has remained inside the audiences the whole time. In spite of the health-related restrictions and the market regulation challenges, cinema reaffirms its essential function. Films flood onto cinema screens, audiences and professionals accept the need to balance freedom with safety and the results posted after the reopening instil confidence right across the sector. Film theatres welcome back the public with great success – watching on small screens has not erased the richness and passions that existed in the pre-pandemic world.

Today

Exhibitors have not given up on their theatres, distributors have protected their films, producers have done everything possible to honour their filming commitments and, now, the Cannes Festival is serving as an international rallying call for all professionals who are able to travel. It will not be easy, of course, but the films are already there. And in every section they promise to be of exceptional quality.

Tomorrow

Naturally, a crisis such as this will leave its mark, and we have all lost time and money. However, the passion remains, skills have been enhanced in the face of adversity and our challenge for the future is clear-



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er than ever: produce quality films and inspire the audiences.

It is theatres rather than platforms that will ensure the future of cinema and, although several months of closure made us fear the worst, we have seen how imagination and creativity have been stepped up across the whole of the cinema industry: reinventing ourselves is an obvious and necessary step.

Europa Cinemas

Our network has demonstrated its durability and resilience: we have already highlighted the various initiatives that many cinemas have taken to maintain the connection with audiences. We have organised numerous Online Innovation Labs, bringing together hundreds of exhibitors to discuss issues associated with the reopening and relaunch.

The results for 2020 set out in this Review show an overall drop in box office takings of 62% (compared with 70% on the European market), but our cinemas continued to play their part in promoting European films, increasing the market share of these films from 53% to 57%, with national productions benefiting

in particular. The cancellation of numerous festivals seriously held up the large-scale releases of European productions, although a number of titles proved more resilient to the challenges associated with the disruption: *Another Round*, *Arab Blues*, *Corpus Christi*, *An Officer and a Spy*, *Hope* and *Undine*.

Recent weeks since the reopening look set to confirm that this trend has continued over 2021.

Collaborate to Innovate

Under this recent initiative Europa Cinemas has committed to a new support scheme for collective innovative initiatives shared among a number of network cinemas. This is a dynamic way of identifying and testing out new responses to the crisis, but also, above all, to the future expectations that exist within our network, which is highly diversified across the whole of Europe. We have just noted how essential our cinemas are for the distribution of European films. They are every bit as important when it comes to ensuring inclusive, pluralistic and responsible cultural activities at the heart of the towns and cities in which they are based. As was the case with digitisation around fifteen years ago, there are new areas to explore for the exhibition sector, which needs to create closer links to all audiences, and the youngest age groups in particular. This new programme,

which is intended to support investments by exhibitors (up to € 100,000 for a joint project), will publish its initial funding allocations in July 2021.

Creative Europe/MEDIA

On behalf of the members of our network, we welcomed the two initiatives that the Commission put in place to provide substantial support to cinemas in the face of the enforced closures: the advance payment of programming support and the exceptional COVID support of 4 million €. The interest that Creative Europe is showing in our exhibitor network is growing markedly and the new Collaborate to Innovate programme proves this once again. We can only welcome the prospects that have been opened up in the area of culture thanks to the European Parliament's recent adoption of the 2.4 billion € budget for 2021-2027, an increase of 1 billion € on the previous budget. We are delighted to congratulate and welcome to this Review the Head of Creative Europe/MEDIA, Lucia Recalde, who will outline this decisive action by the European Commission.

It is a pleasure to be able to share our encouraging news with her and with you!

Claude-Eric Poiroux

General Director, Europa Cinemas



Un divan a Tunis © Carole Bethuel

Interview with Lucia Recalde, Head of Unit Creative Europe/MEDIA

The MEDIA Programme is celebrating its 30th anniversary in 2021. What are the main achievements of 30 years of European audiovisual policy?

This year, we are celebrating our 30th anniversary by putting the spotlight on the numerous success stories of MEDIA-supported projects. Promoting cultural diversity and vibrant creative sectors are at the heart of Creative Europe. Through the MEDIA sub-programme, we have pursued this goal, in particular, by promoting the circulation of audiovisual content across Europe and beyond. For 30 years, the Commission has supported the audiovisual industry and strengthened the competitiveness of the whole value chain, encouraged collaboration among audiovisual companies and helped them to innovate their formats and business models, to adapt to the digital transition, and to reach wider international and cross-generational audiences. As we celebrate the Cannes Festival, let me remind that MEDIA has supported 15 Golden Palms since the establishment of the programme in 1991, roughly all awarded European films...

Our aim has always been that films and TV series (or any other content) travel beyond their country or countries of production. We support creators and distributors to develop and share stories that resonate in their own unique way, but have international appeal and attract audiences in other countries. In this regard, the support to the network of cinemas Europa Cinemas has been fundamental in fostering the screenings of non-national films across borders and in developing new audiences. The exponential development of the Europa Cinemas network is one of the main tangible success of the MEDIA Programme: from a small cinema in Angers in 1992 to 1143 screens, in 34 countries in 2021! In addition, the network has proved to be a crucial partner for us in successfully implementing new MEDIA initiatives such as 'the European Cinema Night', part of the outreach campaign of MEDIA going local, which allowed us to bring Europe closer to citizens while celebrating together the richness of the European film culture.

But ultimately, the main achievement of the programme has been its success in nurturing and supporting several generation of European talents and professionals, who regardless of the country they come from, consider Europe as their playground, and develop, produce and distribute locally-grounded stories for the European and global markets.

The exercise of looking back and analyzing the impact of the programme and its achievements is allowing us to celebrate this milestone anniversary but also inspired us to come up with a strong, reinvigorated programme for 2021-2027.



Lucia Recalde

The new Creative Europe MEDIA Programme 2021-2027 has just been adopted by the European Parliament with an increased budget (2.4 billion €). What are the main objectives and areas of activity of the new programme?

The adoption of the new Creative Europe MEDIA Programme comes at a time of unprecedented crisis for the European audiovisual sector with an almost full paralysis of the production activities and the traditional exhibition activities of 18 months. The pandemic has exacerbated the preexistent fragmentation of the European audiovisual ecosystem and made the sector even more fragile. Thus, the EU programme bringing support to the audiovisual ecosystem could not come timelier.

Creative Europe MEDIA is embedded in the Audiovisual and Media Action Plan, the political roadmap for European audiovisual policy for the next five years. The main objective of the European Commission's policy is to help the sector weather the storm of the pandemic crisis, to ensure that it transforms by fully embracing the opportunities of digital technologies and becomes both more resilient by improving its international competitive position.

As a first concrete sign of the commitment of the European Commission towards the audiovisual ecosystem, Creative Europe budget has been significantly increased to reach a total of around 2.4 billion euros: 63% more than in the previous financial framework. The overall amount represents, based on the 27 member countries of the EU, an increase of over 80%.

Creative Europe 2021-2027 has been designed around several horizontal pillars that will be considered across actions and initiatives to promote best practices and contribute to the achievement of key priorities of the European Commission. These are: greening, diversity, innovation/digitalisation and collaboration.

When it comes to greening, in order to align to the objectives of the Green Deal of von der Leyen Commission, MEDIA has integrated financial incentives to encourage best practices in promoting sustainable development, and plans to launch an industry consultation to set up a carbon calculator and agree on common standards. Regarding diversity, the programme plans to contribute to the global EC's agenda on gender and inclusion. MEDIA will require applicants to provide a strategy and to commit to diversity goals in the application files. In addition, proactive measures will be taken, including dedicated mentoring programmes and training activities.

Like all EU programmes, Creative Europe will intervene where there is European added-value. The goal is of course, through strengthening cooperation and networking, to promote the development and dissemination of high quality works, to encourage innovation, artistic and cultural, and to promote solidarity for the consolidation of the European audiovisual market. It is fair to say that the experience of the Europa Cinemas network is a clear example of what the Creative Europe MEDIA Programme intends as European added value and cooperation.

Moreover, the new MEDIA programme has been adapted in a spirit of evolution and not of revolution. That means that, building on the achievements of the last 30 years, the programme will continue to support the entire audiovisual value chain but it will do so under a different structure designed around four different thematic clusters (content, business, audiences and policy) to ensure more flexibility in its actions and encourage cooperation among professionals.

The COVID 19 crisis has highlighted the essential role of cinemas in the circulation of European productions. The Commission has given them exceptional support to help them overcome their difficulties. How do you see the development of your policy towards Europa Cinemas Network exhibitors and audiences they engage in favour of European films?

COVID-19 was a massive blow for the cultural and creative sectors. At the beginning of the crisis, we identified the cinemas as the hardest-hit sector by the pandemic. Our exceptional support was a first, remedial answer and through your network, we were able to mobilise it in relatively short time. Possibly, this Covid crisis has also shown the importance of public policy, and of rapid response from public institutions.

The crisis has also brought about challenges that cinemas have been able to transform in real opportunities to innovate their business models. Cinemas, showing a remarkable resilience, have embarked on new ways of engaging with their audiences, by exploiting digital technologies, by strengthening their social media communication and by cooperating with other distributors and online platforms. This innovative approach is showing their results. Today, we see people queuing outside cinemas in these first weeks of reopening of cultural venues!

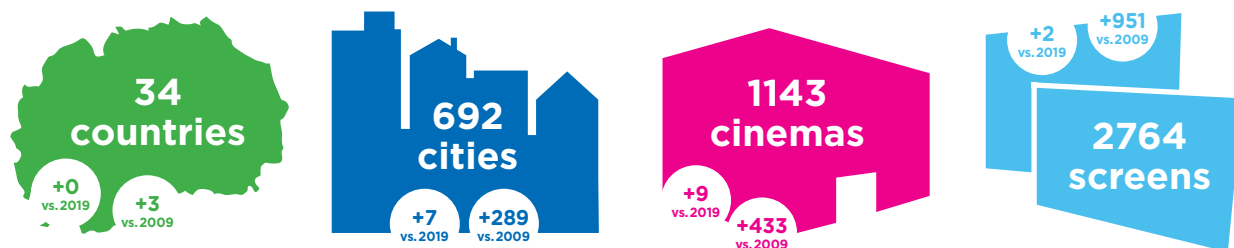
The resilience of the independent exhibitors during the crisis should be capitalised to the benefit of the entire sector. Renewing the cinema-going experience, is an opportunity for the business model and in the strategic plans of the Europa Cinemas network. In this respect, we very much welcome the pilot project that Europa Cinemas has just launched "Collaborate to Innovate". The project will build on the lessons of the pilot action "Cinemas as innovation hubs" that supported innovative projects bridging cinema-going experience, social belonging and technological innovation.

To conclude Europa Cinemas has resolutely followed Winston Churchill's famed quote 'Never waste a good crisis' and in times of deep crisis, reflected on what adaptations can be introduced to make the sector stronger and more resilient. This shared determination of the cinema exhibitors to make the most of this challenging moment makes of Europa Cinemas such a vibrant and future-proof project.



Facts & Figures 2020

In MEDIA countries



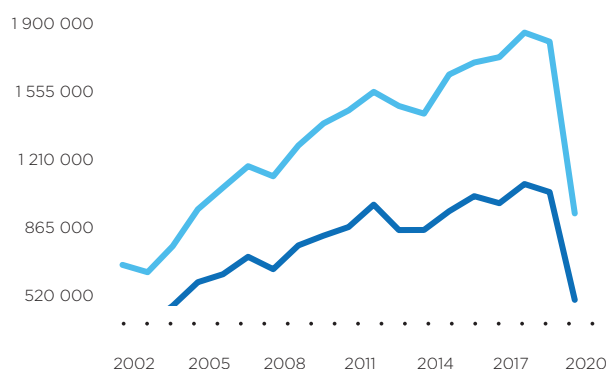
A difficult year for European Admissions in the network

0.95 M
European Screenings
(60,3% of the total screenings)

0.52 M
European Non-National Screenings
(32,8% of the total screenings)

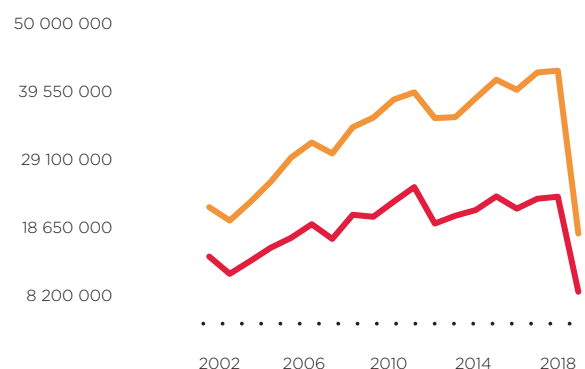
17.1 M
European Admissions
(56,7% of the total admissions)

8.2 M
European Non-National Admissions
(27,3% of the total admissions)



European Screenings

European Non-National Screenings

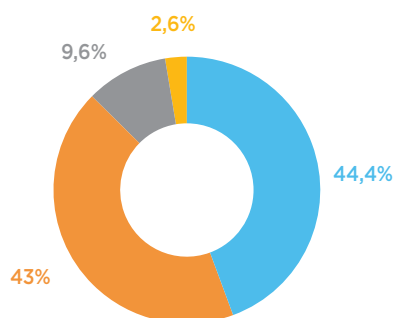


European Admissions

European Non-National Admissions

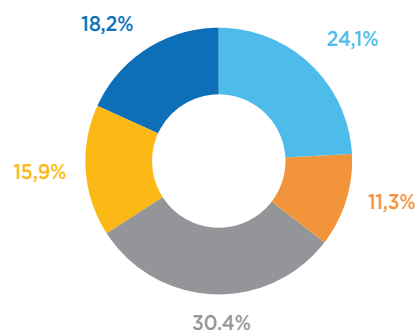
Profile of the Cinemas

Cinemas by number of screens 2020



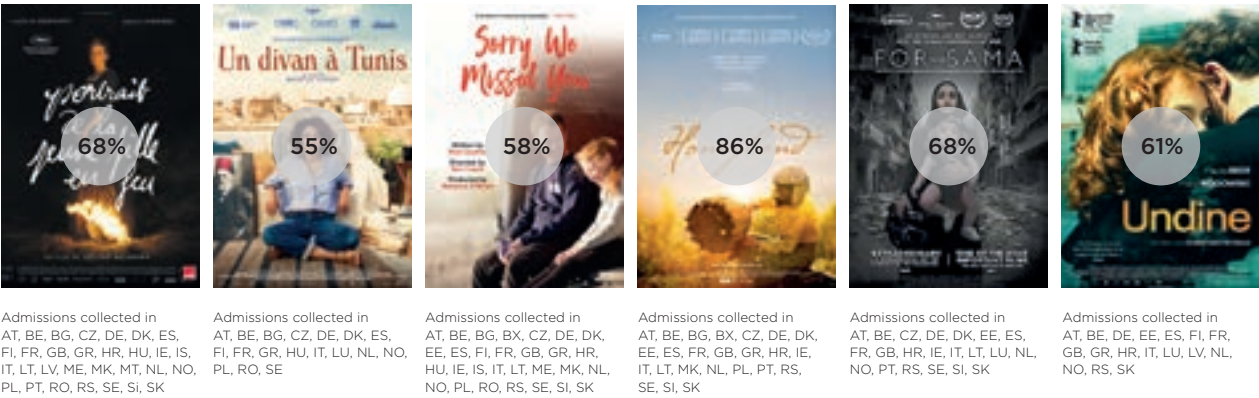
Single Screen: 507 Cinemas
2-4 Screens: 492 Cinemas
5-7 Screens: 114 Cinemas
8 Screens +: 30 Cinemas

Cinemas by city sizes 2020



< 50 000 inhabitants: 276 Cinemas
50 - 100 000: 129 Cinemas
100 - 500 000: 348 Cinemas
500 000 - 1M: 182 Cinemas
> 1M: 208 Cinemas

Europa Cinemas Network made more than 50% of the total admissions for these films!

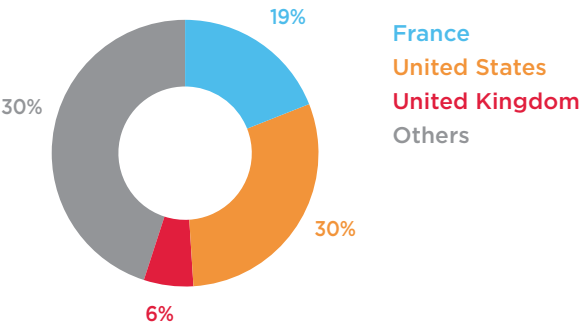


Europa Cinemas Labels

In 2020, the Europa Cinemas labels were admirably shown all across Europe, despite the difficult situation cinemas faced. *Corpus Christi*, labelled at the Venice Festival in 2019, ranked 12th for admissions in 2020, and 7th for screenings. *Håp* was already well underway, released in 13 countries, but was stopped short by the second wave of lockdown across Europe.

Corpus Christi – PL (Venice 2019) 233,429 admissions 13,826 screenings 29 Countries 595 cinemas	Alice and the Mayor – FR (Cannes 2019) 206,321 admissions 6,937 screenings 12 countries 186 cinemas	Hope – NO (Berlin 2020) 28,051 admissions 2,971 screenings 13 countries 170 cinemas
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French movies by admissions in 2020

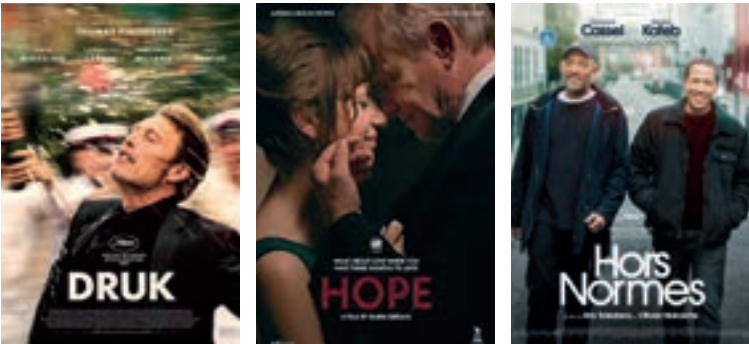


French movies in 2020

French movies have always been especially strong for the network. Owing to the crisis, and with the poor circulation of English movies during 2020, this was further bolstered. They represent 19% of the total admissions, as well as 21% of the total screenings for 2020. This is a strong result compared with 2019, when they represented just 15% of the total admissions and 19% of the total screenings. French movies were also notably present in the top 15 movies for the Europa Cinemas network in both admissions and screenings when compared with other years. In 2019, for instance, only one French movie was present in both charts, while in 2020, 5 were present in the top 15 screenings and 4 in the top 15 admissions.

Interrupted movie circulation

Over the last year, numerous movies have seen their journey cease prematurely. *Drunk*, despite a remarkable beginning (222,000 admissions) was stopped short, just 2 weeks after its release in France owing to new lockdown measures. *Hors Normes* (20,000 admissions) and *Portrait de la jeune fille en feu* (12,000 admissions) were halted in Denmark despite a strong début, and *Håp* was also stopped short, one or two weeks after its release in the Netherlands, Slovakia, and Belgium.



Top 50: European Movies by Admissions

MEDIA 2020



1

J'accuse (FR)
Roman Polanski

countries 26/
cities 376/
cinemas 554/
admissions 323 450/
746 776*



2

Un divan à Tunis (FR)
Manele Labidi

countries 18/
cities 380/
cinemas 516/
admissions 298 907



3

Sorry We Missed You (GB)
Ken Loach

countries 30/
cities 348/
cinemas 491/
admissions 277 069/
726 310*



4

Judy (GB)
Rupert Goold

countries 25/
cities 383/
cinemas 528/
admissions 266 807/
377 761*



5

Les Misérables (FR)
Ladj Ly

countries 30/
cities 470/
cinemas 666/
admissions 258 694/
493 799*

countries/cities/cinemas/admissions

11 Sviňa (SK)
Rudolf Biermann, Mariana Solčanská Čengel
2 / 38 / 53 / 194 326

12 Portrait de la jeune fille en feu (FR)
Céline Sciamma
32 / 348 / 483 / 180 412 / 607 825*

13 Hors Normes (FR)
Olivier Nakache, Eric Toledano
26 / 315 / 421 / 178 582 / 452 401*

14 Antoinette dans les Cévennes (FR)
Caroline Vignal
7 / 194 / 241 / 167 442

15 Hammamet (IT)
Gianni Amelio
3 / 88 / 125 / 164 270

16 La belle époque (FR)
Nicolas Bedos
27 / 326 / 440 / 157 214 / 460 788*

17 A Hidden Life (DE)
Terrence Malick
21 / 312 / 391 / 142 066 / 205 385*

18 Gli anni più belli (IT)
Gabriele Muccino
8 / 134 / 169 / 133 233

19 Effacer l'historique (FR)
Benoît Delépine, Gustave Kervern
12 / 170 / 203 / 130 254

20 Lindenberg! Mach dein Ding! (DE)
Hermine Huntgeburth
3 / 96 / 146 / 130 085

21 La bonne épouse (FR)
Martin Provost
17 / 228 / 294 / 121 662

22 Eté 85 (FR)
François Ozon
20 / 225 / 288 / 121 129

23 Die Känguru-Chroniken (DE)
Dani Levy
3 / 91 / 144 / 120 904

24 De beentjes van Sint-Hildegard (NL)
Johan Nijenhuis
1 / 33 / 38 / 120 114

25 La dea fortuna (IT)
Ferzan Ozpetek
7 / 131 / 199 / 119 150 / 247 690*

26 Das geheime Leben der Bäume (DE)
Jörg Adolph, Jan Haft
7 / 104 / 148 / 115 729

27 Honeyland (MK)
Tamara Kotevska, Ljubomir Stefanov
24 / 266 / 346 / 112 882 / 149 447*

28 For Sama (GB)
Waad Al-Khateab, Edward Watts
22 / 294 / 391 / 110 730 / 166 780*

29 La Fille au bracelet (FR)
Stéphane Demoustier
5 / 115 / 136 / 106 292

30 Adam (FR)
Maryam Touzani
12 / 190 / 223 / 105 171

This list includes movies whose exhibition began before 2020 and others which will continue theirs after 2020. For the movies released before 2020, the total number of admissions realised in the network since their first release is mentioned.



6

Boże Ciało (PL)
Jan Komasa

countries 29/
cities 435/
cinemas 594/
admissions 233 071/
351 930*



7

Tolo tolo (IT)
Checco Zalone

countries 3/
cities 63/
cinemas 82/
admissions 202 724



8

La Vérité (FR)
Hirokazu Koreeda

countries 29/
cities 406/
cinemas 565/
admissions 199 928/
353 235*



9

Druk (DK)
Thomas Vinterberg

countries 16/
cities 155/
cinemas 188/
admissions 197 530



10

Als Hitler das rosa Kaninchen stahl (DE)
Caroline Link

countries 6/
cities 127/
cinemas 197/
admissions 195 312/
268 162*

31 Undine (DE)

Christian Petzold

17 / 303 / 410 / 104 890

32 Prilis osobni znamost (CZ)

Marta Ferencova

2 / 37 / 49 / 104 800

33 Emma. (GB)

Autumn de Wilde

27 / 295 / 375 / 98 209

34 La Daronne (FR)

Jean-Paul Salomé

11 / 161 / 220 / 96 330

35 Josep (FR)

Aurel

5 / 119 / 139 / 91 989

36 Adieu Les Cons (FR)

Albert Dupontel

8 / 83 / 91 / 91 972

37 Les Choses qu'on dit, les choses qu'on fait (FR)

Emmanuel Mouret

7 / 122 / 142 / 91 133

38 Il traditore (IT)

Marco Bellocchio

26 / 301 / 425 / 86 310 / 465 816*

39 Wasp Network (FR)

Olivier Assayas

12 / 143 / 167 / 84 745

40 Le Mystère Henri Pick (FR)

Rémi Bezançon

8 / 179 / 248 / 83 339 / 290 040*

41 Pinocchio (IT)

Matteo Garrone

23 / 246 / 322 / 81 460 / 198 312*

42 Alice et le Maire (FR)

Nicolas Pariser

12 / 182 / 227 / 80 032 / 286 353*

43 La Gomera (RO)

Corneliu Porumboiu

30 / 316 / 388 / 79 133 / 89 167*

44 It Must Be Heaven (EU)

Elia Suleiman

21 / 251 / 329 / 77 927 / 197 085*

45 And then We Danced (SE)

Levan Akin

20 / 191 / 288 / 77 342 / 163 470*

46 Radioactive (GB)

Marjane Satrapi

18 / 225 / 292 / 74 903

47 Šarlatán (CZ)

Agnieszka Holland

9 / 77 / 126 / 70 245

48 Mientras Dure la Guerra (ES)

Alejandro Amenábar

7 / 119 / 146 / 70 185 / 315 214*

49 Enkel für Anfänger (DE)

Wolfgang Groos

4 / 81 / 111 / 69 350

50 V síti (CZ)

Barbora Chalupová, Vít Klusák

4 / 47 / 67 / 66 321

Country Focus 2020

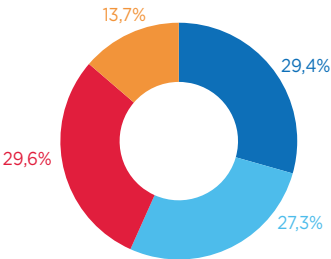
The figures from the European Audiovisual Observatory for 2020 show that 39.7% of all admissions in Europe were for European films. In our Network, this figure is 56.7%. The following pages serve to better understand the different national realities behind global European figures.

Hereafter, you will find two types of results for 2020: national results for several different European countries and our Europa Cinemas members' results (we have selected 29 countries where Europa Cinemas is best established). They enable us to compare the results achieved in different markets and to quantify the remarkable work done by the Network venues in terms of promoting European films. We believe that presenting these figures provides a deeper understanding of the exhibition market in Europe. We also added the number of days of administrative closures, as it impacted deeply the cinema market during this special year.

According to the European Audiovisual Observatory EU cinema attendance decreased by 70% to 80% in 2020, due to the major crisis and the lockdowns in all of Europe. The countries the most hit by this fall were Spain (-79.4%), Romania (-78.5%), Slovenia (-77.7%) and Portugal (-75.7%). The Europa Cinemas Network was equally hit by the crisis, with a fall of 62.4% of its admissions. Some countries fared better than others in the Network, with Denmark, Finland and Estonia resisting well during this period with a decrease of around 35% of their admissions in 2020.

DATA/2020 NETWORK

Results in the Network		
	2019	2020
Total admissions (Mio)	79,7	30
Cinemas	1 134	1 143
Screens	2 761	2 748
National	24,1%	29,4%
European non-national	28,8%	27,3%
US	36,9%	29,6%
Others	10,2%	13,7%



Top European film in Europa Cinemas Network (by admissions): *J'Accuse* (FR) by Roman Polanski



Austria

Administrative closure: 135 days

+9,1 pts

Market share of European non-national films in Austria
(by admissions)

Results in the country

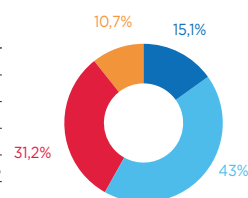
	2019	2020
Total admissions (Mio)	13,7	n/a
Cinemas	n/a	n/a
Screens	n/a	n/a
National	3,3%	n/a
European non-national	19,7%	n/a
US	76,4%	n/a
Others	0,6%	n/a

sources: Wirtschaftskammer, Österreichisches Filminstitut



Results in the Network

	2019	2020
Total admissions (Mio)	1,9	0,8
Cinemas	34	34
Screens	80	80
National	11,9%	15,1%
European non-national	41,9%	43,0%
US	39,4%	31,2%
Others	6,8%	10,7%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	Die Dohnal	AT	Sabine Derflinger	14/02/2020	34 843
2	Judy	GB	Rupert Goold	02/01/2020	17 377
3	A Hidden Life	DE	Terrence Malick	31/01/2020	15 044
4	J'accuse	FR	Roman Polanski	07/02/2020	11 455
5	Brot	AT	Harald Friedl	21/02/2020	10 507
6	La Daronne	FR	Jean-Paul Salomé	09/10/2020	10 026
7	But Beautiful	AT	Erwin Wagenhofer	15/11/2019	9 989
8	Un divan à Tunis	FR	Manele Labidi	31/07/2020	8 469
9	Waren einmal Revoluzzer	AT	Johanna Moder	28/08/2020	8 273
10	Le Mystère Henri Pick	FR	Rémi Bezançon	25/12/2019	7 264

Belgium

Administrative closure: 173-176 days

55,2%

Market share of European films in Belgium's member
cinemas (by admissions)

Results in the country

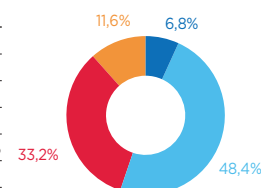
	2019	2020
Total admissions (Mio)	19,9	5,6
Cinemas	80	n/a
Screens	480	n/a
National	8	n/a
European non-national	n/a	n/a
US	n/a	n/a
Others	n/a	n/a

sources: Cinedata, FCB, ABDF



Results in the Network

	2019	2020
Total admissions (Mio)	2,2	0,7
Cinemas	33	33
Screens	75	75
National	7,7%	6,8%
European non-national	46,7%	48,4%
US	36,7%	33,2%
Others	8,9%	11,6%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	Yakari	FR	Toby Genkel, Xavier Giacometti	12/08/2020	12 261
2	Adam	FR	Maryam Touzani	03/02/2020	9 829
3	A Hidden Life	DE	Terrence Malick	05/02/2020	9 791
4	Eté 85	FR	François Ozon	15/07/2020	8 271
5	Il traditore	IT	Marco Bellocchio	18/12/2019	7 919
6	Bože Cialo	PL	Jan Komasa	07/10/2020	7 887
7	La bonne épouse	FR	Martin Provost		7 661
8	Judy	GB	Rupert Goold	13/01/2020	6 943
9	Antoinette dans les Cévennes	FR	Caroline Vignal	16/09/2020	6 850
10	La Vérité	FR	Hirokazu Koreeda	26/02/2020	6 539

Bosnia and Herzegovina

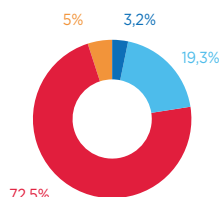
Administrative closure: 58 days


-23,4 pts

Decrease in US market share of BiH's member cinemas (by admissions)

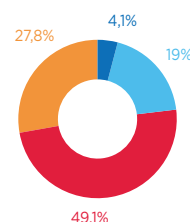
Results in the country

	2019	2020
Total admissions (Mio)	1,2	0,4
Cinemas	11	20
Screens	34	64
National	0,2%	3,23%
European non-national	16,0%	19,3%
US	83,6%	72,5%
Others	0,3%	5,0%



Results in the Network

	2019	2020
Total admissions (K)	669,3	98,0
Cinemas	5	5
Screens	17	17
National	0,9%	4,1%
European non-national	16,9%	19,0%
US	75,8%	49,1%
Others	6,4%	27,8%



source: Creative Europe Desk

Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	Vikend sa ćaletom	RS	Miroslav Momčilović	29/10/2020	3 705
2	Quo Vadis, Aida?	BX	Jasmila Zbanic	10/10/2020	2 739
3	Lassie - Eine Abenteuerliche Reise	DE	Hanno Olderdissen	15/10/2020	2 269
4	Malasaña 32	ES	Albert Pintó	29/10/2020	1 359
5	Les Traducteurs	FR	Régis Roinsard	05/11/2020	1 012
6	Wasp Network	FR	Olivier Assayas	15/10/2020	969
7	Koncentriši se, baba	BX	Pjer Žalica	14/08/2020	841
8	Die Heinzels - Rückkehr der Heinzelmännchen	DE	Ute von Münchow-Pohl	22/10/2020	777
9	4 Ruze	RS	Vasilije Nikitovic	05/03/2020	742
10	El silencio de la ciudad blanca	ES	Daniel Calparsoro	15/10/2020	666

Bulgaria

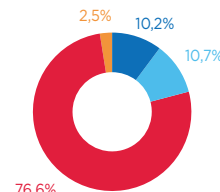
Administrative closure: 97 days


-85%

Decrease in total number of admissions in Bulgaria's member cinemas

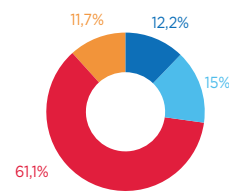
Results in the country

	2019	2020
Total admissions (Mio)	5,0	1,3
Cinemas	68	65
Screens	241	241
National	9,0%	10,2%
European non-national	7,0%	10,7%
US	83,6%	76,6%
Others	0,4%	2,5%



Results in the Network

	2019	2020
Total admissions (Mio)	1,2	0,3
Cinemas	16	15
Screens	75	46
National	10,7%	12,2%
European non-national	16,7%	15,0%
US	67,5%	61,1%
Others	5,1%	11,7%



source: NFC

Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	18% с и в о	BG	Viktor Chouchkov	24/01/2020	7 332
2	Я т а г а н	BG	Andrey Andonov	21/02/2020	6 609
3	Д о з а щ а с т и е	BG	Yana Titova	08/11/2019	3 234
4	Io, Leonardo	IT	Jesus Garces Lambert	13/12/2019	3 029
5	Dolor y Gloria	ES	Pedro Almodóvar	06/12/2019	2 954
6	Judy	GB	Rupert Goold	13/12/2019	2 427
7	Wildlings	BG	Martin Makariev	29/11/2019	1 651
8	Bashtata	BG	Kristina Grozeva, Petar Valchanov		1 601
9	Leo da Vinci - Missione Monna Lisa	IT	Sergio Manfio	30/10/2020	1 575
10	О станало то е Пепел	BG	Georgi Kostov	06/03/2020	1 441

Croatia

Administrative closure: 63 days

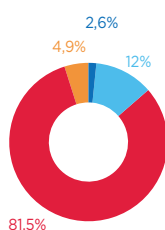


+9,8% Increase in non-National market share of Croatia's member cinemas (by admissions)

Results in the country

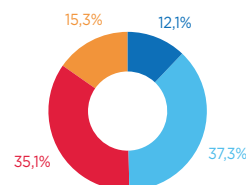
	2019	2020
Total admissions (Mio)	4,6	1,4
Cinemas	95	96
Screens	192	192
National	5,5%	1,6%
European non-national	11,8%	12,0%
US	82,4%	81,5%
Others	0,3%	4,9%

source: HAVC



Results in the Network

	2019	2020
Total admissions (K)	462,5	188,9
Cinemas	15	15
Screens	29	29
National	18,2%	12,1%
European non-national	27,8%	37,6%
US	49,9%	35,1%
Others	4,1%	15,3%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	Dnevnik Diane Budisavljević	HR	Dana Budisavljevic	26/09/2019	3 699
2	El mayor regalo	ES	Juan Manuel Coteló	01/01/2019	3 507
3	Bože Cialo	PL	Jan Komasa	01/08/2020	3 261
4	Honeyland	MK	Tamara Kotevska, Ljubomir Stefanov	10/01/2020	3 180
5	Mater	HR	Jure Pavlović		2 688
6	La bonne épouse	FR	Martin Provost	05/08/2020	2 667
7	Gordon och Paddy	SE	Linda Hambäck	21/12/2018	2 360
8	Kaptein Sabeltann og Den Magiske Diamant	NO	Rasmus A. Sivertsen	20/02/2020	1 888
9	Berge Istra	HR	Dražen Majić	01/01/2020	1 543
10	Tereza37	HR	Danilo Šerbedžija	29/08/2020	1 539

Czech Republic

Administrative closure: 142 days

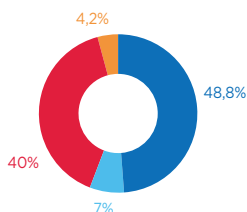


+15,4% Increase in National market share of Czech's member cinemas (by admissions)

Results in the country

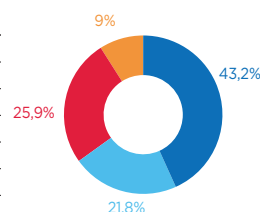
	2019	2020
Total admissions (Mio)	18,3	6,4
Cinemas	913	1 065
Screens	1 157	1 310
National	26,5%	48,8%
European non-national	11,8%	7,0%
US	60,0%	40,0%
Others	1,7%	4,2%

source: Creative Europe Desk



Results in the Network

	2019	2020
Total admissions (Mio)	1,8	0,8
Cinemas	33	34
Screens	43	45
National	27,8%	43,2%
European non-national	22,5%	21,8%
US	42,8%	25,9%
Others	6,9%	9,0%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	V síti	CZ	Barbora Chalupová, Vít Klusák	27/02/2020	53 514
2	Šarlatán	CZ	Agnieszka Holland	20/08/2020	40 686
3	Havel	CZ	Slávek Horák	23/07/2020	34 450
4	Vlastníci	CZ	Jiří Havelka	21/11/2019	33 959
5	Prilis osobni znamost	CZ	Marta Ferencova	23/01/2020	19 432
6	Chlap na stridacku	CZ	Petr Zahradka	13/02/2020	13 272
7	3Bobule	CZ	Martin Kopp	25/06/2020	12 604
8	Babovky	CZ	Rudolf Havlik	24/09/2020	11 561
9	La belle époque	FR	Nicolas Bedos	02/01/2020	9 600
10	V síti: Za skolou	CZ	Barbora Chalupova, Vít Klusák	27/02/2020	9 333

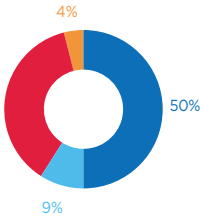
Denmark

Administrative closure: 85–113 days

Results in the country

	2019	2020
Total admissions (Mio)	12,8	7,0
Cinemas	169	167
Screens	484	476
National	26,7%	50,0%
European non-national	10,8%	9,0%
US	58,3%	37,0%
Others	4,2%	4,0%

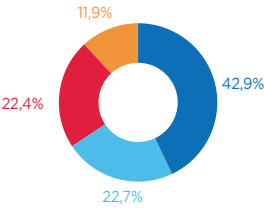
source: Danish Film Institute



-35,6% Admissions in Denmark's member cinemas

Results in the Network

	2019	2020
Total admissions (Mio)	1,1	0,7
Cinemas	15	15
Screens	44	44
National	29,1%	42,9%
European non-national	32,6%	22,7%
US	32,5%	22,4%
Others	5,8%	11,9%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	Druk	DK	Thomas Vinterberg	24/09/2020	85 032
2	De forbandede år	DK	Anders Refn	17/12/2019	41 686
3	Retfærdighedens ryttere	DK	Anders Thomas Jensen	19/11/2020	27 481
4	Undtagelsen	DK	Jesper W. Nielsen	02/07/2020	22 681
5	Vores mand i Amerika	DK	Christina Rosendahl	13/08/2020	21 529
6	Hors Normes	FR	Olivier Nakache, Eric Toledano	23/01/2020	20 535
7	Erna i krig	DK	Henrik Ruben Genz	29/10/2020	16 569
8	Wild Rose	GB	Tom Harper	23/07/2020	14 026
9	Klovn the Final	DK	Mikkel Norgaard	30/01/2020	12 871
10	Portrait de la jeune fille en feu	FR	Céline Sciamma	06/02/2020	12 427

Top European film in Denmark's member cinemas (by admissions): **Druk (DK) by Thomas Vinterberg**



Estonia

Administrative closure: 81–85 days

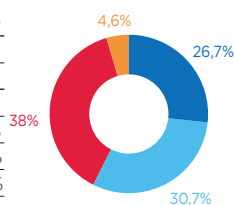
39,5%

Market share of European non-national films in Estonia's member cinemas (by admissions)

Results in the country

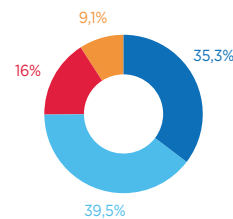
	2019	2020
Total admissions (Mio)	3,7	1,8
Cinemas	56	58
Screens	111	116
National	23,0%	26,7%
European non-national	18,2%	30,7%
US	50,9%	38,0%
Others	7,9%	4,6%

source: EFI



Results in the Network

	2019	2020
Total admissions (K)	246,8	154,7
Cinemas	4	5
Screens	5	7
National	23,8%	35,3%
European non-national	41,0%	39,5%
US	21,6%	16,0%
Others	13,6%	9,1%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	Sipsik	EE	Meelis Arulepp, Karsten Kiilerich	15/02/2020	11 558
2	Fred Jüri: olemise ilu	EE	Jaan Tootsen	15/01/2020	10 953
3	Talve	EE	Ergo Kuld	07/02/2020	10 782
4	Judy	GB	Rupert Goold	08/01/2020	4 223
5	Südamering	EE	Margit Lillak	07/02/2020	4 194
6	Les plus belles années d'une vie	FR	Claude Lelouch	19/02/2020	3 982
7	O2	EE	Margus Paju	09/10/2020	2 547
8	Tove	FI	Zaida Bergroth	16/10/2020	2 538
9	Druk	DK	Thomas Vinterberg	02/10/2020	2 458
10	Portrait de la jeune fille en feu	FR	Céline Sciamma	22/10/2020	1 688

Finland

Administrative closure: 75 days

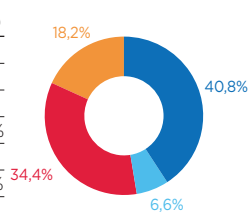
-19 pts

Market share of US films in Finland's member cinemas (by admissions)

Results in the country

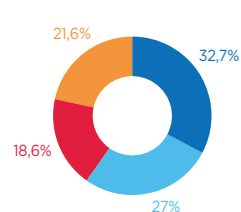
	2019	2020
Total admissions (Mio)	8,4	3,9
Cinemas	176	189
Screens	358	366
National	16,0%	40,8%
European non-national	19,5%	6,6%
US	60,0%	34,4%
Others	4,5%	18,2%

source: Finnish Film Foundation



Results in the Network

	2019	2020
Total admissions (K)	247,7	155,0
Cinemas	7	8
Screens	10	11
National	15,8%	32,7%
European non-national	40,9%	27,0%
US	37,6%	18,6%
Others	5,7%	21,6%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	Helene	FI	Antti J. Jokinen	17/01/2020	11 897
2	Tove	FI	Zaida Bergroth	02/10/2020	10 527
3	Portrait de la jeune fille en feu	FR	Céline Sciamma	27/12/2019	7 564
4	Teräslähdit	FI	Pamela Tola	03/01/2020	6 051
5	Aalto	FI	Virpi Suutari	04/09/2020	5 731
6	La Vérité	FR	Hirokazu Koreeda	03/01/2020	2 845
7	Ensilumi	FI	Hamy Ramezan	16/10/2020	2 470
8	Huvasti, NSVL	EE	Lauri Randal	10/07/2020	2 081
9	Elämäää kuoleman jälkeen	FI	Klaus Härö	06/03/2020	2 072
10	Seurapeli	FI	Jenni Toivoniemi	21/08/2020	1 438

France

Administrative closure: 162 days

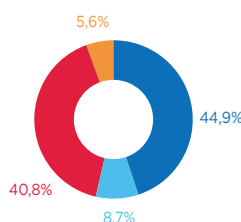
-4,8 pts

Market share of non-national European films in France's member cinemas (by admissions)

Results in the country

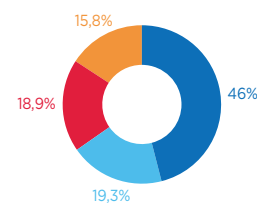
	2019	2020
Total admissions (Mio)	213,1	65,1
Cinemas	2 040	2 045
Screens	5 982	6 114
National	34,8%	44,9%
European non-national	6,6%	8,7%
US	55,7%	40,8%
Others	2,9%	5,6%

source: CNC



Results in the Network

	2019	2020
Total admissions (Mio)	15,7	6,2
Cinemas	156	156
Screens	484	483
National	40,9%	46,0%
European non-national	24,1%	19,3%
US	18,4%	18,9%
Others	16,6%	15,8%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	Un divan à Tunis	FR	Manele Labidi	12/02/2020	154 032
2	Antoinette dans les Cévennes	FR	Caroline Vignal	16/09/2020	134 120
3	Effacer l'historique	FR	Benoît Delépine, Gustave Kervern	26/08/2020	120 018
4	La Fille au bracelet	FR	Stéphane Demoustier	12/02/2020	103 888
5	La bonne épouse	FR	Martin Provost	22/06/2020	90 815
6	Les Choses qu'on dit, les choses qu'on fait	FR	Emmanuel Mouret	16/09/2020	88 691
7	Druk	DK	Thomas Vinterberg	14/10/2020	87 015
8	Josep	FR	Aurel	30/09/2020	86 606
9	Les Misérables	FR	Ladj Ly	20/11/2019	85 563
10	Adieu Les Cons	FR	Albert Dupontel	21/10/2020	84 543

Germany

Administrative closure: 124 - 168 days

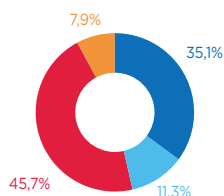
-5,7 pts

Decrease in the non-national European movies marketshare in Germany's member cinemas (by admissions)

Results in the country

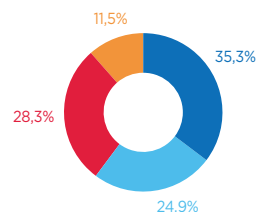
	2019	2020
Total admissions (Mio)	118,6	38,1
Cinemas	1 734	1 728
Screens	4 961	4 926
National	21,5%	35,1%
European non-national	17,6%	11,3%
US	56,5%	45,7%
Others	4,4%	7,9%

source: FFA



Results in the Network

	2019	2020
Total admissions (Mio)	11,3	4,3
Cinemas	198	196
Screens	424	423
National	31,3%	35,3%
European non-national	30,6%	24,9%
US	30,4%	28,3%
Others	7,7%	11,5%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	Als Hitler das rosa Kaninchen stahl	DE	Caroline Link	25/12/2019	184 394
2	Lindenberg! Mach dein Ding!	DE	Hermine Huntgeburth	16/01/2020	126 232
3	Die Känguru-Chroniken	DE	Dani Levy	05/03/2020	115 341
4	Das geheime Leben der Bäume	DE	Jörg Adolph, Jan Haft	23/01/2020	111 967
5	Judy	GB	Rupert Goold	02/01/2020	83 316
6	J'accuse	FR	Roman Polanski	06/02/2020	73 172
7	La Daronne	FR	Jean-Paul Salomé	08/10/2020	67 064
8	Enkel für Anfänger	DE	Wolfgang Groos	06/02/2020	64 375
9	Undine	DE	Christian Petzold	02/07/2020	57 567
10	Mestari Cheng	FI	Mika Kaurismäki	30/07/2020	51 288

Greece

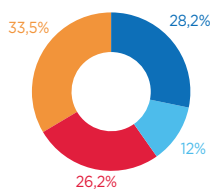
Administrative closure: 175 –192 days


-54 pts
Market share of US films in Greece's cinemas
(by admissions)

Results in the country

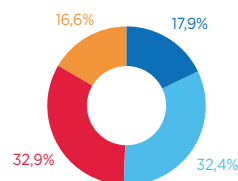
	2019	2020
Total admissions (Mio)	9,4	3,1
Cinemas	339	339
Screens	547	549
National	5,3%	28,2%
European non-national	11,0%	12,0%
US	80,2%	26,2%
Others	3,5%	33,5%

source: GFC



Results in the Network

	2019	2020
Total admissions (Mio)	1,2	0,5
Cinemas	41	46
Screens	56	63
National	7,8%	17,9%
European non-national	44,4%	32,7%
US	33,7%	32,9%
Others	14,1%	16,6%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	Eftychia	GR	Angelos Frantzis	19/12/2019	42 693
2	I balada tis trypias kardias	GR	Yannis Economides	05/03/2020	16 306
3	J'accuse	FR	Roman Polanski	02/01/2020	11 368
4	Boże Ciało	PL	Jan Komasa	09/01/2020	8 106
5	La Vérité	FR	Hirokazu Koreeda	16/01/2020	7 362
6	Winona	GR	Alexandros Voulgaris	04/11/2019	6 259
7	Radioactive	GB	Marjane Satrapi	20/08/2020	4 857
8	Om det oändliga	SE	Roy Andersson	09/01/2020	4 574
9	Le mépris	FR	Jean-Luc Godard	18/06/2020	3 955
10	Apostratos	GR	Zacharias Mavroeidis	04/11/2019	3 953

Hungary

Administrative closure: 145 days

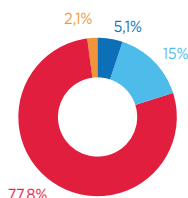

-63,8%

Admissions in Hungary's member cinemas

Results in the country

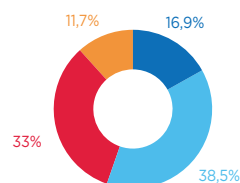
	2019	2020
Total admissions (Mio)	15,2	4,3
Cinemas	132	136
Screens	368	375
National	6,1%	5,1%
European non-national	9,1%	15,0%
US	84,6%	77,8%
Others	0,2%	2,1%

source: NMHH



Results in the Network

	2019	2020
Total admissions (Mio)	1,0	0,4
Cinemas	17	17
Screens	40	40
National	18,5%	16,9%
European non-national	39,0%	38,5%
US	32,8%	33,0%
Others	9,7%	11,7%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	La belle époque	FR	Nicolas Bedos	26/12/2019	15 186
2	Zárójelentés	HU	István Szabó	27/02/2020	9 917
3	Felkészülés meghatározatlan ideig tartó együttlétre	HU	Lili Horvát		9 452
4	Judy	GB	Rupert Goold	16/01/2020	8 021
5	Hors Normes	FR	Olivier Nakache, Eric Toledano	26/12/2019	5 395
6	A feltaláló	HU	Bence Gyöngyössy	06/02/2019	4 904
7	Akik maradtak	HU	Barnabas Toth	26/09/2019	4 613
8	Sorry We Missed You	GB	Ken Loach	06/02/2020	3 965
9	J'accuse	FR	Roman Polanski	17/07/2020	3 759
10	Hab	HU	Nóra Lakos	10/09/2020	3 348

Ireland

Administrative closure: 171–196 days

Results in the country

	2019	2020
Total admissions (Mio)	15,2	n/a
Cinemas	132	n/a
Screens	368	n/a
National	1,7%	n/a
European non-national	7,2%	n/a
US	89,8%	n/a
Others	1,3%	n/a

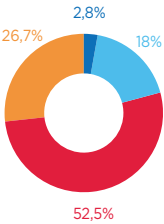
source: Creative Europe Desk



Decrease in European non-national market share of Ireland's member cinemas (by admissions)

Results in the Network

	2019	2020
Total admissions (K)	505,8	157,3
Cinemas	25	24
Screens	35	34
National	5,1%	2,8%
European non-national	35,4%	18,0%
US	50,7%	52,5%
Others	8,8%	26,7%



Top 10 European films by admissions in the Network 2020

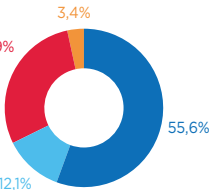
	Title	Country	Director	Release date	Admissions
1	Portrait de la jeune fille en feu	FR	Céline Sciamma	28/02/2020	3 601
2	A Hidden Life	DE	Terrence Malick		1 293
3	Wolfwalkers	GB	Tomm Moore, Ross Stewart		1 290
4	Emma.	GB	Autumn de Wilde	14/02/2020	1 153
5	Les Misérables	FR	Ladj Ly		952
6	Jihad Jane	IE	Ciaran Cassidy		759
7	Sorry We Missed You	GB	Ken Loach	01/11/2019	754
8	Hvítur, Hvítur Dagur	IS	Hlynur Palmason		691
9	La dolce vita	IT	Federico Fellini		684
10	Vielmachglas	DE	Florian Ross	01/01/2018	672

Italy

Administrative closure: 166–179 days

Results in the country

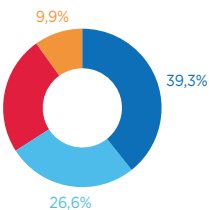
	2019	2020
Total admissions (Mio)	97,6	28,1
Cinemas	1 218	1 309
Screens	3 542	3 667
National	21,5%	55,6%
European non-national	11,8%	12,1%
US	64,2%	28,9%
Others	2,5%	3,4%



Decrease in the country's total number of admissions

Results in the Network

	2019	2020
Total admissions (Mio)	9,3	3,3
Cinemas	192	194
Screens	373	370
National	24,2%	39,3%
European non-national	32,0%	26,6%
US	35,2%	24,2%
Others	8,6%	9,9%



source: Cinetel (93% of the Italian market)

Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	Tolo tolo	IT	Checco Zalone	01/01/2020	202 494
2	Sorry We Missed You	GB	Ken Loach	02/01/2020	196 800
3	Hammamet	IT	Gianni Amelio	09/01/2020	164 191
4	La dea fortuna	IT	Ferzan Ozpetek	19/12/2019	112 149
5	Gli anni più belli	IT	Gabriele Muccino	13/02/2020	99 558
6	Volevo Nascondermi	IT	Giorgio Diritti	04/03/2020	59 237
7	Un divan à Tunis	FR	Manele Labidi	08/10/2020	47 947
8	Portrait de la jeune fille en feu	FR	Céline Sciamma	19/12/2019	47 044
9	Figli	IT	Giuseppe Bonito	23/01/2020	46 706
10	Alice et le Maire	FR	Nicolas Pariser	06/02/2020	45 171

Top European film in Italy's member cinemas (by admissions): *To lo To lo* (IT) by Checco Zalone



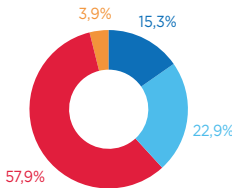
Latvia

Administrative closure: 144 days

Results in the country

	2019	2020
Total admissions (Mio)	2,7	0,9
Cinemas	34	32
Screens	81	69
National	20,2%	15,3%
European non-national	13,1%	22,9%
US	64,9%	57,9%
Others	1,8%	3,9%

source: NKC

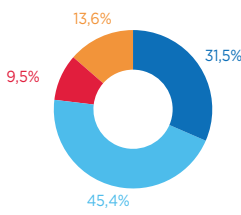


9,5%

Market share of US films in Latvia's member cinemas (by admissions)

Results in the Network

	2019	2020
Total admissions (K)	165,8	66,0
Cinemas	3	3
Screens	4	4
National	41,6%	31,5%
European non-national	33,2%	45,4%
US	17,1%	9,5%
Others	8,1%	13,6%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	Pilsēta pie upes	LV	Viesturs Kairiņš		9 130
2	Dvēseļu putenis	LV	Dzintars Dreiberģis	08/11/2019	2 810
3	Les plus belles années d'une vie	FR	Claude Lelouch	20/09/2019	1 933
4	Mans mīļākais karš	LV	Ilze Burkovska Jacobsen		1 715
5	Banksy and the Rise of Outlaw Art	GB	Elio Espana	04/09/2020	1 517
6	Away	LV	Gints Ziblatodis		1 412
7	Best erotic shorts	EU	Albert Genevieve, Romance Hector, et Ninja Javier, Milheiro Juliana, Gryzewski Kuba, Zmork Sadrak, Zmork Sadrak	14/02/2020	1144
8	Un homme et une femme	FR	Claude Lelouch	06/03/2020	955
9	Portrait de la jeune fille en feu	FR	Céline Sciamma	14/02/2020	942
10	La Vérité	FR	Hirokazu Koreeda	26/12/2019	915

Lithuania

Administrative closure: 135 days

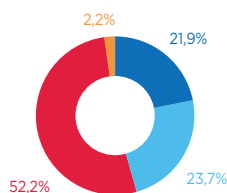


Increase in Market share of non-national European films in Lithuanian's member cinemas (by admissions)

Results in the country

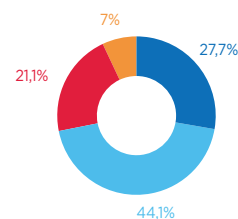
	2019	2020
Total admissions (Mio)	4,2	1,5
Cinemas	26	25
Screens	82	77
National	19,2%	21,9%
European non-national	17,2%	23,7%
US	59,5%	52,2%
Others	4,1%	2,2%

source: LFC



Results in the Network

	2019	2020
Total admissions (K)	427,4	166,1
Cinemas	7	7
Screens	11	14
National	25,2%	27,7%
European non-national	38,3%	44,1%
US	28,8%	21,1%
Others	7,7%	7,0%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	Topulas pasimatymas	LT	Robertas Razma	03/01/2020	11 846
2	Importinis jaunikis	LT	Simonas Askelavicius	01/02/2020	10 115
3	Hors Normes	FR	Olivier Nakache, Eric Toledano	07/02/2020	4 747
4	La belle époque	FR	Nicolas Bedos	07/12/2019	4 482
5	For Sama	GB	Waad Al-Khateab, Edward Watts	10/01/2020	3 653
6	Celle que vous croyez	FR	Safy Nebbou	02/01/2020	3 231
7	Nova Lituania	LT	Karolis Kaupinis		3 004
8	El Padre Medico	LT	Vytautas Puidokas	11/10/2019	2 450
9	Tulipani: Liefde, eer en een fiets	NL	Mike Van Diem	13/12/2019	2 444
10	Pilis	LT	Lina Luzyte	11/09/2020	2 348

Luxemburg

Administrative closure: 110 days

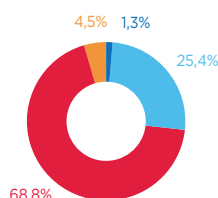


Decrease in the country's total number of admissions

Results in the country

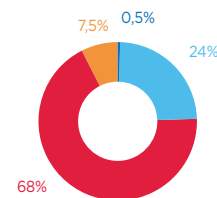
	2019	2020
Total admissions (Mio)	1,0	0,4
Cinemas	13	13
Screens	37	37
National	7,2%	1,3%
European non-national	18,9%	25,4%
US	72,7%	68,8%
Others	1,1%	4,5%

source: NKC



Results in the Network

	2019	2020
Total admissions (K)	745,3	229,8
Cinemas	3	3
Screens	17	17
National	1,3%	0,5%
European non-national	19,5%	24%
US	75,4%	68%
Others	3,8%	7,5%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	Judy	FR	Rupert Goold		2 195
2	Druk	GB	Thomas Vinterberg	14/10/2020	1 973
3	Yakari	DE	Toby Genkel, Xavier Giacometti		1 752
4	Bigfoot	GB	Jérémie Degruson, Ben Stassen		1 565
5	Adieu Les Cons	FR	Albert Dupontel		1 437
6	Le Prince Oublié	GB	Michel Hazanavicius		1 435
7	The Secret Garden	ES	Marc Munden		1 377
8	Les Blagues de Toto	GB	Pascal Bourdiaux		1 315
9	30 jours max	GB	Tarek Boudali		1 271
10	J'accuse	FR	Roman Polanski		1 244

Netherlands

Administrative closure: 108 days

Results in the country

	2019	2020
Total admissions (Mio)	38,0	16,76
Cinemas	195	n/a
Screens	914	n/a
National	11,8%	21,3%
European non-national	12,6%	n/a
US	71,1%	n/a
Others	4,5%	n/a

source: NVBF

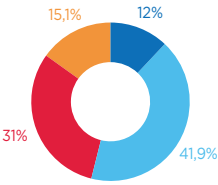


41,9%

Market share of European non-national films in the Netherlands' member cinemas (by admissions)

Results in the Network

	2019	2020
Total admissions (Mio)	5,2	2,8
Cinemas	54	54
Screens	169	178
National	8,3%	12,0%
European non-national	43,7%	41,9%
US	36,5%	31,0%
Others	11,5%	15,1%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	De beentjes van Sint-Hildegard	NL	Johan Nijenhuis	13/02/2020	120 114
2	Hors Normes	FR	Olivier Nakache, Eric Toledano	12/12/2019	67 082
3	For Sama	GB	Waad Al-Khateab, Edward Watts	23/01/2020	47 968
4	Honeyland	MK	Tamara Kotevska, Ljubomir Stefanov	09/01/2020	42 591
5	La belle époque	FR	Nicolas Bedos	19/12/2019	41 068
6	Les Misérables	FR	Ladj Ly	01/05/2019	38 038
7	Boże Ciało	PL	Jan Komasa	08/10/2020	34 304
8	Marianne and Leonard: Words of Love	GB	Nick Broomfield	09/01/2020	31 532
9	La Vérité	FR	Hirokazu Koreeda	04/06/2020	31 426
10	Gli anni più belli	IT	Gabriele Muccino	06/08/2020	29 325

Top European film in the Netherlands's member cinemas (by admissions): *De beentjes van Sint-Hildegard* (NL) by Johan Nijenhuis



Norway

Administrative closure: 56-108 days

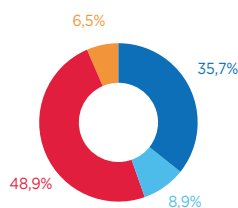
-62,3%

Decrease in the country's total number of admissions

Results in the country

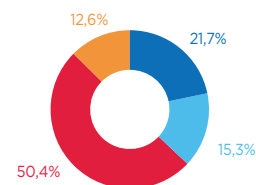
	2019	2020
Total admissions (Mio)	11,3	4,9
Cinemas	204	204
Screens	483	479
National	18,4%	35,7%
European non-national	12,8%	8,9%
US	65,3%	48,9%
Others	3,5%	6,5%

source: Films&Kino



Results in the Network

	2019	2020
Total admissions (Mio)	1,3	0,5
Cinemas	6	6
Screens	30	30
National	13,4%	21,7%
European non-national	19,5%	15,3%
US	60,4%	50,4%
Others	6,7%	12,6%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	Druk	DK	Thomas Vinterberg	23/10/2020	11 734
2	Knutsen & Ludvigsen - Det store dyret	NO	Rune Spaans	25/09/2020	10 748
3	Tunnelen	NO	Pål Øie	25/12/2019	9 491
4	Børning 3	NO	Hallvard Bræin	14/10/2020	9 020
5	Kunstneren og tyven	NO	Benjamin Ree	18/09/2020	8 988
6	Flukten over grensen	NO	Johanne Helgeland	14/02/2020	8 557
7	Portrait de la jeune fille en feu	FR	Céline Sciamma	25/12/2019	8 030
8	Selvportrett	NO	Katja Høgset, Margreth Olin, Espen Wallin	17/01/2020	6 007
9	Dianas bryllup	NO	Charlotte Blom	11/09/2020	5 969
10	Knerten og sjøormen	NO	Tove Undheim	03/07/2020	5 401

Poland

Administrative closure: 141 days

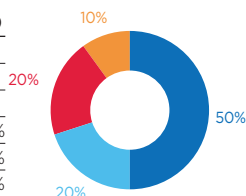
+22,1 pts

Market share of national films in Poland's cinemas (by admissions)

Results in the country

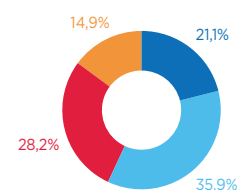
	2019	2020
Total admissions (Mio)	60,9	17,1
Cinemas	490	528
Screens	1 360	1 513
National	27,9%	50,0%
European non-national	10,1%	20,0%
US	59,6%	20,0%
Others	2,4%	10,0%

source: PISF



Results in the Network

	2019	2020
Total admissions (Mio)	3,9	1,4
Cinemas	40	41
Screens	102	105
National	23,1%	21,1%
European non-national	31,3%	35,9%
US	35,4%	28,2%
Others	10,2%	14,9%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	Boże Ciało	PL	Jan Komasa		72 772
2	J'accuse	FR	Roman Polanski	25/12/2019	39 254
3	Judy	GB	Rupert Goold	03/01/2020	31 683
4	Psy 3: W imie zasad	PL	Władysław Pasikowski		25 225
5	La belle époque	FR	Nicolas Bedos	31/01/2020	23 558
6	25 lat niewinności. Sprawa Tomka Komendy	PL	Jan Holoubek	18/09/2020	20 530
7	365 dni	PL	Barbara Białowas, Tomasz Mandes		19 503
8	Les Misérables	FR	Ladj Ly	15/06/2020	18 908
9	Mayday	PL	Sam Akina	10/01/2020	18 755
10	Pan T.	PL	Marcin Krzyształowicz	25/12/2019	17 628

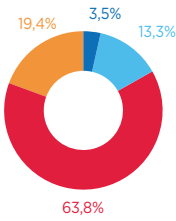
Portugal

Administrative closure: 75 days

Results in the country

	2019	2020
Total admissions (Mio)	15,5	3,8
Cinemas	185	170
Screens	583	561
National	4,5%	3,5%
European non-national	7,6%	13,3%
US	74,8%	63,8%
Others	13,1%	19,4%

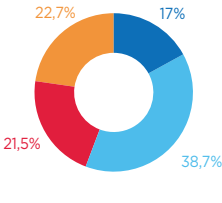
source: ICA



-25 pts Decrease in Market share of non-national European films of Portugal's member cinemas (by admissions)

Results in the Network

	2019	2020
Total admissions (K)	266,4	118,3
Cinemas	5	11
Screens	13	19
National	13,2%	17,0%
European non-national	27,2%	38,7%
US	46,5%	21,5%
Others	13,1%	22,7%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	J'accuse	FR	Roman Polanski	30/01/2020	5 868
2	Listen	PT	Ana Rocha	22/10/2020	4 375
3	Portrait de la jeune fille en feu	FR	Céline Sciamma	12/03/2020	2 736
4	Ordem Moral	PT	Mario Barroso		2 316
5	It Must Be Heaven	EU	Elia Suleiman	02/07/2020	2 059
6	O Ano da Morte de Ricardo Reis	PT	João Botelho	01/10/2020	2 035
7	Les Misérables	FR	Ladj Ly	20/02/2020	1 962
8	Amor Fati	PT	Claúdia Varejão	12/11/2020	1 883
9	A Hidden Life	DE	Terrence Malick	16/01/2020	1 882
10	Celle que vous croyez	FR	Safy Nebbou	26/12/2019	1 851

Top European film in Poland's member cinemas (by admissions): *Boże Ciało* (PL) by Jan Komasa



Romania

Administrative closure: 168 – 243 days

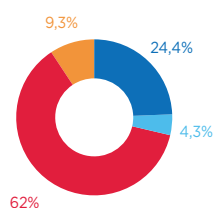

-15,1 pts

Decrease in US market share of Romania's member cinemas (by admissions)

Results in the country

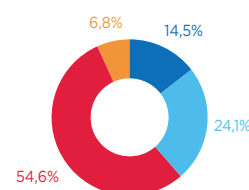
	2019	2020
Total admissions (Mio)	13,1	3,3
Cinemas	98	95
Screens	432	449
National	6,1%	24,4%
European non-national	5,5%	4,3%
US	81,0%	62%
Others	7,5%	9,3%

source: Romanian CNC



Results in the Network

	2019	2020
Total admissions (Mio)	1,4	0,4
Cinemas	21	21
Screens	50	51
National	9,5%	14,5%
European non-national	15,8%	24,1%
US	69,5%	54,6%
Others	5,2%	6,8%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	Miami Bici	RO	Jesus del Cerro	21/02/2020	42 693
2	5Gang: Un Altfel de Craciun	RO	Matei Dima	27/12/2019	15 079
3	Colectiv	RO	Alexander Nanau	28/02/2020	8 109
4	Maria, Regina României	RO	Alexis Cahill	08/11/2019	4 231
5	It Must Be Heaven	EU	Elia Suleiman	03/01/2020	3 890
6	Les Misérables	FR	Ladj Ly	24/01/2020	3 395
7	Latte Igel und der magische Wasserstein	DE	Regina Welker, Nina Wels	07/02/2020	3 079
8	Balanta	RO	Lucian Pintilie		2 561
9	Urma	RO	Dorian Boguță	06/03/2020	2 134
10	Dolor y Gloria	ES	Pedro Almodóvar	18/10/2019	1 948

Serbia

Administrative closure: 168 days

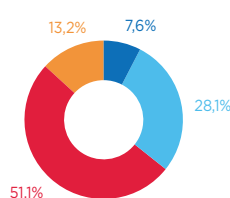

-12,4 pts

Decrease in national market share of Serbia's cinemas (by admissions)

Results in the country

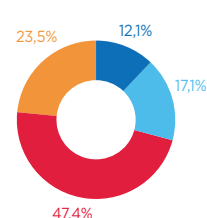
	2019	2020
Total admissions (Mio)	4,8	1,6
Cinemas	70	81
Screens	158	181
National	20,0%	7,6%
European non-national	10,4%	28,1%
US	66,4%	51,1%
Others	3,2%	13,2%

source: Creative Europe Desk



Results in the Network

	2019	2020
Total admissions (K)	834,2	274,9
Cinemas	13	14
Screens	28	29
National	14,8%	12,1%
European non-national	15,8%	17,1%
US	59,2%	47,4%
Others	10,2%	23,4%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	Vikend sa čaletom	RS	Miroslav Momčilović		9 845
2	Ajvar	RS	Ana Maria Rossi		8 178
3	Otac	RS	Srdan Golubović		4 523
4	Lassie – Eine Abenteuerliche Reise	DE	Hanno Olderdissen		4 466
5	Die Heinzels – Rückkehr der Heinzelmännchen	DE	Ute von Münchow-Pohl		2 795
6	Moj jutarnji smeh	RS	Marko Djordjevic	13/12/2019	2 515
7	Honeyland	MK	Tamara Kotevska, Ljubomir Stefanov	03/10/2019	2 175
8	Pinocchio	IT	Matteo Garrone		1 555
9	Malasaña 32	ES	Albert Pintó		1 459
10	Ime naroda	RS	Darko Bajic		1 398

Slovakia

Administrative closure: 118 days

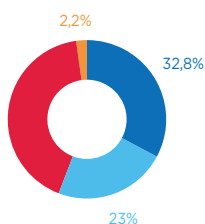
50,7%

European market share of Slovakia's member cinemas
(by admissions)

Results in the country

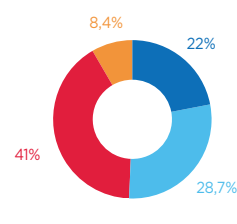
	2019	2020
Total admissions (Mio)	6,5	2,3
Cinemas	168	162
Screens	269	263
National	12,8%	32,8%
European non-national	15,5%	23,0%
US	69,3%	42,0%
Others	2,4%	2,2%

source: SFU



Results in the Network

	2019	2020
Total admissions (Mio)	3,2	1,2
Cinemas	26	26
Screens	82	82
National	13,0%	22,0%
European non-national	16,3%	28,7%
US	67,5%	41,0%
Others	3,2%	8,4%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	Sviňa	SK	Rudolf Biermann, Mariana Solčanská Čengel		191 483
2	Prilis osobni znamosť	CZ	Marta Ferencova	16/01/2020	85 368
3	Šťastný nový rok	SK	Jakub Kroner	05/12/2019	38 946
4	Chlap na stridacku	CZ	Petr Zahradka	13/02/2020	36 974
5	Das perfekte Geheimnis	DE	Bora Dagtekin		24 429
6	Attila	SI	Petr Vetrovsky	20/08/2020	19 275
7	Šarlatán	CZ	Agnieszka Holland	02/01/2020	13 253
8	Špindl 2	CZ	Radek Balaš		12 948
9	Tempos	SK	Roman Kelemen, Maxim Kľujev, Nazarij Kľujev	05/03/2020	12 266
10	V síti	CZ	Barbora Chalupová, Vít Klusák		12 229

Slovenia

Administrative closure: 146 days

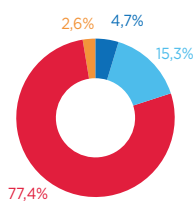
62,3%

Market share of European films in Slovenia's member cinemas
(by admissions)

Results in the country

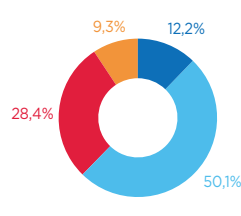
	2019	2020
Total admissions (Mio)	2,4	0,6
Cinemas	52	52
Screens	107	108
National	5,1%	4,7%
European non-national	9,3%	15,3%
US	84,6%	77,4%
Others	1,0%	2,6%

source: SFC



Results in the Network

	2019	2020
Total admissions (K)	399,7	122,1
Cinemas	20	20
Screens	23	23
National	14,8%	12,2%
European non-national	39,6%	50,1%
US	41,8%	28,4%
Others	6,8%	9,3%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	Dnevnik Diane Budisavljević	HR	Dana Budisavljevic	05/02/2020	3 150
2	Mijn bijzonder rare week met Tess	NL	Steven Wouterlood	17/11/2019	3 005
3	Zgodbe iz kostanjevih gozdov	SI	Gregor Bozic	19/09/2019	2 373
4	Celle que vous croyez	FR	Safy Nebbou	18/11/2019	2 336
5	Hope Gap	GB	William Nicholson	13/08/2020	2 161
6	Lotte ja kadunud lohed	EE	Heiki Ernits, Janno Põldma	17/11/2019	1 995
7	Maiden	GB	Alex Holmes	02/03/2020	1 987
8	Honeyland	MK	Tamara Kotevska, Ljubomir Stefanov	20/05/2020	1 863
9	La Vérité	FR	Hirokazu Koreeda	19/11/2019	1 783
10	Polsestra	SI	Damjan Kozole		1 573

Spain

Administrative closure: 72 – 126 days

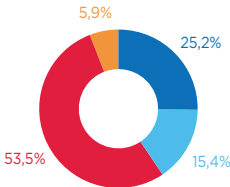


+15,8 pts Market share of European films in Spain's cinemas (by admissions)

Results in the country

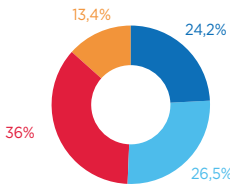
	2019	2020
Total admissions (Mio)	103,7	27,0
Cinemas	766	750
Screens	3 700	3 701
National	14,9%	25,2%
European non-national	9,9%	15,4%
US	73,2%	53,5%
Others	2,0%	5,9%

source: ICAA



Results in the Network

	2019	2020
Total admissions (Mio)	8,0	2,6
Cinemas	59	58
Screens	265	249
National	18,3%	24,2%
European non-national	26,6%	26,5%
US	44,2%	36,0%
Others	10,9%	13,4%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	J'accuse	FR	Roman Polanski	01/01/2020	90 339
2	Adú	ES	Salvador Calvo	22/01/2020	56 290
3	La Boda de Rosa	ES	Icíar Bollaín	21/08/2020	52 587
4	Padre no hay más que uno 2: La llegada de la suegra	ES	Santiago Segura	29/07/2020	42 491
5	Falling	DK	Viggo Mortensen	02/10/2020	35 695
6	Judy	GB	Rupert Goold	31/01/2020	33 327
7	Las niñas	ES	Pilar Palomero	04/09/2020	33 218
8	Eso que tú me das	ES	Ramón Lara, Jordi Évole	30/09/2020	29 950
9	Hors Normes	FR	Olivier Nakache, Eric Toledano	28/02/2020	28 123
10	Sentimental	ES	Cesc Gay		27 941

Sweden

Administrative closure: 0 – 56 days

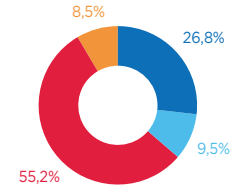


-13,6 pts Market share of European films in Sweden's member cinemas (by admissions)

Results in the country

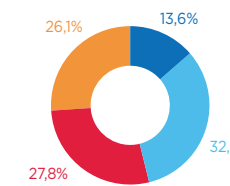
	2019	2020
Total admissions (Mio)	15,9	5,7
Cinemas	476	478
Screens	920	942
National	13,2%	26,8%
European non-national	10,3%	9,5%
US	71,7%	55,2%
Others	4,8%	8,5%

sources: Swedish Film Institute, Sveriges Biografägareförbund



Results in the Network

	2019	2020
Total admissions (Mio)	1,4	0,6
Cinemas	47	47
Screens	87	87
National	19,2%	13,6%
European non-national	40,6%	32,6%
US	27,7%	27,8%
Others	12,5%	26,1%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	Portrait de la jeune fille en feu	FR	Céline Sciamma	13/12/2019	13 820
2	Min Pappa Marianne	SE	Mårten Klingberg	21/02/2020	11 594
3	J'accuse	FR	Roman Polanski	28/02/2020	8 876
4	And then We Danced	SE	Levan Akin	13/09/2019	8 676
5	La belle époque	FR	Nicolas Bedos	14/02/2020	7 986
6	Les Misérables	FR	Ladj Ly	10/01/2020	7 696
7	Hvítur, Hvítur Dagur	IS	Hlynur Palmason	07/02/2020	7 168
8	Hors Normes	FR	Olivier Nakache, Eric Toledano	31/01/2020	6 890
9	En del av mitt hjärta	SE	Edward af Sillen	25/12/2019	6 513
10	Alice et le Maire	FR	Nicolas Pariser	24/01/2020	5 556

United Kingdom

Administrative closure: 130–162 days

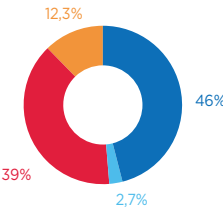
-17,5 pts

Market share of National films in UK's member cinemas (by admissions)

Results in the country

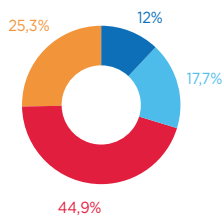
	2019	2020
Total admissions (Mio)	176,1	44,0
Cinemas	775	775
Screens	4 340	4 340
National	47,2%	46,0%
European non-national	1,1%	2,7%
US	50,0%	39,0%
Others	1,7%	12,3%

source: British Film Institute



Results in the Network

	2019	2020
Total admissions (Mio)	3,0	0,8
Cinemas	29	26
Screens	74	67
National	30,5%	12,0%
European non-national	15,2%	17,7%
US	43,5%	44,9%
Others	10,8%	25,3%



Top 10 European films by admissions in the Network 2020

	Title	Country	Director	Release date	Admissions
1	Portrait de la jeune fille en feu	FR	Céline Sciamma	28/02/2020	25 410
2	Emma.	GB	Autumn de Wilde	14/02/2020	17 760
3	La dolce vita	IT	Federico Fellini	03/01/2020	11 402
4	Obywatel Jones	PL	Agnieszka Holland	07/02/2020	7 956
5	Little Joe	AT	Jessica Hausner	21/02/2020	7 157
6	Saint Maud	GB	Rose Glass	09/10/2020	6 514
7	La Haine	FR	Mathieu Kassovitz	20/08/2004	6 254
8	A Hidden Life	DE	Terrence Malick	17/01/2020	5 799
9	Greed	GB	Michael Winterbottom	21/02/2020	5 565
10	Rocks	GB	Sarah Gavron	18/09/2020	5 414

Top European film in UK's member cinemas (by admissions): Portrait de la jeune fille en feu (FR) by Céline Sciamma



Czech Republic

Czech exhibitors try to keep positive attitude while cinemas reopen

By Pavel Sladky

Czech cinemas are open again. After 8 months of lockdown, since October 2020, and in one of Europe's worst pandemic impacted societies in Spring 2021, Czech distributors and cinema owners were able to reopen and start showing films on the big screen on May 24th 2021.

Capacity can be filled up to 50 %, and to a maximum of 500 people indoors, all obliged to wear masks. Viewers must also prove they have had either an antigen test within the past 72 hours, a PCR test within the past seven days, two weeks following their being fully vaccinated, or have recovered from Covid-19 within the last 90 days. Snacks and beverages could not be sold until indoor restaurants reopened. The latest requirement led Czech multiplexes to open more than two weeks later, on June 10th.

Worst 2020. Unpredictable 2021

In 2020, admissions dropped to 35 % compared with 2019. It was the worst year in Czech history, in stark contrast to the

steadily growing box-office in previous years. Filmmakers, exhibitors, and the Czech Film Fund spent most of the pandemic season fighting for the Ministry of Industry and Trade to include cinema in the key Covid Culture support programme. Many cinema owners stated that cinema and culture were discriminated against during the 2020 and 2021 lockdowns, with the government treating the entire creative sector as leisure activities. Some of the changing regulations verged on absurdity. Despite that, not a single Czech cinema closed completely because of pandemic.

"It has really been quite challenging," agrees Ivo Andre from Aerofilms Distribution. "But now we have our dreamer's strategy, so to say. We decided to go full steam ahead and



Kino Aero, Prague



Kino Metro 70, Prostějov

not to wait and speculate on what the upcoming summer season or the quantity of piled-up premieres will mean for film distribution. The results might not be great, I am aware of that. But the market is unpredictable now, and we do not want to wait.” Aerofilms already presented the Berlinale winner, *Bad Luck Banging or Loony Porn* by Radu Jude, the critically acclaimed *First Cow* by Kelly Reichardt and Viggo Mortensen’s *Falling*. Several more Aerofilms titles will premiere after 55th Karlovy Vary Film Festival, which was postponed until the end of August this year.

Over 600 people visited Aero Cinema in Prague, one of the key Czech venues for arthouse events over the first weekend following reopening. “We are running at full speed already with many special programmes to attract audiences,” cinema director Jiří Flígl says. His team prepared a Slow West double feature, comprised of *First Cow* and *Nomadland*, both brand new to Czech audiences. Aero also brings back its “Legends” screen selection with Terrence Malick’s *Days of Heaven* and Spike Lee’s *Do The Right Thing*. Shockproof Film Festival, a popular event focused on bizarre, failing, and creepy cinema returns from online platforms to its home ground. And Aerofilms, together with Flígl and other cinema directors, also scheduled a Cannes parallel opening with Carax’s *Annette* screening on July 6th.

We hope to get back to normal

Aero Cinema has a very loyal audience and its situation in Prague is different to those in smaller cities. “We do our best and we prepare the programme as if there hasn’t been any lockdown previously,” Barbora Kuksa Prágerová tells me. The director of Metro 70, the only city-owned cinema in Moravian town, Prostějov, she sounds energetic and positive. Her cinema managed to undergo reconstruction

during lockdown and now offers a new screen and projector setup. “We are not naive, we know that, for example, last year it took us almost two months to get back to 50 % of our box office. But, we keep our positive attitude. We believe viewers are as socially frustrated as we are and will come back.” According to Kuksa Prágerová, viewers of the Metro 70 Film Club programmes are the most loyal. “There are not many, but they will overcome any obstacle, because film is their life. We know we can rely on them.” On the other hand, it seems that children and families are much slower to return.

With many major Hollywood blockbusters missing in 2020, Czech distributors relied on local production more than ever. Local mainstream comedies are expected to fill the line-up of many Czech cinemas during the summer. Cinemas also planned open-air summer screenings to increase options. “There is no reason to stay at home watching older films,” believes Magdaléna Králová, managing director of Audiovisual Producer’s Association. “Czechs are huge film patriots who love local cinema. We strongly believe that we will bring Czech audiences back to cinemas with a wide range of genres and local productions.”

A special release of award-winning documentary, *A New Shift*, proves some changes to local film distribution are here to stay. This film, about a former miner from industrial Ostrava, navigating his way through training programmes and the labour market, first debuted online at DAFilms.cz. In June, it was released in cinemas as a joint effort from Artcam Distribution and the online streaming platform, an unusual practice before the Covid crisis.

One can see that nothing should be taken for granted for the rest of 2021, at least, but the need to restart working and enjoying cinema is in the air.

France

French Resistance

By Melanie Goodfellow

France's 2,000 cinemas rose to the challenge of the pandemic but the coming six months present a mixed picture.

The Le Méliès cinema in the central French city of Saint-Etienne made the news on May 19th when it marked its reopening after six months of closure due to the Covid-19 pandemic with 6.00 am screenings of Céline Sciamma's *Petite Maman* on all three of its screens.

"We were the first cinema in France to reopen so it drew the interest of national broadcasters," says cinema manager Pierre-Marie Claret. "We sold out across all three screens. Even with the 35% capacity limit, it was pretty impressive."

France's 2,000 cinemas and their 6,000 screens were forced to go dark last October as part of measures to rein in a second wave of the pandemic. It followed a 14-week closure in spring 2020.

They reopened with a 35% capacity limit and a 9pm curfew still in place with restrictions easing to a 65% limit and a 11pm curfew on June 9th and then lifted entirely on June 30th.

Across both closures, French cinemas were shut for 300 days for losses of around €1.6b, according to figures provided by France's National Federation of French Cinemas (FNCF).

Throughout both periods, the Méliès took to the social networks with initiatives like Méliès Battle, under which it would post a weekly theme and ask followers to propose films clips they felt summed it up, and Épicerie Film(s), offering a curated daily selection of recommendations from what was available on TV or the platforms. "Our aim was to keep people interested in the life of the cinema," explained Claret.

There were a raft of similar initiatives by cinemas up and down France. Studio 43 in Dunkerque in northern France moved a collaborative cinema club project around the filmography of Denis Villeneuve online. It expanded its scope to create an A to Z publication inspired by the director's work, which will be released to coincide with the release of his upcoming sci-fi epic *Dune* this September. "We'd already screened and analysed the films together in 2019 and we used this time to work on the ABC publication," explains Studio 43 director Sylvie Presa. "We may not have been able to screen films but we kept up our cultural actions."



Cinéma Lux, Caen



Viewers queuing outside Le Méliès, Saint-Etienne at the cinema reopening © Râ².

During the first lockdown, Dulac cinemas in Paris experimented with virtual screenings on the La Vingt-Cinquième Heure platform, an initiative offering the possibility to run scheduled, geo-blocked screenings for spectators living in close proximity to their venues. “We proposed the films which were supposed to come out in our theatres like Ariane Doublet’s *Green Boys* and Lucie Vivier’s *Sankara Is Not Dead*,” says head of programming Eric Jolival. “It didn’t generate a lot of admissions but it kept us active on the social networks and connected with our spectators.”

Lux in the northern port city of Caen also worked with La Vingt-Cinquième Heure and stepped up the activities of its pre-existing online cinema club Netflux, via the La Toile platform, a profit-sharing VOD initiative working with some 60 individual venues.

“We tried to promote the idea of watching films on platforms with a connection to real cinemas,” says its director Gautier Labrusse, who is also president of the Le Groupement National des Cinémas de Recherche (the national group of research cinemas).

During the second closure, the Dulac circuit developed limited edition Maison Dulac Cinemabox gift box set, offering merchandise and online screenings for films on its sister label Dulac Distribution.

“People were not so locked down at home during the second lockdown so the virtual screenings didn’t make so much sense for us. We came up with the box idea instead. We did one for Christmas and another for the spring and it sold well. It’s an initiative we plan to continue across the year, depending on the season and the films we have to offer.”

With the difficult 18 months of the first and second waves behind them, cinema owners and managers are now focused on the coming summer and autumn months. Conditions are very different from the first reopening in June 2020, when theatres found themselves contending with the vicious circle of spectator health fears and reluctance on the part of many distributors to release their films into an uncertain market.

This time round there is a backlog of some 450 titles jostling for a release slot and France’s cinephile population has shown itself eager to return to cinemas.

Some 300,000 spectators flocked to cinemas on May 19th, which was three times more than an average Wednesday when no capacity limits or curfews are in place. The picture for the summer remains complex, however, with numbers softening after the initial rush.

“As things reopen and life gets going again, people have lots of other things to take up their time and a spell of fine weather has also played its part,” says Jolival. The delayed Euro 2020 soccer tournament, running June 11th to July 11th, has also been an added diversion.

Beyond seasonal factors, concerns remain that the events of the last 18 months will have a longer-term impact, with particular fears around the acceleration in the rise of the global platforms and shortening of windows in the US while cinemas were shut.

“I’m worried for the whole cinema eco-system, not just the arthouse theatres,” says Lux’s Labrusse. “Even if we’ve risen to the challenge, it has been a violent period for the whole sector.”



Wolf Kino, Berlin

Germany

Cinema is going to have a triumphant return

By Birgit Heidsiek

July 1st was set as the national date for German cinemas to reopen, after being closed for the past eight months. Thanks to various state-run aid programmes for the cultural sector, as well as grants, most German theatres survived the crisis.

In Germany, as for the rest of the world, the theatrical market has dramatically changed over the course of the last fifteen months because streaming was the only possible way to enjoy new movies. In that sense, the COVID-19 crisis became a catalyst for streaming and online distribution models at the expense of theatrical exhibition.

“This shift took place much faster because of the pandemic,” says Verena von Stackelberg, Managing Director of Berlin-based arthouse Cinema Wolf. “But the fear of streaming is gone because we’re now looking at new distribution models more calmly.” Many arthouse cinemas in Germany took a new tack to stay in touch with cinemagoers.

“The Europa Cinemas members managed to stay in touch with their audience by offering them local routes in response to global business models and algorithms,” emphasizes Christian Bräuer, Managing Director of Berlin-based arthouse chain, Yorck Kino. Cannes Film Festival director, Thierry Fremaux, said: “Cinema is going to have a triumphant return because people are longing for a communal experience as well as for other kinds of films.”

The biggest changes took place at the global-market level, with many streaming subscriptions sold while cinemas were closed. “This trend anticipated the theatrical window, which has been shortened by the studios from 45 days to zero. It’s

also a matter of revenues and how it might affect arthouse cinema,” says Bräuer.

It's not yet possible to predict what impact the crisis may have on the market in general or the exhibition sector specifically in the long run, as Mikosch Horn, Programme Coordinator at Nuremberg community theatre Filmhaus and Co-Coordinator of the digital Cinemalovers, points out. Launched in May 2020, Cinemalovers has already brought 28 German cinemas together, and it offers a curated line-up of five films every month. Meanwhile, Filmhaus Nuremberg has 500 subscribers who receive access to online programmes as well as to discounted cinema tickets. “Kino 3 is a new marketing tool for us,” stresses Horn. “It attracted new cinema audiences because they discovered us on the Internet.”

One of the Cinemalovers cinemas is Wolf. It features the Kinoktopus film club for children, which continued online during lockdown with video tutorials. “Film literacy is crucial for attracting children to cinema,” stresses von Stackelberg, who considers the online platform an additional communication tool. The virtual screening room “Wolf in Space” presents short and animated films for children. The programmes are streamed throughout Germany. In addition to the subscription service, Wolf also offers T-VOD. “This is often the only option when distributors exclusively sell their S-VOD rights to big streaming platforms, such as Amazon or Netflix.” The Cinemalovers coordinator is convinced that arthouse cinemas must not leave streaming to big platforms. “We have expertise as curators of film programmes.” It is also a huge effort to clear the rights. “As a group of cinemas, we have a better negotiating position”, says Horn. In addition to the distribution fee, technical services are another substantial cost factor.

In releasing German films, that have received support, online, the cinema associations decided theatrical revenue should be collected into a communal fund. The theatrical share for the online distribution of feature films comes down to forty percent. The new distribution outlet Not Sold also collaborates with cinemas for the ticket sales of 24-hour film premieres. The exhibitors receive 25 percent of the revenue. During the pandemic, the production and distribution company Port au Prince launched the on-demand service CVOD.de, which offers exclusive digital live events for 24-hours. The film screening in the virtual cinema is followed by a Q&A with talent, which includes directors, actors, and related experts. The same rules apply for streaming as for cinema. “If we present too many films on our online platform, we lose our profile,” says Felix Grassmann, Chief of the award-winning Abaton Cinema in Hamburg. “Streaming can't be an overflow valve. It has to be curated for quality by the same criteria that are applied to theatrical programming.”

Because of lockdown, many feature films are going to open theatrically over the summer. As of July 1st, a total of 21 films have been scheduled for theatrical release in Germany. “Therefore, curating is even more crucial,” says Bräuer. “We want to support cinemagoers so that they can see the film they are dying to see, and even more films, I hope.” Yorck Kino is optimizing its websites for online ticket sales. “Digital expertise has increased for all demographic groups.” Its website has become the main point of sale for cinema tickets. Moreover, Yorck is launching an online platform this summer. This film boutique is also going to offer recent film classics. “If you visit the right cinema, you never end up getting the wrong film,” concludes Bräuer.



Yorck & New Yorck, Berlin

Italy

Reopening under a sign of trust

By Stefano Radice

In Italy, on April 26, cinemas were able to reopen. Thanks to the vaccination campaign, there is an air of greater optimism. The entire industry is committed to supporting and promoting the experience of seeing a movie on the big screen.

On April 26, 2021, finally, cinemas in Italy were able to reopen. Though this is not the first reopening in the midst of the pandemic—there was a first attempt on June 15 2020, where cinemas resumed their activities, despite the rising rate of infection, until October 25, 2020 when the government decided to close cinemas and theatres. As you would imagine, the exhibition sector has suffered greatly over this time. In 2020, the market collapsed by 71% in terms of admissions and box office (closer to 93%, if we were to consider the period from March 8, the start of the first lockdown, to the end of the year). It must be said, however, that governments have supported the cinema industry with a series of extraordinary measures, totaling 275 million Euros, which is only a part of aid given this past year.

But big screens did not sit back and wait for the pandemic to pass. During the first lockdown of 2020, given the continued closure of screens, several exhibitors began to develop on-demand platforms, ensuring the proceeds of these viewings went to the exhibitors themselves. Probably the most important of these platforms is MioCinema, created by the distributor Lucky Red, and Circuito Cinema, a significant group of quality cinemas in Rome; more than 200 screens all across Italy have joined. The IoRestoinSala platform, created by distributors including Academy Two and Cineteca di Bologna, and the Anteo Spaziocinema circuit in Milan, also has over 200 participating screens. Both platforms are characterized by their programmes of European films, reviews, and additional

content. And these are not the only two examples. A group of exhibitors specializing in independent films—for example, the Beltrade Cinema in Milan, the Farnese Cinema in Rome, and the Iris multiscreen in Messina—created the 1895.cloud on-demand platform. But there were also other initiatives that centred exhibitors as the proverbial protagonists. On November 8, for example, on European Arthouse Cinema Day, a group of 31 cinemas created a real marathon via Facebook, called “Nuvole in viaggio, tra cinema e cinematografi” (“Clouds on the road, between cinemas and cinematographs”), during which exhibitors presented their activities, made their history known, and showed short films and documentaries. There were also other symbolic initiatives to draw people’s attention to the big screen; on the evenings of May 8 and December 13, 2020, marquees were lit up as a symbol of hope for a new reopening.

Finally, on April 26, when it was possible to reopen to the public, adhering to strict safety regulations including the use of masks and maintaining distancing between audiences, activity began with 200 cinemas reopening in the first two or three weeks, increasing to over 2,000 by the start of June. Compared with last year’s false restart, there has been an atmosphere of moderate optimism because, with thanks to the vaccine roll-out, there is hope that this terrible pandemic can be left behind. We have witnessed scenes of great joy, with pastries and cakes brought to the cinema by audiences who see this step in our recovery as a celebration. What is important, and something



Viewers queuing in front of Cinema Beltrade at 6am © Elisabetta Andreis/Corriere della sera



Anteo's litten up marquee during the David di Donatello Award night, May 8 2020

all cinema operators say, is that this reopening is not followed by other closures that could mean bankruptcy for many cinemas. Resuming activities, therefore, has been experienced with great enthusiasm. There has been very significant initiatives from exhibitors, too. For example, the Beltrade in Milan opened its doors to the public with a sold-out marathon that began at 6am on April 26. Paola Corti and Monica Naldi, who manage the cinema, were very happy, “We didn’t expect this kind of response. We knew that our audiences were as crazy and passionate as we are, but not to this extent. It was a surprise for us, too.” On YouTube, there is a video that shows Nanni Moretti answering the phone at his local cinema, Nuovo Sacher in Rome, giving callers information about the films scheduled for its reopening, and the director can also be seen opening the gates and welcoming the incredulous audiences back in.

Umberto Parlagraeco of Iris multiscreen and distributor Valentina Guglielmo created the podcast *Cronache dal cinematografo* (Chronicles from the cinema), giving a voice to those that make it possible for cinemas to operate (cashiers, exhibitors, transporters, etc.). There were many promotional initiatives, including the Palestrina and Mexico in Milan, that gave the first 100 viewers a free ticket to return to the cinema. Anteo Spaziocinema in Milan, led by Lionello Cerri, has also been active since April 26, “The reopening,” declared the exhibitor in an interview with Rai, “has meant a lot to us after six months of closure. The public’s response has been strong since the first day, but we knew this because the dialogue with audiences during the winter months, through social networks, made us understand it.”

The circuit immediately resumed its activities of screenings, as well as meeting with directors and actors, something that has always been a trademark of its success, in addition to the programming of arthouse films. And it is precisely this quality

cinema, from Oscar-winning films to European and independent films that has been the driving force behind the re-launch of the industry over the past few months, with great commercial films only expected to hit from the end of August. Domenico Dinoia, the president of Fice, the Federation of arthouse cinemas, told us, “From the very first days, the arthouse and quality cinemas, many of which are members of Europa Cinemas, resumed their activities. Right from the start, we declared our willingness to open, and we kept our word: we were able to do so thanks to the fact that the few films made available by the distributors were of great quality, coming from the Oscars.” This restart for cinemas is being supported by the entire sector, which is certainly more united than last year. In fact, the associations Anec, Acec, Fice and Anica have created the promotional campaign #Soloalcinema, also supported by the Ministry of Culture and by big name movie stars Pierfrancesco Favino and Monica Bellucci, as well as renowned directors. This programme of events will continue until the end of the year, with the aim of re-igniting a passion for the big screen among cinema lovers, but also to attract new audiences. Ad hoc commercials will be produced and broadcast in cinemas, across social networks, and on TV, while on July 3 and 4 the first White Nights of cinema begins, with a 48-hour non-stop programme of screenings, meetings and events in cinemas. The #Soloalcinema campaign will also focus on collaboration with David di Donatello, Nastri d’Argento, Venice Film Festival, Rome Film Festival and the professional meetings Ciné and CineEurope.

The involvement of the industry at these levels, promoting cinema on the big screen, has never been seen before. This is a sign that, this time, we are getting serious and aiming for a great relaunch of the unique experience of seeing films on the big screen.

Nordic Countries

Nordics optimistic but fear streaming

By Gunnar Rehlin

With cinemas gradually reopening all across the Nordic countries, the future is, in many ways, uncertain. But there is optimism in the air. How has lockdown effected audience willingness to come back to theatres? To what extent have they become used to seeing films on streaming platforms, and what will happen to the window between cinema releases and streaming premieres? What measures can be taken to convince the audience that “films are best in cinemas”?

The Nordic Countries have had different strategies for cinemas during the pandemic. In Denmark, all cinemas were closed from March 12th to the end of May 2020, then, after half a year of restricted screenings, they closed again from December 10th to May 6th. In Sweden, many of the independent chains remained open, largely out of principle, the whole time, while the biggest chain, Filmstaden, was closed until June 1st, 2021. In Finland, all cinemas were obliged to close just for two months, April and May 2020, and in Norway, all cinemas closed between March 12th and May 7th last year.

The fact that tentpole US blockbusters had their premieres postponed for a long time allowed domestic product to be seen. In Denmark, two films starring Mads Mikkelsen, Oscar winner *Another round* and *Riders of Justice*, were big hits. The number one hit after the May 2021 reopening has been local thriller, *The Marco Effect*.

In Sweden, the cinemas that stayed open mostly screened films from smaller independent distributors. The country's second largest chain, Svenska Bio, kept its 38 cinemas open. Peter Fornstam, CEO of Svenska Bio, has been very vocal throughout, making clear the impact the restrictions have had, “Despite the illogical restrictions, we have kept open. The most important thing is for the business to survive. I think we are the only big theatre chain in Europe that did not close. We have suffered a lot, but the financial support from the government has been good, I thank our culture minister Amanda Lind. We have had no back log of films, we have shown what has been offered. Deep down, this is an ecosystem, we must all help each other. Now we are waiting to have the limitation lifted from 50 to 300 seats, and we are waiting for US films like *Black Widow*, *F9*, *Space Jam 2*, and others.”

There is, of course, a fear that the sudden explosion of

big US films, “the ketchup effect”, will result in some films being squashed, and not turning into the money makers they would have been in any ‘normal’ year. The fact that Ruben Östlund's, *The Triangle of Sadness*, will now premiere in Cannes 2022 is not only due to issues around production, but also owing to the fear that with a Cannes premiere now and cinema release in the fall, the film might not do as well as hoped for.

The behemoth in the fall is the new James Bond film, *No Time to Die*. But there the question is whether the audience's appetite for the film is still there, or if the everchanging premiere dates have put people off, or even if they might think they have already seen it.

In Stockholm, Capitol cinema has stayed open throughout, showing a mixture of classics and what has been available, regarding new films. Jakob Abrahamsen, who is the CEO of distributor NonStop Films and of Capitol, says, “Capitol has been open all the time. Suddenly, our cinema was one of the few places in Sweden where you could experience culture. We did it both for the staff and for the audience. We calculated and realized we would lose a little bit less by being open. Our bistro was also kept open, but with reduced opening hours. During the pandemic, it was possible to rent one of the three screening rooms in Capitol for private screenings. We have also added the possibility to use the screen to play video games. ‘Jukeboxcinema’ is very popular and we will continue with it. We also have ‘dine in-cinema’, where we serve hot food to some seating, where we won't disturb the other guests. I definitely think there is a big demand to see films in cinemas. Even though we and some others have stayed open, the general perception is that everything was closed. Most people were unaware that some cinemas were open.”

Many cinema owners are critical of what they see as very illogical restrictions, allowing the same small number of attendance whether the theatre has a capacity for 20 or 500. Markus Lehtinen, working with indie cinema theatre Kino Iris in Lahti in Finland, wrote in an email when the theatre had just opened at the start of June, “Local authorities have restricted the number of customers to 10 people per screening, so opening is not economically viable but at least employees can get back to work. The positive thing is that there are plenty of movies to screen, so we don’t need to think too much about strategies regarding programming.”

Like Jakob Abrahamson, he thinks that one lasting effect of the pandemic will be the continuation of private screenings for families or groups of friends.

Talking to exhibitors and theatre owners across the region, the same subjects come up with regards to the future – a future where it is still not clear when all restrictions will be lifted; the loss of money, illogical restrictions, the difference in support packages, what lessons might have been learned – and the competition from streaming. In Sweden, *Cruella* opened day and date both in cinemas and on Disney Plus, while in Denmark and Norway the absence of a window has led to partial boycotts of films from Disney and Warner.

Kim Foss, the managing director of Danish Camera Film, which owns Grand Teatret, an old, prestigious cinema in central Copenhagen, believes, like his Nordic colleagues, in the necessity of making cinema an event. And, also like the others, he is interested in what will happen with the increasingly smaller window between cinema and streaming releases. Several of the big exhibitors in Denmark right now are boycotting films from Disney and Warner Brothers. Foss says, “We don’t boycott, we are showing *Nomadland* even though it also is available on streaming. It is not our mission to lead the audience back to their homes now cinemas are finally open

again. Quite the opposite. We intend to screen films the way their makers intended them: up on the big screen. We have lost tons of money. The government has had a support package that, in our case, covered 58 percent of our salaries. The rest we paid ourselves during the whole lockdown period in order to not have to let people go”.

Guttorm Petterson, CEO at Film & Kino, the Norwegian cinema’s industry organization, is highly critical of the way Disney releases films to streaming and cinemas simultaneously. “What we fear is the small window between streaming and cinema exposure. Disney is the worst, they said they would be there for the cinemas, but with Disney Plus they do the opposite. The big studios have established their own streaming services, and this is the result. The total loss in 2020 was 57 percent, this year is even worse, but we hope for new and more liberal restrictions. And we need films to open in Oslo; if they don’t come here, they won’t travel to the other regions. At the start of the pandemic, there were some drive-in screenings here in Norway that might also continue.”

Christian Munggard, one of Denmark’s most prolific and well regarded film journalists said, “I think the cinemas will have to rethink and find new ways to get the audience in. The pandemic has shown how dependent they are on big US films, and we can’t have a situation where the big streaming services, owned by the big film companies, continue to have simultaneous releases for streaming and in cinemas. I think the cinemas, in this way, risk losing the younger audience, who wants to see the big blockbusters in the cinemas, only now they can’t. Cinema owners must also get used to it not necessarily being them who decide what people can see at a specific time. That is a development that the streaming services have accelerated.”

But, despite all these worries, there is one thing above all that speaks in favour of the cinemas: people coming together.



Grand Teatret, Copenhagen



Capitol Bio, Stockholm © Sara Kokk



Kino Elektronik, Warsaw

Poland

Polish cinemas and the pandemic: a story of darkness and resilience

By Anna Tatarska

As all branches of film business globally, Polish cinemas were hit hard during the pandemic. A crisis that was especially painful, given the consistently growing turnout over the last decade.

2019 was a record year: more than 61 million viewers visited cinemas, many choosing local productions. The first lockdown hit with immediacy, on March 13th, 2020. Thought to last only a couple of weeks, it took months for the doors to reopen. “Government decisions were announced last-minute, which made planning more challenging. In June, when the lockdown ended, cinema reopening was rather chaotic. Coherent sanitary regulations weren’t in place, multiplexes did not have films to screen. Arthouse cinemas were somehow forced to open to survive,” explains Marlena Gabryszewska, manager of Elektronik cinema in Warsaw and Head of the Polish Arthouse Cinemas Association. Smaller venues, like Gutek Film owned Muranów in Warsaw, had their own movies to screen and didn’t have to wait for big players to update their distribution schedules.

Movie theatres remained open at limited capacity (25% to 50%), later tied directly with COVID rates in particular regions. Masks were mandatory, food and drinks forbidden. Only relatives could omit the “every second seat” rule, familiar to those, who attended Venice Film Festival last September. Some events miraculously managed to have a physical (Warsaw Film Festival) or hybrid (New Horizons) edition before another lockdown was imposed on November 13th. Despite efforts, statistics were grim. Between June and November, the attendance was around 10% of the 2019 average, a proportion translatable to finances too. Attendances rose with bigger titles like *Tenet* and *Mulan*, but it was two Polish films—*Pętle* and *25 years of innocence*—that passed 500,000 admissions in September 2020, the last good month before the specter of a third wave sent viewers back to their couches.

The last freeze was shorter but hit harder. A widely known truth: film lovers are especially keen on seeking inspiration in the magical darkness of a screening room when it's cold outside. Sadly, a brief reopening in February lasted only a month. All multiplexes remained closed. There were some unexpected wins at the box-office: indie film *Palm Springs* passed 100,000 admissions. March 20th became a day to say goodbye, this time for more than two months, contrary to the industry's estimations – and common sense, considering churches never ceased operation. Some big events were again forced to move up the cultural calendar, with the biggest Polish documentary fest, Docs Against Gravity, paving the way by announcing new, September dates. That shook the delicate cultural ecosystem, requiring several other moves by less prominent players. Box-office results from that period are hard to trace, as only official premieres were counted, leaving those interested in preview screenings to wonder. And there were plenty! Distributors, deprived of usual reliable PR marketing strategies, resorted to pre releasing most anticipated – and repetitively postponed – hits. *Nomadland*, *Minari* and *Another Round* were screened months prior to their official release dates, building awareness.

The government financial support for cinemas and film businesses wasn't in place fast enough to secure stability and continuity. Cinemas distributing and promoting Polish films could receive a subsidy, but it was to be paid after (May 2021), not before the fact. Some venues resorted to programmes for general business, others found relief thanks to the Europa Cinemas fund. Some, like Żeglarsz cinema from Jastarnia, chose crowdfunding. Gabryszewska and her colleagues from Arthouse Cinemas Association refused to be complacent and, in May 2020, created Mojeekino.pl (My e-cinema), a virtual platform, initially gathering 42 cinemas. "A concept preceded only by Dutch and German formats, I believe," says Ewa Jaskólska, board member and owner of Stacja Falenica, a café-cinema located in a restored historical train station on

the outskirts of Warsaw. "We did not want viewers to lose touch with movies we, arthouse cinemas, usually screen," explains Gabryszewska, pointing out that major platforms like Netflix did not have an extended non-commercial offer before the pandemic. "I am extremely proud of what we've achieved," Jaskólska smiles, "We're here to stay".

Since the end of May 2021, cinemas have opened with a limited capacity. "Everybody's hoping this is the last restart," says Gabryszewska. One of the knock-on effects of lockdown, observed also in the field of festival programming, is that there are more titles premiering at once. While, usually, Polish films almost never open between March and early Fall, suddenly there are three new titles each week, in addition to foreign blockbusters. The abundance does not make the work any easier, especially with the sun out and restaurants open again. "It's hard to write about all these movies, to secure coverage and promotion," Gabryszewska points out. But nobody wants to wait any longer: the uncertainty beats the usual estimation based on seasonal trends. Holdbacks, regulating how long after premiering a film can be streamed, can also be a factor. On the other hand, major distribution companies that, before the pandemic, often omitted arthouse cinemas, are now more open to collaboration (Searchlight titles from Disney, Sony Classics from UIP, etc.). "Vaccinated viewers are exempt from mask wearing and are not included in the capacity limits. That technically allows us to increase the ticket sales, but is also very difficult to execute. Our computer systems are not adjusted to that many variables. How are we supposed to verify who's vaccinated online?" Gabryszewska shrugs. From June 12th food and drinks are allowed in screening rooms again, and two weeks later the capacity increases to 75%. Jaskólska says, "It feels like we're starting from scratch. There's no point in resorting to data or statistics, as it is an unprecedented situation. But if only the pandemic doesn't hit again, we'll get back on track, sometime. There's no other way."



Kino Muranów, Warsaw



Cinemes Girona, Barcelona

Spain

Spain braves the pandemic: The oasis of independent cinemas

By Elisabet Cabeza

Spain went into a severe lockdown in March 2020 and film theatres were, of course, immediately closed. Reopening was gradual in the areas that were registering lower numbers of transmission and hospitalisation, with an almost full reopening at the end of June.

There have been times when cinemas have had to close again, for different periods of time, depending on regional government policies and Covid-19 statistics—but never as long as they were during the first wave of the pandemic, and not everywhere in the country. Overall, going to the cinema has been an easier option in Spain than in many other countries such as France, Germany, or the UK, where theatres have been closed for much longer.

Openings meant that cinemas had to take the necessary safety measures with capacity limits (up to an average of 70% in place now), as well as the compulsory wearing of masks, allocated seating, encouragement to buy tickets online, and with sanitary gel dispensers in the foyers. In this context, independent exhibitors were some of the first to reopen the doors of their film theatres last year, being able to stay true to their programming style and the tastes of their audiences, as opposed to the commercial multiplexes—such as big Spanish chains Yelmo and Cinesa—where Hollywood cut its flow of releases. The latter had to programme a more significant number of Spanish and European independent films that would not usually have been included in their programme, as well as classics and rereleases. Among them were Giuseppe

Tornatore's *Cinema Paradiso*, one of the first films to symbolically hit screens when cinemas reopened in June last year; Wong Kar Wai's *In the Mood for Love*; and the *Lord of the Rings* trilogy, which topped the box-office in Spain for several weeks in spring 2021.

Members of the Europa Cinemas network in Spain—which includes 58 cinemas with a total of 249 screens—agree that they have had more options for bending than breaking in these difficult times. “Cinemas that have always gone for diversity like ours have had a better chance, unlike the ones that depend solely or mostly on big Hollywood productions,” says Toni Espinosa, manager and founding partner of the Cinemes Girona in Barcelona. “We have had losses, but if other kinds of cinemas have lost 70% or 80% of their audience, in our case it has been lower, about 50%.” On a similar note, Francesc Vilallonga, programmer and co-founder of Cinema Truffaut in the Northern Catalan town of Girona, adds, “In the last year, the access to independent cinema releases has been regular, allowing us to maintain our programming policy, unlike commercial multiplexes that have had to programme with what was available to them. And, in a lot of cases, this was not compatible with the taste they have been catering to for their

audiences. In terms of occupancy, if the general fall has been estimated at around 70% to 80%, ours at the Truffaut has been of about 25%. I think cinemas like ours will be in a better position than commercial multiplexes to get back on track.”

“But being in a better place than most commercial theatres during the last 12 months doesn’t imply that times have been easy,” argues Octavio Alzola, head of programming and marketing for Cines Renoir, which has four theatres between Madrid and Barcelona, and is part of Europa Cinemas. “It has been very tough and it still is. It’s true that we were able to reopen fairly soon, and the impact has been lighter than the one for commercial cinemas, but at a cost. We have been losing money paradoxically at the same time that our cinemas—Princesa in Madrid and Floridablanca in Barcelona—were ranking at first and second position in terms of box office.”

Public funds to help weather the crisis, and to cope with the cost of implementing safety measures as well as the loss of box office revenue, have been key to the survival of theatrical exhibition in Spain. They have come from different sources; the EU, the Spanish government [13M€], and some regional and local governments, but not all. Members of the Europa Cinemas network in Spain consulted all agreed that these have been crucial to stay open and keep business afloat. Some would like to see larger amounts allocated by the central and regional Spanish governments, while others are all for sustained long-term support rather than one-off grants.

In the long term, the nature of independent cinemas might also help in facing the longer-term secondary effect of the pandemic: the competition of streaming platforms, advanced by lockdown. “Because of the pandemic and the competition from streamers, we have listened to apocalyptic messages, but I think it also proves that theatrical and streaming can coexist. Cinephile audiences like going out and enjoy a more immersive cinema experience,” says Toni Espinosa, from Cinemes Girona in Barcelona.

Independent exhibitors are determined to maintain their links with the cultural fabric of the cities (cultural organisations, museums, film schools, festivals) where theatres are based, and to maintain their programme of presentations and Q&As, which have proved effective in navigating these troubled times for the sector. It’s in the name of cultural diversity too that independent cinemas in Spain have launched an association: PROMIO, named after the Lumière Brothers’ cameraman, Alexandre Promio. The initiative was presented at the European Film Festival of Seville in November, attended by Beatriz Navas, director of the ICAA, the film industry’s Spanish government body, as well as Claude-Eric Poiroux, general director of Europa Cinemas.

If anything, the lesson learned, according to Octavio Alzola, of Cines Renoir, is, “We have to give even more support to Spanish and European cinema, which is in our DNA, and work closely with independent distributors to help publicise the films and bring the creative teams to the theatres for presentations and Q&As. That worked very well during the pandemic. Whenever we advertised the presence of Viggo Mortensen [who lives in Madrid] for the release of his directorial feature debut, *Falling*, tickets went like hot cakes, within minutes.”

At the end of the day, Alzola adds, “What drives people back to the theatres are the films, and I think that nowadays the bar has been raised. They have to be really motivated by the appeal of the film to go to the cinema.” In the tough year behind us, films like Thomas Vinterberg’s *Another Round* and Chloé Zhao’s *Nomadland* have stood out on the independent circuit. Spanish titles like Fernando Trueba’s *Forgotten We’ll Be*, Icíar Bollain’s *Rosa’s Wedding*, and Pilar Palomero’s *Schoolgirls* have also worked well.

Spanish programmers from the Europa Cinemas network are in agreement that hope is in the air with promising releases in the months ahead, and all are looking at the Cannes line-up as a healthy signal of better times to come.



Cines Renoir, Madrid



Barbican Centre, London

United Kingdom

Little joy for reduced capacity UK Cinemas despite all the sold out screenings

By Kaleem Aftab

“The impact of Coronavirus has been catastrophic in a financial sense,” says Jason Wood, Artistic Director at HOME in Manchester. “The Cultural Recovery Fund enabled a lot of Europa Cinemas Network venues to remain solvent.”

In April of 2021, the UK government released a further £400 million to help more than 2700 arts, culture, heritage organisations, and independent cinemas survive lockdown. Out of the £1.57 billion DCMS Cultural Recovery Fund, £1.2 billion has now been allocated in grants and repayable finance. The British Film Institute has been the body charged with distributing a small share of the total fund to cinemas. Thus far, they have allocated £27.6 million to 209 independent cinemas in England, which means that 78 per cent of eligible cinemas have received money from the fund, 87 per cent of which has been awarded to cinemas outside London. According to the BFI, there are 808 cinemas in the UK, of which 315 are independent cinemas. The BFI allocate to England only, and the devolved

administrations handle grants to Scotland, Wales and Northern Ireland.

Ben Roberts BFI Chief Executive said, “The Culture Recovery Fund has been a lifeline to survival for local independent cinemas up and down the country. In bringing the latest films from blockbusters to British films and new discoveries from around the world as well as screen classics, the local ‘cinema paradiso’ is often the only form of culture and entertainment in their area and are vital to their communities.”

Cinemas first closed because of the global pandemic in mid-March 2020. In the UK, they were allowed to open at reduced capacity in September last year before the Alpha variant first found in Kent, saw cinemas close again from late

December for five months. Since May 17, 2021, cinemas in the UK have been allowed to open again, as long as they follow strict government guidelines.

To access a film at the BFI Southbank, customers must book seats in advance. The cinema stops advertising and selling tickets online 45 minutes before the screening takes place. All customers must wear masks inside the building and register their visit either using the NHS Covid-19 app or by providing their name and contact details as a condition of entry. Once inside, cinemas must operate at reduced capacity in the screens with social distancing, keeping individuals or households more than 1 metre apart. There was also an increase in deep-cleaning and other safety measures.

The social distancing rules were due to be removed on June 21 as the UK ran a successful vaccine rollout. However, with the rise in cases of the faster spreading Delta variant, first detected in India, the government has postponed relaxing the rules on venue capacity and social distancing in England by four weeks, July 19, at the earliest. The current rules mean across five screens at Home, capacity has been reduced from 508 seats to just 108.

HOME's Wood was stunned at this news. "The financial ramifications of operating at reduced capacity are grave, and the delay in the full lifting of lockdown brings more financial hardship." Wood points out that HOME, like other cinemas, enjoyed record attendances before the pandemic, with the critical and financial success of multi-award-winning *Parasite* proving that subtitles need be no barrier to populism. The pandemic could not have come at a worse time.

Gearing up to the opening on May 17, cinemas were much better versed in good pandemic fighting practices because they had operated at reduced capacity from September to December

when audiences proved that they would return to venues when they had the opportunity. For many, it demonstrated the critical role cinema plays in the community and that audiences wanted to be back in auditoriums.

Audiences were quick to return to cinemas after May 17. The BFI Southbank operated at 27 per cent of its total capacity. The top film by a distance was *Nomadland*, with *Sound of Metal* and *First Cow* performing well. A retrospective on Robert Altman has also been performing strongly. Home reported sale out screenings of *Minari*, *County Lines*, *Polystyrene: I Am A Cliché*, *Apples*, *Quo Vadis*, *Aida* and its top title was *Judas and the Black Messiah*.

"There was a sense that the absence of blockbusters and higher profile titles would give more space to titles such as *Nomadland*, *Minari* and *After Love*," states Wood. "This is good news, both for cinema in terms of diversity in the sense that it proves that audiences do want films from outside mainstream Hollywood and that they do also want films by more diverse voices."

Gail Gold, Head of Cinema, Barbican, has also followed a diverse programming strategy to attract spectators back to cinemas following the pandemic. Gold says, "Barbican Cinema's enduring curatorial priorities—whether through our in-house team or external partners—are to amplify under-heard voices; to offer a big screen, collective experience of the most exciting international cinema; to champion independent cinema; and to ensure our offer is affordable and accessible."

However, the big moment will come when cinemas are once again able to operate at full capacity. Selling out screenings in socially distanced cinemas is not a sustainable business model for cinemas, and attracting audiences to a more diverse selection of films will be key to the survival of independent cinemas.



Home, Manchester



© Giornate degli Autori – Moris Puccio

The 27 Times Cinema initiative and the LUX Audience Award

Bringing young audiences together and promoting European cinema

By Jesus Silva Vilas, Cineuropa

Engaging with younger audiences and film lovers is key to ensuring the future of a healthy and thriving market in the European arthouse sector. It's also integral in stimulating public debate around culture, a cause some initiatives have shown great commitment to over the years. Since 2010, 27 young cinephiles, each representing one country from the European Union, attend the Venice International Film Festival under the umbrella title, *27 Times Cinema* project—previously titled *28 Times Cinema*, before Brexit. The project was launched by the European Parliament, in partnership with Europa Cinemas, Giornate degli Autori—the independent section of the Venice Film Festival—and Cineuropa. The participants, all aged 18 to 25, are selected each year based on their creativity and passion for cinema,

demonstrated through the application process, carried out by a group of designated theatres within the Europa Cinemas network.

During their stay at the Lido, these 27 film buffs represent their local cinemas and comprise the official jury of the Venice parallel sidebar, which, for the last 7 years, has been handing out the GdA Director's Award. They are joined by a renowned filmmaker, who serves as Jury President—in previous editions, this position has been held by Golden Bear winner Nadav Lapid, Karim Aïnouz, Jonas Carpignano, Samira Makhmalbaf, and Bruce LaBruce, among others. They are also joined by Karel Och, Artistic Director of the Karlovy Vary International Film Festival, who has acted as Jury tutor and moderator since the establishment of the

award in 2014. Through a series of deliberations, leading up to a live-streamed final discussion and voting session, this unique film jury decides on the winning film, which receives a cash prize of €20,000 to be split between the director and the distributor. The list of recent laureates includes, *The Whaler Boy* by Philip Yuryev, *La llorona* by Jayro Bustamante and *Real Love* by Claire Burger.

In addition to their jury duties, the 27 representatives take part in several activities during the festival, including workshops —on film criticism, digital communication, film translation and more— and roundtables, and special screenings alongside the GdA's competition titles. These activities usually include meetings and discussions with film professionals, cultural influencers, festival programmers, and even members of the European Parliament, with whom participants can share their concerns and hopes for the state of culture in Europe. At the same time, they become working reporters and film critics, contributing to a special blog managed by Cineuropa, where they publish articles, reviews, and interviews, while sharing their personal experience in Venice through Europa Cinemas' social media.

However, the journey of the 27 Times Cinema extends far beyond the Lido. With over 300 members taking part in the initiative over the years, this intensive training programme has seen many of its attendants become prominent professionals within the European film industry —from established filmmakers to awarded producers and critics— and all take on the role of ambassadors for the LUX Audience Award in their respective countries.

This newly launched pan-European award, presented by the European Parliament and the European Film Academy, in partnership with the European Commission and Europa Cinemas, was first introduced in Venice last year, as merger between the LUX Prize of the European Parliament and EFA's People's Choice Award. The aim of this award is to promote films that highlight the diversity and complexity of European cinema, while dealing with important social and political subjects, and supporting their circulation across the member states by subtitling the films in all the official EU languages. The titles running for this award are selected by a panel of European film professionals, including filmmakers, producers, and festival directors, approved by the Committee on Culture and Education of the European Parliament. Once the nominated films are unveiled, the European public and the Members of the European Parliament can vote for their favourite titles through a dedicated site. The winner is eventually chosen based on the votes by these two groups (each representing 50%), and is announced at a ceremony held during a plenary session of the European Parliament in Strasbourg.

In the upcoming years, this new format will feature five titles competing for the award, but, due to the impact of the COVID-19 pandemic, the number of nominated films was reduced to three in its first edition, which has recently

wrapped. *Collective* by Alexander Nanau became the first-ever recipient of the award, beating the other two candidates, *Another Round* by Thomas Vinterberg and *Corpus Christi* by Jan Komasa. During the voting campaign, the three finalists travelled around Europe taking part in different online and physical screenings, while members of the 27 Times Cinema project promoted the events in their communities and social media, encouraging people to vote. Despite the challenges posed by the pandemic, the 27 Times Cinema project is set to celebrate its 12th edition in 2021, welcoming, in Venice, a new batch of ambassadors who will join a network of young and enthusiastic film supporters that continues growing every year.



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COLLECTIVE

by Alexander Nanau



LUX
AUDIENCE AWARD
WINNER

Congratulations to Collective by Alexander Nanau (Romania), Winner of the LUX Audience Award 2021!

The newly launched LUX Audience Award is an initiative of the European Parliament and the European Film Academy, in partnership with the European Commission/Creative Europe and Europa Cinemas.



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