EUROPA CINEMAS

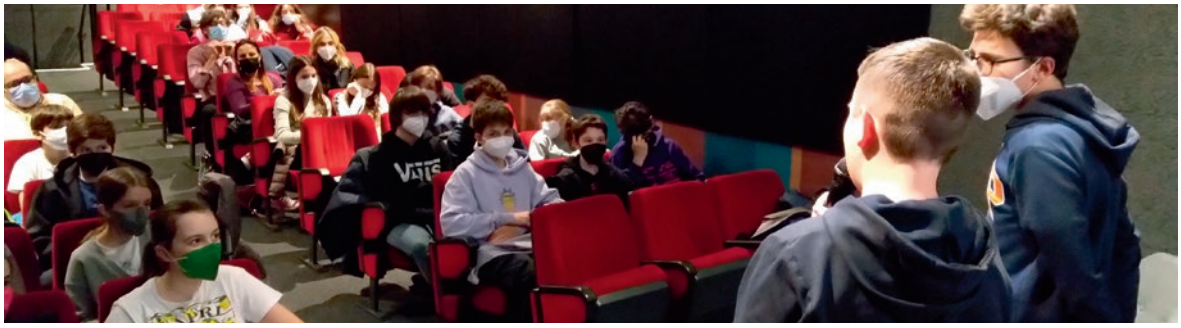
Cannes 2023

Network Review #41

Facts & Figures 2022

Post-Pandemic Recovery

Cineville Belgium



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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At the 2023 Directors' Fortnight

Editorial
by Claude-Eric Poiroux

© Sandrine Jousseaume

To begin with, let us look at the figures just analysed for the year 2022, which saw our cinemas return to an almost normal level of activity after closures or constraints linked to Covid. **Only a few venues have closed permanently (about fifteen)** but some are fragile and their future still depends on recovery for stability.

After the catastrophic year that was 2020, and despite a promising recovery in 2021 (+68%), attendance within our Network's cinemas is **down by 32.6% when compared with admissions from 2019** (from 77m to 52m, excluding the UK, over the two years).

Still, this is better than the overall European market, which is -36,7% (source: European Audiovisual Observatory, Berlinale 2023).

However, there are serious disparities between countries: a drop of more than 40% in Portugal, Italy, Greece, Bosnia and Estonia, but less than 25% in France, Denmark, Belgium and Finland. Some cinemas in the latter countries have even returned to their pre-Covid figures!

A positive observation: between 2019 and 2022, **the European market share for the entire Network increased by 2.7 percent from 53% to 55.7%**. This is all the more remarkable as British films are no longer considered European, as of this year – their 5% in 2022 has now been added to the non-European percentages alongside American and Asian productions.

Another observable trend: the European progression in the Network clearly benefits **national cinema (+7 percent)**. We knew that, in 2021, this was a global economic phenomenon: the lack of Hollywood blockbusters and the difficulty in international exchange have largely benefited national cinemas. But, in our Network, this progression solidified in 2022: almost one third of admissions on our screens are national content. In the European Top 10 countries with a significant proportion of national production it is not unusual to find six or seven films made locally. In Serbia, the first nine titles in the European Top 10 are Serbian! Nine Spanish, eight Norwegian, Czech, French films top the chart in their own markets! This is good news for each of the countries that support their industry and domestic productions: all the better if the public likes to hear their own language, appreciate their actors and talents, share their culture, humour and social issues. The quality and popularity of national productions therefore remain a serious asset in attracting audiences back to our big screens!

What about the **circulation of these films** beyond their borders of origin? It is not as beneficial, but **its increase is 3.8 percent** above figures from 2019. There are two notable points regarding this non-domestic share: children's films account for a significant portion, and the Palme d'Or winner at Cannes 2022 has helped boost results. It is indeed *Triangle of Sadness* that reached number one across all nations combined, ahead of US films, which are in poor form this year (30% of market share instead of 37% as in 2019).

This situation, with low market shares for US and UK films, is rather favourable for European results, but it should not conceal what the entire industry has noted, namely the fragile capacity of a growing number of European productions to emerge and circulate on our continent. Many exporters cite difficulties in signing sales contracts for little-known European films, and distributors are reluctant to commit to titles that are too risky. Many exhibitors point out that increasingly more quality European works are being shunned by a less curious public that limits itself to safe havens. This is a joint reflection that we can carry out **together (sellers, distributors, exhibitors, but also festival directors)**, to reinforce the visibility of the wealth of European production. It is the common

will of all these individuals, supported by Creative Europe MEDIA, to identify and show the diverse forms of creativity from our continent, and it is the merit of our Network to display this impressive diversity of origins and film genres. It should be noted that many European films experience most of their theatrical life in our cinemas, which confirms the quality of the programming.

Thanks to the Commission's support, Europa Cinemas has just launched - in the midst of the COVID crisis - an additional tool, **Collaborate to Innovate**, which enables exhibitors to develop large-scale initiatives aimed at developing audiences, the first effects of which are already visible on the ground. One example, among the 28 projects already supported, is **Cineville**, which was inspired by the success in the Netherlands and has been replicated and adapted in Belgium and Austria and is soon to be launched in other European countries thanks to joint initiatives of our exhibitors.

To conclude on an optimistic note, let's look at the positive surprises of 2022: a nice breakthrough of Spanish cinema from Pedro Almodóvar (*Madres Paralelas*), Fernando León de Aranoa (*El buen Patrón*), Rodrigo Sorogoyen (*As Bestas*), Mariano Cohn & Gastón Duprat (*Competencia Official*), Carla Simon (*Alcarràs*), all of them placing in the international Top 50 of our Network. We should also note the fine performances of Joachim Trier, Cédric Klapisch and Lukas Dhont, and of Giuseppe Tornatore's documentary *Ennio*. And, of course, the joyous success of the President of the Cannes Jury, after his Palme d'Or win last year: *Triangle of Sadness* was released in the 32 territories of our Network for a box-office of almost 10 million Euros.

Europa Cinemas is ready for Ruben Östlund's next production!

Claude-Eric Poiroux
General Director

Claude-Eric Poiroux, Jan Macola, Alzbeta Macolova, Simon Wullens, Fatima Djoumer, Nico Simon (Europa Cinemas Awards 2022) © JoanaLinda

Cinemas' post-pandemic recovery in 2022: New strategies and youth are key

by Martin Blaney

Kim Foss, Grand Teatret, Copenhague © D.R.

Koen Van Daele, Kinodvor, Ljubljana © D.R.

According to preliminary results collated by the European Audiovisual Observatory (EAO), cinema attendance in the European Union in 2022 increased year-on-year by 64% from 2021's total admissions of 320 million to 525.8 million.

This substantial increase was not surprising given that many member states were still imposing restrictions on cinemas' operations well into 2021.

However, a comparison with attendances from 2019 is more instructive when seeking to establish the extent to which the European theatrical sector has recovered post-pandemic. The EAO's data suggested that ticket sales in the EU were 34.9% below the 2017-2019 average, while Europa Cinemas reports that its network posted a total of 50.6 million admissions, down 37% from 2019's 79.7 million. But, as Kim Foss, managing director of Copenhagen's Grand Teatret, points out, "The situation not only varies between countries, but also locally - and even between cities and cinemas."

"Although many feared that the main problem in the post-Covid era would be how to motivate audiences to return to the cinema, this turned out to be no issue at all, and we are rapidly getting back to pre-Covid numbers," Koen Van Daele of Kinodvor in Ljubljana, reports. Indeed, this is an experience shared by Sabine Hoffmann of Vienna's Filmcasino and Filmhaus where attendance in 2022 even topped that for 2019 with such successful titles as the Norwegian children's Christmas film *Teddybjørnens jul*, the David Bowie documentary *Moonage Daydream* and the ubiquitous Oscar winner *Everything, Everywhere, All At Once.*
"Nonetheless, we witnessed some major changes over the past two years," Van Daele said, "Some of them were probably bound to happen, but the pandemic served as a catalyst pushing the change."

As Tom Ooms, head of programme at Lab111 in Amsterdam, explains, "During the pandemic, I think many of us suddenly felt that our social lives had been incredibly overstuffed with activities pre-pandemic. I see my peers being much more thoughtful in how they plan their cultural activities; we've become much pickier and more sensitive."

Andrea Romeo, Vincent Lindon, Julia Ducournau, Cinema Troisi, Rome.
© Andrea Littera

Louis Garrel and the team of Cinema ABC, Toulouse © D.R

Pedro Borges, Cinema Ideal, Lisbon © D.R

Dario Argento, Gaspar Noe, Cinema Troisi, Rome © Stefania Casellato

"It's not that our customers have stopped coming to the cinema, but they are coming less often and choosing the films they want to see in the cinemas more carefully," Pedro Borges of Lisbon's Cinema Ideal adds. Moreover, many cinemas have seen that older audiences have been reluctant to come back and yet, at the same time, they have cited increases in attendances by younger cinema-goers.

"This demographic shift has led to some pressure being put on certain areas of programming, particularly (European) arthouse films, and we have to recognise that our market still thinks in old(fashioned) terms," Christian Bräuer of the Yorck Kino Group, argues. "It is important to continue to promote diverse and interesting content that appeals not only to the older generations, but that is also aimed at the growing group of young and film-interested moviegoers, while simultaneously remaining true to the principles of arthouse cinema. Keeping in mind the evolution of audiences and the industry and adapting accordingly will be crucial to staying relevant and sustainable."

"During the first lockdown we spent a lot of time thinking about and developing strategies for how we would persuade our most vulnerable customers to return to the cinema. We thought, for instance, that it would be particularly hard to convince seniors," Van Daele says "However, already, the first time we re-opened, we noticed that members of all age groups were back. The same pattern followed after the second lockdown."

"We lost a few habituées during Covid, but, in general, the audience is back," Kim Foss concludes. "But they are spoilt for choice from the streamers - also when it comes to quality films - so they have become pickier and more selective than ever. If we can all rise to that challenge, the future looks bright, at least cinema-wise."

TOP 50
European Movies
By Admissions
Europa Cinemas/
MEDIA 2022

For the movies released before 2022, the total number of admissions realised in the Network since their first release is mentioned.

1

Triangle of Sadness
Nationality **SE**, Director **Ruben Östlund**, Countries **32**, Cities **560**, Cinemas **825**, Admissions **1133774**

2

Verdens verste menneske
Nationality **NO**, Director **Joachim Trier**, Countries **31**, Cities **449**, Cinemas **679**, Admissions **445941**

3

En corps
Nationality **FR**, Director **Cédric Klapisch**, Countries **12**, Cities **299**, Cinemas **402**, Admissions **416340**

4

Competencia oficial
Nationality **ES**, Director **Mariano Cohn**, **Gastòn Duprat**, Countries **29**, Cities **517**, Cinemas **731**, Admissions **277995**

5

Qu'est-ce qu'on a tous fait au Bon Dieu?
Nationality **FR**, Director **Philippe de Chauveron**, Countries **14**, Cities **289**, Cinemas **401**, Admissions **269141**

6

Ennio
Nationality **IT**, **Giuseppe Tornatore**, Countries **25**, Cities **407**, Cinemas **578**, Admissions **261200**

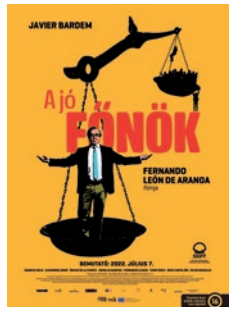
7

La Panthère des neiges
Nationality **FR**, Director **Marie Amiguet**, **Vincent Munier**, Countries **23**, Cities **397**, Cinemas **528**, Admissions **254673**

8

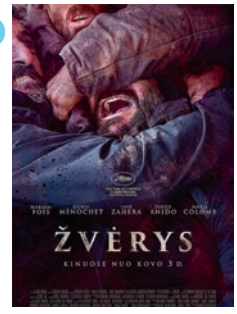
Madres paralelas
Nationality **ES**, Director **Pedro Almodóvar**, Countries **32**, Cities **483**, Cinemas **723**, Admissions **413619**

9



El buen patrón
Nationality **ES**, Director **Fernando León de Aranoa**, Countries **29**, Cities **519**, Cinemas **738**, Admissions **314407**

10



As bestas
Nationality **ES**, Director **Rodrigo Sorogoyen**, Countries **8**, Cities **193**, Cinemas **252**, Admissions **312168**

11

Close
Nationality **BE**, Director **Lukas Dhont**, Countries **23**, Cities **281**, Cinemas **367**, Admissions **286887**

12

Alcarràs
Nationality **ES**, Director **Carla Simon**, Countries **29**, Cities **357**, Cinemas **526**, Admissions **247389**

13

L'Innocent
Nationality **FR**, Director **Louis Garrel**, Countries **10**, Cities **149**, Cinemas **184**, Admissions **240378**

14

Ouistreham
Nationality **FR**, Director **Emmanuel Carrère**, Countries **21**, Cities **450** Cinemas **606**, Admissions **235327**

15

Boy From Heaven
Nationality **SE**, Director **Tarik Saleh** Countries **15**, Cities **200**, Cinemas **268**, Admissions **227451**

N°	TITLE	NATIONALITY	DIRECTOR	COUNTRIES	CITIES	CINEMAS	ADMISSIONS
16	**Wunderschön**	DE	Karoline Herfurth	7	124	180	217216
17	**Un autre monde**	FR	Stéphane Brizé	11	250	308	207534
18	**Corsage**	AT	Marie Kreutzer	26	413	573	206753
19	**La Nuit du 12**	FR	Dominik Moll	8	212	274	203869
20	**Le otto montagne**	BE	Charlotte Vandermeersch, Felix van Groeningen	18	221	286	179597
21	**Simone, le voyage du siècle**	FR	Olivier Dahan	4	135	175	178537
22	**Hytti nro 6**	FI	Juho Kuosmanen	19	337	477	174095
23	**Mittagsstunde**	DE	Lars Jessen	2	103	167	165572
24	**Illusions Perdues**	FR	Xavier Giannoli	24	373	532	157825
25	**La Stranezza**	IT	Roberto Andò	2	78	117	155883
26	**Guglhupfgeschwader**	DE	Ed Herzog	4	87	107	145718
27	**Die Schule der magischen Tiere 2**	DE	Sven Unterwaldt	5	90	139	140131
28	**Spencer**	EU	Pablo Larraín	27	341	496	139874
29	**Les Amandiers**	FR	Valeria Bruni Tedeschi	8	190	236	139674
30	**Les Jeunes amants**	FR	Carine Tardieu	11	196	253	138095
31	**Le Pharaon, le Sauvage et la Princesse**	FR	Michel Ocelot	7	154	197	136858
32	**Revoir Paris**	FR	Alice Winocour	8	150	181	131113
33	**Les Olympiades**	FR	Jacques Audiard	28	351	541	130990
34	**Chronique d'une liaison passagère**	FR	Emmanuel Mouret	8	141	176	122642
35	**Avec amour et acharnement**	FR	Claire Denis	23	297	377	121574
36	**Les Enfants des autres**	FR	Rebecca Zlotowski	8	152	186	113476
37	**EO**	PL	Jerzy Skolimowski	13	220	289	112697
38	**Der Nachname**	DE	Sönke Wortmann	3	96	132	112612
39	**Les Passagers de la nuit**	FR	Mikhaël Hers	17	238	301	110163
40	**Il signore delle formiche**	IT	Gianni Amelio	4	86	125	106201
41	**À plein temps**	FR	Eric Gravel	14	257	329	104010
42	**Il Colibrì**	IT	Francesca Archibugi	4	85	125	103987
43	**Maigret**	FR	Patrice Leconte	13	188	265	103760
44	**Rabiye Kurnaz gegen George W. Bush**	DE	Andreas Dresen	14	156	245	101219
45	**Le petit Nicolas - Qu'est-ce qu'on attend pour être heureux ?**	FR	Amandine Fredon, Benjamin Massoubre	11	189	264	100657
46	**Incroyable mais vrai**	FR	Quentin Dupieux	16	179	219	99425
47	**Nobody Has To Know**	BE	Bouli Lanners	7	196	228	99328
48	**Nostalgia**	IT	Mario Martone	12	138	202	98071
49	**Ernest et Célestine : le voyage en Charabie**	FR	Julien Chheng, Jean-Christophe Roger	5	182	220	96620
50	**Los renglones torcidos de Dios**	ES	Oriol Paulo	1	23	38	96520

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Facts & Figures 2022

Europa Cinemas / MEDIA Network

33 Countries

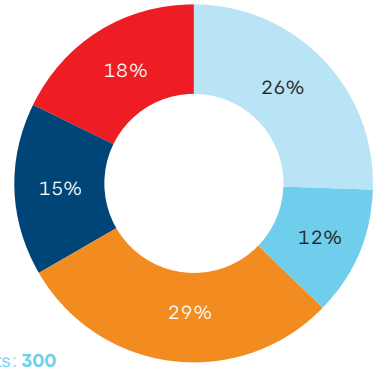
707 Cities
+15 vs 2021

1168 Cinemas
+24 vs 2021

2782 Screens
+41 vs 2021

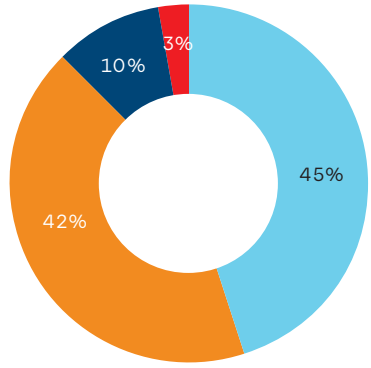
Profile of the cinemas

Cinemas by city sizes



> 1M: **207**
500 000 - 1M: **181**
100 - 500 000: **343**
50 - 100 000: **137**
< 50 000 inhabitants: **300**

Cinemas by number of screens



Single screen: **528**
2-4 screens: **496**
5-7 screens: **114**
8 screens +: **30**

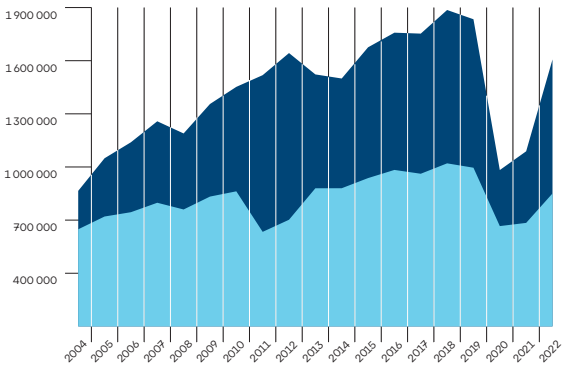
Network results 2022

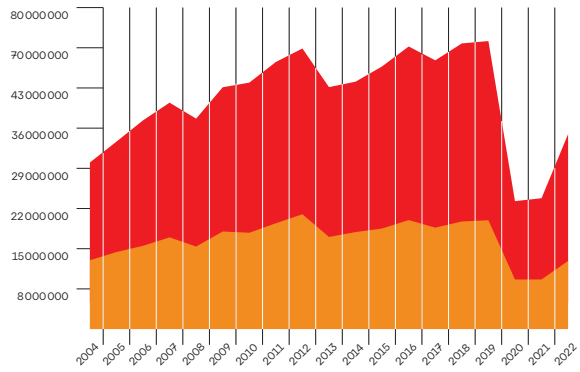
0.83 M
European Non-National Screenings
28.3% of the total screenings

1.68 M
European Screenings
57.7% of the total screenings

12.85 M
European Non-National Admissions
24.6% of the total admissions

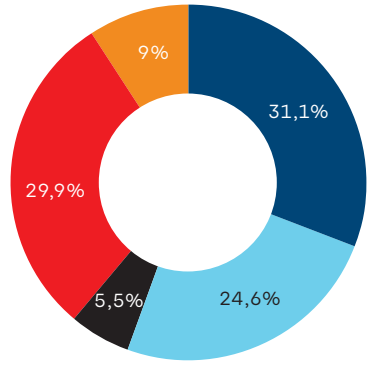
29.14 M
European Admissions
55.7% of the total admissions





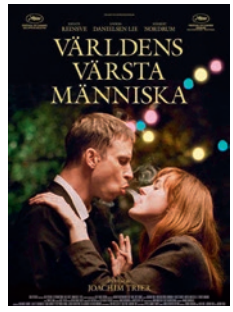
Network results before and after the Covid crisis

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (Mio)	79,9	30,6	52,3
Cinemas	1 136	1 144	1 168
Screens	2 783	2 741	2 782
National	24,1%	31,2%	31,1%
European non-national	20,8%	21,3%	24,6%
UK	8,0%	5,6%	5,5%
US	36,9%	33,7%	29,9%
Others	10,2%	8,2%	9,0%

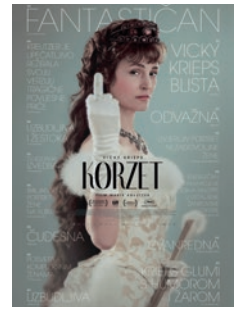


The Europa Cinemas Network had a huge impact on the screen lives of these films

As Bestas
86%, 8 countries



Verdens verste menneske
69%, 31 countries



Corsage
65%, 26 countries

EO
61%, 13 countries

Triangle of Sadness
56%, 32 countries

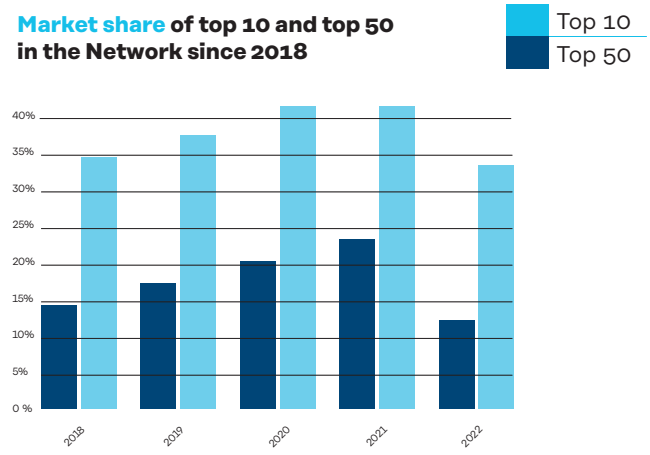
Circulation of diverse cinema

To measure the importance of the Europa Cinemas Network, beyond its essential role in the circulation of European films, let us compare it, with its 52 million admissions, to an imaginary market of roughly the same size as the Spanish or Italian markets.

This imaginary market, consisting of cinemas united by the same values, differs from these national markets in that it focuses much less on the 'big' films: the Network's top 10 represents just 12% of its total admissions, i.e., about half of what would be seen in a national market. The admissions are therefore not as focused on the big hitters found in the European market. Only one film is a millionaire in terms of admissions within the Network this year (*Triangle of Sadness*) and only seven films exceed 500,000 admissions, all nationalities combined.

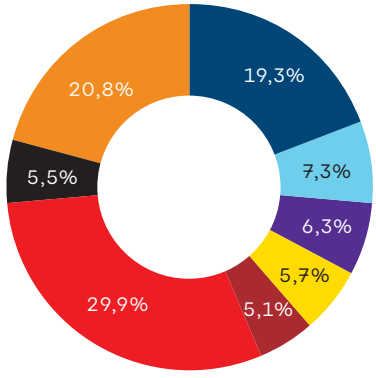
After them, there are more films achieving "good" results: around fifty films passed 200,000 admissions and there are a hundred or so with numbers above 100,000 admissions. It is, therefore, already, at this level, that we can measure the diversity of circulation of European films: 45 of these 100 films are European.

Market share of top 10 and top 50 in the Network since 2018



Nationalities in the Network

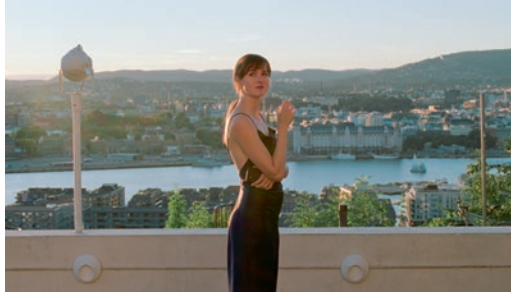
United States	29,9%
Others	20,8%
France	19,3%
Nordic Countries	7,3%
Germany	6,3%
Spain	5,7%
United Kingdom	5,5%
Italy	5,1%



This year was therefore important for the circulation of the diversity of European films: in addition to the strong presence of Nordic films (driven by *Triangle of Sadness, The Worst Person in the World* and *Compartment No. 6*), already observed last year, 2022 was a good year for Spanish films, of which there are five titles in the top 50 (*Madres Paralelas, El Buen Patrón, As Bestas, Competencia oficial* and *Alcarràs*).

English films are mostly absent, in line with the previous two years, with only *Belfast* standing out. Films from France, Italy and Germany maintained their usual market shares within the Network.

The Worst Person in the World © Oslo Pictures



Alcarras © Pyramide Distribution

Record results for domestic films

Top 5 countries with the highest market share for their national admissions

	Countries	Market share of national productions in the country
1	France	48,9%
2	Czech Republic	37,2%
3	Italy	35,7%
4	Germany	34,6%
5	Denmark	33,7%

Never before has the share of national films been so high within the Network. Before 2020, national productions represented 24% of admissions. In 2022, they represented 31.2%. Of the 33 MEDIA countries, 23 have a share of national films above 15%, a rarity, which is reflected in each country's top 10 where, on average, three films are national. You can see these rankings on the following pages.
This finding also represents an opportunity: these creations, which have found their audience in their own country, may be the European films of tomorrow.

Triangle of Sadness: an immediate and impressive success

Druk (by Vinterberg) had been the big European success of 2020 and 2021. Ruben Östlund's second Palme d'Or is a new success for Nordic cinema.

Its results are impressive for their speed: 1.7 million admissions in the MEDIA countries, of which more than 60% was within the Europa Cinemas Network, with significant distribution in some thirty countries between September and December 2022. In Italy and Germany, the Network accounts for more than 80% of the film's admissions and 96% in the Netherlands.

Screened in 824 Network cinemas, it attracts an average of 1,375 attendees. Forty-seven theatres in the Network saw the film exceed 5,000 admissions. In Poland, the film was presented as previews with significant results: more than 4,000 admissions at the New Horizons festival in Wroclaw; 6,500 admissions at the Kino Muranow in Warsaw. It was then released in the country at the start of 2023. Its journey is currently continuing in a good ten countries around the world.

Three other films from Northern Europe also did well this year: *The Worst Person in the World, The Cairo Conspiracy* and *Compartment No. 6*, all of which also played at Cannes. Another rarity: this year, Danish cinema is lagging behind on a European level, with the first Danish film, *Mashhad Nights* (winner of the Best Actress award at Cannes 2022), not yet reaching 100,000 admissions in the Network.

Ruben Ostlund, Grand Teatret © Photo Kim Foss

European successes on the long-run

Every year, we see the continuation of the life of films that have already been on release for one or two years: *Mustang* (2015 - 2016), *Sameblod* (2017 - 2018) and, more recently, due to Covid, *Portrait of a Lady on Fire* and *Drunk*. Looking at our results, there is a change in scale: 2022 featured even more films that had their first European release in 2021.

There are at least eight films in the European top 50 that began their screen life two years ago, and three in the top 15. One example is *Madres Paralelas* by Pedro Almodovar. Its European releases were spread out from October 2021 (in Spain, Italy and Greece) to March 2022 (Denmark, Finland, Germany and the Netherlands) and even as far as Japan in November, i.e., over a year later. It will have attracted more than 900,000 attendees in the Network's cinemas, achieving an equivalent number of admissions in 2021 and 2022.

The same is true for *Compartment n°6*, by Juho Kuosmanen, or for *The Worst Person in the World*, which began its journey in France in October 2021 and ended in July 2022 in Greece, and which will have achieved 640,000 admissions in our cinemas. *Lost Illusions*, by Xavier Giannoli and adapted from Balzac's novel of the same name, surely holds the record: it opened in October 2021 and had its final release in Sweden in March 2023. Its career in Europe will therefore have lasted for more than 17 months.

It was important for us to underline the continuation of this trend and to recall the importance of these films. It is true that many successful films make the majority of their admissions in their first few days. But, contrary to an easy overview of the market which, due to competition from platforms, would suppose a shortening of the theatrical lives of films (which is the case for a certain number of them), many films continue to work in theatres long after their first releases and represent an important part of the vitality of European cinema in all its diversity.

Illusions perdues © Gaumont

Madres Paralelas © El Deseo / Pathé

More presence for Irish culture

Is this an effect of the UK's exit from the European Union? Or is our gaze suddenly a little more interested in its neighbour?

Irish or Irish-related films have been very prominent this year. *Belfast* (Kenneth Branagh), about the civil war in Northern Ireland, is the only British film that really circulated within the Network, 4th in our top ranking films with 646,000 admissions. More grounded in the West of Ireland, the British film *The Banshees of Inisherin*, a new opus by Martin McDonagh after his hit *Three Billboards Outside Ebbing, Missouri*, promised good results in the Network, after its release at the end of 2022.

Wolfwalkers © Haut et Court

The big surprise was *An Cailín Ciúin (The Quiet Girl)*, an Irish film funded by Cine4, a programme that supports Irish language films. It had already funded *Arracht*, the second-best performing film in the Network in Ireland in 2021.

In 2022, *The Quiet Girl* surpassed it at the top of the box office (25,600 admissions) but it is also the most seen Irish language film of all time, worldwide and in Ireland. Adapted from a short story by Claire Keegan, it has won awards at just about every festival it has been shown at and has been enthusiastically received by audiences, including exhibitors who saw it at the Europa Cinemas Conference in November 2022. It reminds us of another award-winning film that passed through our Conference in 2005, *Pavee Lackeen: The Traveller Girl*, by Perry Ogden, which we invite you to rediscover. *The Quiet Girl* will be released in theatres across the Network at the start of 2023, having been a finalist for the Foreign Film Academy Award.

Finally, the animated film *Wolfwalkers* (Tomm Moore, Ross Stewart) still achieved almost 20,000 admissions within the Network, after having circulated well in 2020 and 2021. It totalled 131,000 admissions (out of 260,000 in Europe).

American films offer safe values

In our top 10, six films are American, but only two of them seem, to us, to correspond with the auteur films that usually characterise European arthouse cinema: *Elvis* and *Licorice Pizza*.

The other US films at the top of the rankings are all sequels and are, therefore, more in line with the general public (i.e., the "mainstream"): a "family" oriented film (*Minions: The Rise of Gru*), the two great popular successes *Avatar: The Way of Water* and *Top Gun: Maverick,* and a dark action film for an "adult" audience (*The Batman*).

Thus, this better than usual placing for mainstream US films is a testament not only to the relative insufficiency of American auteur films underlined by Claude-Eric in his editorial, but, also, perhaps to a desire on the part of European exhibitors, in this year of recovery, to ensure the return of the public with "safe values".

Licorice Pizza © Universal Pictures

Resuming activities for young audiences

Theatres in the Network are financially supported for their activities aimed at young audiences, from kindergarten children to tertiary students. This support was put on hold during the two years of lockdowns. In 2022, theatres in many places resumed their activities.

Among the best ranking films presented in screenings for young audiences were two documentaries (*Le Chêne - Heart of Oak* and *The Velvet Queen*) and two biographies (*Simone Veil, a Woman of the Century* and *Dante).*

Best performing films for young audiences in the Network:

N°	FILM	NATIONALITY	DIRECTOR	ADMISSIONS	SCREENINGS	SCREENINGS IN YOUNG AUDIENCE ACTIVITIES	CATEGORY
1	The Black Pharaoh, the Savage and the Princess	FR	Michel Ocelot	121379	3682	2206	Animation
2	School of Magical Animals: Part 2	DE	Sven Unterwaldt	103131	3250	2332	Family
3	Simone Veil, a Woman of the Century	FR	Olivier Dahan	96027	2614	586	Biopic
4	Little Nicholas	FR	Amandine Fredon, Benjamin Massoubre	76048	3033	1716	Animation
5	Ernest & Celestine 2: A Trip to Gibberitia	FR	Julien Chheng, Jean-Christophe Roger	72595	2741	1768	Animation
6	Heart of Oak (Le Chêne)	FR	Laurent Charbonnier, Michel Seydoux	61189	2404	851	Documentary
7	The Velvet Queen (La Panthère des neiges)	FR	Marie Amiguet, Vincent Munier	58432	2668	942	Documentary
8	Dante	IT	Pupi Avati	51287	1356	256	Biopic
9	Knor	NL	Mascha Halberstad	48877	2462	2321	Animation
10	Even Mice Belong in Heaven (Myši patří do nebe)	CZ	Jan Bubeníček, Denisa Grimmová	48819	1720	1307	Animation

Knor © The Jokers

La panthere des neiges © MFA

Initiatives and films for Ukraine

The cinemas in the Network took action very early on, in March 2022, in response to Russia's aggression against Ukraine.

First, cinemas located close to the border provided assistance to refugees, such as the Kino Usmev in Košice, Slovakia. Then, many cinemas in the Network offered special screenings. For example, the Hackesche Höfe Kino, which has long had a free admission policy for refugees, extended their support of Ukrainian refugees in Berlin, and the cinema now offers a daily children's film dubbed in Ukrainian, an offer that has found its audience with over 10,000 attendees to date. The cinema is strongly committed to this issue and publishes communication materials for Ukrainian refugees and has directly employed a refugee to facilitate contact with the community.

These initiatives have extended to the public, with the number of admissions for Ukrainian films increasing tenfold when compared with those of 2019. *Pamfir* (Dmytro Sukholytkyy-Sobchuk), presented at the 2022 Directors' Fortnight, found its audience, especially in France. Other Ukrainian films that circulated well included *Butterfly Vision* (*Bachennya metelyka*, by Maksym Nakonechnyi) and *The Earth Is Blue as an Orange* (*Zemlia blakytna niby apel'syn*, by Iryna Tsilyk), both devoted to the consequences of the war that has been raging in the east of the country since 2014.

A special mention, in terms of programming of Ukrainian films in the Network, goes to Lithuania, which records the 4th highest level of admissions for Ukrainian films, after France, Poland and Germany, and ahead of Italy, Serbia and the Czech Republic.

Pamfir © CondorDistribution

Butterfly Vision © Nour Films

The Earth is Blue as an Orange © Cat n Docs

Facts & Figures:
Nicolas Edmery, Jean-Baptiste Selliez

Austria

RESULTS IN THE COUNTRY source: Wirtschaftskammer, Österreichisches Filminstitut	2019	2021	2022
Total admissions (Mio)	13,7	5,2	10,0
Cinemas	142	n/a	n/a
Screens	569	n/a	n/a
National	3,3%	n/a	5,0%
European non-national	19,7%	6,2%	21,7%
UK	n/a	n/a	1,8%
US	76,4%	n/a	69,9%
Others	0,7%	n/a	1,6%

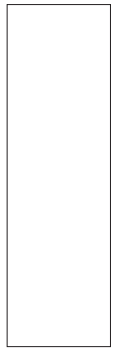
RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (Mio)	1,9	0,7	1,4
Cinemas	34	37	37
Screens	80	85	85
National	11,9%	11,7%	17,7%
European non-national	33,1%	36,8%	39,7%
UK	8,8%	5,1%	5,9%
US	39,4%	39,1%	30,9%
Others	6,8%	7,4%	5,7%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Triangle of Sadness**	SE	Ruben Östlund	14/10/2022	40961
2	**Corsage**	AT	Marie Kreutzer	07/07/2022	35531
3	**Qu'est-ce qu'on a tous fait au Bon Dieu ?**	FR	Philippe de Chauveron	21/07/2022	34214
4	**Guglhupfgeschwader**	DE	Ed Herzog	04/08/2022	30377
5	**Rotzbub**	AT	Santiago López Jover, Marcus H. Rosenmüller	24/03/2022	23121
6	**Geschichten vom Franz**	AT	Johannes Schmid	14/04/2022	21277
7	**Märzengrund**	AT	Adrian Goiginger	19/08/2022	20166
8	**Wunderschön**	DE	Karoline Herfurth	04/02/2022	18313
9	**Madres paralelas**	ES	Pedro Almodóvar	11/03/2022	18118
10	**Elfriede Jelinek – Die Sprache von der Leine lassen**	DE	Claudia Müller	10/11/2022	17642

Belgium

RESULTS IN THE COUNTRY source: Cinedata, FCB, ABDF	2019	2021	2022
Total admissions (Mio)	19,9	7,5	n/a
Cinemas	80	75	n/a
Screens	480	466	n/a
National	n/a	n/a	n/a
European non-national	n/a	n/a	n/a
UK	n/a	n/a	n/a
US	n/a	n/a	n/a
Others	n/a	n/a	n/a



RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (Mio)	2,2	0,9	2,0
Cinemas	33	33	39
Screens	75	78	88
National	7,7%	8,9%	21,0%
European non-national	37,9%	43,0%	41,7%
UK	8,8%	7,1%	5,3%
US	36,7%	32,1%	23,6%
Others	8,9%	8,8%	8,5%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Close**	BE	Lukas Dhont	02/11/2022	93776
2	**Onze Natuur**	BE	Dick Harrewijn, Pim Niesten, Maria Lise van Lente	21/09/2022	54468
3	**Triangle of Sadness**	SE	Ruben Östlund	27/09/2022	54374
4	**Le otto montagne**	BE	Charlotte Vandermeersch, Felix van Groeningen	14/12/2022	34133
5	**Tori et Lokita**	BE	Jean-Pierre Dardenne, Luc Dardenne	07/09/2022	24341
6	**Simone, le voyage du siècle**	FR	Olivier Dahan	12/10/2022	23648
7	**Zillion**	BE	Robin Pront	26/10/2022	21016
8	**Un Monde**	BE	Laura Wandel	20/10/2021	19573
9	**Nobody Has To Know**	BE	Bouli Lanners	23/03/2022	18087
10	**Madres paralelas**	ES	Pedro Almodóvar	01/12/2021	17528

Bulgaria

RESULTS IN THE COUNTRY source: NFC	2019	2021	2022
Total admissions (Mio)	5,0	2,5	4,0
Cinemas	68	64	71
Screens	241	211	213
National	9,0%	3,8%	16,3%
European non-national	7,0%	16,1%	8,0%
UK	n/a	n/a	0,2%
US	83,6%	79,2%	74,7%
Others	0,4%	0,9%	0,8%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (Mio)	1,2	0,5	0,8
Cinemas	16	15	15
Screens	75	47	47
National	10,7%	14,9%	15,8%
European non-national	13,8%	12,1%	12,9%
UK	2,9%	1,2%	1,0%
US	67,5%	63,4%	66,1%
Others	5,1%	8,5%	4,2%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Петя на моята Петя (Petya na moyata Petya)**	BG	Aleksandar Kosev	20/03/2021	19822
2	**Завръщане 2 (Reunion 2)**	BG	Niki Iliev	18/02/2022	16386
3	**В Сърцето на Машината (In the Heart of the Machine)**	BG	Martin Makariev	18/03/2022	14509
4	**Жълт олеандър (Yellow Oleander)**	BG	Lachezar Avramov	01/04/2022	9628
5	**Juzni Vetar 2: Ubrzanje**	RS	Milos Avramovic	04/02/2022	8514
6	**Моралът е доброто**	BG	Veselin Dimanov	09/12/2022	7947
7	**Бай Иван 2 (Bai Ivan 2)**	BG	Nikolay Garabedyan	09/09/2022	7707
8	**Ooops! The Adventure Continues**	EU	Toby Genkel, Sean McCormack	25/02/2022	5944
9	**Бай Иван: Филмът (Bai Ivan: The Movie)**	BG	Dimitar Kiriazov	03/12/2021	5897
10	**Triangle of Sadness**	SE	Ruben Östlund	02/12/2022	4788

Bosnia

RESULTS IN THE COUNTRY source: Creative Europe Desk	2019	2021	2022
Total admissions (Mio)	1,2	n/a	1,1
Cinemas	11	n/a	22
Screens	34	n/a	71
National	0,2%	1,0%	2,3%
European non-national	16,0%	28,0%	14,9%
UK	n/a	n/a	0,1%
US	83,6%	40,0%	76,6%
Others	0,3%	31,0%	6,1%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (K)	669,3	196,1	213,4
Cinemas	5	3	3
Screens	17	9	9
National	0,9%	2,1%	1,8%
European non-national	14,8%	43,2%	26,8%
UK	2,1%	0,6%	0,4%
US	75,8%	49,1%	64,9%
Others	6,4%	4,9%	6,1%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Zlatni decko**	RS	Ognjen Jankovic	13/01/2022	9612
2	**Sveta Petka: Krst u pustinji**	RS	Hadzi-Aleksandar Djurovic	15/09/2022	5012
3	**Leto kada sam naucila da letim**	RS	Radivoje Raša Andric	24/02/2022	4822
4	**Vera**	RS	Nedeljko Kovacic	17/11/2022	4373
5	**Komedija na tri sprata**	RS	Sandra Mitrovic	27/10/2022	4159
6	**Ala je lep ovaj svet**	RS	Filip Colovic	22/09/2022	2752
7	**Bilo jednom u Srbiji**	RS	Petar Ristovski	10/03/2022	2495
8	**Le Tour du monde en 80 jours**	FR	Samuel Tourneux	22/09/2022	2193
9	**Balada**	BX	Aida Begic	17/11/2022	1695
10	**Praznik rada**	BX	Pjer Zalica	13/10/2022	1438

Croatia

Big market shares for coming-of-age films

RESULTS IN THE COUNTRY source: HAVC	2019	2021	2022
Total admissions (Mio)	4,9	2,5	3,2
Cinemas	95	104	109
Screens	192	200	210
National	5,5%	7,1%	5,2%
European non-national	11,8%	17,6%	5,7%
UK	n/a	n/a	3,3%
US	82,4%	72,9%	83,7%
Others	0,3%	2,4%	2,1%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (K)	462,5	228,9	384,6
Cinemas	15	16	18
Screens	29	30	33
National	18,2%	11,0%	13,5%
European non-national	21,6%	30,3%	38,0%
UK	6,1%	3,6%	4,7%
US	49,9%	43,2%	32,7%
Others	4,1%	11,9%	11,0%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Leto kada sam naucila da letim**	RS	Radivoje Raša Andric	11/08/2022	12668
2	**Marginalci**	HR	Ljubomir Kerekeš	27/10/2022	6519
3	**Die Schule der magischen Tiere**	DE	Gregor Schnitzler	03/03/2022	6428
4	**Kapa**	SI	Slobodan Maksimovic	10/11/2022	6254
5	**Šesti autobus**	HR	Eduard Galić	17/11/2022	5252
6	**Baci se na pod**	HR	Nina Violić	23/06/2022	4935
7	**Stric**	HR	David Kapac, Andrija Mardešić	01/12/2022	4108
8	**Pil**	FR	Julien Fournet	19/05/2022	3927
9	**Nosila je rubac črleni**	HR	Goran Dukic	22/09/2022	3503
10	**Sigurno mjesto**	HR	Juraj Lerotić	03/11/2022	3462

With a 30% loss in attendance when compared with 2019, the Croatian market made no exception to the European trend of 2022. The Network cinemas, however, are slightly above this level, with 27% fewer admissions.

The generalized slump conceals good news, however. Favoured by the relative absence of a traditionally fluctuating national cinema, non-domestic European films are taking advantage of the ambient discouragement, almost equalling their 2019 attendance levels (barely -2%, on a like-for-like basis), while all the other categories are in sharp decline. We can even speak of a collapse for British cinema: 70% fewer admissions from 2019 to 2022.

The biggest success of the year is the Serbian-Croatian-Bulgarian-Slovakian co-production *How I Learned to Fly*, a coming-of-age movie, aimed at family audiences throughout the Balkans. Indeed, films aimed at young people are the ones that support the Network's best results: nine of the top 10 most viewed non-domestic titles are aimed at young audiences. Moreover, Croatia is one of the few countries in Europe that still produces many fictional films aimed at pre-teens and teenagers, and these are the very engine of the national film industry.

Outside of this category are the Nordic films of the year: *Triangle of Sadness* (just 5th) and *The Worst Person in the World*, along with the traditional representatives of the southern European region. However, more rare and demanding films also stand out, such as Radu Jude's *Bad Luck Banging or Loony Porn* and Eric Gravel's *Full Time.*

Alexandre Tchernookov

Safe Place (Sigurno mjesto) © Cercamon

Czech Republic

Czech films hit the market

RESULTS IN THE COUNTRY source: Creative Europe Desk	2019	2021	2022
Total admissions (Mio)	18,3	7,1	13,5
Cinemas	913	1 094	1 144
Screens	1 157	1 346	1 396
National	26,5%	41,8%	33,4%
European non-national	11,8%	8,2%	3,5%
UK	n/a	n/a	0,6%
US	60,0%	48,4%	61,5%
Others	1,7%	1,7%	1,0%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (Mio)	1,8	0,6	1,2
Cinemas	33	34	33
Screens	43	46	44
National	27,8%	47,2%	37,2%
European non-national	16,7%	18,7%	21,4%
UK	5,8%	0,9%	3,1%
US	42,8%	28,0%	31,8%
Others	6,9%	5,1%	6,6%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Triangle of Sadness**	SE	Ruben Östlund	06/10/2022	40947
2	**Tajemství staré bambitky 2**	CZ	Ivo Macharáček	09/12/2021	33102
3	**Vysehrad: Fylm**	CZ	Martin Kopp, Jakub Štáfek	14/04/2022	26883
4	**Mimořádná událost**	CZ	Jiří Havelka	03/02/2022	24456
5	**Il Boemo**	CZ	Petr Vaclav	20/10/2022	24119
6	**Poslední závod**	CZ	Tomas Hodan	24/03/2022	23540
7	**Jan Žižka**	CZ	Petr Jakl	08/09/2022	22220
8	**Planeta Praha**	CZ	Jan Hošek	04/08/2022	20346
9	**Verdens verste menneske**	NO	Joachim Trier	10/02/2022	17231
10	**Srdce na dlani**	CZ	Martin Horsky	20/01/2022	14263

Concealing a great diversity of programming, the cinematographic landscape in the Network (33 cinemas) remains devoted – on the surface – primarily to Czech films, followed by American films, to a lesser extent.

In 2023, in the top 10 European films, only Nordic cinema has broken through the barrier of Czech films. *Triangle of Sadness*, released in mid-October, is at the top of the list. It is followed, in 9th place by *The Worst Person in the World*, which was released in February. As far as the 70th rank, it is still Czech cinema and its twin brother – Slovak cinema – that reign as absolute masters. Non-national European films are still very rare, with three Danish films (still Northern European) - *Margarete den 1ste, Druk* (2 years after its release!) and *Vidmaend* (*Wild Men*).

French cinema struggles, aside from *Little Nicholas' Treasure* (37th) and *Serial (Bad) Weddings 3* (43rd), and with one notable exception: *Amélie*, re-released on 14 April by Aerofilms (which includes six of the Network's cinemas), which came in as the 20th best of the year. Spanish cinema is also present with *Competencia Oficial* (21st) and *El buen Patron* (75th).

From these rankings, despite the apparent monotony, the Network shows an admirable vitality, with more than 1,500 European films across all nationalities screened by member cinemas this year. One example of this momentum is the award for best programming in 2022, given to Prague's Kino Pilotu and its exhibitor Jan Macola, who is also the producer of one of the year's most successful arthouse films - Petr Vaclav's *Il Boemo* (8th best result of the year).

Alexandre Tchernookov

Il Boemo © Nour Films

Denmark

RESULTS IN THE COUNTRY source: FFA	2019	2021	2022
Total admissions (Mio)	12,8	6,8	10,2
Cinemas	169	167	168
Screens	484	476	481
National	26,7%	41,0%	30,0%
European non-national	10,8%	22,0%	6,0%
UK	n/a	n/a	4,0%
US	58,3%	34,0%	59,0%
Others	4,2%	3,0%	1,0%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (Mio)	1,1	0,6	0,9
Cinemas	15	16	16
Screens	44	45	45
National	29,1%	43,1%	33,7%
European non-national	19,7%	10,8%	26,7%
UK	13,0%	8,6%	6,6%
US	32,5%	31,9%	26,3%
Others	5,8%	5,7%	6,8%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Rose**	DK	Niels Arden Oplev	24/02/2022	53854
2	**Triangle of Sadness**	SE	Ruben Östlund	22/09/2022	42432
3	**Bamse**	DK	Henrik Ruben Genz	25/08/2022	40436
4	**Fædre & Mødre**	DK	Paprika Steen	03/11/2022	32281
5	**Verdens verste menneske**	NO	Joachim Trier	16/06/2022	29919
6	**De forbandede år 2**	DK	Anders Refn	21/04/2022	19623
7	**Tag min hånd**	DK	Lars Kaalund	27/01/2022	18200
8	**Resten af livet**	DK	Frelle Petersen	07/07/2022	16904
9	**Holy Spider**	DK	Ali Abbasi	13/10/2022	15909
10	**Madres paralelas**	ES	Pedro Almodóvar	03/03/2022	14843

Estonia

RESULTS IN THE COUNTRY source: EFI	2019	2021	2022
Total admissions (Mio)	3,7	1,4	2,3
Cinemas	56	57	56
Screens	111	114	111
National	23,0%	14,2%	20,6%
European non-national	18,2%	19,4%	14,4%
UK	n/a	n/a	n/a
US	50,9%	62,9%	59,5%
Others	7,9%	3,6%	5,5%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (K)	246,8	101,8	188,7
Cinemas	4	5	5
Screens	5	7	8
National	23,8%	22,3%	29,6%
European non-national	32,8%	34,1%	32,4%
UK	8,1%	6,4%	3,5%
US	21,6%	27,1%	24,0%
Others	13,6%	10,1%	4,4%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Apteeker Melchior**	EE	Elmo Nüganen	15/04/2022	10748
2	**Kalev**	EE	Ove Musting	23/09/2022	8081
3	**Triangle of Sadness**	SE	Ruben Östlund	23/09/2022	7729
4	**Apteeker Melchior. Viirastus**	EE	Elmo Nüganen	19/08/2022	5298
5	**Tagurpidi torn**	EE	Jaak Kilmi	29/04/2022	3472
6	**Hytti nro 6**	FI	Juho Kuosmanen	03/12/2021	3277
7	**Soo**	EE	Ergo Kuld	18/02/2022	2862
8	**Erik Kivisüda**	EE	Ilmar Raag	10/12/2022	2624
9	**Le Chêne**	FR	Laurent Charbonnier, Michel Seydoux	15/10/2022	2608
10	**Machina Faust**	EE	Kaupo Kruusiauk	20/10/2022	1916

Finland

RESULTS IN THE COUNTRY source: Finnish Film Foundation	2019	2021	2022
Total admissions (Mio)	8,4	3,4	3,4
Cinemas	176	178	184
Screens	358	351	369
National	16,0%	25,1%	26,8%
European non-national	19,5%	26,4%	4,6%
UK	n/a	n/a	9,1%
US	60,0%	41,3%	53,7%
Others	4,5%	7,2%	5,8%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (K)	247,7	136,0	208,5
Cinemas	7	8	8
Screens	10	10	10
National	15,8%	28,0%	17,2%
European non-national	21,4%	11,8%	27,7%
UK	19,5%	15,6%	7,5%
US	37,6%	38,9%	37,8%
Others	5,7%	5,7%	9,7%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Triangle of Sadness**	SE	Ruben Östlund	23/09/2022	9825
2	**My Sailor, My Love**	EU	Klaus Härö	30/09/2022	9269
3	**Madres paralelas**	ES	Pedro Almodóvar	04/03/2022	5035
4	**Verdens verste menneske**	NO	Joachim Trier	18/03/2022	4903
5	**Hytti nro 6**	FI	Juho Kuosmanen	29/10/2021	3132
6	**Mielensäpahoittaja Eskorttia etsimässä**	FI	Mika Kaurismäki	09/09/2022	2923
7	**El buen patrón**	ES	Fernando León de Aranoa	22/07/2022	2245
8	**70 on vain numero**	FI	Johanna Vuoksenmaa	25/02/2022	2218
9	**Äitee - Sisulla voittoon**	FI	Jani Wallennius	01/06/2022	2087
10	**Spencer**	EU	Pablo Larraín	25/12/2021	2072

Compartment Nº6 (Hytti nr° 6) © Haut et Court

France

Back to normal, but with conditions

RESULTS IN THE COUNTRY source: CNC	2019	2021	2022
Total admissions (Mio)	213,1	95,5	152,0
Cinemas	2 040	2 028	n/a
Screens	5 982	6 193	6 298
National	34,8%	40,6%	40,9%
European non-national	6,6%	14,0%	n/a
UK	n/a	n/a	n/a
US	55,7%	43,0%	40,5%
Others	2,9%	2,4%	18,6%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (Mio)	15,7	7,2	13,1
Cinemas	156	156	164
Screens	484	488	519
National	40,9%	48,2%	48,6%
European non-national	17,1%	17,4%	20,8%
UK	7,0%	5,3%	4,1%
US	18,4%	16,4%	12,7%
Others	16,6%	12,8%	13,6%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**En corps**	FR	Cédric Klapisch	30/03/2022	303181
2	**L'Innocent**	FR	Louis Garrel	12/10/2022	226972
3	**Triangle of Sadness**	SE	Ruben Östlund	28/09/2022	215259
4	**Boy From Heaven**	SE	Tarik Saleh	26/10/2022	177661
5	**Un autre monde**	FR	Stéphane Brizé	16/02/2022	173340
6	**La Nuit du 12**	FR	Dominik Moll	13/07/2022	162872
7	**Simone, le voyage du siècle**	FR	Olivier Dahan	12/10/2022	139705
8	**Ouistreham**	FR	Emmanuel Carrère	12/01/2022	132087
9	**Le Pharaon, le Sauvage et la Princesse**	FR	Michel Ocelot	19/10/2022	130089
10	**La Panthère des neiges**	FR	Marie Amiguet, Vincent Munier	15/12/2021	122065

The French market showed its ability to recover in 2022, but some concerns remain. In Rennes, the Arvor cinema team opened its new complex in May of 2021, following the second Covid lockdown. Their director comments on this past year.

2022 was our first full year in our new cinema. The freshness of our new configuration protected us from a general state of gloom. Everything was new: more screens (five instead of two) and a new geographical location, near the train station.

Despite sanitization constraints, the cost of living increase and the conflict in Ukraine, we had to set up as a new organization, reinforce our editorial line and establish a new communication strategy, with a single objective: to make the new Arvor a leading venue for cinema in Rennes and in Brittany. With 168,789 attendees, following our forecast of 170,000 admissions, 2022 was well on track.

The most fragile films struggled to find their audience. But even some of our top five successes (*Triangle of Sadness*, 5,473 admissions – *The Innocent*, 4,727 – *Cairo Conspiracy*, 3,941) plateaued far from their pre-Covid potential. Thus, it was above all thanks to our activities that we were able to pull through: an active events schedule, multiple previews, "ciné-rencontres" (meeting with directors), "ciné-citoyens" (screenings followed by a discussion), and cine-club screenings around heritage films (all very successful), not to mention young audience activities targeting 15-25-year-olds promoted by the CNC & the AFCAE.

Even the good weather from last summer did not prevent us from attracting many viewers for a single afternoon screening with, among others, *Lawrence of Arabia* and *Singin' in the Rain* (113 admissions on 14 July at 3pm)!

All these efforts have paid off and have contributed to a continuous increase in attendance since the end of September 2022. If the gamble has been won, we remain vigilant!

Eric Gouzannet

Germany

Coming back from Covid to face an energy crisis

RESULTS IN THE COUNTRY source: FFA	2019	2021	2022
Total admissions (Mio)	118,6	42,1	78,0
Cinemas	1 734	1 723	1 730
Screens	4 961	4 931	4 911
National	21,5%	21,7%	27,1%
European non-national	17,6%	3,6%	4,6%
UK	n/a	n/a	n/a
US	56,5%	55,5%	64,1%
Others	4,4%	20,0%	4,2%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (Mio)	11,3	3,7	7,0
Cinemas	198	195	200
Screens	424	417	428
National	31,3%	35,9%	34,5%
European non-national	20,2%	18,9%	25,1%
UK	10,4%	6,7%	5,7%
US	30,4%	34,5%	29,4%
Others	7,7%	4,0%	5,3%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Triangle of Sadness**	SE	Ruben Östlund	13/10/2022	316982
2	**Wunderschön**	DE	Karoline Herfurth	16/12/2021	194753
3	**Mittagsstunde**	DE	Lars Jessen	22/09/2022	164508
4	**Die Schule der magischen Tiere 2**	DE	Sven Unterwaldt	29/09/2022	120485
5	**Qu'est-ce qu'on a tous fait au Bon Dieu ?**	FR	Philippe de Chauveron	21/07/2022	117190
6	**Guglhupfgeschwader**	DE	Ed Herzog	04/08/2022	114925
7	**Madres paralelas**	ES	Pedro Almodóvar	10/03/2022	104745
8	**Der Nachname**	DE	Sönke Wortmann	20/10/2022	99087
9	**Rabiye Kurnaz gegen George W. Bush**	DE	Andreas Dresen	28/04/2022	93140
10	**Freibad**	DE	Doris Dörrie	01/09/2022	77144

Though the figures appear bittersweet when compared with 2019, some key figures from 2022 allow for optimism. The energy crisis and the subsequent cost explosion for cinemas is already bringing new challenges.

In Pforzheim, in the southwest of the country, Christine Müh, head of Kommunales Kino Pforzheim (one screen, 109 seats), finds herself re-inventing the cinema's programme to draw the audience back in: "Even more so than in pre-pandemic times we had to complement our offering on screen. The audience accepted invitations for special events more than for "normal" film screenings: guests, discussions, accompanying music," and many more. She also points out the cinema's focus on new formats for young audiences, including "encounters between film & gaming". The cinema's resilience explains how a catastrophe has been, largely, avoided. "In 2022, we had to adjust ourselves and the cinematographic offers we made in many ways and re-invent ourselves."

It was also a great year for national productions. At both the national level and in the Europa Cinemas Network, German productions represent 27% of the admissions, a very high proportion. The top 10 most viewed films among the German Europa Cinemas members boasts four national films and three American ones. Notably, two positive surprises among the national films, *Mittagsstunde* and *Rabiye Kurnaz vs. George W. Bush*, amassed more than 60% of their viewers in our cinemas, while the 2022 Golden Palm winning *Triangle of Sadness* received an astonishing 90% of admissions across the Network.

Sadly, amid all of this good news, rising costs brought on by the energy crisis and the subsequent inflation that struck Germany in the second half of 2022 are now threatening cinemas, stretching already tight budgets and driving the prices of tickets even higher. Even though local and national governments have pledged public subsidies, cinemas will now have to balance paying their bills while keeping their prices affordable for lower income individuals.

Quentin Bucher

Greece

Slow recovery mainly driven by open-air cinemas

RESULTS IN THE COUNTRY source: GFC	2019	2021	2022
Total admissions (Mio)	9,4	3,0	5,5
Cinemas	339	n/a	n/a
Screens	547	n/a	n/a
National	5,3%	17,3%	5,5%
European non-national	11,0%	9,8%	10,2%
UK	n/a	n/a	6,6%
US	80,2%	71,9%	75,4%
Others	3,5%	1,0%	2,3%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (Mio)	1,2	0,5	0,6
Cinemas	41	46	49
Screens	56	63	66
National	7,8%	21,3%	13,5%
European non-national	34,1%	26,4%	38,0%
UK	10,3%	10,4%	4,7%
US	33,7%	35,7%	32,7%
Others	14,1%	6,3%	10,5%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**El buen patrón**	ES	Fernando León de Aranoa	16/06/2022	22034
2	**Magnitika pedia**	GR	Yorgos Gousis	19/05/2022	21587
3	**Triangle of Sadness**	SE	Ruben Östlund	22/09/2022	13408
4	**Smyrni mou agapimeni**	GR	Grigoris Karantinakis	23/12/2021	12201
5	**Loving Vincent**	PL	Dorota Kobiela, Hugh Welchman	02/11/2017	12000
6	**Qu'est-ce qu'on a tous fait au Bon Dieu ?**	FR	Philippe de Chauveron	07/07/2022	11884
7	**Verdens verste menneske**	NO	Joachim Trier	15/07/2022	7451
8	**Maigret**	FR	Patrice Leconte	25/08/2022	6580
9	**Corsage**	AT	Marie Kreutzer	17/11/2022	6359
10	**Madeleine Collins**	FR	Antoine Barraud	07/07/2022	5820

"The market made a slight recovery, with the summer season being a success due to the open-air cinemas," says Ilias Giorgiopolous.

Aside from the fact that, today, people feel safer in outdoor spaces, summer cinemas have been historical cultural places in Greece. Since 1997, 47 of them are protected as cultural monuments by a resolution initiated by Melina Mercouri.

23 Greek open-air cinemas are members of the Network and, in 2022, they comprised 35.5% of the total admissions from our cinemas in Greece. In the national market, they have been driving the results of arthouse films. "An evident change is the prime season of the film's release date. Many distributors hold their titles, waiting for summer. We saw typical "winter" movies like *Happening*, *The Lost Daughter* and *Spencer* released during summer," says Michalis Zeis.

"As a film distributor as well, we had to adapt to the new reality. We chose fewer films and were extremely careful with our selection. We also changed our strategy depending on the film: we chose to push *The Worst Person in the World* to July and release it in open-air cinemas, and our decision paid off. It was a big success!" Ilias told us. The film achieved 20,000 admissions in cinemas.

Other arthouse titles with good results released during summer include the animation French film *Little Nicholas' Treasure* (over 30,000 admissions) and the Greek title *Magnetic Fields* (over 27,000 admissions), which Michalis Zeis tells us, "Is a low-budget movie that became, unexpectedly, a great blockbuster. It attracted a lot of young people through word of mouth."

Nonetheless, poor attention for arthouse titles is hitting hard, which have seen the biggest drop in attendance and, at the same time, the recovery in the Greek market has been very slow with results significantly behind pre-pandemic levels with -44.3% tickets sold when compared with 2019. However, expectations are higher for 2023, with stronger results in the first part of the year compared with the previous one.

Irene Angel Echeverri

Hungary

RESULTS IN THE COUNTRY source: NMHH	2019	2021	2022
Total admissions (Mio)	15,2	6,2	10,2
Cinemas	132	152	152
Screens	368	415	415
National	6,1%	9,0%	5,9%
European non-national	9,1%	11,9%	8,0%
UK	n/a	n/a	1,6%
US	84,6%	76,5%	83,9%
Others	0,2%	2,6%	0,6%

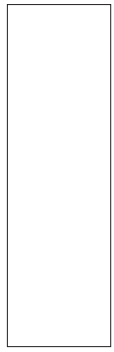
RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (Mio)	1,0	0,3	0,6
Cinemas	17	17	17
Screens	40	40	40
National	18,5%	32,5%	19,7%
European non-national	29,5%	30,9%	38,2%
UK	9,5%	5,1%	5,1%
US	32,6%	26,2%	30,7%
Others	9,9%	5,3%	5,4%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Triangle of Sadness**	SE	Ruben Östlund	06/10/2022	23854
2	**Verdens verste menneske**	NO	Joachim Trier	20/01/2022	22977
3	**Madres paralelas**	ES	Pedro Almodóvar	26/10/2021	10573
4	**Le Chêne**	FR	Laurent Charbonnier, Michel Seydoux	03/11/2022	8816
5	**A játszma**	HU	Péter Fazekas	09/06/2022	8643
6	**El buen patrón**	ES	Fernando León de Aranoa	07/07/2022	7875
7	**Blokád**	HU	Ádám Tősér	20/10/2022	7757
8	**Larry**	HU	Szilárd Bernáth	01/12/2022	6472
9	**Ich bin dein Mensch**	DE	Maria Schrader	07/10/2021	5701
10	**Magasságok és mélységek**	HU	Sándor Csoma	22/09/2022	5279

Iceland

RESULTS IN THE COUNTRY source: IFC	2019	2021	2022
Total admissions (Mio)	1,5	1,3	n/a
Cinemas	17	17	n/a
Screens	44	43	n/a
National	13,3%	n/a	n/a
European non-national	2,4%	n/a	n/a
UK	n/a	n/a	n/a
US	84,3%	n/a	n/a
Others	0,0%	n/a	n/a



RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (K)	66,4	33,0	49,3
Cinemas	1	1	1
Screens	3	3	3
National	12,3%	14,2%	13,8%
European non-national	30,4%	55,4%	46,5%
UK	7,2%	3,2%	6,5%
US	34,1%	25,4%	22,8%
Others	1,8%	1,7%	10,3%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Triangle of Sadness**	SE	Ruben Östlund	30/10/2022	6657
2	**Madres paralelas**	ES	Pedro Almodóvar	n/a	1411
3	**Verdens verste menneske**	NO	Joachim Trier	15/10/2021	1127
4	**Svar við bréfi Helgu**	IS	Ása Helga Hjörleifsdóttir	2/9/2022	870
5	**El buen patrón**	ES	Fernando León de Aranoa	n/a	856
6	**Berdreymi**	IS	Guðmundur Arnar Guðmundsson	22/04/2022	727
7	**Rocca verändert die Welt**	DE	Katja Benrath	n/a	595
8	**Listy do M. 5**	PL	Łukasz Jaworski	n/a	585
9	**Hvor kragerne vender**	DK	Lisa Jespersen	n/a	568
10	**Ich bin dein Mensch**	DE	Maria Schrader	n/a	510

Ireland

RESULTS IN THE COUNTRY source: Creative Europe Desk	2019	2021	2022
Total admissions (Mio)	15,2	5,8	10,7
Cinemas	132	78	78
Screens	368	537	537
National	1,7%	n/a	n/a
European non-national	7,2%	n/a	n/a
UK	n/a	n/a	n/a
US	89,8%	n/a	n/a
Others	1,3%	n/a	n/a

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (K)	505,8	134,1	352,3
Cinemas	25	24	24
Screens	35	34	34
National	5,1%	9,7%	15,3%
European non-national	21,0%	17,6%	16,4%
UK	14,3%	12,4%	18,4%
US	50,7%	55,7%	41,6%
Others	8,8%	4,6%	8,2%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**An Cailín Ciúin**	IE	Colm Bairéad	13/05/2022	25578
2	**Madres paralelas**	ES	Pedro Almodóvar	28/01/2022	6124
3	**Nothing Compares**	IE	Kathryn Ferguson	07/10/2022	4706
4	**Verdens verste menneske**	NO	Joachim Trier	25/03/2022	4262
5	**Triangle of Sadness**	SE	Ruben Östlund	28/10/2022	4068
6	**Róise & Frank**	IE	Rachael Moriarty, Peter Murphy	16/09/2022	3192
7	**North Circular**	IE	Luke McManus	23/09/2022	2951
8	**Competencia oficial**	ES	Mariano Cohn, Gastòn Duprat	26/08/2022	1983
9	**Paris, Texas**	DE	Wim Wenders	25/01/1985	1616
10	**The Wonder**	IE	Sebastián Lelio	02/11/2022	1451

The Quiet Girl (An Cailín Ciúin) © ASC Distribution

Italy

Italy's very slow recovery

RESULTS IN THE COUNTRY source: Cinetel (93% of the market)	2019	2021	2022
Total admissions (Mio)	97,6	24,8	44,5
Cinemas	1 218	1 221	1 121
Screens	3 542	3 482	3 412
National	21,5%	22,5%	19,7%
European non-national	11,8%	6,4%	25,2%
UK	n/a	n/a	11,1%
US	64,2%	56,8%	58,5%
Others	2,5%	14,3%	10,7%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (Mio)	9,3	3,1	5,4
Cinemas	192	196	205
Screens	373	365	378
National	24,2%	39,5%	35,7%
European non-national	25,2%	21,3%	23,7%
UK	6,7%	5,7%	8,1%
US	35,2%	26,9%	24,1%
Others	8,6%	6,6%	8,4%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**La Stranezza**	IT	Roberto Andò	27/10/2022	155833
2	**Ennio**	IT	Giuseppe Tornatore	17/02/2022	150988
3	**Il signore delle formiche**	IT	Gianni Amelio	08/09/2022	105771
4	**Triangle of Sadness**	SE	Ruben Östlund	27/10/2022	104096
5	**Il Colibrì**	IT	Francesca Archibugi	14/10/2022	102869
6	**Dante**	IT	Pupi Avati	08/09/2022	91959
7	**Nostalgia**	IT	Mario Martone	25/05/2022	90864
8	**Siccità**	IT	Paolo Virzì	29/09/2022	87926
9	**Le otto montagne**	BE	Charlotte Vandermeersch, Felix van Groeningen	22/12/2022	74018
10	**Maigret**	FR	Patrice Leconte	15/09/2022	63627

Although Covid was less present in 2022, many restrictions limited the return to cinema theatres, including the health pass requirement, which was in place until March, as well as the wearing of masks until June and leaving empty seats between people.

Compared with 2021, revenues and admissions have increased by 80%, but this is still 50% less than in the 2017-2019 period. On the podium of the Network's top films in 2022, there are, not too surprisingly, many American titles. Italian productions are just behind, with the strongest domestic films being *La Stranezza*, *Ennio* and *Il Signore delle Formiche*. Non-domestic European films are still struggling to find a wide audience in Italy, the only exception being *Triangle of Sadness*, which enjoyed 2022's Palme d'Or win.

Italian cinemas are only slowly recovering from the damage caused by the Coronavirus. The small cinemas were the most affected. Several of them have been forced to close permanently. In these difficult times, Cinema Troisi, a new member of the Network, which opened in Rome in 2021, is showing one glimmer of hope: "We have managed to emerge without living in the 'ghost of the old'. The aftermath of the pandemic helped us: there was a desire to be together, to finally return to the cinema. The figures for 2022 were very positive and we think that what helped us most was the fact that we built a multifunctional cultural space, a point of reference for everyone," explains Valerio Carocci, founder of the cinema.
Finding a new balance, even a new normal, is a real challenge for many exhibitors who, in addition to the damage caused by Covid, have to deal with inflation and rising energy costs. Will the transformation of cinemas into multi-purpose spaces advocated by Troisi reverse this trend? "In the end, only those cinemas that manage to control their programming and ensure an eclectic offer will be successful."

Mathilde Narros, Andrea Mancini

Latvia

RESULTS IN THE COUNTRY source: NKC	2019	2021	2022
Total admissions (Mio)	2,7	0,5	1,7
Cinemas	34	32	32
Screens	81	78	80
National	20,2%	9,2%	11,0%
European non-national	13,1%	6,6%	10,5%
UK	n/a	n/a	1,4%
US	64,9%	73,4%	74,4%
Others	1,8%	10,9%	2,7%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (K)	165,8	32,5	109,4
Cinemas	3	3	4
Screens	4	4	5
National	41,6%	22,3%	28,0%
European non-national	28,7%	42,5%	39,3%
UK	4,5%	5,2%	1,7%
US	17,1%	19,5%	20,3%
Others	8,1%	10,6%	10,8%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Janvāris**	LV	Viesturs Kairiss	22/09/2022	7327
2	**Triangle of Sadness**	SE	Ruben Östlund	28/09/2022	3807
3	**Mans laulību projekts**	LV	Signe Baumane	05/10/2022	2745
4	**Jõulud džunglis**	EE	Jaak Kilmi	01/12/2022	1967
5	**Mamma vēl smaida**	LV	Elza Gauja	30/09/2022	1941
6	**Māsas**	LV	Linda Olte	18/10/2022	1890
7	**Circenīša Ziemassvētki**	LV	Aigars Grauba	17/11/2022	1667
8	**Nemierīgie prāti**	LV	Lauris Ābele, Raitis Ābele	20/04/2022	1336
9	**O2**	EE	Margus Paju	14/09/2022	1187
10	**Neona pavasaris**	LV	Matīss Kaža	14/10/2022	1177

Liechtenstein

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (K)	n/a	n/a	17,0
Cinemas	n/a	n/a	1
Screens	n/a	n/a	2
National	n/a	n/a	n/a
European non-national	n/a	n/a	37,9%
UK	n/a	n/a	10,4%
US	n/a	n/a	38,6%
Others	n/a	n/a	13,0%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Triangle of Sadness**	SE	Ruben Östlund	n/a	381
2	**Guglhupfgeschwader**	DE	Ed Herzog	n/a	366
3	**Wunderschön**	DE	Karoline Herfurth	n/a	301
4	**Mein Lotta-Leben: Alles Tschaka mit Alpaka!**	DE	Martina Plura	n/a	249
5	**Freibad**	DE	Doris Dörrie	n/a	219
6	**Die Schule der magischen Tiere 2**	DE	Sven Unterwaldt	n/a	194
7	**El inconveniente**	ES	Bernabé Rico	n/a	193
8	**Der Räuber Hotzenplotz**	DE	Michael Krummenacher	n/a	181
9	**Teddybjørnens jul**	NO	Andrea Eckerbom	n/a	168
10	**Une belle course**	FR	Christian Carion	n/a	145

Lithuania

Mobilisation of cinemas against the war in Ukraine

RESULTS IN THE COUNTRY source: LFC	2019	2021	2022
Total admissions (Mio)	4,2	1,3	3,0
Cinemas	26	27	22
Screens	82	77	103
National	19,2%	6,2%	19,3%
European non-national	17,2%	11,9%	10,2%
UK	n/a	n/a	0,7%
US	59,5%	81,9%	67,8%
Others	4,1%	0,5%	2,0%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (K)	427,4	129,3	304,3
Cinemas	7	7	7
Screens	11	13	14
National	25,2%	17,7%	25,7%
European non-national	35,2%	35,0%	33,3%
UK	3,0%	2,7%	1,6%
US	28,8%	38,3%	30,9%
Others	7,7%	6,3%	8,5%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Triangle of Sadness**	SE	Ruben Östlund	06/10/2022	12030
2	**Drugelio sirdis**	LT	Inesa Kurklietyte	09/04/2022	11506
3	**Kernagis**	LT	Andrius Lekavičius	18/02/2022	9265
4	**Piktuju karta**	LT	Emilis Velyvis	14/10/2022	9242
5	**Vesper**	LT	Kristina Buožytė, Bruno Samper	30/09/2022	7234
6	**Verdens verste menneske**	NO	Joachim Trier	24/03/2022	6101
7	**Vyras uz pinigus**	LT	Justinas Krisiunas	31/12/2021	5288
8	**Šuolis**	LT	Giedrė Žickytė	17/09/2021	4794
9	**Ko nežino vyrai**	LT	Robertas Kuliūnas	16/09/2022	3696
10	**El buen patrón**	ES	Fernando León de Aranoa	24/03/2022	3144

Although the loss of admissions for the Network's Lithuanian cinemas, when compared with 2019, is in line with the European average (-28.8%), the detailed figures show unprecedented and extreme differences.

The drop in attendance was, unfortunately, mainly at the expense of European non-national films: - 38%. Non-European films lost only 16.2% against 27.5% for national films. However, the latter occupy seven out of the top 10 places on the European podium in the Network. The other three being *Triangle of Sadness* (first in the Network representing 35% of its admissions, but only 32nd nationally), *The Worst Person in the World* (6th in the Network, 86th nationally with 92% of its admissions recorded within the Network) and, finally, *The Good Boss* (10th in the Network, 108th nationally, with 82% of its result concentrated in member cinemas).

Further down the ranking, we note some Polish successes (*Where is Anne Frank* by Ari Folman, *Girls to Buy* by Maria Sadowska), French titles (*Fantasies* by David and Stéphane Foenkinos, *Paris, 13th District* by Jacques Audiard) or Italian titles (*Supereroi* by Paolo Genovese, *A Bookshop in Paris* by Sergio Castellitto).

It is worth noting the mobilisation of Lithuanian society against the war in Ukraine and in support of refugees: for the exhibition sector, this translates into a stronger presence of Ukrainian films and, in particular, the strong results of the film *The Earth Is Blue as an Orange*, by Iryna Tsilyk. It ranked 12th in the Network, with all nationalities combined, 74th at the national level, 49% of the admissions in member cinemas.
In addition, support and charity evenings, dubbed or subtitled screenings in Ukrainian, especially for young audiences, have become the norm in the Network's cinemas.

Alexandre Tchernookov

Luxembourg

RESULTS IN THE COUNTRY	2019	2021	2022
Total admissions (Mio)	1,2	0,5	0,5
Cinemas	13	13	13
Screens	37	37	37
National	7,2%	1,1%	3,4%
European non-national	18,9%	22,0%	15,7%
UK	n/a	n/a	n/a
US	72,7%	71,4%	75,4%
Others	1,1%	5,4%	5,5%

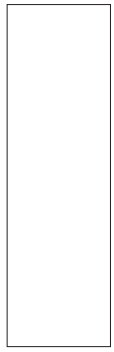
RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (K)	745,3	332,3	506,1
Cinemas	3	3	3
Screens	17	17	17
National	1,3%	1,3%	0,4%
European non-national	14,9%	17,4%	17,4%
UK	4,6%	4,0%	2,1%
US	75,4%	69,9%	75,4%
Others	3,8%	7,4%	4,7%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Corsage**	AT	Marie Kreutzer	n/a	5821
2	**Qu'est-ce qu'on a tous fait au Bon Dieu ?**	FR	Philippe de Chauveron	n/a	4545
3	**Triangle of Sadness**	SE	Ruben Östlund	n/a	4193
4	**Le Petit Nicolas - Qu'est-ce qu'on attend pour être heureux?**	FR	Amandine Fredon, Benjamin Massoubre	n/a	3287
5	**Die Schule der magischen Tiere 2**	DE	Sven Unterwaldt	n/a	3132
6	**Simone, le voyage du siècle**	FR	Olivier Dahan	n/a	2652
7	**Tadeo Jones 3. La tabla esmeralda**	ES	Enrique Gato	n/a	2276
8	**Le Nouveau Jouet**	FR	James Huth	n/a	1991
9	**Die Häschenschule 2 - Der große Eierklau**	DE	Ute von Münchow-Pohl	n/a	1621
10	**Curral De Moinas - Os Banqueiros Do Povo**	PT	Miguel Cadilhe	n/a	1615

Malta

RESULTS IN THE COUNTRY source: National Statistics Office Malta	2019	2021	2022
Total admissions (K)	839,9	n/a	n/a
Cinemas	8	n/a	n/a
Screens	35	n/a	n/a
National	2,1%	n/a	n/a
European non-national	4,6%	n/a	n/a
UK	n/a	n/a	n/a
US	91,5%	n/a	n/a
Others	1,8%	n/a	n/a



RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (K)	456,8	172,3	275,4
Cinemas	1	2	2
Screens	13	14	14
National	1,6%	6,0%	0,9%
European non-national	2,2%	3,2%	4,5%
UK	4,6%	2,4%	1,2%
US	89,3%	84,0%	87,7%
Others	1,1%	4,4%	2,0%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Tadeo Jones 3. La tabla esmeralda**	ES	Enrique Gato	n/a	2455
2	**The Amazing Maurice**	DE	Toby Genkel, Florian Westermann	n/a	1082
3	**Mia and Me: The Hero of Centopia**	DE	Adam Gunn, Matthias Temmermans	26/10/2022	1034
4	**Uwijja**	MT	Keith Albert Tedesco	25/03/2022	837
5	**Just Noise**	EU	Davide Ferrario	n/a	816
6	**Zlatni decko**	RS	Ognjen Jankovic	n/a	549
7	**Watcher**	IT	Chloe Okuno	16/11/2022	536
8	**Luzzu**	MT	Alex Camilleri	n/a	460
9	**Madres paralelas**	ES	Pedro Almodóvar	05/02/2022	385
10	**Triangle of Sadness**	SE	Ruben Östlund	11/11/2022	305

Montenegro

RESULTS IN THE COUNTRY source: Film Center of Montenegro	2019	2021	2022
Total admissions (K)	285,4	n/a	207,2
Cinemas	10	n/a	7
Screens	18	n/a	n/a
National	1,7%	n/a	0%
European non-national	39,0%	n/a	22%
UK	n/a	n/a	3%
US	57,8%	n/a	71%
Others	1,5%	n/a	4%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (K)	61,7	26,4	223,9
Cinemas	1	1	3
Screens	4	4	12
National	0,1%	0,0%	0,0%
European non-national	20,6%	44,3%	18,6%
UK	2,8%	0,8%	0,4%
US	67,7%	48,5%	74,2%
Others	8,9%	6,3%	0,1%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Zlatni decko**	RS	Ognjen Jankovic	13/01/2022	5224
2	**Leto kada sam naucila da letim**	RS	Radivoje Raša Andric	17/02/2022	4974
3	**Komedija na tri sprata**	RS	Sandra Mitrovic	20/10/2022	4348
4	**Vera**	RS	Nedeljko Kovacic	10/11/2022	3649
5	**Sveta Petka: Krst u pustinji**	RS	Hadzi-Aleksandar Djurovic	08/09/2022	3508
6	**Drachenreiter**	DE	Tomer Eshed	10/02/2022	3181
7	**Le Tour du monde en 80 jours**	FR	Samuel Tourneux	22/06/2022	2176
8	**Ala je lep ovaj svet**	RS	Filip Colovic	22/09/2022	1973
9	**Karlchen - Das große Geburtstagsabenteuer**	DE	Michael Ekbladh	25/10/2022	1886
10	**Chickenhare and the Hamster of Darkness**	BE	Benjamin Mousquet, Ben Stassen	14/04/2022	1435

How I learned to fly (Leto kada sam naucila da letim) © Pluto Film

Netherlands

"2022, year of reconnecting with our audiences"

RESULTS IN THE COUNTRY source: NVBF	2019	2021	2022
Total admissions (Mio)	38,0	14,2	24,8
Cinemas	195	203	204
Screens	914	958	976
National	11,8%	23,0%	16,7%
European non-national	12,6%	8,2%	6,4%
UK	n/a	n/a	6,0%
US	71,1%	66,8%	68,1%
Others	4,5%	2,0%	2,9%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (Mio)	5,2	1,8	3,4
Cinemas	54	54	55
Screens	169	178	183
National	8,3%	13,5%	9,9%
European non-national	26,9%	29,8%	34,9%
UK	16,7%	13,5%	15,2%
US	36,5%	36,6%	29,6%
Others	11,5%	6,6%	10,5%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Triangle of Sadness**	SE	Ruben Östlund	15/12/2022	90241
2	**Verdens verste menneske**	NO	Joachim Trier	10/02/2022	75463
3	**Close**	BE	Lukas Dhont	31/10/2022	75319
4	**Madres paralelas**	ES	Pedro Almodóvar	08/12/2021	59135
5	**Knor**	NL	Mascha Halberstad	13/07/2022	56756
6	**Le otto montagne**	BE	Charlotte Vandermeersch, Felix van Groeningen	20/12/2022	39053
7	**Silence of the Tides**	NL	Pieter-Rim de Kroon	07/01/2021	29285
8	**En corps**	FR	Cédric Klapisch	07/07/2022	28060
9	**Corsage**	AT	Marie Kreutzer	07/07/2022	26428
10	**Hytti nro 6**	FI	Juho Kuosmanen	17/02/2022	26122

Despite a difficult start for Dutch cinemas (imposed closures due to Covid lasted until the end of January), the admission level reached 25M in 2022, 32% less than the average from 2017-2019.

For Wouter Timmermans from FilmHallen in Amsterdam, "We were denied a good start and we missed out on strong titles until the summer. We saw younger audiences returning faster to cinemas, especially in the big cities for titles like *The Worst Person in the world* and *Licorice Pizza*. After the summer, *Elvis*, *Close* and, mostly, *Triangle of Sadness* did really well with older and younger audiences alike. We still have not returned to pre-Covid levels but the future is looking better."

Rare are the cinemas that managed to reach the level before Covid as is the case for KINO in Rotterdam: "As a young cinema still in its growing phase, starting in Autumn 2022 we regained our attendance numbers from 2018-2019 and, at the time of writing, we have actually surpassed them. I think we have been able to do so by organizing many events, and with the help of some crossover titles like *Triangle of Sadness* and the eventual importing of some titles ourselves - like the great Danish comedy *Wild Men* and many, many classics," says Frank Groot.

As for Dutch films, they comprised 16% of the total admissions in the country. This is mostly due to mainstream film. Arthouse domestic titles by filmmakers such as Sam de Jong (*Met mes*) and Mijke de Jong (*Along the Way*) attracted only 6,368 and 4,270 visitors respectively, notes Alex de Ronde from Het Ketelhuis in Amsterdam: "More than ever, Dutch arthouse cinema has to be cherished. Together with the other subsidized film theatres –9% of all admissions in The Netherlands – we have to accept this cultural challenge."

Adrian Preda

Close © Diaphana Films

North Macedonia

Two key Europa Cinemas members at risk of closure

RESULTS IN THE COUNTRY source: Media Desk North Macedonia	2019	2021	2022
Total admissions (K)	401,3	n/a	253,5
Cinemas	19	n/a	n/a
Screens	27	n/a	n/a
National	1,9%	n/a	10%
European non-national	16,9%	n/a	10%
UK	n/a	n/a	n/a
US	75,3%	n/a	78%
Others	5,9%	n/a	3%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (K)	121,9	37,9	38,9
Cinemas	4	4	4
Screens	5	5	5
National	15,3%	4,0%	12,0%
European non-national	21,5%	41,4%	31,7%
UK	1,1%	0,9%	0,3%
US	54,5%	46,5%	46,0%
Others	7,6%	7,3%	10,0%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Kaymak**	MK	Milcho Manchevski	16/11/2022	1880
2	**Sveta Petka: Krst u pustinji**	RS	Hadzi-Aleksandar Djurovic	18/10/2022	1258
3	**Snow White Dies at the End**	MK	Kristijan Risteski	26/08/2022	1167
4	**Triangle of Sadness**	SE	Ruben Östlund	23/08/2022	979
5	**Un petit frère**	FR	Léonor Serraille	19/08/2022	847
6	**Mimi**	MK	Darijan Pejoski	n/a	508
7	**Nebesa**	RS	Srdjan Dragojevic	20/08/2022	287
8	**Rabiye Kurnaz gegen George W. Bush**	DE	Andreas Dresen	25/08/2022	222
9	**R.M.N.**	RO	Cristian Mungiu	02/06/2022	217
10	**Peterchens Mondfahrt**	DE	Ali Samadi Ahadi	21/04/2022	209

The most striking event of 2022 in the exhibition sector are the threats of closure hanging over two exemplary cinemas, Millenium and Frosina, both members of our Network in Skopje. Europa Cinemas sent a letter of solidarity which we reproduce here:

Millenium and Frosina in Skopje have been members of the Europa Cinemas Network for many years: more than 10 years for Millenium, nearly 20 years for Frosina. This partnership has enabled them to receive regular support from Europa Cinemas, through Eurimages and then through Creative Europe MEDIA.

They are supported for the great diversity of their programming and their work to attract and retain an ever-growing audience. Their efforts and results give real visibility to European films, notably in Skopje.

The team that runs these two cinemas has always shown great professionalism in managing and monitoring their commitments with Europa Cinemas.

We have recently been informed of serious decisions concerning the governing body and the budget of these two cinemas, which could compromise the continuity of their long-term work to which we are particularly attached.

This is why we would like to fully affirm our confidence in the cinema team whose action has always been crowned with success. We would like it to obtain increased local resources to develop its programming and animation activities in favour of films produced in North Macedonia as in the rest of Europe. This will allow us to assure the team of the continuity of our partnership and European community support.

Menem Richa

Frosina, Skopje © D.R.

Norway

RESULTS IN THE COUNTRY source: Film&Kino	2019	2021	2022
Total admissions (Mio)	11,3	5,7	8,8
Cinemas	204	204	199
Screens	483	478	479
National	18,4%	30,1%	24,5%
European non-national	12,8%	7,6%	7,7%
UK	n/a	n/a	0,5%
US	65,3%	59,0%	63,0%
Others	3,5%	3,3%	4,3%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (Mio)	1,3	0,6	0,9
Cinemas	6	6	6
Screens	30	30	30
National	13,4%	33,4%	22,6%
European non-national	10,6%	8,5%	14,7%
UK	8,9%	3,6%	2,7%
US	60,4%	47,8%	52,6%
Others	6,7%	6,8%	7,4%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Krigsseileren**	NO	Gunnar Vikene	23/09/2022	51376
2	**Verdens verste menneske**	NO	Joachim Trier	15/10/2021	17378
3	**Triangle of Sadness**	SE	Ruben Östlund	14/10/2022	15201
4	**Sick of Myself**	NO	Kristoffer Borgli	09/09/2022	15006
5	**Olsenbanden - siste skrik**	NO	Hallvard Bræin	02/09/2022	13979
6	**Teddybjørnens jul**	NO	Andrea Eckerbom	11/11/2022	11571
7	**Hytti nro 6**	FI	Juho Kuosmanen	25/12/2021	9176
8	**Jentetur**	NO	Katarina Launing	14/10/2022	8377
9	**Kampen om Narvik**	NO	Erik Skjoldbjærg	18/03/2022	7651
10	**Full dekning**	NO	Arild Andresen	25/02/2022	7579

War Sailor (Krigsseileren) © Beta Cinema

Poland

A Network open to diversity and experimentation

RESULTS IN THE COUNTRY source: PISF	2019	2021	2022
Total admissions (Mio)	60,9	17,1	41,4
Cinemas	490	511	570
Screens	1 360	n/a	1 512
National	27,9%	18,4%	19,3%
European non-national	10,1%	4,4%	18,7%
UK	n/a	n/a	n/a
US	59,6%	67,0%	61,0%
Others	2,4%	10,2%	1,0%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (Mio)	3,9	1,9	2,7
Cinemas	40	41	47
Screens	102	107	123
National	23,1%	23,1%	21,2%
European non-national	25,3%	29,3%	32,2%
UK	6,0%	4,1%	6,0%
US	35,4%	37,4%	32,1%
Others	10,2%	6,1%	8,5%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Johnny**	PL	Daniel Jaroszek	23/09/2022	76754
2	**Madres paralelas**	ES	Pedro Almodóvar	18/02/2022	61880
3	**Verdens verste menneske**	NO	Joachim Trier	11/03/2022	57630
4	**Listy do M. 5**	PL	Łukasz Jaworski	04/11/2022	31578
5	**Qu'est-ce qu'on a tous fait au Bon Dieu ?**	FR	Philippe de Chauveron	15/07/2022	29776
6	**Piosenki o miłości**	PL	Tomasz Habowski	25/02/2022	29216
7	**La Panthère des neiges**	FR	Marie Amiguet, Vincent Munier	01/04/2022	28737
8	**Triangle of Sadness**	SE	Ruben Östlund	06/01/2023	26522
9	**Competencia oficial**	ES	Mariano Cohn, Gastòn Duprat	13/05/2022	26269
10	**EO**	PL	Jerzy Skolimowski	30/09/2022	25618

With the most dynamic national market in Eastern Europe, attendance at Polish cinemas in the Network, like everywhere else, is marking time with a 31% drop related to 2019.

It is still European non-national cinema that is doing best in the Network, with "only" a 29% drop, compared with 33% for national cinema. Indeed, although the best result of the year was national (*Johnny*, by Daniel Jaroszek) and even if Polish films were as numerous as usual, the public mainly attended Spanish (*Madres Paralelas*, *Competencia Oficial*) and French films (immediately after the top 10: *Paris, 13th District, Lost Illusions, Titane*).

Of course, since *Another Round* in 2021, Nordic cinema has played a real role as a locomotive for European cinema. *The Worst Person in the World* achieved the third best result of the year. The other major European film in the second half of the year, *Triangle of Sadness*, was not due for release until January 2023. However, public and industry expectations were such that the distributor (Gutek film, a member of the Network with several cinemas) carried out a pre-release through a series of previews, starting from October 2022, taking the film, with only 214 screenings, to eighth place in our European ranking.

Finally, the Polish cinema landscape has the particularity of having no qualms regarding platform films - they are even seen as an opportunity. Thus, the profile of non-European films is quite different when compared with other countries, with, for example, Maggie Gyllenhaal's *The Lost Daughter*, achieving eighth best result of the year in the Network.

Alexandre Tchernookov

Portugal

RESULTS IN THE COUNTRY source: ICA	2019	2021	2022
Total admissions (Mio)	15,5	5,5	9,6
Cinemas	185	172	186
Screens	583	543	565
National	4,5%	3,0%	5,6%
European non-national	7,6%	18,5%	2,9%
UK	n/a	n/a	0,8%
US	74,8%	74,7%	74,6%
Others	13,1%	3,8%	16,1%

RESULTS IN THE NETWORK source: SFC	2019	2021	2022
Total admissions (K)	266,4	130,2	189,8
Cinemas	5	11	12
Screens	13	19	20
National	13,2%	13,7%	18,4%
European non-national	18,4%	35,9%	33,2%
UK	8,8%	3,7%	3,6%
US	46,5%	37,0%	25,5%
Others	13,1%	9,8%	19,4%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Triangle of Sadness**	SE	Ruben Östlund	13/10/2022	78839
2	**Verdens verste menneske**	NO	Joachim Trier	10/02/2022	53657
3	**Um Corpo que Dança**	PT	Marco Martins	16/06/2022	35271
4	**Lobo e Cão**	PT	Cláudia Varejão	08/12/2022	25459
5	**Fogo-Fátuo**	PT	João Pedro Rodrigues	29/09/2022	20376
6	**Alma Viva**	PT	Cristèle Alves Meira	03/11/2022	17275
7	**Madres paralelas**	ES	Pedro Almodóvar	01/12/2021	16755
8	**Cesária Évora**	PT	Ana Sofia Fonseca	27/10/2022	16138
9	**El buen patrón**	ES	Fernando León de Aranoa	20/01/2022	12615
10	**Dehesa, el bosque del lince**	ES	Joaquín Gutiérrez Acha	11/08/2022	7924

Will-o'-the-Wisp (Fogo Fatuo) © Terratreme Filmes

Romania

Record year for domestic films

RESULTS IN THE COUNTRY source: Romanian CNC	2019	2021	2022
Total admissions (Mio)	13,1	4,7	11,2
Cinemas	98	90	95,0
Screens	432	443	453
National	6,1%	5,2%	17%
European non-national	5,5%	4,8%	9%
UK			n/a
US	81,0%	88,8%	72%
Others	7,5%	1,2%	2,0%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (Mio)	1,4	0,4	0,8
Cinemas	21	18	19
Screens	50	44	45
National	9,5%	11,2%	19,4%
European non-national	13,5%	17,1%	17,5%
UK	2,3%	1,1%	0,9%
US	69,5%	65,0%	58,7%
Others	5,2%	5,5%	3,4%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Teambuilding**	RO	Alex Cotet, Matei Dima, Cosmin Nedelcu	30/09/2022	59942
2	**R.M.N.**	RO	Cristian Mungiu	03/06/2022	28352
3	**Mirciulica**	RO	Cristian Ilisuan	07/10/2022	14568
4	**Tabara**	RO	Vali Dobrogeanu	31/12/2021	10048
5	**Capra cu trei iezi**	RO	Victor Canache	18/06/2022	9401
6	**Triangle of Sadness**	SE	Ruben Östlund	01/07/2022	8336
7	**Die Heinzels - Rückkehr der Heinzelmännchen**	DE	Ute von Münchow-Pohl	26/08/2022	6965
8	**Metronom**	RO	Alexandru Belc	04/11/2022	6599
9	**Drømmebyggerne**	DK	Kim Hagen Jensen, Tonni Zinck	27/05/2022	4639
10	**Chickenhare and the Hamster of Darkness**	BE	Benjamin Mousquet, Ben Stassen	22/04/2022	4307

For the first time, two Romanian titles made it into the country's top 10: *Teambuilding* by Matei Dima, Cosmin Nedelcu and Alex Coteţ, ranking second (with 996,000 admissions) and *Mirciulica* directed by Cristian Ilişuan, ranking seventh (327,000 admissions), both placing ahead of blockbusters, including *Black Panther*: *Wakanda Forever* and *The Batman*.

Teambuilding, a comedy about a teambuilding contest between teams from different regions of the country working for a corporation, was leading the charge in front of *Top Gun: Maverick* until the release of *Avatar: The Way of Water*. To reach almost one million admissions is an incredible performance for a domestic film, becoming, in this way, the most popular release since 2009 (with the exception of *Avatar*) and defeating Hollywood blockbusters that, each year, would normally rank first (with around 500,000 admissions). *Teambuilding* and *Mirciulica* are both independent productions with no support from the Romanian National Center. On the other hand, Romanian arthouse titles recognized internationally, including *R.M.N.* by Cristian Mungiu (Cannes 2022) and *Metronom* by Alexandru Belc (Directing Prize, Un Certain Regard) did not do so well, with only 33,000 admissions for *R.M.N.* (compared with 55,533 admissions for his 2016 film, *Graduation*) and just under 23,000 admissions for *Metronom*.

Moreover, 86% of the national admissions for *R.M.N.* were from our member cinemas, which shows the importance of the Network for domestic arthouse titles in a market dominated by multiplexes (90% of the country's screens).

The Europa Cinemas Network has continued to grow in Romania, from nine members in 2007 to 16 cinemas in 11 cities (and with three mobile cinemas) in 2022, accounting for 20% of the total number of cinemas in the country. Since 2017, Europa Cinemas, together with Transilvania International Film Festival, have organized an annual Innovation Day Lab, providing access to professional training for Romanian exhibitors.

Adrian Preda

Serbia

Policy of support for film production bears fruit

RESULTS IN THE COUNTRY source: Creative Europe Desk	2019	2021	2022
Total admissions (Mio)	4,8	3,4	3,7
Cinemas	70	86	88
Screens	158	194	196
National	20,0%	38,2%	n/a
European non-national	10,4%	7,2%	n/a
UK	n/a	n/a	n/a
US	66,4%	51,6%	n/a
Others	3,2%	3,0%	n/a

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (K)	834,2	478,7	658,5
Cinemas	13	14	15
Screens	28	29	34
National	14,8%	36,7%	23,7%
European non-national	13,9%	11,2%	12,6%
UK	1,9%	0,8%	0,9%
US	59,2%	44,9%	55,1%
Others	10,2%	6,4%	7,8%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Leto kada sam naucila da letim**	RS	Radivoje Raša Andric	17/02/2022	36606
2	**Zlatni decko**	RS	Ognjen Jankovic	13/01/2022	23635
3	**Bilo jednom u Srbiji**	RS	Petar Ristovski	10/03/2022	14382
4	**Vera**	RS	Nedeljko Kovacic	09/11/2022	12745
5	**Komedija na tri sprata**	RS	Sandra Mitrovic	20/10/2022	12708
6	**Sveta Petka: Krst u pustinji**	RS	Hadzi-Aleksandar Djurovic	06/09/2022	11397
7	**Ala je lep ovaj svet**	RS	Filip Colovic	22/09/2022	10673
8	**Vučje bobice**	RS	Sreten Jovanovic	n/a	10545
9	**Trag divljaci**	RS	Nenad Pavlovic	06/10/2022	4835
10	**Die Schule der magischen Tiere**	DE	Gregor Schnitzler	17/03/2022	4003

The results recorded in 2022 in Serbia confirm the trend observed for several years in the country. They bear witness to the good health and vitality of national cinema and its ability to play leading roles, often ahead of US films.

In 2022, the production support budget in Serbia was of €16.5 million. 54 Serbian and other international projects have benefited from incentives, such as a 25% cash rebate, to encourage the film industry.
These incentives have proven to be among of the most efficient procedures in Europe. As the national film funds developed its actions and increased its budget, the Serbian film industry surged and is now a leading actor in the Balkans.

Results of this policy include: 22 feature films produced in Serbia in 2022 and, in the network, four Serbian films placed in the "Top 10 of all films by admissions" (including US blockbusters). Ranked 1st and 2nd are Serbian films, with better results than US films: *Leto Kada Sam Naucila da Letim* by Radivoye Rasa Andric (36,606 admissions) and *Zlatni Decko* by Ognjen Jankovic (23,635 admissions). The four Serbian films together totalled 87,368 admissions which represents 47% of the total of those films' admissions. When considering only European films, the first nine films were Serbian.

Serbian cinema is doing well at home, but it is also worth pointing out its strength in the region. For example, the top five films of the "Top 10 European films by admissions" in Montenegro are also Serbian.

The good health of Serbian cinema proves that nothing is fatal and that, even after two very complicated years of Covid, cinema can not only once again raise its head but, also, make remarkable progress. All that is needed is a policy of support for national production, to set clear objectives and the means to achieve them.

Menem Richa

Slovak Republic

RESULTS IN THE COUNTRY source: SFU	2019	2021	2022
Total admissions (Mio)	6,5	2,0	4,3
Cinemas	168	112	115
Screens	269	224	227
National	12,8%	8,2%	10,5%
European non-national	15,5%	18,3%	16,4%
UK	n/a	n/a	1,1%
US	69,3%	71,5%	71,2%
Others	2,4%	2,0%	0,8%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (Mio)	3,2	0,9	1,9
Cinemas	26	26	27
Screens	82	82	83
National	13,0%	8,4%	9,9%
European non-national	14,4%	17,2%	16,3%
UK	1,9%	0,6%	0,5%
US	67,5%	66,2%	71,8%
Others	3,2%	7,6%	1,4%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Šťastný nový rok 2: Dobro došli**	SK	Jakub Kroner	11/08/2022	78839
2	**V lete ti poviem, ako sa mám**	SK	Marta Ferencova	11/08/2022	53657
3	**Pil**	FR	Julien Fournet	21/04/2022	35271
4	**Dziewczyny z Dubaju**	PL	Maria Sadowska	28/07/2022	25459
5	**Po čem muži touží 2**	CZ	Rudolf Havlík	03/11/2022	20376
6	**Střídavka**	CZ	Petr Nikolaev	24/11/2022	17275
7	**Za vším hledej ženu**	CZ	Miloslav Šmídmajer	19/05/2022	16755
8	**Vánoční příběh**	CZ	Irena Pavlaskova	31/03/2022	16138
9	**Qu'est-ce qu'on a tous fait au Bon Dieu ?**	FR	Philippe de Chauveron	19/05/2022	12615
10	**Srdce na dlani**	CZ	Martin Horsky	31/03/2022	7924

Slovenia

RESULTS IN THE COUNTRY source: SFC	2019	2021	2022
Total admissions (Mio)	2,4	0,7	1,8
Cinemas	52	50	50
Screens	107	103	106
National	5,1%	2,4%	17,1%
European non-national	9,3%	29,0%	9,2%
UK	n/a	n/a	1,1%
US	84,6%	67,5%	71,9%
Others	1,0%	1,2%	1,2%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (K)	399,7	126,5	323,8
Cinemas	20	20	22
Screens	23	24	26
National	14,8%	9,2%	25,6%
European non-national	29,2%	41,7%	33,9%
UK	7,3%	3,6%	2,7%
US	41,8%	36,9%	32,7%
Others	6,8%	4,1%	5,1%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Kapa**	SI	Slobodan Maksimovic	17/11/2022	17986
2	**Gajin svet 2**	SI	Peter Bratuša	01/09/2022	12853
3	**Pr'Hostar 2**	SI	Luka Marčetić	27/10/2022	9335
4	**Prasica, slabšalni izraz za žensko**	SI	Tijana Zinajić	24/03/2022	7799
5	**Myši patří do nebe**	CZ	Jan Bubeníček, Denisa Grimmová	04/12/2021	7112
6	**Triangle of Sadness**	SE	Ruben Östlund	23/11/2022	4616
7	**Orkester**	SI	Matevž Luzar	01/08/2022	3758
8	**2017**	SI	Goran Vojnović	03/06/2022	3677
9	**Divja Slovenija**	SI	Matej Vranic	28/08/2021	3093
10	**Madres paralelas**	ES	Pedro Almodóvar	11/11/2021	3061

Spain

A renaissance for independent and commercial Spanish films

RESULTS IN THE COUNTRY source: ICAA	2019	2021	2022
Total admissions (Mio)	103,7	41,7	55,7
Cinemas	766	711	725
Screens	3 700	3 631	3 634
National	14,9%	15,8%	22,1%
European non-national	9,9%	16,4%	14,6%
UK	n/a	n/a	n/a
US	73,2%	50,6%	55,6%
Others	2,0%	17,2%	7,7%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (Mio)	8,0	3,3	4,5
Cinemas	59	59	58
Screens	265	253	247
National	18,3%	28,9%	32,3%
European non-national	18,0%	18,5%	17,8%
UK	8,6%	4,5%	5,3%
US	44,2%	39,0%	35,6%
Others	10,9%	9,1%	9,1%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**As bestas**	ES	Rodrigo Sorogoyen	20/07/2022	160756
2	**Alcarràs**	ES	Carla Simon	29/04/2022	143417
3	**Los renglones torcidos de Dios**	ES	Oriol Paulo	06/10/2022	96520
4	**Cinco lobitos**	ES	Alauda Ruiz de Azúa	20/05/2022	88153
5	**Verdens verste menneske**	NO	Joachim Trier	11/03/2022	87337
6	**El cuarto pasajero**	ES	Alex de la Iglesia	28/10/2022	59682
7	**En los márgenes**	ES	Juan Diego Botto	07/10/2022	57105
8	**Modelo 77**	ES	Alberto Rodriguez	23/09/2022	52618
9	**El buen patrón**	ES	Fernando León de Aranoa	15/10/2021	45050
10	**Tadeo Jones 3. La tabla esmeralda**	ES	Enrique Gato	26/08/2022	42246

Even though cinema attendance remains 46% below the figures from 2019 in Spain, and is, along with its southern neighbours, one of the EU markets still struggling to recover from Covid closures, local production is experiencing a renaissance.

In 2022, Spanish films not only doubled their outcomes and obtained their third best results in the last decade with a market share of 22%, but these results are accompanied by large and diverse production. First, comedies and family titles are heading up the national top 10 with *Padre no hay que uno 3* - the best Spanish release since 2016 with over 500,000 admissions on its opening weekend. Following is the third installment of the animation franchise *Tadeo Jones,* with over 1M admissions, and *Los Renglones torcidos de Dios*, one of the unexpected success stories in 2022 (which ranks fourth by admissions among our Network cinemas in Spain).

In addition, three major local independent titles made records throughout the year. First, in April, was the outstanding results of *Alcarràs* by Carla Simon, the first Spanish female film director to win the Golden Bear award. The title remained on the Spanish billboards for over 25 weeks grossing more than 380,000 admissions. The film also reached second in admissions in the Spanish chart of the Network.

In May, Alauda Ruiz de Azúa's debut film, *Cinco Lobitos*, was another unexpected success story, which received marketing support through our Collaborate to Innovate project *Viridiana*, contributing to its success and comprising 65% of its national admissions across Network cinemas. The *Viridiana* project is the first joint effort marketing initiative between the 26 Network members supporting European releases; the project won a special price from The Federation of Spanish Cinemas in 2022.

And last but not least, *As Bestas*, released in November, was a box office breakout both in the national market and across the Network in Spain, and won countless prizes in Spain and internationally.

Irene Angel Echeverri

Sweden

A fresh recovery with national films as a hotspot

RESULTS IN THE COUNTRY source: Swedish Film Institute, Sveriges Biografägareförbund	2019	2021	2022
Total admissions (Mio)	15,9	6,0	10,4
Cinemas	476	475	475
Screens	920	938	945
National	13,2%	12,6%	19,4%
European non-national	10,3%	21,7%	5,6%
UK	n/a	n/a	n/a
US	71,7%	56,5%	69,0%
Others	4,8%	9,2%	6,0%

RESULTS IN THE NETWORK	2019	2021	2022
Total admissions (Mio)	1,4	0,6	1,0
Cinemas	47	47	50
Screens	87	87	90
National	19,2%	15,9%	29,8%
European non-national	25,0%	25,9%	23,3%
UK	15,6%	12,7%	6,5%
US	27,7%	40,3%	30,9%
Others	12,5%	5,3%	9,5%

TOP EUROPEAN FILMS BY ADMISSIONS IN THE NETWORK 2022

	Title	Country	Director	Release Date	Admissions
1	**Triangle of Sadness**	SE	Ruben Östlund	07/10/2022	61881
2	**Hilma**	SE	Lasse Hallström	19/10/2022	33877
3	**Boy From Heaven**	SE	Tarik Saleh	18/11/2022	31101
4	**Madres paralelas**	ES	Pedro Almodóvar	04/02/2022	28330
5	**Bränn alla mina brev**	SE	Björn Runge	23/09/2022	26572
6	**Competencia oficial**	ES	Mariano Cohn, Gastòn Duprat	26/08/2022	18823
7	**Utvandrarna**	SE	Erik Poppe	25/12/2021	16896
8	**Hytti nro 6**	FI	Juho Kuosmanen	11/02/2022	15023
9	**Spencer**	EU	Pablo Larraín	07/01/2022	10658
10	**Jag är Zlatan**	SE	Jens Sjögren	18/03/2022	10073

As is the case for every European country this year, Sweden still did not fully recover its admissions from 2019, neither at the national level (-35%) nor in the Europa Cinemas Network (-26.3%).

This slow recovery conceals the best year for Swedish national cinema: with more than 300,000 admissions, these are the best levels ever recorded within the Network, representing 29.9% of the total (19.6% at the national level and also one of the highest shares for Swedish films since 2014).

The reasons for this increase in national admissions are different depending on whether we focus on the Network or the country as a whole: *Triangle of Sadness* worked well in the Network, but was only 15th at the national level (5th in the top Swedish films in the country). *Boy From Heaven* is another example of a successful Swedish film that did not find its public at home. The Swedish audience preferred biopics such as *Jag är Zlatan* or *Hilma*, or family titles (*Länge leve bonusfamiljen*, based on a TV-series, or *LasseMajas detektivbyrå*, a Young Audience title).

Non-national European films, despite the loss of British films from this count, fared well, thanks to other Nordic films (*The Worst Person in the World*, *Compartment n°6*, *Rose*) and Spanish films (*Madres Paralelas*, *Competencia Official*, *Alcarràs*). All of these films have profited as much from the low number of well received US films as from the absence of British films (the latter saw their market share divided by more than two).

Other bright news for the film industry in Sweden relates to the relatively weak concentration of admissions for the top films: the top 10 represents 30% of the total admissions in the Network, which is a decrease when compared with 2019 (34%). This trend is also present at the national level as noted by the Nordisk Fund. With admissions spread between more films, smaller films are given the opportunity to find their audience and contribute to the overall health of a recovering film industry.

Nicolas Edmery

Interview with Susan Newman-Baudais

Executive Director, Eurimages

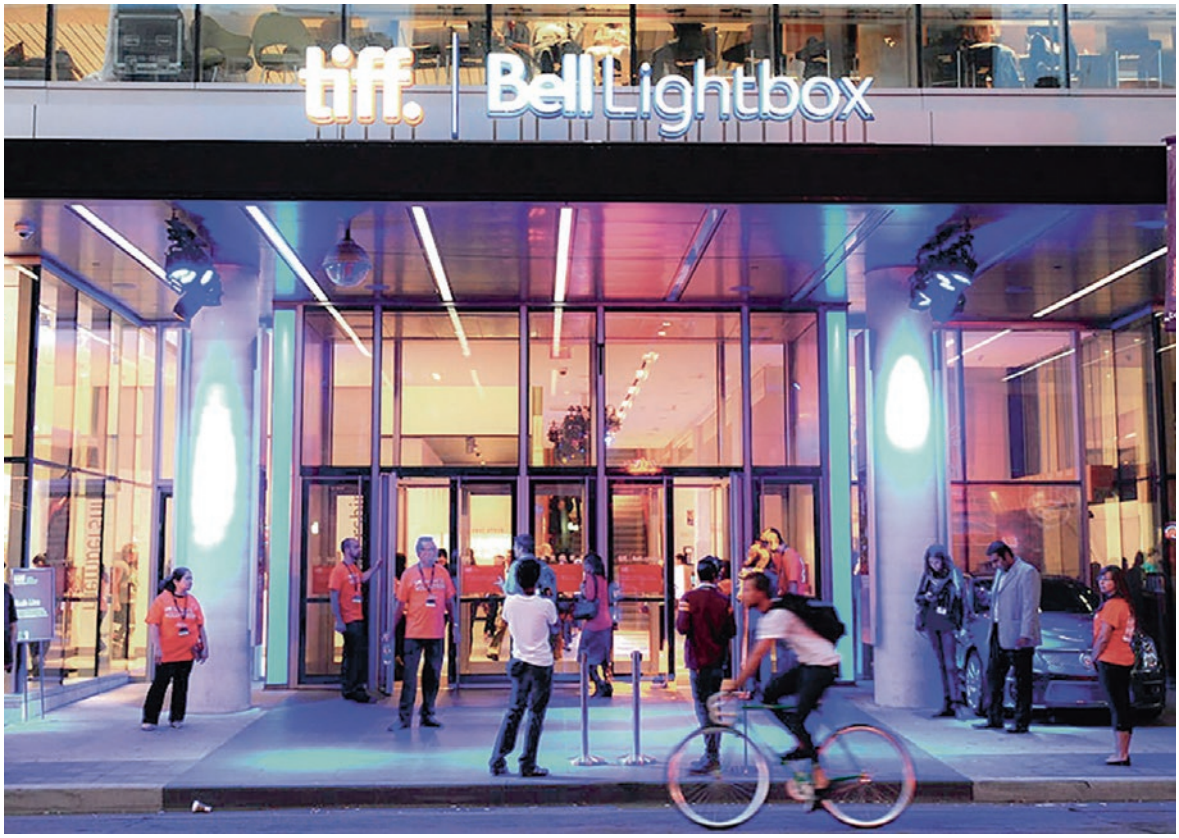
© DR

The Europa Cinemas – Eurimages Network is celebrating its 30th anniversary this year. How does Eurimages assess this partnership in light of the challenges that cinemas must meet today, especially after two very difficult years of Covid?

The Europa Cinemas – Eurimages Network was established 30 years ago to provide support to exhibitors in Eurimages member countries. Over time it has evolved to remain relevant for this dynamic and changing segment of the film industry, while at the same time preserving its complementarity with other Eurimages support programmes, namely co-production and distribution.
The partnership with Europa Cinemas has proved to be extremely valuable for Eurimages. Thanks to it, the Fund has been able to rely on Europa Cinemas' expertise both in the daily management of the support programme and in the periodic finetuning necessary to cater for the changing needs of exhibitors and of the Fund itself.
The repercussions of Covid are still felt in many segments of the film industry. With specific regard to cinemas support, Eurimages and Europa Cinemas continued supporting the cinemas belonging to the Network during this period and in 2021 extra-ordinary support was provided to the theatres most hard-hit by pandemic-related closures and the loss of audiences.

New regulations for the support of co-productions have been set recently. New regulations are in process for the support of distribution companies and cinemas. Could you present the spirit and outline of this overhaul?

Major changes in the governance and decision-making processes of Eurimages were introduced in 2022, following an external evaluation of the Fund's operations commissioned in 2018. One of the recommendations of the evaluators, which the Board of Management of the Fund decided to act on, was to suspend the former distribution support programme and to rethink it. The underlying concept was to pivot from a programme supporting the distribution of European films in 6 Eurimages member countries outside Creative Europe's Media Programme to a programme open to all member States and generating greater synergy with the Fund's film co-production support activity. This translates into focusing the distribution support on films also supported for co-production by the Fund. But with 71 films supported for co-production in 2022, there are clearly additional decisions to be taken about how exactly to focus the support and on the detailed design of the programme, particularly in terms of the final beneficiaries. Extensive consultations with representative groups have taken place, and we hope to propose a small number of options emerging from these discussions to our Board of Management for its decision on the final format in June 2023. The new programme should then be launched in 2024.
Concerning the cinemas support programme, a similar aim to find greater synergies with the films supported for co-production informs the reflection on how to refocus the support which is currently underway in close collaboration with Europa Cinemas.



TIFF Bell Lightbox, Toronto, member of Europa Cinemas – Eurimages Network since 2019 © DR

Eurimages has been a pioneer in its commitment to gender equality, in particular by setting up the "Women's Films" bonus as part of support for cinemas. Important measures have been also taken in the support for production. Reducing the carbon footprint is also at the heart of Eurimages' concerns. Could you tell us more?

Reducing the environmental impact of the Fund's operation and encouraging greener practices in the sector we support was written into the Eurimages statutes when they were revised in 2020. Our Board adopted in 2021 a Sustainability Strategy for the period 2022 – 2024 and this is accompanied by an action plan of which the first elements are currently being implemented. Since the start of 2023, we are now asking producers applying for film co-production support to tell us about any measures they have implemented to reduce the environmental impact of their projects and taking the replies into account when recommending projects for support. We are also exploring putting in place an online platform to provide training to industry professionals on the frontline in this regard. Many countries are now requiring the use of carbon calculators and/or green certifications, but it is not our intention at this stage to impose their use at Eurimages, as the implementation of these measures is at very different stages across our 39 member countries. But just as was the case for gender equality, we aim to raise awareness and share best practice, activities which can be surprisingly effective in such a highly networked industry as ours. Last and very far from least, we commissioned a study from specialized consultant to look at the carbon footprint of our own operations, so we have a starting point from which to measure our progress towards a greener functioning.

Collaborate to Innovate

Cineville, Belgium

By Frédéric Cornet, Cinema Galeries (Brussels)

Inception of the project

The **Cineville Pass in Belgium** is a project that was supported through the inaugural Collaborate to Innovate fund (2021), with the support of Creative Europe/MEDIA. Further financing came from The Cinema and Audiovisual Centre of the Wallonia-Brussels Federation, the Brussels region and the Commission communautaire francophone (COCOF).

The "Belgian Cineville Pass" was successfully launched in June 2022 in almost all arthouse cinemas in Brussels (Cinema Galeries, Palace, Vendôme and Kinograph, Aventure, Nova, Cinematek, Flagey).

We were impressed by the Cineville presentation at the Europa Cinemas Network Conference in Lisbon (2019), and decided to work on a Belgian pass, following the steps taken by Cineville Netherlands. Starting in Brussels, we built a community, reached younger audiences, and plan to expand to other cinemas in Brussels and Belgium. In the future, as we are using the technology developed by Cineville, pass holders will also be able to visit cinemas in the Netherlands with their pass, and vice versa.

Here is a precis of the Cineville Pass in the Netherlands and what we strive to create in Belgium based on their model: The Cineville Pass allows you to watch as many films as often as you like in film theatres across the Netherlands for a monthly membership fee. Cineville has existed since 2008 and, by early 2023, had around 70,000 passholders and 55 affiliated movie theatres and independent cinemas.

The Cineville Pass is an "all you can eat" subscription, but it is also a social innovation that offers greater visibility and fair, easy and open access to independent cinema. The technological and data package that Cineville have established in the Netherlands is of great benefit to independent cinemas, featuring a comprehensive film schedule. The App groups affiliated Cineville film theatres and allows audiences to see which film festivals and events they can attend with their pass.

Other noteworthy elements of the technology that Cineville created concern audience data, which can help cinemas adapt their programming to cater to wider audiences and their behaviours. Studies showed the impact that Cineville had in cities in the Netherlands including changes in **audience growth** (the membership especially made independent films more accessible to young people), as well as in **audience behaviour towards the discovery of new films** (Cineville passholders tend to discover different forms of cinema that they were not familiar with before).

Our aim is to encourage cinema visits, strengthen collaboration between cinemas and provide a platform to enhance the cinema experience.

We have since built a network of arthouse cinemas in Brussels, soon to expand across Belgium. It has helped foster a **sense of community** between arthouse cinemas in Brussels and their audiences, and the data generated from this network through surveys and data analysis will further help exhibitors in Brussels and Belgium to adapt their programming to **cater to specific audiences and demographics**.

Adaptation to Brussels local context

We aim to consolidate the marketing power of individual cinemas and give a new impetus to these exhibitors, to lower the threshold that limits cinema attendance and to raise interest in the wide and unique range of films on offer.

Brussels has a strong independent cinema presence and an eclectic cinema landscape. Venues often collaborate through festivals, retrospectives and shared programming. Though it is a strong collective entity, it is always looking to expand as a network and reach wider audiences.

However, when compared with other capital cities in Europe, Brussels lacks art house screens and would greatly benefit from the Cineville Pass in establishing new exhibitors. We would like to stress that, as observed with the Cineville Pass in the Netherlands, **such a pass also encourages new arthouse cinemas to open, as there is a known, existing pool of audiences interested in arthouse programmes.**

The development of Cineville in the Netherlands showed amazing results, and a thriving arthouse network in Brussels will strengthen the existing bonds between the different players in our eclectic landscape. It will enhance our cinema community, encourage audiences to experiment with their film choices and inspire new people to engage with independent cinema.

Our next step will be to extend the use of the pass to other cinemas in Belgium, first in Wallonia and then in Flanders, to continue to promote European cinema outside of Brussels.

Replication through the Europa Cinemas Network

As one of the first alumni of **Collaborate to Innovate**, I have been following the development of another arthouse cinema pass project in Austria, which was awarded in the second iteration of the funding-scheme. I was able to help "Nonstop Kino" in various stages of setting up their structure and communications, and could share early results from Brussels and our discussions with the distributors.

The context is of course different in each city/country but discussion and collaboration between the different project holders of unlimited subscriptions for European arthouse cinemas helped us find new solutions. It has also created **a strong sense of community between the different European cinemas that launched the pass** themselves or those that joined different projects.

At the Europa Cinemas Network Conference in Paris last December, many cinemas from different countries (Germany, Italy, Poland) approached us. We have since followed up with them. Some have submitted applications for Collaborate to Innovate 2023 or have expressed a willingness to apply later.

The Nonstop Kino team in Austria provided support to another iteration of the project in Germany, which has since applied for Collaborate to Innovate 2023.

Relationship with distributors

All the positive aspects of the Cineville Pass were well known to **independent film distributors** in Belgium, most of them working in the Benelux. They already knew the value of the pass for independent and European films. But, there was a need to convince **the majors** (Universal, Sony) that the pass would also benefit their films. Months before the launch of the Cineville Pass, **we explained our model to them:**

"With the Cineville Pass, you not only satisfy your movie hunger, you also support filmmakers and the independent film theatres in Cineville, because 90% of your contribution goes to them."

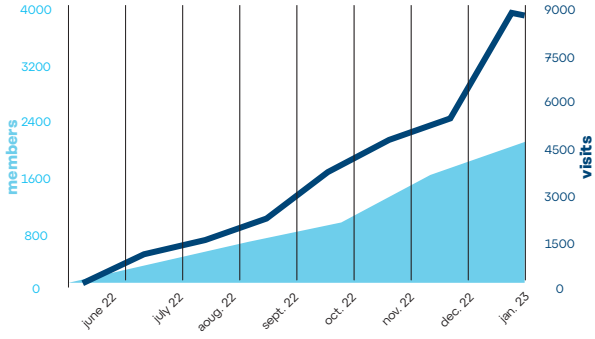
Between 10-15% of the revenue from the subscriptions is used to run the pass and to pay for a coordination team, marketing campaigns, customer support and community management. **85 to 90% will be redistributed to the cinemas** through the evolving price per ticket. Each time a subscriber uses the pass, a certain amount is given to the cinema who shares this amount with the distributor of the film. In Belgium, this price is fixed for one year to be reviewed according to the frequency of subscriber use, which is currently between 2.6 and 2.8 times a month. If this remains stable, the cinema and distributor share will increase along with the ticket price.

Key figures

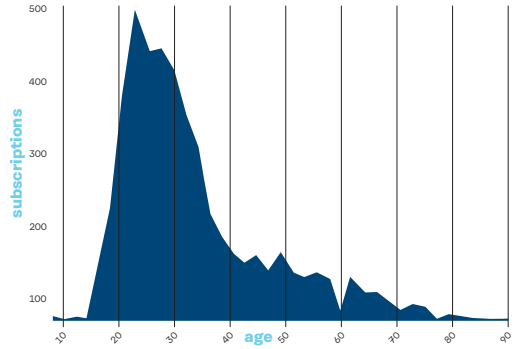
At the start of April, the number of active users was over 4,000. We expect this to continue to increase by 400-500 per month, and a little less over the summer.

In launching the Cineville Pass, we wanted to **attract a younger audience,** which was a success. The average age of Cineville users is 31.

Pass Cinevilles



Age Cinevilles



As you can see in the graph hereunder, the majority of Cinevillers are under 25-years-old.

As our Cineville community grows, we have developed more tools for them:
– a new programme section with all cinemas on our website
– a new section dedicated to film critics
– 2 special monthly 1+1 events (Cinevillers can bring one friend for free)

Our team also grew since we launched the pass in June:
– 1 full time coordinator
– 1 part time communication and community management employee
– 3 part time students for customer support

First Cineville Belgium customer

EUROPA CINEMAS Label Quinzaine des Cinéastes Cannes 2023

The Europa Cinemas Label was created in 2003 at the Directors' Fortnight. Recipients of the Label honoured at Cannes include *One Fine Morning* by Mia Hansen-Løve (2022), *A Chiara* by Jonas Carpignano (2021) and *Alice et le Maire* by Nicolas Pariser (2019).

Get to know the four Network exhibitors of the jury who will award the 20th Europa Cinemas Label to an outstanding European film of the Directors' Fortnight.

Laurent Callonnec

(Director & Programmer, Cinéma l'Ecran, Saint-Denis, France)

A graduate of La Fémis in Cinema Management, Laurent is the director and curator for Cinéma l'Ecran, a non-profit arthouse cinema supported by the municipality of Saint-Denis. With 30 years of experience in film exhibition, he is also, as of this year, the director of "Cinema Days" film festival. He is now working on a collaborative project with universities, local cultural partners and distributors around l'Écran.

Sofie Mercier

(Special screenings & outreach, Sphinx Cinema, Ghent, Belgium)

Sofie (1989) studied journalism and film and theatre studies. She works at Sphinx cinema, a five-screen venue. She is responsible for special screenings and the communication and organization of the non-profit branch of the cinema. With a focus on audience development, outreach and funding, she takes care of long-term projects including co-programming, re-imaging the 'cinema experience' and building film literacy programmes.

Viviane Thill

(Head of Film-TV Department, Ciné Starlight, Dudelange, Luxembourg)

Born in 1962, Viviane has been a regular member of staff at the National Audiovisual Centre since 1996 and is currently the head of the Film-TV Department. She is also a producer of documentary films, a film critic and the author of many articles about cinema. She is the co-author of a book about Oliver Stone and co-editor of two books on the subject of amateur cinema and photography. As a screenwriter, she wrote the scripts for two feature films.

Justė Vyšniauskaitė

(Head of film programming, Kauno kino centras 'Romuva', Kaunas, Lithuania)

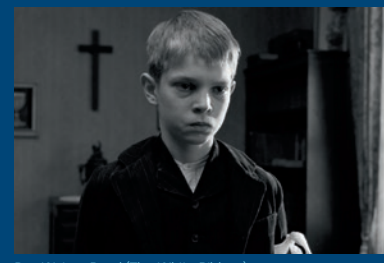
While working as Head of Film Programming in Kaunas cinema centre "Romuva", Justė has established partnerships with cultural and business organizations. She has created special film programmes screening classic films, themed seasons, and has organized lectures as well as discussions with directors, producers, actors... She has partnered with various film festivals working on special screenings and events and coordinates the cinema's communication strategy.

In November 2022, Europa Cinemas celebrated its 30th anniversary at the Network Conference in Paris

Top 20 best European films

Zimna Wojna (Cold War)

The Artist


Das Weisse Band (The White Ribbon)

Volver

Toni Erdmann

The Favourite

1 **Intouchables** (FR)
2 **The King's Speech** (GB)
3 **Le Fabuleux Destin d'Amélie Poulain** (FR)
4 **Slumdog Millionaire** (GB)
5 **Volver** (ES)
6 **The Artist** (FR)
~~7~~ **Das Leben der Anderen** (DE)
8 **Qu'est-ce qu'on a fait au Bon Dieu?** (FR)
9 **Vicky Cristina Barcelona** (ES)
10 **Amour** (FR)
11 **Good Bye Lenin!** (DE)
12 **Das weisse Band** (AT)
13 **Dolor y Gloria** (ES)
14 **Bienvenue chez les Ch'tis** (FR)
15 **Des hommes et des dieux** (FR)
16 **The Favourite** (GB)
~~17~~ **Toni Erdmann** (DE)
18 **Zimna wojna** (PL)
19 **Philomena** (GB)
20 **Carnage** (FR)

10 of these 20 films were discovered at Cannes!

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