

23RD EUROPA CINEMAS NETWORK CONFERENCE

ADAPTING TO THE SHIFTING CINEMA LANDSCAPE THROUGH SHARED INNOVATION

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Radisson Blu Hotel, Vilnius, LT

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OPENING OF THE 23RD EUROPA CINEMAS NETWORK CONFERENCE

Mathias Holtz – President, Europa Cinemas and Fatima Djoumer – CEO, Europa Cinemas

A very warm welcome. We would like to invite some special guests to the stage: Lithuanian Minister of Culture, Mr Simonas Kairys; and Lucia Recalde – Europa Cinemas is only possible because of the ongoing support of the Creative Europe Media Program.

Simonas Kairys – Minister of Culture, LT

I'm delighted that we are in the spotlight of filmmakers and organizers of the international conference. The Europe Network Conference is taking place in the Baltic region for the first time. This is a great achievement for all of us. Our dynamic, vibrant original cinema has brought us to this goal. Usually when we're talking about nature in Lithuania, we have four seasons, yet many of us count two of them: the first season has Scanorama Film Festival, which takes place in November. The other season has Kino Pavasaris Festival or Cinema Spring Festival. There are many similar smaller festivals, film events and education activities which we also appreciate very much

We are a turning point where the audience looking for something new, interesting and different. The eye is turning to the Baltic States, and this is very encouraging. Perhaps the greatest reward for any filmmaker is a full house and with so many competitors vying for the viewer's attention, attracting wider audiences is crucial.

Let's not be modest. European cinema is a phenomenon. It should be everywhere in the pages of history and in today's cinema reports. Attracting young people, therefore, remains a key challenge. This is not possible without film education and involvement in the school system. During my four years as a Minister of Culture, I have always sought to reinforce one key perception in Lithuania: culture is a horizontal value that connects all other areas together. Cinema is a perfect example of this. It is not measured in terms of artistic values only; it also has huge economic, social, educational, even political weight. It is a language that allows us to communicate with other languages.

I hope all the participants of this conference find as many contacts as possible with education, business and social affairs for cinema, to remain strong and active. We need to find as many allies as possible. So, let's keep looking. Thank you very much.

Lucia Recalde – Deputy Director Media Policy & Head of Unit Audiovisual Industry and Media Support Programmes, DG CONNECT, European Commission

I'm delighted to be here in Vilnius. It is really important that this event takes place here in the Baltic region. It was only two years ago we met in Paris, but the world has changed so much since with the war in Ukraine emerging as a defining crisis that has reshaped global politics and economics; something our friends from Ukraine that I hope are here and even Lithuania know all too well.

In a couple of weeks' time, the Vice president of Ukraine and the newly appointed Vice President of the European Commission will formally sign the agreement that will grant Ukraine full access to Creative Europe Program. You are a member of Europa Cinemas, but also a member of the Creative Europe Family.

Within the European Union, we see rise of populism, polarisation, growing dissatisfaction with our democracies. It's fair to say that we are in a period of deep uncertainty for Europeans. But as

President Ursula Von Der Leyen said in the European Parliament this week: “In a world full of uncertainties, we must come together and build a future for ourselves.”

For Europa Cinemas, I believe you can really – you *are* already playing – but you can play even a more important role in uniting Europeans. Let's start with a new college in Brussels because we are in a period of change. And the new college led by President Ursula Von Der Leyen will start – we take duties – this Sunday. And as you probably know, Media and Audio-visual files have been entrusted to the Executive Vice President Henna Virkkunen, a former journalist, passionate about media policies.

The uniqueness of the media sector has been recognized in her mandate letter, and Media is unique because of three interrelated dimensions: because media is important for culture, business, and democracy. These three dimensions are equally important and should support one another. I think the cinema sector, and Europa Cinemas, you really embody these three dimensions because you enrich our cultural experience on a daily or a weekly basis.

You are innovation hotspots, and you play a key role in fostering democratic societies. You are really key in fostering the circulation of European non-national content across borders. That is your bread and butter. And while the richness, as the Minister said, of European content, is really unparalleled,

The reach of European content still is limited, it's not good enough. We have data showing that around 30% only of European content travels across borders, and I think this is a challenge that we need to discuss not only with you but also with other segments of the audio-visual industry. Because cultural diversity effectively happens when people, when European citizens, wherever they are located, have access to and enjoy the richness of European content.

We must attract young people, the young generation to the cinemas. I'm very glad because I see that, throughout these days, we are going to discuss extensively audience development. And I also know that through the various events you organise – the labs in Bologna and Sophia, you are not only discussing, but you are also implementing initiatives.

So now let me turn to this my second point which is the contribution of cinemas to innovation, and competitiveness, because President Von der Leyen has said that this commission will put competitiveness, investment and skills at the heart of his action.

When it comes to cinemas, to Europa cinemas, we are not starting from scratch – because you have already covered a lot of ground through Collaborate to Innovate. And these projects really testify your willingness to experiment with the cinema-going experience. With the training boot camps, you are already delivering results, equipping young exhibitors with the right skills.

As you pointed out, something that is very, very important for us is that you don't operate in a vacuum: you operate in an audio-visual ecosystem. Success in cinemas also depends on innovations that happen elsewhere in the value chain.

So, from the European Commission, t we must reflect together with all the players on how we can best support the competitiveness, resilience and transformation of the audio-visual industry at large. And since you have been front runners in driving innovation, I really invite you to sit with us and play your part in this conversation that will start soon.

My third point is one that has become even more relevant: the role of cinemas as hubs for social cohesion and democracy. This is actually the title of your report. In an increasingly polarised world, cinemas are not just the place where I go to watch films. These are community places.

Unfortunately, they are not well spread all over the European Union, as you said in your report. There are areas in big member states and in small member states, where people don't have access at all to the cinematic experience. We have labelled these areas as 'cinema deserts'. This is a key challenge that we would like to overcome in the years to come.

The financial framework that will start in 2027 will have to reflect those challenges from defence to the reconstruction of Ukraine. The geopolitical situation has changed and there will be increased pressures on the budget. But we are confident, and we believe that we can work hand in hand with you to secure an adequate budget for the future. But to do so, we believe that a successful programme will have to build on the success of today and also evolve and project itself into the future. This is what you are doing already through the Europa Cinema Network, which is – I would say it again and again – one of the greatest successes of Creative Europe, not only Media, but the whole of Creative Europe, which will help us make a very strong case for the future.

And it's not because of the content that you bring, or the impressive number of cinemas that are already present, but because you dare to experiment and take risk. Because you have the courage to challenge your models and ask yourself difficult questions for your future. And because you have the vision and ambition to continue to be relevant in the years to come. We can only commend and support this approach. The success goes to you, but it goes to Fatima and her team for really driving the network forward. We cannot thank you enough for having re-energized the network and for taking it to the next level. We are immensely proud of your achievements, and we see a bright future for you.

To conclude, let me reiterate you have in the European Commission, a trusted partner and a long-standing partner that will, *is* willing to embark in this future journey with you. Let's continue to work together and to nurture your passion, creativity, and inventiveness. Thank you.

MH: Thank you for recognising the cinema's role in art, in social structures. The theme for this year's conference is adapting to the shifting cinema landscape through shared innovation. This is a very good description of who we are as a network and as individual cinema professionals. We're always looking for ways to improve ourselves through innovation and collaboration. We will see and hear many great examples of that during the conference.

Since our last conference in 2022 in Paris, the European box office recovered partly and the audiences came back to the cinemas, especially the young audiences. But as you know, there are still some discrepancies between European countries across the continent. There are parts of Europe where investment in culture is extremely limited and where infrastructure and skills need serious development. The European Commission and Creative Europe, thank you. Thank you to Alexandra Sumi and Jan Bodo again, who are present here, whose support is so vital to our sector.

You have recognized the need to ensure that there are no deserts without access to the cultural diversity that unites us all as a network. That is a practical challenge. How do we ensure that vital skills, innovation, and best practice reach every member of the network? Europa Cinemas has more members today than at any time in its 30-years of history. And those members are more active than ever before. Record numbers of members are joining workshops, networking with each other and sharing ideas and knowledge.

We are happy to welcome here in Vilnius almost 500 participants from 35 countries, even from the United States of America. And to mention one special member – Yuliia from Kyiv, Ukraine. Welcome cinemas in 24 countries including Lithuania and its Baltic neighbours, who have developed projects for Collaborate to Innovate, and for a brand-new initiative of local boot camps that are already

attracting application from across Europe. We had seven boot camps organized these past few weeks and months. They work because the guidelines for all the new initiatives have been devised and developed by network members.

This network proves itself over and over again to be adaptable, resilient, and innovative for our members. Optimism and wishful thinking are not the issue. It is about belief, commitment and action. And in this age of geopolitical turmoil, the idea of collaboration across borders is more relevant than ever.

SESSION 1: Great Expectations – Who are today’s audiences and what do they want?

Moderated by Michael Gubbins (Consultant, Sampo Media)

MG: This is actually my 20th year doing this conference. I'm just looking through my book ... 2004? That was a disaster. Cinema was going to end in 2008, 2012, 2014... and if I can bring us up to date, where did, where did we leave it two years ago? Oh, yes. Pestilence disease and economic ruin. So, let's see where we've got to with our first panel.

What we're going to be talking about in this first section is a familiar theme but one that I think is particularly relevant at the moment when we're looking at where we are and where we sit as businesses, in terms of European culture and film. We're going to be talking a lot about who the audiences are and what they expect. The argument has been that this has been a period of significant change and that the pandemic, if it didn't create that change, accelerated that change and that maybe audiences need to be thought about in different ways. And that's going to be the theme of this session.

Ben Luxford – Director of UK Audiences, BFI, GB

I want to share a few key findings from the quantitative stage of a study we've done called the Wider World of Film. This is the BFIS mixed method, ambitious audience facing study. Mixed method: audience surveys, focus groups, we gave thousands of people all across the UK a watching diary. We also track data through various open-source data. It was conducted by GFK on behalf of the BFI and overseen by our research and statistics team who regularly put out really rich, really important and valuable studies into the public domain.

Visit our research website where you can see these studies:

<https://www.bfi.org.uk/industry-data-insights/reports/wider-world-film>

We started the study in 2019 and it finished in 2023. It was annoying but we ended up with a real, rich understanding of the changes that we've all felt throughout that significant period. A primary objective of the of the project's quantitative stage was to provide new insights into the role of film in the context of the wider viewing landscape. We know film has competition. How is it competing with all of these other things that people can do with their eyes, with their screens in the world right now? Importantly to that are the key barriers and the key drivers to consumption.

Key insights: there's good news and there's bad news. Film viewing is incredibly popular, more popular than it's ever been. It's more habitual than it's ever been before. 95% of UK adults reported watching a film in the past 12 months and 23% of all UK adults watched films on most days. Of course, they're all watching this on streaming. Streamers are dominant, they're increasingly dominant. They are the primary destination for film consumption in the UK, with 43% of adults watching at least one film every week on an SOD platform.

The good news is that over half of all UK adults had returned to the cinemas post pandemic and returning audiences are more likely to be younger. They come from a higher societal status and a higher educational background. So, we read into that, that cinema is becoming increasingly exclusive – or at least it's perceived to be. The point is: audiences love films, people love films, and the UK population and adults love films and they're watching them regularly – mainly they're happy to do so at home. So where does the big screen fit into their lives?

Well, now to play into that point of exclusivity, cinema is a special treat for most people. It's also understood to be the best way to watch a film. That's *why* it's a special treat. It's not necessarily about the negronis in the bar or the popcorn or the trip out of the house. Those things will help, but it's really because that is the best way to watch a film.

Fewer people than ever see the cinema as providing value for money. So, there's work to do there about understanding what this brings to you. And the biggest need that audiences have now is to escape. That's what they want from their cinema visits. What they don't want any more is to be challenged and to learn and to be stimulated. Those are the lowest needs of audiences according to this study. They want to escape. There's also a reference here to where cost is felt the most – which is between 16 and 54-year-olds. These are the working population, who are feeling the effects of the cost-of-living crisis. And obviously, again, streaming plays into this. I'm going to talk about behaviour. Firstly, that independent, non-chain cinemas, which I think will be represented by a lot of people in the room, have the broadest demographic profile now. And whilst 60% of UK adults have returned to the cinema, 30% are just not going to go now – we've lost them for now. This is to show you that competitive nature that I was talking about in terms of how film competes for people's time against screens. Film is competitive with other screening activity and the film is universally shared by males, females, young people, Black and global majority audiences, disabled audiences. It is a universal activity for UK adults.

Drivers: What do people want to watch? Largely, Hollywood films. They are dominantly viewed equally, in cinema and at home; there's very little difference to who these audiences are. The big concern here is that British films are much more popular at home than they are now in the cinemas. 2023 delivered a market low for British independent films. We had just 3.8% of UK box office went to UK independent films in 2023. A lot of things play into that recovering market. We also produce a lot of dramas and drama isn't something that offers people escape. Older audiences have been the fastest adopters of SOD platforms. If people pay for membership, that's ok for the cinema owners and operators because you've got their money. But if they're not using it, that's more of a concern.

Barriers: Anything interesting, challenging, stimulating has now dropped way, way down and surprisingly, the idea that cinema is good for your mental health is not felt to be important, but I'm sure it is. If you ask people what stops them going to the cinema, cost is always going to come up it's there more profoundly than ever.

Equally worrying is the lack of slate awareness. Anyone who runs a cinema will know there is no shortage of films, but the fact that people aren't aware of them, when they're coming, what they are – that's more of the concern. To balance this out a bit, streaming is being consumed in a very, very different way: it's a beneficial distraction; it's something to have on; it's the convenience of it; it's the choice that it brings within that monthly subscription charge. Whereas compare that to cinema, which is immersion and the best way to watch a film – these are very different propositions and value for money is obviously compounding that binary. When we asked people about streaming, the two highest statements that people agreed with were: “If I'm not enjoying something, I will turn it off,” and “Streaming gives me everything that I need.” It

turns film into this much more disposable thing, which cements the idea of why cinemas are so valuable.

In conclusion, no matter what film audiences choose to watch or where they choose to watch them, this study demonstrates just how important this art form is to so many of us, not least as a source of fun and entertainment and as a means of escape. We also know from other BFI research that cinema venues deliver wider societal value beyond the value provided to those watching films: there is a value we've measured in people simply knowing that a cinema exists in their community.

MG: We'll talk a lot about time during the next two sessions, but what do we do? Is it a marketing issue? Do we need to rethink the way that we address audiences about the films that we're showing? I'm concerned that we create something that's kind of self-perpetuating. You may think it's a posh thing to do – a rich person's arthouse cinema. We place it socially and then we worry about why people then don't seem to want it. I just wonder if you have some solutions to this?

BL: There's obviously a correction that is taking place and probably needs to take place as well. When we talk about the idea of cinema being a special treat, *where* are you most likely to experience that special treat? In the place that is presenting it in the best way possible. So, obviously, there's a thing there around investment needed within cinemas to make sure that they are delivering the best that they can for their audiences and for their community to grow that value much more – whether that's capital upgrades as well as just general infrastructure and what their offer is... the other thing of course, is um younger audiences. Who do you welcome into your venue? And how do you welcome them in? Really making sure that it is a place that is understood to be for them. Now that the older audiences have migrated to streaming, younger audiences have to be a priority. I don't think they actually were much of a priority, but now it's business critical.

At BFI Southbank [national cinema] we've doubled our young audiences in central London over the last three years with three-pound tickets. Around 33% of our audiences are under 25 now at the BFI and they're watching a range of things, and that's an investment for the future.

Also, slate awareness. We're not very good at this in the UK, but I think there are some really great examples across Europe of showcasing the slate and films that are coming out – creating that public awareness to make sure people really understand what's coming. Because right now, left to the market when famously there's a downturn in marketing budgets and advertising spend, it's going to be very difficult to reach everyone. We're talking to a very narrow sector of audience and that's unlikely to grow.

MG: If you ask people, “Am I going for escapism or am I going for something challenging?” It feels like we're already placing something in the market as if there is escapism over here and an arthouse-commercial split, which is one of the weaknesses of our industry. Does it concern you that maybe by using those words, perhaps we've created an artificial result?

BL: Yeah, possibly. The survey data was gathered throughout a very challenging period, as they say, so challenging will mean something very different, maybe, in 2023 to what it means now. The fundamental point though is that going to the cinema and genuinely having that shared experience that you're not going to have at home is usually something that's going to be much more immersive. Like *The Substance* for example: people are leaving, people are screaming, people, people are loving it. That's a challenging, stimulating film, but it's pure escapism for the

audience. We've obviously seen horror films do fantastically well over the last couple of years, and we'll continue to see things in that space.

MG: When we're talking about diversity, we always talk about getting young people in. But it also feels to me that, in social class terms – there was another report that came out of the UK pointing out that filmmaking was overwhelmingly now created by richer, educated private school graduates and that a lot of the arthouse cinemas now in the UK are the boutique cinemas charging £20 a ticket. Do you worry that actually there's a big demographic of working-class people who are being excluded? We need to make sure that the full diversity of our communities come together.

BL: The cinema is still, absolutely, the most accessible form of cultural activity and is consumed as such. It reaches all corners of the UK on those audiences. They're three times as likely to watch a film than go to the theatre or the opera. If you're in those lower social classes, the average ticket price in the UK hasn't moved with inflation. It's still just over seven pounds. London skews that slightly – the average ticket price in London is eight pounds. It's still an accessible art form.

We have an initiative now in the UK called Escapes. That's largely informed by this data, where every month now we put on a film for free in cinemas all across the country, they show the same film. The point of this is to get more people watching independent films in independent cinemas. People watch a film they wouldn't have watched otherwise and watch it in a place they wouldn't have otherwise. We've done this 10 times so far and the average is 50% of all audiences would never have been to that cinema before. It's a free ticket, no catch, no hidden criteria. And you see people saying there is a catch, you've got to watch something really weird. Our highest level of those lower working-class audiences engaged because of that. It's delivering new audiences. We've collected around 40,000 email addresses so far for cinemas to start new relationships with these new audiences.

Elise Jalladeau – Thessaloniki Film Festival, GR

This research was with the Aristotle University in north of Greece. We wanted to build a bridge between the crowd of the festival and the year-round audience, because we also have the cinemas during the year. The festival is a tool for us to advertise – it's a brand. So, we wanted to better use this tool to strengthen the audience during the year using the festival. We had a survey, and we also did focus groups and interviews in 2018.

“Cinema is a treat” is now the case because now we are facing a new generation of audience who are completely different to the previous one. We have a huge split between the classical audience of cinema lovers and the new generation, which is massive. But their choice is concentrated on very few films, and they don't want to lose time because they have a lot of things to do in life – they have to go on social media or video games. So, they don't take any risk. That's why, like many other cinemas, we started to show classics. They're rated very high on aggregate websites and aren't a 'risk'. Our older audience of cinema lovers are getting older, and they are going to disappear. They are more predictable for us, going for the films, not a 'treat'.

We've done a lot since 2010 to improve the cinema; audio-visual quality and changed the seats. What we didn't realise but is in the survey is that the older audience consider that the most important thing is “loyalty to the cinema and the directors,” whereas 18-35-year-olds don't see the distinction between commercial and arthouse films as so important, but they don't want to risk their time. Also, the older cinephiles identify themselves as “members of an artistic cinema loving community”, which is weird because, in the survey, they will also say that they love to

come alone: solidarity viewing. Whereas the new generations don't belong to a cinema loving community, but they come all together: it's a social activity. The younger generations want to attend special events and screening of classics or very massively advertised films. We want to keep the older audience by showing a very high-level quality European programme of arthouse films *and* we want to attract new generations by offering them special events. They also said that they wish both festivals – we have two festivals – would last longer. For us, it would be impossible. They also said that it's too bad that we don't have more comedies and we only have dramas in European cinema. Of course, even the young audience is segmented.

My problem as a cinema owner is not the future of cinema because as long as we do special events people will show up. My worry is for the diversity of European cinema. The only time when they go to see new films is during the festival because they like being part of an event – the event is more important.

MG: The key factor is time. That's the thing that we don't have anymore. The reality is that when we were young or when those older people in this room were young, there was nothing much to do. There was the local cinema but now you've got to compete for those thousands of ways. If the reality is time, people will go when they already know that it's what they want. It seems to me like a challenge that requires some rethinking of the way that we behave.

Julien Staartjes – FilmHalen, NL

I think that especially during Covid, people became more tech savvy. They were glued to the phone all day for any activities, and you had a lot of companies – streamers, but also other big data companies and Amazon – fighting for your time and also conditioning the audience to um service them as best as possible. So, if one company would say: 'I can get this to you tomorrow,' then the other one would say: 'I can get it to you today. In fact, I'm already outside of your house.' And this is something that our audience has become accustomed to, which is a bit unfair because we're cinemas, we don't have the same technological means. But it's still something that they interact with every day. They buy stuff online and they're accustomed to getting what they want as soon as they want, and at the same time being very, very well serviced by it.

So, I think, as a cinema, you've got to act on that. You've got to adapt to those new audience demands. What we really try to do is look at those industries that they interact with on a daily basis, like the service industry or ecommerce. For example, we really looked at how in the travel or leisure industries you get service emails before you went on a plane; or after your dinner, you would be asked to give a review. So, we also started doing that: we started giving tips for going to the restaurant near the cinema, or movie recommendations for future visits. If we have some cool background information about films, we try to give that as well. It's a way of servicing people, but also of trying to get back the time that the other companies are taking, and people respond really well to this, which I think is because we are not a big faceless tech company. We are your local cinema and we're trying to make this experience as special as possible for you. I completely agree with the BFI report that has become a special treat and that it's not necessarily because there is a negroni involved or an introduction – just going to the cinema itself is something that you can really look forward to. And I think it also shows on social media the way that people romanticize cinema-going.

If you buy shoes online and they don't have your size, you can often leave your email address to you get a notification when it comes back in size. What works for sneakers actually works really well for arthouse film as well. It may be a surprise, but we have that function for if a film is coming out soon: you can leave your email address and get an automated email when it comes out. It's a great indicator of how popular a film is going to be, which helps us with programming it. I

guess we're kind of turning our website into a magazine. We do work with website personalisation and stuff like that, so it affects the algorithm, but we don't try to just send people into a funnel. We also don't make a distinction really between arthouse and commercial films. For us, the focus is really on cinema-going itself. We look at what people are talking about and really try to join the conversation to see, OK, what is trending? What do people that come to our cinema really like? And the TV show *Fleabag* is a big hit with a big part of our audience. When we found out it's based on a theatrical play, and there was a live registration of it available for the cinema, we didn't have to think very long, and we booked it.

Giuliana Fantoni – President, FICE, IT

We have a situation that's completely different, especially for the younger audience. I don't share the view that young people go to the cinema with the idea of seeing something that's safe. They're the least lazy audience and they're the most attracted by new experimental things. Movies like *The Substance* or *The Zone of Interest*, or *Perfect Days*. They were the best in Europe and a lot of tickets were bought by young people.

After the pandemic, there was a very strong increase in the presence of young people in cinemas. I manage an historical arthouse theatre in the city of Treviso, and I always had very few young people in my audience. But after the pandemic, there are a lot of young people – 20-35 – who started coming, especially in the evening. A lot of students with that genuine pride of showing that there were cinephiles.

This is a new audience with very clear ideas about what they like and why they don't. So, we could ask questions to understand the phenomenon. We understand that the origin of this phenomenon is the audio-visual overload during the pandemic that also created a sort of cinema literacy. It's true that young people prefer the classics, but they're also more curious than the traditional audience. They're drawn to dystopia. This is not a genre that I would define as something safe so, they are quite curious. But the older people like to share the theatre with younger people, but not the opposite. Younger people don't like to share with older people. So, I tried to change my staff, for instance, at the box office. I have a person who's been there for years, and they work from opening to 8pm. And then after 8pm, I have someone younger manning the till because, when young people reach the box office, the concession stand, they want to interact only with younger people. That way, they can see a young environment. In Italy, there are theatres where young people choose to go, where it's obvious that they have entirely colonised the theatre. And since I'm the only cinema in Treviso, I have to cater to different kinds of audiences, and I have to serve all these categories.

Another thing that I've noticed about the young audience, I was mistaken, I tended to generalise my approach. I treated young people, the young audience, as being university students because that was my reference category for young people. But this year, because I've been involved in quite a few different projects, I started interacting a lot with younger people, ages 17-18. And this is a completely different story. In the past, I worked with them through teachers, but this is the first time I've had a real direct 1 to 1 dialogue with them. And they want to go to the cinema all together. One problem is that they don't have a license, so I organised shows and screenings at 2.30 in the afternoon after school. They have lunch together, they go to the cinema, and then they go home because otherwise they can't go out due to lack of transport.

Often, they don't understand the movies and they're not even able to explain why they liked the movie or why they didn't like it. There's a lot of support, of education, that's different that they need. We will cultivate, nurture this very young population. The results we have in Italy are

extremely encouraging. We have to adapt the kind of language we use to address them, and we need to think differently.

MG: Julien, is there a danger of a kind of algorithm culture where we are constantly given a diet by whatever corporation of the things that we think we want? And the challenge of arthouse film is in discovering something new that you never got before. And the future of European films themselves could get lost unless we can find ways to get through that kind of algorithm culture, to build a relationship with audiences where they are willing and open to discovery.

JS: I think, as a cinema, it's important to build a durable relationship with your visitor, a relationship in which you listen to what they want to see but don't forget your own voice. As a cinema, you also have an artistic agenda, and if you do it well, these things come together quite nicely. KINO Rotterdam have a strong identity and a very strong programme with a really clear vision. That also really helps people with being introduced to new films.\

MG: The curation role of the cinema itself remains essential if you have a personal relationship with those audiences and a trust relationship with those audiences.

SESSION 2: Re-energising Your Business Model: Investments, brand identity and programming choices

Moderated by Michael Gubbins (Consultant, Sampo Media)

Christof Papousek – CFO, Constantin-Film and Cineplex Group, Austria

Stephanie Silverman – Executive Director, The Belcourt Theater, Nashville, US

Ramiro Ledo Cordeiro – Director, Duplex Cinema

Sylvie Presa – Director and Programmer, Studio 43, France

MG: This session kind of follows on from our previous session in the sense that we talked about the changing audience and shifting expectations of our audiences. The obvious follow-on question then becomes, what about the business model?

Christof Papousek – CFO, Constantin-Film and Cineplex Group, Austria

We run a cinema group of 70 theatres in 12 countries, from Austria towards South eastern European territories. We are partly also in cinema deserts, where we try to close the gaps. We run cinemas in Albania, Bosnia, and Romania – regions with a lower density of theatres. Of 70 theatres, we have seven (10%) in the network. We have a 10-screen multiplex in the network and today I'd like to explain how, for the audience, content wise, it's not that cinemas can be successful in only one field – arthouse or commercial/mainstream. The audiences of today want to watch both: 'I want to watch *Dune*; I want to watch *Honora*, I want to watch James Bond and I want to watch the local production in Austria. Sometimes I want to watch it on a single screen and sometimes I want to watch it in an IMAX, and this leads us to technology.

In the 10-screen cinema in Vienna city centre, we implemented Dolby Cinema. We have two big screens there out of 10, each with approximately 400 seats. We converted one into a Dolby Cinema with a double laser projection with leather seats, high comfort, Dolby Vision projection, Dolby Atmos sound. Our statement is that different movies can be shown in different environments, and there is an audience out there who are deeply interested in technology and also in comfort, but also in movies and stories.

If you find a way with the technology companies to integrate their products or concepts in a visible space, then they might help you. It's not only an upfront investment, but also an investment which

can be taken on a ticket fee basis. Certainly, you need a volume and approximately 350-400,000 tickets per year. This one auditorium is maybe 70-80,000 of that.

In this special auditorium, we hosted the Jewish Film Festival in Vienna, and the opening movie was *Crescendo*, which is not a high technology movie. But it surprised the audience, the cast and director by showing this movie in such an environment. It's a place where technology meets culture and where commercial meets arthouse and so on.

You have to look at the markets and we have very young, developing markets and we have mature markets. This example is for a mature market, for a higher ticket price. In a developing market, it's a different story. You have to provide basic quality and basic comfort because the people there appreciate modern things in their cities because they are expected to travel. You cannot come with a second quality cinema approach there. And local content is even more important than other things, including local content and language in the programme. You have to work with local politicians, with the municipalities. You have to invite them.

In smaller markets like Albania, we have an overall of 5,600,000 tickets per year. So, if a movie does 50,000, then we have a plus of 10%. When it's local, 20,000 people come and watch it in a cinema of 1000 seats, over a period of three weeks.

Stephanie Silverman – Executive Director, The Belcourt Theater, Nashville, US

I know we all do a lot of repertory programming and I'm just presenting a few examples of some of the things we are doing to really localize national or international programming to our audience in Nashville, Tennessee. And to really use programming in ways that are addressing some serious challenges we've been seeing recently. But 2) this series in particular had to take the place of what is typically a very busy first run new release season in the US because of the impacts of the Writers Guild and the Screen Actors Guild strikes, which totally stopped up production in the summer of 2023 hit summer of 2024.

There was no independent first run content and when it's hot in Nashville and when people want to be theatres. We are seeing tremendous youth audiences come to repertory for us. We've always seen young audiences in our first runs and watching them convert to becoming repertory audiences has been incredibly exciting. We wanted to lean into that heavily, so we chose this 1999 series, which was a fabulous year for films. This series was 25 films long spread across the whole month of June and it was really films for all ages: from kids to our midnight movies. We leaned heavily into wrap around programming. We had two separate seminars: one called *Super Giant*, which was led by an animator about the impact of the film *Iron Giant*. The second one was by a film historian, titled 'Panic'. A '99 seminar on crisis and turn of the century cinema, which was a blast. We held a writing workshop following *10 Things I Hate About You* called 'Cringe Café' and an opening night, MTV style VJ request party, which was very fun.

For this series, we not only ticketed individually, but we did full series passes, and we also sold five packs which people could use flexibly to bring five friends with them to one film or to see five of the films independently, however they wanted to use it. In total, this series ended up selling 9,000 tickets over those three ticket types and generated \$73,000 (€69,5000) in revenue.

We were already seeing these younger audiences for repertory programming, but we're very excited to see these young audiences come in communities. And I think that is a Covid outcome, honestly. But this kind of programming takes significant additional work on the staff front. So, from curation to design to trailer making, our staff had to work a lot harder. But the outcome was tremendous, and

the social media sharing was through the roof. We always hope people leave our theatre with an 'only at the Belcourt' kind of sensibility and it worked.

In 2023, 25% of our audiences and in 2024, 28% of our audiences, have encountered something additional when they've come to see a film, like talent Q&As or video introductions, so that it's full circle between artist and audience. Letterboxd lists and TikTok are very influential.

Ramiro Ledo Cordeiro – Director, Duplex Cinema

Since 2019, I have been working at Duplex Cinema. We have about 50,000 inhabitants in our town. There was another cinema called New Max, which was located nearby. The family who built the cinema rented it, but it has a lot of very old structures and the programming was a little bit arthouse, but also of commercial films, dubbed. The first thing we did was change the programming to attract different kinds of audiences, to mix together so they could learn from each other. We felt it was very important that to build up this special link with the overall community. There was a lot of parallel programming, we did a lot of branding, showing films for families and young audiences. There was a subscription system and local groups and associations could book sessions.

After Covid, we were in a position to bring our audiences back, so we showed a lot of the original versions. It was a bit risky perhaps, but our approach was very consistent. It was very logical, and we multiplied our numbers by three compared with the previous 10 years and the previous management.

I think, in Spain and in Italy, we share similar trends. We've reached a fairly record levels when it comes to local productions for various reasons; more films shot in Southern Europe, better scripts, more financing available for films. We have about 30% more films. As for the independent cinema, Spain is a bit of a special case, we've never had much support from state policy.

We have a broad demographic, but you may have a small film that requires quite a lot of support. We don't necessarily have the structures when it comes to marketing. We reach out to the local communities.

Sylvie Presa – Director and Programmer, Studio 43, France

Our cinema is 90% independent, located in Dunkirk. We have 86,000 inhabitants as cities in the north of France. We have three sectors of activity, and we do a lot of cultural activity. We have artistic workshops and a department that also focuses on independent films for young audiences. We have another specificity: we're housed within a multiplex, our legal status and our programming, however, are completely independent.

In 2023, we renovated the structure, we opened a third room. We wanted to show a much more diverse range of films: research films, discovery films, European films, short films. And we also wanted to focus on young audiences through cinema education. This renovation project was conducted with Jean-Marc Lalo, and we had a number of artistic and cultural and economic aims. The hall was completely restructured to be more functional, more user friendly, with cinema snacks, environmentally friendly, and offering top quality goods.

The hall was inspired directly by Wes Anderson. And now we have private areas that can be rented by companies; the cafe area can be set aside for cocktail parties; there is a room for young audiences with very colourful seating. We totally renovated the seats right next to the screen. They are now sort of a low-lying seats where children can sit and young people, and these rooms can be rented out for birthday parties.

There is a modular area. Our architect worked on it for three years. The idea was to reach out to more to young audiences and to fit in better with new uses. We drastically reduced the number of seats. We went from 174 to 71. The stage is much bigger and there's a black curtain; we can currently welcome live performances or concerts in this room.

We hold workshops with film being shot against a green background. We've had young people create a mini-series for a festival; the room is also used for editing and a dubbing workshop. It was part of a series of workshop to discover the various jobs available in the cinema. We've had podcast recording and we also work a lot on video games.

This renovation has enabled us to increase the number of people coming to the cinema. We offer new services and can propose cultural activities for young audiences.

Key points:

- Localising for audiences
- Local partnerships
- Young audiences expect more than just a film: event or activity, workshop, etc.
- Creative use of space
- Technology as a tool for impact
- Cinema brand and use of young ambassadors
- Listening to audiences but retaining curatorial vision (i.e. special films or local partnership events or dubbing/subtitling preferences, etc.)
- Building loyalty through building audiences

SESSION 3: 20/20 Europa Cinemas Arthouse Tales / Part 1

Moderated by Metka Dariš (Director, Kinodvor, Slovenia)

Asta Martinonytė – Kino Pasaka, LT

I usually introduce myself as Asta from Pasaka – which in Lithuanian means ‘tale’ or, more accurately, ‘fairy tale’. And that's the name of our boutique cinema. Obviously, this is my favourite tale, and I would like to share it with you. We have two locations in Vilnius. This year we celebrated our 15th birthday. Our team consists of 14 people, programming and communication are our top priorities. We love bad weather: monthly admissions might be something like three times higher than those shiny summer months. To deal with summer time, we have an open-air film festival called Cinema Under the Stars at the end of July, beginning of August and it is truly our passionate project. It brings cinema magic to the audience and to our hearts. We now have Cinema Under the Stars Junior. Entertainment becomes part of the educational process.

Laurent Callonnec – Cinema L'Ecran, FR

I started as a cashier in this little cinema in Paris that was an original settlement over 2000 years ago. There are a lot of people working in cinema in Paris, so we have a lot of competition. We have around 70-80,000 people coming to the cinema every year. We work a lot with schools and do TikTok with young kids. We have a history of activism from blue collar workers to leftism that we are connected to. We also have young audience creation, where we opened our screens to young people to show films, two years ago. We have an amazing team of 12 people.

Eva Demeter – TISZApART Cinema, HU

I'm going to tell you a real Hungarian cinema tale. Once upon a time there was and there is a three-screen arthouse cinema with a bar and a terrace, 100 kilometres from Budapest. It is a family business, meaning that my father is a director. My mother is working there, my sister, and we have other colleagues as well. In the 1990s, nobody wanted the cinema building. It was very in a bad shape, and my father decided to buy the building and to renovate it. We had more than 50 video stores and other arthouse cinemas as well but, when the first Multiplex was built, we decided to run only one arthouse cinema. I realized, as a child, that all the furniture, carpets, and pictures from home started to disappear and ended up at the cinema because my family wanted to share what they love and have at home: my house is your house. We have a big screening room and two smaller ones and a terrace where we can show movies from May to October on a huge LED screen. We have parties, wedding photos, events, VR, quizzes and discussions. It is a community place, we educate youth, help them make films (we have our own camera and lighting equipment) and have the oldest film club in Hungary. We hold family movie mornings with arts and crafts activities. We have our own film festival that has run for 34 years.

We really believe that we need to be innovative, which is why we have our own mobile application, a loyalty card, an outside kiosk and a film and drink stock market. The more you drink, the less the prices go down. We collaborate on international projects such as the Cinema for Youth or the Resonance Cinema Project, or Cinema Without Barriers. And we were the first Hungarian Cinema to do the training boot camp, a couple of weeks ago, which we are really proud of. Accessibility is important to us with 40 films (from now to 2026) set to have audio narration, sign language, interpretation, and special subtitles.

Jan Van Den Brink – Verkadefabriek, NL

Located in the beautiful city of Den Bosch, which is at the centre of the Benelux. It is a former cookie factory, where many locals worked before it shut down. The factory was rebuilt as a theatre and arthouse cinema. In 2004, this neighbourhood became a popular hub for culture. This autumn is our 20th anniversary, and the centre has become an inspiration for many venues in the Netherlands. We have 20 screenings a day, three theatre shows a week, jazz and Americana concerts. If there's no cultural time slot, especially at daytime, we have more commercial activities like conferences, conventions, company presentations, as well as collaborations with local and social partners.

Last year, more than 2,500 people took a film course with us in film analysis and the history of film. Famous Dutch director Martin Koho visits the cinema five times a year for an interactive college on film history including war films, Dutch cinema and James Bond – he's a walking encyclopaedia. We focus on young film professionals by showing their work, giving them an open stage or a working period in an open project space. In the holidays, we have kids-only screenings in the evenings, workshops, arts and crafts activities and we have a special doctor to repair their plush cuddly toys on a Friday afternoon during the film screening. We present four photo exhibitions each year, often related to cinema, theatre and photography. We have concerts, events, a film preview day with four premier film journalists, who introduce the films, and a lunch and dinner for 300 visitors from all over the country.

There is an open-air cinema on our own property. We will launch the third edition of our queer arts festival in June 2025, and we are working on improving the building and its facilities. Last year, we replaced all our projectors and screens, and this year, we created our own boutique cinema with relax easy chairs, specially designed with recycled materials on the walls and on the floor, with green plants in it. This auditorium has 25 seats, but we also have cinemas with 55, 77, and 150 seats. We will cross the magic border of 150,000 film visitors in 2024.

We intend to develop a new multifunctional space, where we might present digital sets for theatre shows and highly immersive VR experiences, an art gallery and a second café/restaurant.

Bozena Perska – Kino Kosmos, PL

I would like to present Cosmos Cinema, an arthouse cinema celebrating its 60th anniversary next year. We are located uh 15 minutes from the city centre in a green residential area. Cosmos Cinema is managed by Silesia Film Institute, a public institution that operates five art houses and the Silesian Film Archive, the only original film archive in Poland.

Cosmos Cinema opened in 1965. It was designed by a team of three architects and was a very modern, equipped with a panoramic screen. A bold example of modernist architecture, the front was completely glazed, and, after dusk, the shining building looked splendid. In the late '90s, Cosmo Cinema lost its charm. Thanks to EU funds and public grants, we started renovations, but the result was rather disappointing. We received the Concrete Cube Award granted by the association in my city for the worst reconstruction in Katowice.

We reopened in 2006 in a building compared to a popcorn box, which is the worst shape for an arthouse with policy of no popcorn, but with two screening rooms and extra space for exhibitions and educational workshops. We are planning extra events to celebrate our 60th anniversary next year.

Kim Foss – Grand Teatret, DK

Our cinema in Copenhagen is one of the oldest in the country, celebrating 111 years. We actually have more than one company: the cinema and Camera Film as our distribution arm. Every cinema should have a distribution arm; every distributor should have a cinema. We expanded just before Covid with a streaming platform: Grand Home Cinema, though we're generally very opposed to streaming. But when our customers insist on being on their couches, we would like to be the providers of the product.

The latest addition to our cinema is actually a neighbouring cinema, which we acquired in the summer, called Gloria. It's a single-screen cinema and, for us, it's an experimental venue. We use it for spill over screenings and we use it for exclusive screenings of films not coming out elsewhere. The cinemas have cafes and the audience love to come early, there is free coffee with the first morning screenings to attract an audience – we start at 9:30am.

We still do the printed programmes and all the old school stuff which people have lying on the that tables at home because it still works. I heard it said several times today, that the older audience is dying out, but it's actually the opposite for us, because this demographic – the 50+ demographic – is becoming a bigger and bigger part of our society. We actually have a burden. We are not allowed to use the word, but we have the elderly burden as we call it in Denmark. We are getting more and more people in this age group coming to our cinema, which means I didn't even have time to say anything about the younger audience – but we also cater to them.

Yuliia Antypova – Zhovten, UA

First of all, we would like to thank you for your support and solidarity. This is our people in the first days of the full-scale invasion of Russian troops. Today, our cinema has become a multifunctional cultural centre that combines cinema with this other form of creativity, creating a space, inspiration – exchange of ideas in progress. Back in January 1931, the first film screening took place. Since then, the countdown of the history of the Kiev Cinema which is located in the historic centre started

Our cinema features six cinema halls equipped with modern technology and comfortable seats. From the beginning of the war to the present day, our cinema hosted around 30,000 film screenings attended, by more than 500,000 viewers. In addition, the cinema has a conference hall where lectures, workshops and master classes are held, and the exhibition gallery where exhibitions of paintings by our contemporaries take place. There's also a bookstore selling movies, literature and merch as well as a popcorn bar and café.

The cinema hosts more than 15 different festivals each year. Despite the difficulties we face, this year, we have launched two arthouse film festivals. We've organised more than 50 creative meetings with filmmakers and several charity poster markets, the proceeds from which go to the armed forces of Ukraine

Since 24 February 2022, our cinema has been operating in extremely difficult conditions: constant shelling and the threat of attacks. Regular power cuts have become part of our life. This forces us to screen and look for creative solutions to ensure that we can operate even in the absence of electricity. Recently, our team suffered the loss of a colleague, movie engineer Mi Chan, who was killed on a combat mission in the summer.

We help Ukrainian soldiers and internally displaced persons from other regions to ensure social equity, supporting their well-being and adapting to difficult life circumstances. As a result of the Russian armed aggression in Ukraine, around 600 Children were killed and over 2000 were injured. This is why we put a lot of work into supporting the children who need psychological and emotional support. We train our staff in first aid. Thanks to our friends and partners for their help in countering the threat of destruction of humanity.

SESSION 4: Re-imagining the Cinema Experience – Next Steps

Workshop 1: Making a success of subscription models

Moderated by Michael Gubbins (Consultant, Sampo Media)

MG: How do we get audiences to watch films? They don't know they want to watch. How do we build loyalty amongst younger people? How do we deal with pricing? And one of the key trends that we've seen in Europa cinemas is the loyalty programme – a subscription scheme – that has worked in ways that were unexpected.

Samir Azrioual – Managing Director, Cineville BV, NL

In the Netherlands, Cineville has been around for about 15 years now, but we still have a lot to learn. For us, success means collaborating with smaller independent cinemas. Sharing and becoming more attractive to existing audiences, and new audiences, by working together. Today, in the Netherlands, we have 94,000 members. Though Germany and Belgium are not as far into their journey, they have followed the same growth trajectory, which means that if the model works in the Netherlands, it can also definitely work in other countries. Our Belgian colleagues are proving that right now. They hit 10,000 subscribers in 2.5 years.

In Summer, we see all these people leaving and we're like, 'oh my God, what's happening?' But they always come back again, which makes the second time it happens a little bit less scary. One of the main lessons is that collaboration really is key. It works best in the bigger cities – some with a population of hundreds and thousands of people, and a significant student population always works. In Amsterdam, we have about 35,000 members. For smaller cities with just one cinema, they work together as a small region. There are 22 different types of models, and they work differently – but it also works the same, namely getting new people to different cinemas.

What we do in our model is try to balance out the age groups of our members. And this is a requirement for a sustainable financial model as well. About a third of our members are below the age of 32; a third is above the age of 40; and you need this type of ratio because the people under 40 go, on average, a little bit under two times a month with our subscription model and the people over 40 visit about 2.7 times a month on average. If you want to have a healthy price to pay out to the different cinemas, you kind of need both groups because otherwise the pay-out would become too low. And if you combine it, you get a financially viable subscription model. In the Netherlands, we're going to up the pay-out price to €9.25, which will be divided between the theatre and the distributor, and a ticket price on average is about €12. So, that's actually quite a lot.

Because we have these two different audiences, we also need different strategies to reach them. Here, I think you see a very big difference between the younger audience and the older audience. The younger audience know us through their friends and through social media. They also need a bit more encouragement to go to a film that they otherwise wouldn't have gone to. We have a large content team that make recommendations and write reviews and a newsletter to seduce them to go to that one film that they otherwise wouldn't have gone to – in depth interviews and analysis. Whereas the older audiences really love their local cinema. They just want to go a little bit more often. When they become a member, they will basically stay with you forever, because of their loyalty. There, we really use our marketing in the cinema itself. We target the younger audiences online, and the older audiences are usually targeted either through the people who work in the cinema, who tell them about Cineville, or through print media like posters, flyers, and the trailer that we show in the cinema.

In general, what we've learnt is that it takes a lot of effort. At the beginning, everyone was a little sceptical because the pay-out price starts at quite a low rate. When we started, the pay-out price wasn't €9.00, it was €4.00 because you need to scale it in order to become financially viable. For distributors, what they like about Cineville is that they can push a film that's riskier. We conducted research, around 2020. On average, people were 1.5 times more likely to see something than they would have been.

€9.25 ticket price to calculate distributor/cinema pay-out

€12 is average ticket price

Monthly subscription for younger group is €8.50 and the older group is €23.50

A lot of our marketing is just the clear message that if you go more than twice, then you've already got your subscription back, basically. But there are also lots of other reasons for people to subscribe: it feels like a community. It may start with price, but as it goes on, what keeps them is something other than the savings. People kept their subscription during Covid, even though they couldn't go, purely out of a sense of loyalty to the whole cinema industry.

Mirjam Haas – Project Co-ordinator, Cineville DE

We launched in August this year, in five German cities and 30 cinemas. Prior to the launch, we had presales and a fresh website, social media channels and newsletter. This really gave us the opportunity to connect with our potential subscribers early on and let them know what we're all about, which is, of course, great marketing wise. From that moment on, the clock was ticking. So, you have to know exactly what you're selling and how the process will work for your customer service.

As for pricing and conditions: Germany offers free and unlimited entry to all participating cinemas, all screenings, with very few exceptions. It costs anything from €22 a month if you're under the age

of 25 and €24 for ages 26 and over, with a very non-scary minimum contract period of four months. We also started out with a special offer to incentivise long-term commitment. If you pay upfront for the year, it's €20 a month. As for numbers, we're currently at well over 2,000 subscriptions, with projections to reach 3,000 by the end of the year and 5,000 by early 2025. As of last week, we have expanded to 50 cinemas across 10 German cities and there's more lined up for the next year.

It's really all about communication and service. This is your first point of contact with people where you can really describe your service, hype them up about the cinemas and create a loyal subscriber base. The daily grind of subscriptions is managing lost cards, changing payment methods – I recommend it's in place early on. POS system integration and online booking systems need to be thought out across participating cinemas. We've worked with a third-party provider from the start, which means we have 70% of our cinemas connected to our system (more or less). So, they can actually make online bookings possible, but there's still 30% missing – it's ongoing work.

If we look at the numbers, we already see a similar age distribution to what Samir presented. The pensioners really love the subscription. They basically live in the cinema now. But there's more between the ages of 25 and 35/40. We started with a lower pay-out price but it's now at €6.00. We are close to 10% of people coming with a pass and they are bringing friends.

Katrina Mathsson – Marketing Manager, Cineville SE

We haven't started yet, but everyone is worried: Sweden has fallen far behind most of Europe in getting the audience back to the cinemas after the pandemic. I'm not sure it was so great even before the pandemic, but now it's really bad. Following a study trip to Amsterdam, meeting with the cinemas there, we made the decision to do it. Finding the money – Collaborate to Innovate was key – but we also needed additional funding, which we got from the Swedish Film Institute. We have quickly realised that it's not going to be enough, and we are in discussion with them. They told us when we were there that they were expecting us to ask for more money in the first place, so they want to give us money.

You can't do one thing at a time; you have to do everything at the same time. You have to get the cinemas on board, you have to get the distributors on board, figure out your forecasts and the pay-out and talk to everybody at the same time. We are in close collaboration with Samir in the Netherlands and call our friends in Belgium for advice – the strength of the project is that everything is already in place. But people are sceptical about something new. I don't know if this is a Swedish thing, but we have to learn how to use it. Having a project manager is essential. We will have 16 cinemas in five cities, launching in March next year. When writing our application, we had help from our other colleagues in other countries.

Anna Hartweiger – Assistant to the management, KIZ RoyalKino, AT

We launched in March of 2023. There were 18 cinemas across Austria, and we were part of it from the very beginning. It was easy with three key steps to implement. 1) technical facilities / equipment, 2) marketing to the audience (logo/branding, trailers before every screening), 3) staff and team training. Non-Stop Kino also had an Instagram series where they introduced every cinema, and their team asked them questions like: what was your first movie in the cinema? Why do you like working at the cinema?

Wiktoria Pelzer: We should clarify that we are not working with the full integration of Cineville at the moment, it's a parallel system, technically. So, subscribers come with their card, but can't use Non-Stop Kino as a payment beforehand. They have to reserve a ticket and scan to pick up their ticket at the cash desk, which we were worried about in the beginning – if that might be too much work for the cinemas – but it turns out that it's not. We are still developing it together.

SA: When we project the ceiling for this – it's maybe 10,000, and then 40,000 and, right now, we're still at a growth rate of about 20% per year. So, we haven't really hit the ceiling, which is a nice thing, but it's also a little bit scary because we don't know where it is. And there is an increased responsibility of Cineville to the cinemas. So, in the Netherlands, there are cinemas that sometimes receive 60-70% of their revenue from Cineville, which is a lot, and something that feels a little bit heavy for me. It makes us really want to do the work very well because people are relying on us.

One of the issues that could develop over time is the shifting of the age groups because, at some point, if you get too many people in the older age group, your pay-out is going to decrease, which is why you need to keep investing in the younger ages. Or if you're a very isolated cinema in a very isolated region, then taking on a model like ours brings a risk of cannibalising your audience. If you look at the big cities like Amsterdam – there are 800,000 people in Amsterdam – it's easier but some of the smaller regions and also very happy because they see an increase in visits from seniors in the city.

We are at 7,250 members. We had a very intense and very good start. We had a pre-sale of one-week last year in March and, in one week, reached 1,200 subscribers. We ran a very intense campaign on Instagram with a wide press engagement. In Netherlands, all the distributors are on board, we have the problem that Universal is not on board – at a time when *Tar* and *The Fabelmans* were released, which was scary for us, but we communicated very openly from the beginning and people reacted very positively. Our demographics are almost the same as in the Netherlands. We have a very big focus on young people – our biggest group of subscribers is 24. We have 12 cinemas in Vienna. We decreased by 200 subscribers in the summer, but we regained those subscribers, and we want to reach – or we have to reach – 10,000 subscribers to not be dependent on any outside money anymore. We hope to reach that goal in March next year.

Workshop 2: New trends in audience development – re-thinking programming and events

Moderated by Irene Musumeci (Marketing Director, Global, MUBI)

IM: As we all know, audiences are the most important aspect of everything that we do. Everything that we do is for them and attracting new audiences is a big challenge for all of us.

Züleyha Azman – Marketing Director, KINO Rotterdam, NL

“Run by cinephiles for cinephiles.” This describes who we are as a cinema and is at the core of what we do - knowledge and enthusiasm. It's important, of course, to listen to your audience. But we prefer to stay close to ourselves and our passion and to give the younger audience what they didn't know they needed – not the other way around. I think it can backfire if you host events and specials for the sole purpose of attracting a younger audience. People can smell this and that it wouldn't be authentic. My advice is to stay close to yourself and maybe even reflect on who you are as a cinema and why you do what you do and from *there* plan your events and marketing.

Of course, we do think about our audience and try to translate our specials in a way that might appeal to them. We have a very small creative team: me, our trailer editor and graphic designer and a programmer. We always sit down and discuss our programming and the vibe and feeling of what the trailer has to convey. Every programme is different, and, in this way, we treat our audience and make them feel special, taking the time to make something for them. They feel the enthusiasm we have in making our own trailers. We also create a ‘fear of missing out’ (FOMO) by posting pictures of the events online, making people want to subscribe to our newsletter, etc, not to miss out. We shot

our promo on an iPhone – the tools are in our pockets to be creative and make stuff to set your cinema apart from everyone else.

Ioana Dragomirescu – Manager, Cinemas Victoria, Timiș and Studio, RO

They're old buildings but they have been refurbished and reopened: Cinema Victoria has 193 seats, we have been operating it for two years; Tish has 505 seats, a very big venue, very central; and we are opening another venue next week, with two auditoriums. They're all publicly owned cinema venues. The local municipality has invested in and subsidises them – we are public servants.

We don't want to cannibalise each other so we are united and share the public. We have the same brand but a different identity for each one, and the identity is very much enforced through curated programming. At Cinema Victoria, we have seven curated series, and a graphic identity for each one. Tish, which is much bigger is community aimed – it's a neighbourhood cinema. The message is to come with like-minded people or to come alone and meet like-minded people. It's not just cinema but broader cultural events, ballet and opera, too, and alternative content.

Maddy Probst – Head of Film, Watershed, GB

We are three screen indie cinema based in Bristol in the UK and we're very focused on first run films. We always up for championing the latest up and coming filmmakers through short film showcases and festivals like Encounters Festival. We've also just opened a brand-new immersive gallery where we're showing work which hasn't even got really a distribution or exhibition model. So, we very sort of future facing but, saying all of that, like we heard yesterday, we're really noticing a resurgence in the interest in classic and repertory cinema. We do projection tours; there is interest in film on film; particularly amongst young audiences. In 2009, we introduced Sunday brunch screenings, which was a way for us to introduce rep into the mix without eating into our first run film programme. It was intended to boost the café/bar sales for breakfast – and then it was so successful that the kitchen couldn't keep up with us.

Post-Covid, repertory films now represent about 11% of our admissions and 9% of our box office. For ages 24 and under, 24% are coming to see the screenings, which aligns roughly with the rest of our programme. In July, we have an annual festival, Cinema Rediscovered, now in its eighth edition, inspired by Il Cinema Ritrovato. It's also a theatrical kind of launch pad for the distribution of digital restorations. We collaborate with other venues. The key to the success of Cinema Rediscovered is that we're working with lots of really interesting co-curators and partners. Supported by BFI lottery funds, we have a professional development programme that's also about diversifying the sector, bringing in new people into film exhibition. We set up a Letterboxd HQ to reach wider audiences.

Axel Scoffier – General Secretary, Unifrance, FR

We're an association that promotes French films abroad. We are not lucky enough to have a physical cinema. We work with distribution, organise French weeks abroad with cinemas or institutions, and have launched a festival called my French film festivals, which is an online on-demand video festival. We have a special way of addressing the public and we constantly try to innovate.

We have My Meta Stories to look for the audience in the virtual world. We used the Minecraft video game world and created a cinema in the Minecraft world. For 24 days on about 30 platforms all over the world, in 200 territories, we show 20 films, seven feature films, and 13 shorts. In Minecraft, for the first time this year, we had feature films. They are European, French, Polish, Dutch, whatever, and the festival is also on VOD platforms. But the promotional part is on Minecraft for a long weekend from Friday to Monday. In order to support and moderate this virtual world, we work with influencers and gamers who stream on Twitch. This is a living world, a very active one.

We created a movie under the Minecraft, called the server – but it's a level in the video game. So, when you enter the game, the train station might talk to you, and there is a cinema with the colours of the pavilions in France. There are 13 different rooms. Each one has 120 seats. The real-life number is 80, but if we have more than 80 the room is replicated digitally.

Minecraft sold 300 million, and still has 150 million active people every month. We didn't get all the 150 million people, obviously. But it's a very active world. The mean age of the players is not that low – it's around 24-years-old. It's a nonviolent, constructive community world, and there's a lot of control as to what we can broadcast – the level of language. It's a game that was developed by Swedish people in the beginning and it was bought by Microsoft. So, it's a European adventure that became a world – a global one.

There's an online forum where people can meet and chat. With streaming platforms, you never know whether people have watched for one second or more. Here, the duration is quite long, and you get their reactions. For each short, there's a small game on top of it with the Minecraft Codes. The introduction to the film is enabled by playing in this world.

Sylvain Pichon – Programmer, Cinéma Le Méliès, FR

Saint Etienne is in the south-eastern part of France, and we have two cinemas, one with four screens, one with two. We have a brasserie, a restaurant, and a bar. As soon as the films closed in France, in 2020, we started a battle on Facebook: a game to recreate an online community. We couldn't find a way to do it on Instagram or TikTok. Every week, we suggest a theme and people fight based on the filmmakers. We have 2,700 members and 200-300 hardcore regulars who play every week. Everybody can publish a maximum of one film a day.

Every week, there's a special theme, either related to political topics or cinema topics. People share popular or lesser-known films. This community of viewers was really national – people from all over France. Now, after the pandemic, it's mainly people from Saint Etienne. They can meet at the bar, now, or virtually, online. We organise bus trips, to visit festivals, and we recruit around 30 young people every year, with sponsors, too.

Workshop 3: Updating and upgrading communication and marketing strategies

Moderated by Irene Musumeci (Marketing Director, Global, MUBI)

Daniel Sibbers – Director of Communications, Yorck Kinogruppe, DE

We are a group of 14 cinemas around the city of Berlin, and one companion in Munich, consisting of traditional and also modern venues. We have embarked on a journey of becoming a brand over the last 15 years. This has been our tool to turn around the fortunes of the company. A lot of people said this is impossible and does not work with arthouse cinemas. Arthouse is not about screaming out marketing things, but we think it's impossible not to communicate.

On a Friday, people decide what they want to do and what is tempting. 15 years ago, we received funding from the state funding agency to develop our brand identity. 'Real cinema' – to say that you're never in the wrong movie, which is a way of saying that you're never lost. This is the promise that we're making to our clients and visitors. We have changed our logo slightly over the years. This is the graphic design that comes with it, a corporate identity that we don't like to call corporate because we are a lot of things, but definitely not a corporation.

As there is no money in arthouse, we separated what we really had to spend money on from what we felt that we could do differently. We invested in 1) graphic design – to keep all these very diverse cinemas together as a unit; 2) photography – a good photographer, who was able to capture the essence of the cinemas but still have them share a visual identity; and 3) digital experience – to attract younger audiences, we had to become much more digital than we were. We created a motion ID to show on screens like an animated logo, relaunched the magazine we've had since 1998, and went into partnerships with local media. We traded advertising space, ran giveaways to incentivise local media to promote our cinemas and embarked on partnerships with bookstores, media stores, the local subway – selling vouchers over their ticketing system, which we did not make money from, but it opened a lot of other doors - we work with local museums, bought advertising space and re-sold it to local distributors, and made arthouse visible on a very large scale.

The marketing part is the top of the iceberg. When you create a brand, you have to know who you are – be fully sure of what your personality is. You should go through this process before you build a brand. We are storytelling and a lot of times we are very political; we are ethical, we have values, and we promote those through storytelling and social media. We have a VOD platform for the 30-40-year-olds who don't go to the cinema much, to allow people to re-watch films from our series, but nothing showing in the cinema is on this platform at the same time.

Javier Pachón – Executive Director and Head Programmer, CineCiutat, ES

We know that we have to reach those audiences, but we don't have the money, and we don't have a dedicated person. We have eight hours a week between me and the deputy director, more or less. Between the other staff, maybe four hours that we can use for a newsletter, social media, graphic design, social media, Telegram. We have to be constant and consistent with our communication. We know our community and when we make a mistake, they tell us. So, okay, they do read everything that we put out. Our newsletter opening rate is about 40%, which we're quite happy with. Of course, we can do better but without the money to pay someone, our philosophy starts with analysis. That's time – which is also money, but we're investing.

Analysing the data to read the engagement and talk to your audience means using those time and money resources in an optimal way. We take what we learn at the conference, the labs, etc and analyse it as a team, to see what will work for us and to decide, together, what we're able to do. Access is key for us: everyone has access to almost everything within the organisation. This helps us avoid time wasting and unnecessary conversations between programmers and other members of the team writing articles or working on the website or ticketing system. For that to work, we need clear instructions and onboarding for new personnel. If we want to work properly, we need to sit down and talk properly to save time in the long run. Manuals, documents and templates are prepared to speed up customer response times and internal processes.

We promote self-management within our philosophy, and each team member has time slots and clear tasks. We use Canva, Trello, and other systems to optimise workflow and a little AI.

Jens Lanestrand – General Manager, Biografcentralen, SE

Seven years ago, at the Europa Cinemas Conference in Bucharest, Romania, November 2017, I was listening to an Englishman talk about analysing data and I was inspired to create something similar in Sweden. That Englishman is Ian Wild. Seven years later, we share the stage today.

Our project is a website, now hosting the programme for 250 independent cinemas. We are a national non-profit organisation for arthouse and independent cinemas. From last year, we integrated online sales and posts from 120 cinemas using the same ticketing system with a professional CRM system. Each of these cinemas could not afford to develop their own professional

CRM system. So, our goal is to make this powerful marketing tool accessible to them by providing data and services. We saw the value not only in gathering data, but also in sharing data between exhibitors, giving broader insights of how box office is actually performing. Insights into age group demographics can be valuable for both exhibitors and distributors when it comes to marketing to specific audiences.

Through identifying audience members in your data set who only come once, you can then work strategically with loyalty programmes and long-term campaigns to engage them further. CRM is heavily focused on segmentation and the goal is to narrow down target groups. Then, all of the emails become highly relevant to the receiver, your potential ticket buyer.

One challenge we have experienced is that segmentation is a time-consuming work, and we could probably work better together with the distributors on this. Another challenge is to encourage cinemas and distributors to try this new marketing tool for a longer period and to learn from it. During our Collaborate to Innovate project, we conducted a physical mail campaign in areas in five cities. The results weren't magical but not every campaign succeeds. Marketing is all about testing, learning, and try again.

Ian Wild – Chief Executive, Showroom, GB

My cinema, Showroom in Sheffield, screens independent cinema. Sheffield is an industrial city in the north of England, and we've struggled to regain our audiences after Covid. Today, we are 20% lower than we were in 2019 in terms of numbers. At the same time, we've had some quite large increases in our operating costs, particularly for energy and staffing. So, we're having to think about how we can move forward and find new ways of operating, try and reduce our costs and build our audiences.

I think AI can be part of a solution to some of our business issues. There are three areas we're looking into: 1) connecting with audiences, 2) fundraising and 3) operating efficiencies.

We have an issue with our website, that's more than 15-years-old now and is not designed to help us engage with our customers. It's designed to tell our customers which films we're showing this week, and it's not telling us very much about our audience. It's not telling us what our customers want. So, we're changing that – developing a new, integrated website, to be launched early next year, that will link to our box office data to our membership data, and our till system in the bar as part of a digital pipeline. We hope AI tools will be part of that, to analyse box office data in conjunction with audience surveys, streaming metrics and social media insights in a much more integrated way to give us a much more holistic view about our audience behaviours.

We already use AI for targeting audiences in personalising e-mails, which has been very successful, but we know we can do it better. We currently also use AI for content creation. It helps us to make social media posts in a fraction of the staff time that it used to take us. We also want to try and apply AI to fundraising. As a non-profit organisation, we're increasingly relying on fundraising as an income stream. We've already very successfully increased our income from this area. We're starting to use AI to help us personalise our donor segmentation and engagement. We want to look at how we can use predictive analytics to identify high potential donors, maybe find out which donors are likely to contribute more and maybe looking at some publicly available data already: wealth indicators, professional affiliations that will help us to identify sponsors that we can approach to fund our film programme. We use AI to write funding applications – it doesn't help you write better applications, but it does speed up the process and it does sometimes unlock ideas that you haven't thought of in writing applications. We also think we can streamline our operations – we spend a lot of time doing quite routine tasks: scheduling films, writing staff rotas, ordering stock and selecting which stock to sell to our customers. Do we need a box office? 90% of our tickets are online at the moment and our

customers tell us they love the box office; but maybe that's something an AI chatbot could do just as well. If we can improve our efficiencies, we can reduce our operating costs. If we can operate with fewer staff, the question then will be: do we want to redeploy those staff to do other tasks?

There are some challenges that we need to think about. Can independent cinemas adopt AI without losing their unique identity? We recognize that our strength is that we are not uniform, we offer something different, and there may be biases in AI algorithms that may impact on diversity, which is really important for us. AI tools are high cost, which is the barrier for lots of independent cinemas. And AI has a massive carbon footprint, which is quite a challenge for us. We're a cinema that is trying to reduce our carbon footprint: we're putting solar panels on our building roof and yet this is going in the opposite direction, which is something we are struggling with at the moment.

I think AI is an amazing tool that can help cinemas remain relevant, help us find new audiences and stay true to our cultural mission. But it's a tool, it won't solve our problems for us. We have to do that ourselves.

Elise Mignot – Director and Programmer, Café des Images, FR

This project was launched with the support of Collaborate to Innovate. It's called Screen Spirits. It was developed with a cinema project incubator named Futura Cinema in 2023. Five professionals across curation, streaming and architecture, came up with the idea to broadcast on Twitch, collaborating with several French cinemas. Each represents very different locations, very different demographics. The project raised issues around branding, communication and aimed to produce cultural content and spark debate.

Twitch is often about video games and politics but not really cinema. We broadcast live from cinema theatres, both in front of a real audience and also via screen. It is a live 'performance' so anyone following can interact. The streamers would host filmmakers, critics, DOPs, for example, and the conversations would be followed by a screening of a film inside the cinema. There were test screenings and then there was a festival with everyone connected at the same time. Our locations were linked via the platform. It cost around €2000 for each broadcast and took a lot of time resources. The concept brought new and young audiences to cinema – who were not really cinema-goers. A group of young people also wanted to show a film, so there was an educational element.

Workshop 4: The inclusivity and sustainability challenge – commitments and actions

Moderated by Michael Gubbins (Consultant, Sampo Media)

MG: Two years ago, we put forward two charters: one about the environment with a strong commitment to sustainability, and one committing to diversity and inclusion.

Joanna Stankiewicz – Co-leader, Cinema Without Barriers, PL

I'm the co-leader of Cinema Without Barriers. It is in Poznan, in Poland. The main idea is to create a model of accessible film screenings that we can then replicate in different places. We launched the project in 2022 and it was funded by the state fund for the rehabilitation of disabled people. We use inclusive language, but this is the exact name of the fund. We did something innovative and revolutionary, because we began organising accessible screenings twice a week: the first such screenings in Poland. Our goal was to fill the gap and to open up the cinema experience to people who had been excluded from culture for many, many years because of their disabilities. As the project developed within the Social Program department, which I'm the representative of, our funding idea focused on social change. When you have such a broad goal, you need to address real needs. All of our projects starts with a research process, to understand our audience, their needs

and concerns what films they want to watch. We conducted our first focus group when we were writing the first application.

Our core values from the beginning have been inclusivity, accessibility and participation. Now, I would also add community building and education. The screenings were open to everyone, not just people with disabilities. This is very important. The ticket price was five slots – around €1. It's also financially accessible because many people with disabilities, especially in Poland, are on low incomes. But we also know, from our research, that they want to pay for tickets because they want to be treated as regular audience members. It is a symbolic price. We also invited our audience to actively participate in programming. We applied to Collaborate to Innovate and worked with other cinemas in Poland. We tested the model, identified the weak points, and saw the barriers and challenges. Most importantly, with support, we managed to develop and improve it. Next, we applied for the audience development and film education programme under Creative Europe Media. We were awarded the grant and have expanded into smaller towns in Poland. We have invited partners from Central and Eastern Europe that we share common values and history with.

Jean-Marc Lalo – Architect and Professor, National School of Architecture of Paris La Villette, FR

I've worked on the design of cinemas for about 20 years, on about 30 cinemas: two-third renovations, and one-third new constructions, in France and elsewhere. We have to work with existing buildings, which you can transform very easily with structural changes: you can dig underneath, make it higher – anything is possible.

According to French laws, you have to renew the air once every hour and you have to control the degree of moisture in the air because, obviously, when we breathe, you have to regulate that. Heating, projection, servers, lighting – these all need to be considered. The first topic is maintenance: the increase in energy demand when you do not change the filters can increase the energy consumption by 20%. Heat pumps are effective and can be regulated to the number of people in the room, to detect the carbon dioxide that emit as you breathe, which is better than controlling temperatures. You must give preference to natural ventilation for the lobby but for the screening room, this doesn't work for sound reasons. There's also laser projection – which you can retrofit, changing a Xenon lamp to a laser lamp and for lighting using solar light through optical fibres (this is expensive, but will become more feasible).

Problems include fluctuations in power and a lot of battery power which still aren't ecological. Geothermal energy is trickier, and I've rarely been able to use it, maybe twice across 30 cinemas, where a whole town or district was equipped with geothermal energy. Recycled materials are fine to use as building materials. It can be expensive: It's about €30-50,000 per projection room for a heat pump, but then you then recover that cost over the next 10 years. For geothermal energy and wind power, there's a budget of about €50,000 for a return on investment, which is a lot longer. It needs to happen so there's a case for government intervention – perhaps EU intervention.

Birgit H: I'm the Green Cinema Consultant of the German Federal Film Board and I've been working on Green Cinema for seven years. I have a question on materials for insulation: Styrofoam is really dangerous and a public building where we have audiences has to be fireproof. It's only allowed in Germany to use minerals.

J-ML: Yes, it has to be fire resistant. This is true for all new materials, and it is a considerable obstacle when we use existing materials. They haven't been through the process of fire certification. So, we need to do tests according to local regulations.

Maeve Cooke – Managing Director, access>CINEMA, IE

One of our initiatives is called the New Audiences Initiative. We exist because of the ‘cinema deserts’ in Ireland. In the Republic of Ireland, there are only three full time arthouse cinemas. So, for people in isolated, rural areas to see a diverse programme of cinema, we work with a mini network of non-dedicated cinema venues. Some are independent cinemas who show commercial content, but a major part of our network is made up of mixed programme venues where cinema is part of an overall programme, and some smaller film club setups. Some of them are DCP enabled, and they are part of the Europa Cinemas Network. Three quarters of them are non-DCP sites. Pre-covid, we had seen quite a lot of growth within the network in terms of diversification, but what we started to see when audiences returned was a polarisation in terms of the content that both the programmers in those sites and the audiences in those sites seemed to want to take a chance on or wanted to see.

What we saw was in cinemas with a greater diversity in their programmes pre-Covid, was being reversed. There was a wariness from our programmers, saying that their audiences didn't want to see anything too challenging. During Covid, a lot of people who lived in Dublin and other urban centres, moved out of those areas because they were too expensive: we had a lot of new communities and therefore new audiences. To encourage greater diversity and inclusivity in the cinema programmes, we select and curate one film each quarter. We also produce additional promotional assets focusing in on digital assets, from a sustainability and green point of view. We offer extra marketing spend and add-ons like virtual director Q&As.

It builds confidence in the relationship between the programmers and their audiences and is funded by Screen Ireland.

Verena von Stackelberg – Founder, Manager and Programmer, Wolf Kino, DE

Wolf is located in Berlin, in a very special neighbourhood. It's the least German neighbourhood: there are about 330,000 people living in that area and it has one of the largest Palestinian diasporas in Europe. It also has a very large general Arabic and Turkish diaspora. It is a gentrified area so there is a range of social class. Wolf opened in 2017, after a long period of construction and fundraising, ending with a huge crowdfunding campaign. We have two screens with 40 and 50 seats, and a flexible studio space that was conceived of as a more immersive perhaps gallery type workshop space but is now maybe better used as a third screen. There is a café and social exchange is just as important as the cinema itself.

We invited people from the neighbourhood to come and tell us their story, to talk about their neighbourhood memories, to make sure that we're not imposing a project that is actually not needed and to understand our audience better. Listening has been very important.

A local school director asked me if we wanted to become part of a weekly workshop for teenagers from a local high school (which has a 98% migrant background). A lot of those kids who go into higher education are the first in their family to do so. For four years, we held a regular Monday workshop with a group of selected teenagers. The group changed every year, but we built a relationship with the school and their pupils. The kids learned how to operate a cinema, how to programme, and the logistics of running a space. The funding has been cut but we continue to have young audiences.

SESSION 5: No Looking Back: A vision for the future of cinema

Moderated by Michael Gubbins (Consultant, Sampo Media)

Wiktoria Pelzer – Managing and Artistic Director, Stadtkino im Künstlerhaus & Admiral Kino

Eric Franssen – General Manager, Palace, BE

David Kelly – Film Programmer, Lighthouse Cinema, IE

Marynia Gierat – Director, Kino Pod Baranami, PL

Metka Dariš – Director, Kinodvor, SI

MG: Where is cinema actually at right now? What is it that we need in order to move forward and how are we going to move forward? We're going to get different perspectives on the approaches that we need to take and come away with some practical ideas.

Eric Franssen – General Manager, Palace, BE

The Palace is a historic cinema in the centre of Brussels, renovated in 2018. We thought about our identity, we thought about our location, the comfort of our rooms, the infrastructure – we felt this could be summed up in a very simple way: the best films under optimal conditions. And on that basis, we defined the way in which we work. I can give you two examples.

Unlike current trends, we only show films, no alternative content, no series, no concerts, no yoga classes. We focus exclusively on the cinema, and we try to screen films the way they should be shown. A lot of cinemas changed to automation, but we did the opposite. We have a projectionist. Theatrical windows have grown shorter, there is a massive onslaught of platforms, changes in viewers habits – all these things already existed and Covid simply precipitated the trend.

When the cinema closed, arthouse films put on platforms didn't perform well at all, reinforcing the role of movie theatres. When we emerged from the lockdowns, we were in a quite powerful position vis a vis distributors in terms of defending arthouse films. Our negotiating power is now much stronger.

Metka Dariš – Director, Kinodvor, SI

Cinema is changing all the time – cinemas were always very adaptable. The change is from the outside. The essence of the cinema is something that we shouldn't change. And you really shouldn't change is change out of panic. After the pandemic, a lot of people thought they have to do something completely different. But your audience, if you know them, come to you because of that specific thing that you are to them. That's why I don't agree with Ben from the BFI – that cinema is a treat. It has to be part of their life. They cannot live without cinema. They have to come for the first time when they're a small child – two-years-old. Their families bring them and then they don't like it for a little time when they're teenagers and they rebel, but then they come back because it's a cool place and then they feel at home because they know everything, and they know people. Everybody on Saturday goes to the market to get lettuce and fresh vegetables – it has to be that type of habit. You have to go to the cinema because you can't live without it.

David Kelly – Film Programmer, Lighthouse Cinema, IE

I think it's the frequency of the events. The pace of recovery has been overwhelming in Ireland because we are probably going to record our biggest ever year for admissions and box office this year. It hasn't come without a lot of hard work and a lot of events. Every single weekend we're doing events and if it's a new release, we'll try to add value with Q&As or intros or a party or a double bill. The younger audiences really respond to events – Letterboxd / TikTok generation are coming out for Powell & Pressburger. The younger audience are really driving that recovery for us.

We also need to listen and be involved more. Five years ago, we could predict things like the weather. But right now, even the booking process – the window of pre booking, has shortened completely. On a Friday five years ago, if you think it looks like a quiet weekend, it probably would have been a quiet weekend. Now, you come in on Monday and a couple of extra thousand people

came in over the weekend that you didn't anticipate. We're relearning this year with regards to trends.

Marynia Gierat – Director, Kino Pod Baranami, PL

Watching a film in a dark room together with strangers: that's the essence of cinema. I think it still is the essence of cinema and will be for the next 100 years. At the same time, I do agree with David about the events. We have always done many, many events, but I'm pretty sure that we have done more in the past two years, after the pandemic. Brainstorming is also part of the fun of our work for sure, but the challenge that I see now after those couple of years of really huge work, is that we have to do more all the time. We have to be more active, we have to be more creative in our programming, curation, marketing ideas, more flexible to react to problems, to challenges, but also to opportunities... we have to do more of everything. The word more is hanging over us. And it takes energy out of us, out of our teams. So, I think the challenge for the for the future of cinema is to deal with those two things: the lack of time and the lack of energy.

I want to focus in in my cinema, for example, automation; how some things can be automated in order to get more done in a simpler way so that the team – who are a small team and very often overwhelmed – so that their lives is are made a little bit easier. To use new technologies, new tools – one of my personal inspirations is always Javier from CineCiutat, using cool tools to simplify the life of a team, to make communication within a team, more reliable.

But the second problem that I mentioned is energy – the energy that we all have to have for those ideas, to brainstorm, to still find fun in it. Perhaps coaching to maximize their performance, to find their strengths, their talents, to support them. Events – we will have to continue to do that, but we need to have more support for the team: to work on their skills, train them, teach them how to do those things in a simpler way.

Wiktoria Pelzer – Managing and Artistic Director, Stadtkino im Künstlerhaus & Admiral Kino

We also do distribution. We release 15 titles a year, roughly. And then there is the cinema – Stadtkino is a single-screen cinema with 285 seats, and I would call it hardcore arthouse programming, what we're doing there. Then we took over a new cinema, the Admiral Kino, last year. It's also single screen – which is very specific in Vienna, we have a lot of single-screen cinemas – and it has 80 seats. It's a neighbourhood cinema, mostly second run and we have a very strong feminist focus in that cinema. Both cinemas have their own identity.

We're showing films but are also a sort of a social hub. The title of this panel, 'No Looking Back' really triggered me, because I really hate when it comes up, "that we've been doing it like that all the time, so we're going to keep on doing it the same way." What you're saying is that we have to keep innovating. But it's a very fast world and there's so many communication channels and I'm inspired by so many things. So, I'm gathering a lot of ideas here, for example, but, at the same time, I'm hesitant – because I know that that's going to be more work for everyone. We have to innovate, and we have to work on all these things. But you were also pointing towards the topic of mental health and are the team able to manage all of that? Don't get me wrong. I, I really get super excited about new ideas, but you also have to think about how you can implement it and is it sustainable, and what tools will help. But you also have to find time to learn to work with those with those tools - the training and skills element is very important. Is it the current environment or are we just moving forward – progress for progress' sake?

It's not just streaming or television that is a competitor, it's the restaurant, the theatre and so on. We have to always be on top of things. So, you can be two things: you can be traditional in the way of showing films, but how you communicate about them and how you're creating a community is innovative. We brought Non-Stop Kino (subscription model) to Austria and the core thing for me was not pricing, it's more accessible for people, and really creating this community – wanting to be together, wanting to be part of something. This is the strongest argument that you can have as a cinema: you want to be part of a community.

EF: When we organise events, it's a lot of work. When we do all this editorial work, it's a lot of work as well, but we're having good fun, too. A very important element of our working environment is to be able to have fun, to challenge ourselves as well. So, this is the positive side of things. But, to give you an example, we've got, in the summer, a programme called Sunscreen. We show about 50 films over six weeks. It works very well. We do 40% of the market share of our house in Brussels with this programme. When we reached the end of this programme, when we tot up the accounts and realise that, once you've paid everybody – for the film, the people – you've made €5,000. So, it's not very profitable. On top of that, you've also got people who are tired. Usually in the summer, you're resting here. We're not resting at all. It's the busiest period of the year. So, we have to scale things back a little bit. You constantly have to assess what you're doing to avoid burning people out.

And it's true that we need to listen to the audience. But we also have a role to play, as culture disseminator. We need to have our own certainties and beliefs, not just follow where the audience wants us to go. We also need to impose some things. If you only listen to the audience, you will have a limited number of movies. That's not what we want. We want to show a lot of movies. If you only listen to the audience,

WP: There are some films that maybe you have to let them go, because you've been waiting for a long time and trying to advertise them, and nobody will come anyway. I have two programmes in my cinema that I'm letting go now because, I feel, we tried all the ways to communicate it to audiences. Another programme for small kids took 1.5 years to attract the right audiences and now it's working super well. So, it's also sometimes about different paces that you have in your cinema. If there isn't an audience, you need to accept that and mix up what you do in order to reach those different audiences. It's also about leadership and supporting your team. Leadership might be something for the future, for Europa Cinemas to think about.

MD: We have to limit how much our staff are doing and list the requirements of energy and resources. We have categories and we have four projectionists because we have so many projections. We have 13 festivals per year, but we also have a workflow. We have our tasks set out so that everybody knows what they're doing. The most important thing is that we really love each other. We have this common goal: we respect each other. It is a belief in what you're doing.

SESSION 6: Is the film ecosystem ready for change?

Moderated by Michael Gubbins (Consultant, Sampo Media)

Mette Schramm – Manager and CEO, Empire Bio, DK

Valeska Neu – International Sales Manager, Films Boutique, FR/DE

Mark Cosgrove – Cinema Curator, Watershed, UK

Christian Bräuer – Managing Director – Yorck-Kino GmbH & Chairman AG Kino – Gilde e.V., President of CICAe, DE

Algirdas Ramaška – CEO, Vilnius International Film Festival and Kino Pavasaris Distribution, LT

MG: It's not just cinemas solely in charge of their destiny; there is an ecosystem out there. We need to see ecosystem in a broad sense here – we're talking about a film value chain, but we're also talking about relationships with audiences. We're dealing with the distribution system, the way that films are made and consumed. So, streamers are in there as well.

AR: The stakeholders in this industry is everybody. Absolutely. It's the producers, filmmakers, distributors, exhibitors, public partners, sponsors, partners and suppliers and the audience in general, schools, kids, politics, it's everybody. I think there is a lack of understanding. The word that we have to take from here is togetherness.

We have to talk with each other, about digital, AI, everything. But in an old school way: meeting person in person, to talk and listen, hear and learn from each other. I think the key challenge is how to make this environment and build trust so that people can be open and sharing. This conference is an absolute perfect example of being together and sharing and being open, and this is crucial.

An example – an hour ago, I met a producer with a film about Ukrainian kids who were kidnapped by Russians. And it's a really, really hard topic. It's really sad. And I said, 'But did you think about the audience – because you will put a lot of effort and resources and you will talk to these kids and it's very hard for them to talk. But then if there will be no audience, why did you do it?' And he's never thought about it. I said, because this film will be very depressing and very sad. People might decide not to see it because it's just too hard to swallow. You have to think about that. There should be some hope. People often give the product to the cinemas, but now you have to bring the audience. A lot of filmmakers are artists, and they constantly forget about that.

It's also about data and knowledge from the audience. This is where the connection with the audience happens, so this knowledge should not only stay in the cinema. Somehow, it has to get back to the roots, where the films are made. There's too much rivalry, but we need to work together. Making a difference and inspiring communities will come with profit as well.

MS: I think it's very important that the distributors and exhibition work together and it's even more important now because there are so many films on the market. The smaller distributors really need help from the cinemas – it's very important that we work together. It's getting tougher – if you looked at the overall ecosystem, it's giant films up here and small films down here, now. That middle space that used to be how most of us experience arthouse film, but that seems to be a problem at the moment. From an economic point of view, there's an issue. The big films are bought up long in advance and the small films, too, but that middle ground feels like it's empty at the moment.

A lot of things are pre bought either by Streamers or by distributors with more money. We actually started the distribution company to assist the cinema in getting more interesting content. In the beginning, we bought films at festivals, but it's become so expensive that we don't anymore. We buy them in between festivals – what's left over. There is always something you can pick up, but to compete with the other distributors on the festival circuit has become almost impossible.

There are so many things that disappear so fast, but you can't be lucky. We distributed a lot of domestic Danish films, and it turned out to be really interesting. The add-on for our cinema, if we had the distribution of the film, was the gala and the talent – so everyone had to come to our cinema and not to other cinemas.

MG: Valeska, you've been a journalist and you've been in production – you've got a kind of broader view; does that notion of now a need for different thinking about the way we work together, could it unlock positive opportunities?

VN: As a sales agent, we work together with everybody and we need to listen to the producers, the distributors – we are not so much in touch with the cinemas, but we listen to what the distributor say to us: what does work, what does not work.

I do not agree with Mette that the little gems don't exist anymore – I think these gems still exist. The problem is people cannot make money from that anymore, because the campaigns for the bigger things are so huge – most of the attention of the audiences go to these films. So, that means these films stay longer in the cinemas as they have more advertising, more reviews and so on. The smaller films they just cannot compete anymore, especially without funding.

MG: Are you saying public funding needs to be spent on how some of those films that have been produced actually reach audiences?

VN: Yeah. In Europe, it depends very much on the country – if there is funding for distributors. I know that in many countries it's not the case. Some countries have support from their national film agencies and, yes, I think they should be supported more.

MG: If we talk about this ecosystem, is it ready for change? There are films that would potentially have reached audiences before and, and public service broadcasting may have been played a big role in that, maybe DVD was a more manageable and easier thing to work with than streaming – have we reached a stage where there what's broken is economic rather than cultural?

AR: Maybe we should rethink the funding schemes. When the filmmakers are making films and they are applying for funding, there are official and unofficial rules that you should tick. I think maybe there is a misunderstanding that we are trying to face a social injustice or some really hard topics, thinking that if we show this on the big screen, we will change this. But all the films are becoming social dramas – an overproduction. Maybe we should rethink this kind of model and think about the audience. I believe everybody in the audience would agree that we need more positive films.

Not just cheap comedies to make money – but we have to go in the middle, everybody is desperately looking for audience films.

MG: What is it that's pushed this market into where it is? Is it the streamers?

VN: I think it's a mix, of the streamers – I have the impression that distributors or many distributors are more open to bet on one film that will have big revenue instead of buying three films and divide their spend. Everything becomes more expensive now, not only for the distributors, but for us as well, we need to invest a lot more money than we did before.

It's a systemic problem in as much as the economics is now fixed. It's there. It's something you just have to deal with.

MG: There is a pipeline issue. I've yet to see a resolution for other than what you're saying is, perhaps the public money should be less focused on just production and more focused on how that connects to markets. A couple of years back they were saying that the films that were being made through national production schemes weren't getting into cinemas. Maybe what they should be thinking about is investing in the audience rather than in the production side. It didn't go anywhere.

We've got a linear value chain with development over here and the audience all the way over there. Logically, it should be circular, but as long as you have the kind of tax incentives for production and

automatic schemes, you're going to produce more and more films. The film ends in front of the audience, but I would say this is actually the starting point.

MC: In the UK, we've got the Film Audience Network, which is a more decentralised exhibition and development network. But now the BF I have got a talent development network, and they map that onto some of the exhibition side. So, at Watershed, we are the Film Hub Lead Organisation for the South West of the UK, based in Bristol. We're running the cinema, Watershed, but we're also supporting audience development initiatives across the region and with partners nationally. Then, you've got, mapped onto that, talent development network. In the audience, you have filmmakers. And they don't just come from London, they come from all over the country and it's a way of identifying that talent.

Mark Jenkin, the director of *Bait* is the perfect example of somebody that's come out of a regionally developed context. He went on to have great success in Berlin and at the box office. And what he absolutely advocates for is the cinematic experience. There is a relationship between the cinema and filmmaking in this ecology.

Pre-Covid, we were on a growth trajectory, but post-Covid, people don't buy advance tickets anymore, and after being at Watershed for 30 years, there was now a young person from the curation MA, and they wanted to screen *Wings of Desire*. And I was so familiar with that film that I just felt we've shown it, and recently, but we screened it, and it was our highest grossing film that weekend. So, I realised, 'I've been here long enough: young person programme the cinema.

And I talk to the audience in the café/bar – because that's what audiences want to do. The film is a springboard for all kinds of conversations about what it is to live in the world in 2024.

But the films that I would view as our bread and butter, I now have no confidence in. How do we make the smaller films work better? We're in the early stages of working with a marketing person – Action Marketing Works [<https://www.actionmarketingworks.com>]- about using data analytics and with groups of us from both exhibition and distribution, putting money on the table, saying – through early awareness activation, can we make these films work better in the marketplace?

CB: Distributors are still our key partner within the film industry. But the pandemic was an acceleration of trends. A lot has to do with the digitisation of movie theatres. It's way easier to produce movies, but also way easier to release movies. It's also a big advantage for us. We have more diversity of films, more choice of films. But it's also a risk

Right now, everybody is talking about A24 and Neon, even German distributors. They are focused on a specific audience, and they do it well. They don't release more and more movies. It was always difficult; it will always be difficult because we are living in a high-risk market. We need a holistic approach. If you just produce a movie and don't invest in marketing, it can't work.

What have we seen, since digitisation, is more and more movies coming to the market, but the marketing spend per film is less – if it won't be as long in theatres, why spend as much? It's logical, but it's also a self-fulfilling prophecy that it doesn't work. I'm part of a film distribution company in Germany. And if I look back on last year, they did a really good job with *Anatomy of a Fall*. It's not just because this film was a sensation at Cannes, it's also momentum – they worked a lot with the press.

It's also about data, in my opinion, nothing works today without technology. It's about working together and it's about audience development. We need distribution companies, but we need

cinemas. Small distributors can't really invest in audience development, so it's our job and we are doing it within the Europa Cinemas Network. In my opinion, it always was our mission, and we need to invest more in audience development. It's more complex and expensive today because before we had one or two local newspapers and one or two public TV broadcasters, but traditional media and social media are both important.

There are globalised strategies, but we also need data on who is in our neighbourhoods – audiences and brands. Audience development is trust building.

VN: We've always been, but maybe nowadays we're even more, dependent on the festival selections, for visibility for films. Sometimes it's just a matter of timing.

MS: We try to attend smaller festivals, because things are quieter, and you can actually talk to the sales agent because they have fewer customers and you can meet people on a more personal level.

Wiktoria Pelzer: The Producers Association in Austria, for example, doesn't support us money wise when it comes to NON-STOP KINO, which is silly because the subscription model helps smaller films. I would like to say something more provocative about risk taking. I'm asking myself, 'who's taking the risk?' I, as a distributor take risk, I think you, as sales, already take risks. But maybe we talk more to each other about how we can distribute this risk a little bit better, because I don't think that there is one single part that is taking more risks than the others.

I also have to give the smaller film the same marketing as the bigger film – it's how you find them at a much earlier stage. I think that has been effective for us when we want to buy something. We don't just say, 'We love this movie, we want it,' but we have done the whole marketing campaign and finding the audience in our head before we make an offer on a film.

MG: What you're saying is that you want production to be in tune with or in conversation with how those things are marketed.

MC: I think there's a way in which we've got to be more playful but also sort of responsive and experimental around scheduling, programming and responding. A film we'd keep showing week after week would suddenly come out of nowhere and become the big hit. But it didn't start off as a big hit because there's pressure now – with the turnaround of new releases. The audience is bewildered.

MG: Is the film ecosystem ready for change? No, but if it were, great things could happen. What would you do if you could change one thing?

VN: I would give more money to audience development and film education.

CB: If it comes to distribution, it's about focus. If it comes to us, it's about audience development. And if it comes to politics, we need a holistic approach. The second point is regulations, the biggest threat for independent European movies would be a collapse of the territoriality.

MC: More meaningful, nuanced conversation across exhibition and distribution to engage and activate the audience earlier in order to make the smaller films work better.

AR: More togetherness. The Europa Cinemas boot camp training we had was an amazing example.

SESSION 7: 20/20 Europa Cinemas Arthouse Tales / Part 2

Moderated by Metka Dariš (CEO, Kinodvor, SI)

Janeta Henzele – Kino Bize, LV

Marco Fortunado – Cinemazero, IT

Ryan Keating & Jaroslava Kolibačová – Edison Filmhub, CZ

Cenk Sezgin – Cinemarine, TR

Hrönn Sveindóttir – Bio Paradis, IS

Juergen Luetz – Odeon Lichtspieltheater, DE

Sigrid Butlers – Elektriteater, EE

Janeta Henzele – Kino Bize, LV

When Kino Bize first was founded, in 2012, it was a part of a cultural centre/bar. In 2015, it moved to a new location, but it wasn't a cinema. Maurice, the founder, rented an apartment and turned the living room and the bedroom into the cinema hall and the kitchen into a bar. The rest is what you see today. After eight months of really hard work, Bize finally opened its doors. It's still a cinema with the warmth of the home because it is in this apartment.

The cafe was a part of a community project using recycled materials to keep the costs as low as possible. Building sustainably wasn't that trendy back then, but it was the only option. In return, it did give the space character. Almost everything is repurposed. For example, the bar is made from old wooden walls and the shelves and framings – even the glassware is borrowed from someone's grandmother.

There are five of us and, most days, there's just one person operating the projector, making drinks, selling tickets. For our annual celebrations, each year, we pick a director and dedicate a week to their work. We collaborate with artists to make souvenirs for our anniversaries that we also ship worldwide. It's really important for us to connect with the younger audiences – through family screenings, workshops, with schools and universities.

Last month, we held Baltic cinema data training thanks to the Europa Cinemas boot camps initiative. That was a very rewarding event and really important for us to gather together in one room. There is no railway but there is potential for Baltic collaboration in the cultural sector.

During Covid, we launched a VOD platform that is still active, mostly in the summertime, and which is a good way to stay connected with the audience. In 2013, we also became film distributors. We release one or two titles a year. So, it's a very small operation. Whenever it's possible, we take the cinema outdoors. We don't have a garden but have done film screenings in a tent at the biggest music festival in Latvia. We're all about laid back, welcoming spaces where people can connect and feel at home.

Marco Fortunado – Cinemazero, IT

This is a cinema that wants to become a cultural place. Cinemazero is in a small city in Pordenone, the Northeast, near Venice. Everything started in the late '70s when a group of enthusiasts decided to create an association that started from zero: zero budget, zero experience, only passion. We had five cinemas in Pordenone, but they were all showing the same movies. This desire to change helped us. Now we have four screens with an average of 100,000 admissions a year; 150 different movies - most of them are European, and over 1,000 screenings a year. Cinemazero also has a media library with a unique collection of Pasolini's movies. We are also part of Tucker Films, the distribution company that distributed *Drive My Car* last year.

We have three major values: the first is sustainability, which means that we have concrete actions and investments in our infrastructure – we've made a commitment with our audience. We've created a Green Manifesto with best practice. Our second value is inclusivity. This is something we care strongly about. We have an inclusivity manifesto for respect, and we stand by it. It's an essential element to protect diversity. The third is innovation. To take risks, challenge ourselves, and to experiment.

We split the young audience into two segments: a very young audience from 0 to 15. We have initiatives for media training for them to understand the audio-visual language. We bring them to the cinema. Then we've got the 'young club', which is for young people between 15 and 25. And we ask them to make a commitment. They are involved in the programming of the cinema. They are part of the jury of our festival. In 2017, we opened a fourth screening room, which was very important for programming, but the technical quality wasn't very good.

We looked at the space and it was an ugly square outside of our cinema. There was a car park that was only used by a limited number of people. We wanted it to become a community space again. Our project now is to work on this multifunctional place, with an extended foyer that goes out of the cinema all the way into the city. The cinema is not just a place for culture but also a social place. you managed to say twice as much.

Ryan Keating & Jaroslava Kolibačová – Edison Filmhub, CZ

Edison Film Hub in Prague holds festivals, film nights, special events, collaborations, parties and our amazing merchandise – which have all been successful. And we're always thinking about new, exciting events and ways to get people into the cinema. Edison Film Hub has been around for five years – the building was originally an old electrical station in the centre of Prague's beautiful old town. We have a cafe and one cinema hall with 75 seats and six people in our main team. 90% of our films are screened with both English and Czech subtitles. We are also dog friendly.

Our cinema is owned by film Europe, a distribution company and VOD platform in the Czech Republic and Slovakia. We buy films from Europe's big festivals and screen them in events-based programming and festivals. We also aim to bring context to film through our events: discussions with critics, scholars and Q&As with directors and actors. These are either in person or online on Zoom. The pandemic obviously taught us how to work very well with Zoom and has really given us a lot more opportunities as well.

Our cafe is just as important as our cinema hall. We believe that movies have to be paired with great drinks and coffee. We with high quality local businesses and we often create special drinks to match the films to add to the overall experience. We have uh three main film festivals which take place in our cinema every year: Scandi, focusing on Scandinavian films; Buchan, which is a selection of films from Berlinale, Venice, Cannes and a new festival, which we started last year. Al Kamar is our newest festival, focusing films from the Middle East and North Africa, which was born on the night of the Blue Super Moon last year.

We usually have a mix of contemporary films and classic films with discussions and other cultural activities in the cinema and cafe. A big part of Al Kamar is our moonlight markets which takes place on the steps outside the cinema cafe every evening at the festival. We collaborate with local businesses originally from places like Iran, Syria, Jordan, and Iraq to sell delicious food and gifts.

Originally, we started with regular programming, but after creating a film night for foreigners every Monday – everything with Czech and English subtitles, we found that foreigners in Prague generally

had a great appetite for films that were English friendly, and they've since become one of our most popular groups. Events are the way forward including feminist film nights and a 'sip and paint' night, where we screen a film about an artist and people paint and drink wine in our cafe before the screening. The distribution company has invested in silent films which we screen once a month with live music.

Recently, we had a screening of *Scott Pilgrim Versus the World* with a party, a video game in the cinema, and live tattooing. Over 30 people left with tattoos. I'm not sure how they felt in the morning... We are upcycling our banners to make merchandise including backpacks, laptop bags, wallets by made by a designer in Zlín. The coasters in our cafe are also made from those banners, and we sell film books, magazines and t-shirts.

Cenk Sezgin – Cinemarine, TR

The city where our brand was born was all lifeguards and sailors and water sports. This is why we called our brand Cinemarine. It was 1994, and we opened at Club Marine on the rooftop of the building. It has a stunning view. The place was a total wreck, but we transformed it into something special.

We bought a giant TV screen, with surround sound, put in some seats and, with the audience, we thought: 'we have a cinema.' We had visitors from a corporate office who said we could not make a cinema like that. So, we had to change our system. We were on the third floor of the building and people couldn't find us. We began outdoor screenings, which were very popular, not just on the Belgian side but also on the Turkish side. Then we decided to play a larger role in the Turkish Cinema exhibitors' development. The Turkish Cinema Exhibitors Association was born. We've had the integration of VPF (virtual print fee scheme) to Turkey, but I'm most proud of the one million students involved with the cinema project: we brought every elementary school student in Turkey to our cinemas.

The Ministry of Education organised the students and the Ministry of Culture provided the films. Over three years, until the pandemic, we welcomed three million students in our cinemas, nationwide. For Turkish Film Week, we put screens everywhere possible: the historical castle boardroom, beaches, mega yachts, city squares, streets, hills, valleys, and they all became our cinemas. This year, we held the 12th Turkish Film Week on two continents simultaneously: in Asia and on a Greek island. We host many Turkish film industry professionals and artists in both continents.

Many cinemas closed after the pandemic, due to earthquakes or economic crisis, but Cinemarine made Europa Cinemas' '50 giants of exhibition' list. I personally design and manage the construction of all of our cinemas which makes it easier for us to create and implement innovative ideas.

Hrönn Sveindóttir – Bio Paradis, IS

I run the only Art House Cinema in Iceland, home to 370,000 people. It was founded that when the last cinema in downtown Reykjavik closed in 2010, and the guild of filmmakers in the country took it over as a non-profit. Bio Paradis does everything that the commercial cinemas in Iceland don't do: we screen classics, arthouse films, documentaries and shorts, host many festivals, countless film events and offer a very ambitious film literacy programme for Children and young people.

I want to talk about our marketing. One of our first challenges was screening classics, nobody came to see them, and the license is very expensive. So, we started having local artists make new posters for each film, releasing them on social media. Now we have hundreds of posters, and we have a gallery full of posters. We localise them and have a lot of fun with it. To widen the audience, we

create stunts such as singing outside the cinema, short videos with our staff about supernatural events to coincide with *The Good Spunk Miracle* (documentary). We also hired a psychic who was seriously interested in exploring all the spirits and talking to dead people in our cinema, so she started making videos. This woman did live broadcasts from the cinema, and everybody was watching it. When we finally premiered this documentary, she had a live séance, and it was sold out. We even had some therapists to prescribe it to their clients. The headline became: 'your doctor wants you to see this film.' And it's the first film ever prescribed by a doctor in Iceland.

When we first premiered *The Substance*, somebody fainted, and another person had a seizure and started vomiting all over everyone. It was a really immersive experience. My PR person said, 'Don't talk about this ever to anyone,' but we just couldn't. I was worried talking to the media about vomit bags, paramedics on standby, not coming if you're vulnerable, and of course, it was sold out every screening after that. It was like mass hysteria. We called about 10 Ambulances, which caused a discussion about all the films that used to be dangerous, films that were banned, which was great. We had a dog screening the other day, but a really famous cat went missing and it dominated the news – and we have national elections today. So, we have cat cinema tomorrow with *Flow*.

The commercial cinemas have been in decline and closing. But we are actually in a growth period after Covid. We have a new series called 'An evening with a filmmaker,' that is not a typical Q&A. It's more, 'What is your first film memory? Why do you like film? Why do you make film?'

Juergen Luetz – Odeon Lichtspieltheater, DE

Our cinema is a building that dates from 1954. It was built during the war and rebuilt afterwards. In 2002, we bought it, and since 2004, we have been members of Europa Cinema. We have 370 seats and in 2008, we twinned the room because it was too big – 220 seats and 90 seats.

When we turned 20, we showed excerpts from the 140 films that worked the best in our cinema. We have around 90 screenings with filmmakers and guests every year. We have children's workshops. Here you have a few examples. With colleagues in Freiburg, Hamburg and other German cities, we created a German cine group. It started with 45,000 admissions but now, after twinning the cinema, we've reached 170,000 annual admissions.

Sigrid Butlers – Elektriteater, EE

Elektriteater came into existence as a fun hobby to do with a group of friends in 2011 when a team of three started screening films in various places in the city of Tartu. Our screening hall is located in the historic University Church on the third floor. So, after you buy a ticket, you have to climb a breath-taking (literally) staircase to reach the actual cinema. It was initially for cultural activities, but we were kicked out by a Christian school. So now we share the building with a storage facility for university archives. We have 120 seats with state-of-the-art equipment and with screen films at least twice a day, seven days a week. We have school screenings and various events; we operate a mobile outdoor cinema and have pop up screenings all over Estonia including drive-in cinema or location specific outdoor screenings (the most profitable part of our business). Our programme is Estonian and European feature films, documentaries, animations, short films, and arthouse classics. The most popular events are moderated conversations with filmmakers, and many festivals, Black Nights Film Festival, of course, but also smaller ones like Tartu Fest Heart Fashion Film Festival, Hungarian Film Nights, Ukrainian Film Club to name just a few.

In 2022 Elektriteater started its educational programme including an array of workshops ranging from simple stop motion to voicing classic film clips. And every summer, we have a very popular three-day cartoon camps for children between the ages of 7 to 12. The idea behind it is that you should treat children and teens with just as much respect as you do adults. So, not a single school

screening starts without an introduction. We have also extended our meet the filmmakers series to young audiences and believe that if a film has been made for children, they should be the ones to give their perspective on it. These events are moderated by children.

SESSION 8: Open Slot – Case Studies

Moderated by Michael Gubbins (Consultant, Sampo Media)

Andres Kauts – Managing Director, Kinola, EE

After more than a decade as the manager of a cinema, I have dedicated my time to building the ticketing system that we started with the cinema. First, we wanted to do 'Food Cinema', selling a movie with a three-course meal. I was unhappy with the generic, available systems through third party operators, which were expensive. We did our own for one weekend and it was easy, so we kept it. But we always had the feeling that we really need a good ticketing system, and nothing was available in Estonia or for the small cinemas. When I looked around, I always felt there was nothing in the world, either. The feeling kept bubbling inside, that we should do something ourselves.

One day, we got the money, from Tartu City Council, which has an amazing - the best - culture department in the world. And a few years ago, they decided to introduce support for innovation and investments. We received €10,000 and made the first prototype of an actual ticketing system. This got the proof of concept working, but it turns out that it is very, very expensive. So, we applied to Collaborate to Innovate, and received a fair bit more money, gathered together with partners from Estonia. There are five Europa Cinemas members in Estonia and four of them came together for that project. Thus, Kala was born.

It came from our own needs. We wanted to do something that would actually make life in the cinema easier, and that would understand the processes that are in the cinema. So, it has ticket sales both in the ticket office and on the website. It has a film database, and you can import the films from the internet so that you don't have to put all the info in manually or Google and copy. It has a calendar to schedule the movies and you can count work hours. And of course, lots and lots of reports, which we all need, and which can be integrated into the website. The Europa Cinemas report, that used to take weeks to produce in last few years in our office, now takes half a day.

We started with four cinemas. Now we have eight cinemas in three countries. Half are them are Europa Cinemas members. We are hoping to have 10 cinemas in four countries soon and have sold almost half a million tickets. Feedback is positive and the cinemas are happy. Our pricing model is a monthly price: for very small cinemas, €100 a month, and for a reasonable size cinema, €300 a month. We don't take any cut on the sales. It is the same percentage, if you sell online, for bank and transaction fees. If the money goes to us, then we ask for transaction fees back. But we don't take our percentage from the ticket sales because, as a cinema, I never liked that idea.

Toni Espinosa – Co-founder and Manager, Cinemes Girona, ES - & Beatriz Patraca – PhD in Social and Cultural Anthropology, Autonomous University of Barcelona, ES

This analysis was conducted by anthropologists at the University of Barcelona. Cinema Girona is in the centre of Barcelona. It has three auditoriums and will be 25-years-old next March. we were pioneers in 2010 in terms of alternative content and Catalan language cinema. A few years later, we conducted this anthropological study. We show Asian, Latin-American films, European films and national films, and pay a great deal of attention to young audiences. As an example: in November, we showed eight films, welcomed three festivals and 70 special events were organised. 6000 students from schools between the ages of three and 16 attended the sessions.

Last October, our audience had grown by around 50% since 2019. We felt that marketing, which is important, is based more on trends and fashion, but we needed something more specific. Rather than impressions, we wanted audience data. We conducted a mixed analysis, both qualitative and quantitative. Over 1800 people were questioned and there were two focus groups, one comprising experts and another young people. We analysed sociological profiles and geo located people. We wanted to look at the percentage of people coming from the neighbourhood because, after all, it's a neighbourhood cinema. What we noticed is that rather than talking about competitors, there is a sort of a distribution in the use of various spaces in Gerona. There are other cinemas located nearby and although the content is mostly for loyal audiences, there's a share of streaming platforms in overall film consumption.

Consumers over the age of 45 watch most films in the cinemas in Gerona. People visit the cinema and then go back home; it's not to go and meet people – they go to the cinema. Many are motivated by habits and routines. There are frequent viewers who also go to exhibitions, the theatre and bookshops. And then there is a bigger set of consumer patterns which comprises video games and other folkloric, more traditional events. The young people are the ones who like these new artistic forms, and they are the biggest consumers. They talk about the need for new experiences and go in for a wide range of cultural events. What struck us, is we don't think there's a cinema for young people.

We realized quite quickly that we had to improve the experience in our cinemas. We bought new laser equipment and installed a Dolby system. In Barcelona, there aren't a lot of arthouse cinemas with Dolby. It's very important to make these technological investments. We think arthouse movie-goers are entitled to the best technological quality. We want to improve our digitisation strategy to reach out to the community. The study has highlighted our typical audiences, and now we can better understand what the consumption of culture is like in Barcelona.

Giacomo Caldarelli – Co-founder, PostModernissimo, IT

This is a project that was financed by the Erasmus Program. PostModernissimo was set up 10 years ago. It was set up by the group Anonymous Social Enterprise. This is a project which was designed to give the community a place – an urban area – to provide a cultural offering for the city. We worked a lot with schools and with students. After lockdown, we had new challenges and new needs: we needed to develop new audiences. We put a call for tender and chose Erasmus Plus which we felt was the most suitable tool. Erasmus Plus, as a means of financing our activities, enables us to work in co-operation with institutions and organisations that don't usually speak the same language as exhibitors. Likewise, this gave us access to resources that we couldn't otherwise obtain. Thus, we could transform the very role of the cinema from a place where people come to see a film to one where they have a good time. The cinema becomes a place which really creates meaning. We have tried to develop a European network, a transnational network that meets the criteria of Erasmus Plus. We looked at the Europa Cinemas pages and at the things that had inspired us in previous Europa Cinemas conferences with a view to contacting these other cinemas. We work with a cinema in Sweden, Finland and Milan, another in Zagreb. We set up focus groups in each locality and share our skills in film education, organising workshops for students, families, educators, and social workers. We reach out to our local communities, and work on a European and international level.

Thierry Baujard – Co-founder, Spielfabrique, FR-DE

I've worked in cinemas for 20 years and, eight years ago, I moved slowly into video games. We want to be more active in this sector, but it is not so far from the film industry – but a bit different. Kino Games is a project that we started a few months ago, co-funded by the European Commission in audience development. There have been trials in other countries – in France last year, there were

100 events about video games in cinemas. The first thing we're trying to achieve is attract young people and a new target audience.

Today, people who play video games is 100% online: they don't have a place to meet. After Covid, we wanted to create a social place for the gaming communities. This can optimise occupancy of the cinema and, at the same time, attract gaming communities. The question, of course, is how to make a business model out of that. First, the average age in Europe for gamers is 31 years old; 51% of Europeans are playing games and 45% of them are women. But which games? There are 50 to 100 new games every week, worldwide. There are a lot of what we call 'casual games' – very small games, free of charge. But you have also have bigger games that constitute €200 billion per year, which is more than music and cinema together and it's still a growing market.

We are looking at how we can position a new player between the people in the video game industry: we're talking about developers, which are producers in film terms, and game publishers, which are more like distributors. We need to develop the market to access local gamer communities. We have a catalogue of video games and want to do more than just events. We have five partner cinemas in Germany, Ireland, Slovenia, Belgium and France – only one from Europa Cinemas, in Belgium – but we have different size cinemas in cities and the countryside. We also have a film festival in Strasbourg, and we are evaluating our event feedback. In Strasbourg, 47% of the people never came to the cinema before their gaming experience. We are in contact with more than 900 studio game studios in Europe and have access to a lot of European game studios that want to present their projects. We have created a platform where we put all the information about the events, the feedback and are obviously interested to have more cinema join. We hold the rights for 46 games.

Baris Azman – Head Visual Artist and Editor, KINO Rotterdam, NE

We've made custom movie trailers since the opening of KINO Rotterdam about eight years ago. We are close to 100 videos and 50 original videos on our Vimeo site. 90% of those are our own trailers and maybe 10% are interviews with filmmakers, plus one documentary that we made about the lost photographs of *Apocalypse Now*. Our team consists of three people: the creative director, marketing director, and me. Making custom movie trailers is the strongest tool we have in our marketing toolbox because it's visual, it's audio, and we screen the trailers in our own cinemas. So, we have the full attention of the audience when they go to see a movie. For us, it's a really quick and easy way to show what the programme is going to be about.

Currently, we have a film programme for the Czechoslovak New Wave. Our programmes were typically for three to eight titles, but we've upped it up to 14 film titles. The only thing that connects them is location and time period: the 1960s in the former Czechoslovakia. It's up to me to make a tasteful soup out of all these different movies. I go through every movie frame by frame and look for connections between the movies, or if there are striking images. I'm also thinking about music. Sometimes it's very easy and sometimes it's very difficult if we, for instance, have a programme by Wes Anderson, who has a very distinct style and soundtrack. But, if the only thing that connects the film programme is something like a location or a time period, then it becomes a little more difficult.

We find a visual identity for the programmes – we have mood boards, or we send each other images that could work. Then we have discussions together about the message of the programme. For example, the Creative Director can say: 'I want to focus on the playfulness of the movies, the exciting experimental nature,' and the Marketing Director can say: 'I would like these certain kinds of images to use as promotion.' And based on all of that, I try to create a graphic design for the trailer for what we call ads so that the ad copy and design is consistent. We do a lot more posters for the movie programme now, too which means we can have a really cohesive visual identity for the trailers.

For every non-English language trailer, we try to find an official translator (Google Translate led to gibberish). We try to be respectful of the movie – so we don't make it something else. And everything we do is to sell extra tickets, so the distributors get more money, and everybody is happy. But copyright wise, we have never had a problem.

SESSION 9: Summary of the conference and next steps

Moderated by Michael Gubbins (Consultant, Sampo Media) and Irene Musumeci (Marketing Director, Global, MUBI)

IM: From the workshop on trends in audience development, rethinking programming and events, we looked at presentations from various different cinemas, but also non-physical cinemas. We heard about a cinema that exists in Minecraft, and other ways of involving the programming of European films between virtual and non-virtual worlds. Don't be afraid to make mistakes!

- A general trend across the conference is the big resurgence of repertory programming, particularly for classic cinema, which younger audiences are experiencing for the first time.
- Some active work has been done in involving young audiences in curation. This is from staff, but also from the audience and the wider communities. There has been thinking around how to respond to the needs and interests of those communities without necessarily pandering to a broad interest.
- “Listening Mode” is also a phrase that has resonated. Listening doesn't mean you do exactly as you're told, but it does mean that you pay attention and you're influenced by what happens around you. And this listening mode is necessary for survival.
- There was a really good discussion around audiences, not being a fixed block – not thinking about young audiences as one monolith. We shouldn't make assumptions, we should talk to them, observe them, really pay attention to the data and the information that we receive about them.
- Creating connections between the audience and the cinemas by really showing what the cinema can do as an organization.
- The most valuable resource that we have is time. The challenge is not just they can be at home and watch a film, but they can also go out clubbing, they can go to a restaurant... so, what is it that the cinema does in the community that is unique and special?
- Through marketing and effective communications around events and through maximising opportunities and resources, you can create a unique event for your audience and localise your programming.
- Play: playing games at home, but also playing within your venue, making sure that the cinema is a welcoming space: not only a space where people feel they can come to think about big issues, but also a space to just enjoy themselves.

MG: The first workshop for me was talking about loyalty and subscription models.

- A demographic trend that went across the models that we saw from the Netherlands, Sweden, Austria and Germany: younger audiences will be price motivated.

- The older demographics will be at the cinema more (50-60+) so there is an economic consideration to have with the subscription model.
- Distributors have been enthusiastic on the whole: sure payments.
- Adopting Cineville in other markets has been supported by Collaborate to Innovate. It allows adaptation and change, and it's been essential in developing this model throughout multiple countries. There is financial but also exhibitor, project and operational support.
- Boot camps: if you need skills development, there is an opportunity.

IM: The third workshop, 'updating and upgrading communication, marketing strategies' was around the relationship between the organisation's workflows and how the organisation functions.

- Brand strategy and communication: a brand is a story – a story that is meant to energize, inspire, create community.
- Communication is unavoidable: all staff need to understand the mission, purpose and what the organisation stands for.
- If time is the most precious resource, how we can avoid wasting it? What tools – technological, especially – exist that could help us when budget and resources are low. AI was talked about and used in the creation of presentations [and writing of this resume]. It will not replace us; it will still need a human corrective.
- Cinemas are not just containers for content: they're incubators for ideas, debates, revolutions in some cases, and the cinemas are very powerful spaces because they are collective spaces.

MG: The fourth workshop was on inclusion. Two years ago, we launched the network charters on inclusivity and gender balance, and on sustainability and the environment. In this session, we looked at some of the practical ways in which action was being taken.

- We can bring people with disabilities in, using technology – another area where AI could make a difference.
- People don't want to give up on cinema, so cinema can't give up on them (when age comes into it).
- Actively working with audiences and encouraging people from different social backgrounds and ages works.
- Examples of creating pathways for audiences – Wolf Kino Germany & access>Cinema Ireland
- Creating collaborative partnerships is key.
- Using technology and architecture to enhance environmental sustainability – using data.

Where costs are increasing, and inclusion and environmental sustainability can feel like one-offs or project based, owing to financial support, there is still hope: the commitment from the network is to integrate this on a permanent basis. There are things – practical steps – that can be taken. Those 'small things' aggregate and, when integrated into your day-to-day, shows growth.

- Everyone wants cinema. It is shown in the research: people love the cinema, and they go to the cinema.
- For a lot of people, though, it is a 'special treat' and 'escapism'. That doesn't mean escapism content, but an escape from everyday: you are engaging with a world that is not your world.
- If it is a treat, our job is to turn the treat into a habit. It's an active process.
- We are competing for time. So, you've got to build awareness and data is the tool to use.
- Localisation works: partnerships, engaging with your audience.

- A huge challenge is that we are all always doing ‘more’. People are doing really exciting things – but it’s tiring. We’re working all the time; everything is an event. Rest is important, too, taking care of the wellbeing of the team as well as providing for the community.
- But cinema has always adapted. Streamlining workflow and logistics can help.

CONCLUSIONS of the Conference & Future Perspectives

Mathias Holtz – President, Europa Cinemas, FR

Alessandra Luchetti – Deputy Director, European Education and Culture Executive Agency EACEA and the Head of Department for Creativity, Citizens, EU Values and Joint Operations, European Commission, BE

Miila Norris – Coordinator, Training Boot Camps, Europa Cinemas, FR

Fatima Djoumer – CEO, Europa Cinemas, FR

- The conference felt positive after years of “doom and gloom”
- Impressed, energised and inspired by the work everyone is doing.
- Huge thanks to the European Commission
- Highlighting the importance of training and skills development: boot camps
- Success across the network in attracting young audiences
- Members of the network have proven they are proactive and solutions-oriented.

Miila Norris – Coordinator, Training Boot Camps, Europa Cinemas, FR

Europe is fragmented in terms of development locally, regionally, and nationally. Training Boot Camps are professional trainings done by network members for network members. We give you the financial and technical support, but you organise these training programmes.

Guidelines for the rolling fund are on the Europa Cinemas website: https://www.europa-cinemas.org/en/activities/Support_for_cinemas/training-boot-camps

We are looking for practical, solution-oriented training. It is not an industry meeting, nor a theoretical approach, or conference. This is ultimately about your local needs. Applications should be sent eight weeks before the training is due to take place. We typically take four weeks to assess applications.

Fatima Djoumer – CEO, Europa Cinemas, FR

On December 15th, we will launch the 5th edition of Collaborate to Innovate. The total fund is for €1.5 million as in the past. Next year, we will have an overall assessment of the five editions to see what improvements we can make to better respond to your needs.

European Cinema Night will have 85 cinemas in 27 countries participate, and some are in remote parts of Europe, which is significant. We have had this project with the European Commission since 2018, and it provides strong visibility for the Commission, the network and the films.

Fatima Djoumer gave thanks to all of the cinemas and speakers, Europa Cinemas team, translators, hotel and conference staff, technical staff, the moderators, photographer, blogger, Lithuania as a host country including the cinemas and members there, the Europa Cinemas board, and special thanks to both Nico Simon and Claude-Eric Poiroux.