

# A EUROPA CINEMAS



Cannes 2024

Network  
Review  
#43

Facts  
& Figures  
2023

Training  
Boot Camps

The Multi-  
Faceted Impact  
of Cinema



## EUROPA CINEMAS NETWORK REVIEW #43 - MAY 2024

President:

**Nico Simon**

Honorary President:

**Claude-Eric Poiroux**

CEO – Network Review Editor:

**Fatima Djoumer**

Deputy Editors:

**Nicolas Edmery, Nathan Germain**

Press:

**Charles McDonald**

[charles@charlesmcdonald.co.uk](mailto:charles@charlesmcdonald.co.uk)

Contributors to this Issue:

**Irene Angel Echeverri, Nicolas Edmery, Nathan Germain, Michael Gubbins, David Hancock, Noémie Levadoux, Geoffrey Macnab, Mathilde Narros, Adrian Preda, Lisa Püscher, Jean Baptiste Selliez.**

English Proofreader: **Tara Judah.**

Graphic Design: *Hartland Villa*

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© PAGE 114 – WHY NOT PRODUCTIONS –  
PATHÉ FILMS - FRANCE 2 CINÉMA - SAINT  
LAURENT PRODUCTIONS - Shanna Besson

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

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Europa Cinemas  
54, rue Beaubourg  
75003 Paris, France  
T. + 33 1 42 71 53 70  
[info@europa-cinemas.org](mailto:info@europa-cinemas.org)

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# Anatomy of a Recovery

It is always tempting to draw definitive conclusions from the annual box office figures published each year, and especially so following the health crisis and its deep impact on consumer spending and on the priorities and potential investments of cinemas.

And yet, the figures for 2023 show some promising signs. It is probably too simplistic to say that we are entering a “new normal”, as the picture is far from even across Europe. Some cinemas are still fighting for their future and some countries are struggling for their box office recovery, such as Greece and Hungary with respective decreases of 25% and 35% when compared with 2019. But, in any case, the figures achieved by the Europa Cinemas network in 2023 are not only promising but are almost back to pre-pandemic levels! Across the entire network, admissions have returned to 90% of the pre-pandemic figures while the rest of the EU cinema market has only reached 80% (Source: European Audiovisual Observatory, Berlinale 2024). Perhaps best of all is the return of younger audiences, to 96% of pre-pandemic numbers.

Another note of optimism: network cinemas continue to lead the way in terms of programming and diversity, with six out of 10 screenings devoted to European films and an average of 15 EU nationalities represented. The big winner in 2023 was *Anatomie d'une chute* (*Anatomy of a Fall*) by Justine Triet, rising to the top of the European box office with 1.1 million admissions in 781 theatres across the network.

Last year, a survey carried out among network exhibitors showed 72% of respondents believed they would “survive and thrive”. That confidence was not based on wishful thinking but on their ability to adapt to the changes and challenges facing the sector, in particular since the pandemic. The same survey revealed that 83% were planning to build their business around audience development innovation and events.



© Gerhard Kassner

Europa Cinemas – with the ongoing support of Creative Europe/MEDIA since its inception 30 years ago – has been working with the network to build an interconnected programme of incentives, initiatives and activities that will encourage members to share best practice and acquire the skills and knowledge they need to embed the changes in audience habits for a sustainable growth.

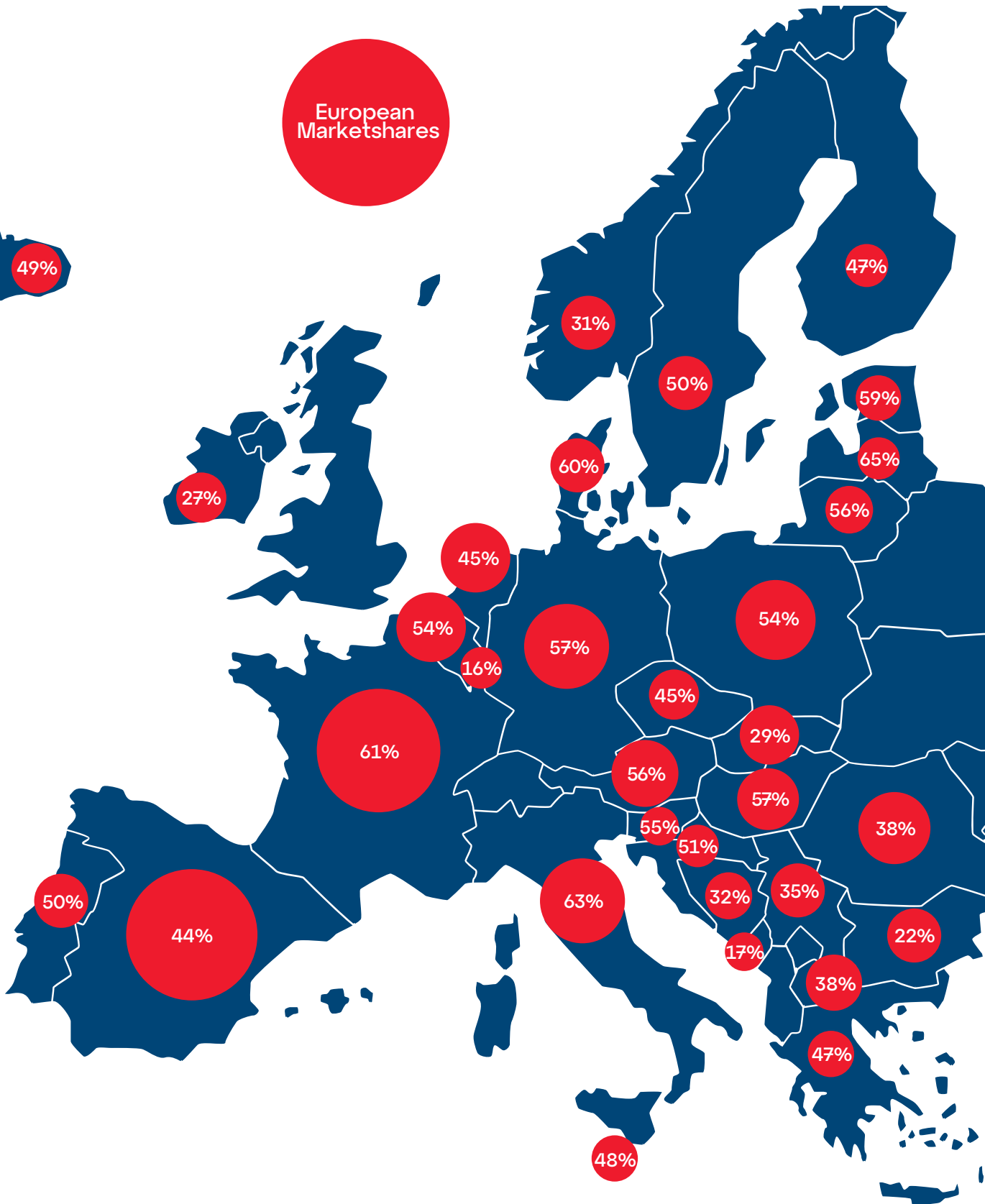
Collaborate to Innovate, launched in 2021, has enabled

exhibitors across Europe to launch new services, such as the subscription model Cineville, created in the Netherlands and replicated in Belgium, Austria, Germany, and soon Sweden. In Belgium, Cineville already accounts for 20% of the total attendance figures. The network is continuing along this path in 2024 with the launch of the Training Boot Camps, a new training scheme to support and develop skills in regions and nations, tailored to local needs.

The progress of the network has been and will continue to be built on collaboration, and it is in this spirit that we will all meet again in Vilnius in November for the 23rd Network Conference.

**Fatima Djoumer**  
CEO of Europa Cinemas

# European Marketshares





# The multi-faceted impact of cinema: Economic engine, social facilitator and cultural hub

A report for Europa Cinemas, CICAIE and UNIC.

Cinema is one of the most popular activities across Europe, one of the primary hubs for cultural exchange, local community activity, a central plank in the health of the entire audiovisual industry, a mainstay of our social activity for over 100 years and one that is evolving with the acceleration of new technology and societal change. Across Europe in 2023, there were very nearly one billion visits to the cinema, down from the peak of 1.36bn in 2019 and well on the way to coming back.

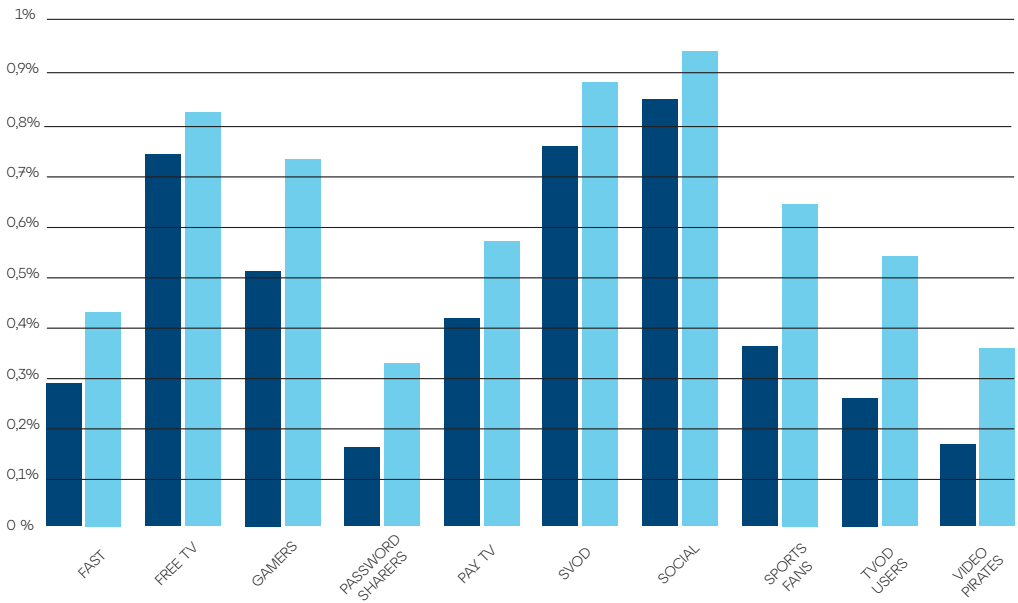
This is a good time to portray the importance of cinema from a cultural and social perspective, having recently experienced the power of cinema as a global cultural enabler, as well as an economic force in creating value for films. Cinemas regularly create an excitement around a film release, such as the success of French film *Anatomy of a Fall*. Likewise, the success of Event Cinema, such as *Andre Rieu* and *National Theatre*,

also reminds us that cinemas' programming is evolving and how cinemas help people access other art forms.

Cinema straddles several distinct sectors, notably culture, art, leisure, entertainment, media. It is the beginning of the economic life of a film setting a benchmark for future value creation, but it is also an artform, and a cultural good. It sits alongside the arts, sometimes melding them all together as a form of high cultural endeavour. Additionally, the cinema is often the only cultural activity in a town, serving a vital role for the people living there. Cinemas are highly valued by their community and play a central role in those communities, even by those that don't often visit. Cinemas are also a gateway into other activities in the community, and a trip to the cinema is often accompanied by a visit to a restaurant, pub, bar, local shops but also other cultural-activities (such as a museum visit, heritage site).

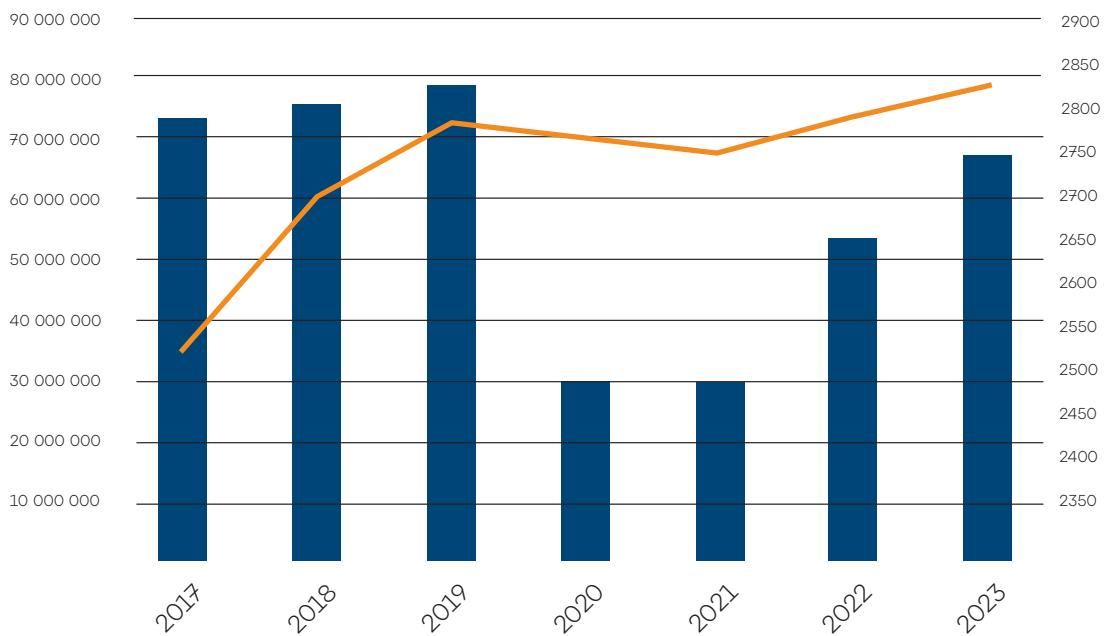


Irish Film Institute - Documentary Festival 2023 - YFF



**Spain, media usage split by cinemagoer and non-cinemagoer (November 2023)**

Cinemagoers  
Non-Cinema



**Europa Cinemas network performance**

Admissions  
Screens



Romuva Music Live

There are just under 40,000 screens based in 12,300 cinemas in Europe in 2023, employing close to 100,000 people in France, Germany, Italy, Spain, and UK alone. Cinema has a central place in the media economy of the future, as an out-of-home leisure and cultural experience but also as the dominant launchpad for both large and small films. It remains one of the major sources of transactional film revenue for producers. Films with an exclusive theatrical window perform better on the following windows too, but also films released theatrically in more than one territory are more likely to be available on more VOD platforms, according to a recent study by the European Audiovisual Observatory. Cinemas act as the main value creator for rights holders in a way that no other release window can, and if they didn't exist, we would need to invent them.

Cinemas are highly innovative and have been for many years. A sector that doesn't evolve and innovate regularly would not have lasted for as long as cinema has. The widespread adoption of Internet ticketing has led to better data for exhibitors to analyse. Cinemas are experimenting with subscription models, all-you-can eat models, membership schemes, dynamic pricing (flexible pricing based on demand), and other business models to find the right way forward for them and for their audiences. Cinemas across Europe have also been pioneering innovative loyalty programmes, providing film enthusiasts with exclusive benefits and a sense of belonging to a cinematic community. The key to successful cinema is finding and engaging with your audiences.

While the home-based sector is advancing technology-wise, what the home cannot replicate is the big screen, and this is an area where cinema has been investing, in making that auditorium experience special and differentiating it from the home. Premium is not just about technology, it is about offering something over and above the expected experience, including the curation of films and events but also added-value factors, such as service, design, high quality food and comfort.

The cinemagoer is a modern, enthusiastic consumer of all types of content, media and leisure such as gaming and VOD, and cinema attendees don't exist in a silo away from the general population. Young people sitting at home playing video games and ordering films from VOD platforms are also proportionally more active cinemagoers. For example, according to Omdia data, in Spain 72% of cinemagoers are also gamers, compared to 51% for non-cinemagoers. For transactional VOD (TVOD), cinemagoers are twice as likely to engage with buying content on VOD than non-cinemagoers (53% compared to 27%). Cinemas are an educator of people. The cinema introduces children to culture and perspectives outside of their immediate world. Cinemas also host screenings for schools, not just allowing the pupils to watch new films but providing a space for debate, concentration and curation, bringing the school into the wider community.





Mestni Kino Ptuj



Meeting point Sarajevo

Cinema acts as a mirror to our own cultures and other cultures, reflecting back stories that describe, shape, and illuminate our own experiences. Around Europe and the world, producers are making a wide variety of films (global film production is now around 9,000 features a year, having doubled in the past 20 years), some highly local and some highly global. It is the cinema that selects, and curates films, communicates with audiences, and ensures that this diversity of film production actually finds its audience. The cinema is the place where smaller films come alive and remain alive.

Additionally, watching together as a shared experience has positive influences on our emotional wellbeing and connectedness, and there are numerous pieces of research showing that sharing an experience enhances its intrinsic value, even if the participants do not communicate about the experience itself. A BBC report found that we are 33% more focused when watching on the big screen

versus the small screen. Crying during a film produces oxytocin, a hormone associated with feelings of empathy and compassion. Cinemas remind us of what it is to be human.

The environment has become a priority for all cinema operators and all exhibitors are taking steps to manage and reduce their carbon impact, especially regarding energy usage and sourcing. Among Europa Cinemas' network members, 55% were planning to increase spending on green activities and the rest aimed to maintain investment at current levels, despite the challenges of the economy, while 83% believed greener business was both essential and would help long-term economic growth.

Cinemas are a major force for good in their community and the wider world. It is clear from the past few years how much cinemas need films but also how much films need cinemas. The heart of the cinema sector remains the socialised nature of the viewing experience and the cinema where a film is shown for the first time. These core principles have driven the last hundred years of cinema exhibition and will drive the next hundred years too.

**David Hancock**  
Chief Analyst, Cinema and Movies (OMDIA)

# 3 years of Collaborate to Innovate

Collaborate to Innovate, a Europa Cinemas funding scheme launched in 2021 with the support of Creative Europe Media, has already sparked many ingenious approaches to re-engaging the European cinema public.

As the sector bounces back from the pandemic, the scheme has enabled groups of exhibitors to use everything from data analysis and VR to subscription models and new forms of marketing to get loyal customers back and to target new audiences.

In Estonia, Andres Kauts, who runs **Tartu Elektriteater**, is the leading figure behind an initiative for “new collective innovative software for small-sized cinemas.” The scheme may not sound revolutionary, but it is transforming the way that Estonian arthouses operate their businesses. The idea is that small theatres can use the software for bureaucratic “grunt work”: to handle ticket sales, programming, membership planning, gift cards and much of the traditional back office administration. This frees the operators up to “concentrate more on the creative side.” In other words, this is a labour-saving initiative that gives exhibitors more time and freedom to “work with audiences.” It also gives smaller venues, those with only a few hundred seats and a few screens, access to technology comparable to that used by much bigger operators.

The software has been embraced by seven cinemas (having started in an initial four venues) and is expanding beyond national borders.



Nonstop Kino team © Elsa Okazaki

“At the moment, we have: one cinema in Lithuania; a first cinema in Finland – and we are in talks with a second cinema; and we have had contact with cinemas all over Europe,”

Kauts explains how the idea has caught on abroad. “It has given us a lot of flexibility and freedom we didn’t have before.”

Kauts, who comes from an IT background, has overseen the development of the software.

“It was designed by a professional designer, but I am the one who gives the guidelines and has the cinema expertise.”

The scheme seems to be working. Post-pandemic, audience results have been improving sharply. **Tartu Elektriteater** itself had its “best year ever” in 2023 and other arthouse cinemas have been posting strong results, too.

In some instances, cinema exhibitors have used Collaborate to Innovate to refine ideas originally hatched elsewhere. For example, Austrian subscription model Nonstop Kino, launched in March 2023, picks up on the highly successful Cineville model, which started in the Netherlands over a decade ago (and was also embraced in Belgium in 2022).

“We are very, very happy with how the project has turned out,” says **Wiktoría Pelzer** from **Stadt kino Filmverleih** in Vienna.

The scheme has already “enhanced the frequency of people going to the cinema.” Those who used to visit the cinema once or twice a year will now go two or three times a month if they are members of the scheme.

“That’s a huge difference.”

Another encouraging trend is that the scheme is luring younger cinemagoers to arthouse theatres. Those under 26 pay €22 for unlimited cinemagoing while older viewers pay slightly more. The range of films they’re watching is also broadening. For instance, classic older titles are becoming increasingly popular as are smaller films that don’t have huge marketing budgets behind them. The scheme encourages a sense of community, “This was something very important after Covid, to feel that we are all together again.”

Pelzer acknowledges that Austrian arthouse theatres had been “afraid” that the rise of streaming platforms combined with the after effects of the pandemic had left them in a vulnerable position. Now, though, they are markedly more optimistic. 18 cinemas participated in the application to Collaborate to Innovate, 10 in Vienna and eight in other towns. There are currently 22 cinemas participating. All are benefitting.

Another initiative that is also thriving thanks to Collaborate to Innovate seed support is Nu:Reality in the Netherlands. This is a ground-breaking attempt to introduce VR into commercial cinemagoing. It was conceived by Jan Uttien from arthouse theatre **Schuur** in Harlem together with distributor **Babette Wijntjes**, of **Cassette Stories**. The pilot programme was successful, and funding has now been secured from the Netherlands Film Fund to continue the scheme.

“We were hoping that we would be able to change the scene of what an arthouse cinema does in the Netherlands by bringing VR into it - and I think we managed to do that,” Uttien reflects on the original intentions of the scheme.

“We wanted to broaden the audience for VR, to get it out of its niche by partnering with the cinemas to reach a broad audience,” **Wijntjes** adds.

There were around 3,000 visitors during the first six months of the pilot programme, a healthy result for an initiative that has never been tried anywhere. Nu:Reality was launched in late 2022. Three cinemas were involved: **Schuur**, **Lantaren Venster** in Rotterdam and **LUX** in Nijmegen. They’ve now been joined by **Filmhuis Den Haag**, **Eye Filmmuseum** (the national cinematheque and one of the country’s flagship venues), **Concordia**, and **Slachtstraat**.



Nureality © Franklin van der Erf





Tartu Elekriteater Ticket office

“We always wanted to find a sustainable model. We also knew that with expansion into more cinemas we would have better reach. We can share costs and the teams from the pilot programme can share their knowledge with the other cinemas,” Wijntjes explains, as it was always their intention for the programme to grow.

Between 15 and 20 other cinemas in the Netherlands are now also looking to join Nu:Reality and there are plans to expand it beyond Dutch borders, too.

Another successful programme from Collaborate to Innovate is “Data Sharing,” a project overseen by Jens Lanestrand at **Biografcentralen** in Stockholm. The aim is to ensure that “would-be cinemagoers” receive information and marketing material tailored specifically to them and that will persuade them to go to cinemas more often. Nine cinemas are involved in the scheme. They share data with each other, which enables them to see which titles are working best and how many tickets were sold at the other venues. Given that Swedish box-office information is not widely shared, this data has been extraordinarily helpful.

“Sweden is kind of unique in that matter. Here, all the data, all admission numbers, are secrets. There are no industry reports,” Lanestrand says of the lack of information from distributors.

He points out that the Swedish cinema sector hasn’t fully recovered from the reverses endured during the pandemic. Average annual cinemagoing rates remain very low. This heightens the need for “new ways of thinking”



Nonstop Kino © Florian Wallisch

like the data sharing scheme. Dutch exhibitor Bob van der Meer of **FilmHallen** in Amsterdam is coordinator of a group of exhibitors across the Netherlands who have jointly ramped up their online marketing through the bold new scheme Cinema+ (with Collaborate to Innovate backing).

“What we are looking at is how we can improve the online visitor experience: how we can improve our online presence on our website in a way that can pull customers back in after they’ve been to the cinema, to engage them on a content level and, at the same time, to get them enthusiastic about returning and seeing another movie,” van der Meer explains.

Cinema+ offers “the sort of content you would, in the past, have found as DVD extras. That has sort of disappeared.” When customers buy a cinema ticket, they’re then given access to curated content: short movies, video essays and interviews.

“Everyone can create a YouTube link on a website [but] this is about creating communication channels, creating the right kind of analytics and, in marketing speak, trying to create the right kind of feedback loop.”

The goal is to turn regular cinemagoers into “fans.” Cinema+ has quickly expanded; the team tracks what viewers watch and how they react to it. They also communicate with customers about new movies. In the process, they build up profiles of their visitors that are not based on personal data but on their behaviour on the website.

“It’s data that the customer gives us by interacting with us,” the FilmHallen manager explains.

Cinema+ is working with around 30 screens and another 10 screens are set to be added later this year.

“The evidence is anecdotal, but we get so much positive feedback from visitors about what they’ve seen on the website, how they enjoy it and how it inspires them. In relation to how we communicate with our customers, there is a change,” he reflects on the impact Cinema+ is already having.

One immediately noticeable trend is that the cinemas are seeing much higher attendance for Dutch movies which have been struggling for traction at the local box-office.

There has already been a 300% improvement in attendance for local movies. Cinema+ doesn’t target one demographic group over another. Younger audiences tend to go to Hollywood blockbusters but the idea is to get them engaged and then to try to “nudge” them toward what van der Meer calls “more quality fare; some European movies that are interesting. But we don’t collect that much visitor info with gender or age because we don’t really want to go in that direction of creating these very ubiquitous customer profiles. That also makes you vulnerable when data gets leaked. I don’t want to over-ask our customers.”

Cinema+ is connected to Cineville and can access certain anonymised details regarding customer ages and postcodes. Van der Meer and his team have set KPIs for themselves - email open rates, views for movies, etc. Although they’re not reaching all of these objectives they are generally very satisfied with how the project is running.

Innovation, Collaboration and Sustainability are the three watchwords of the new funding scheme. As these projects and many others attest, exhibitors in the Europa Cinemas Network are becoming ever more creative and skilful in the ways in which they are bringing customers back to their venues.

**Geoffrey Macnab**



Nureality VR Programma © Marcel Krijgsman



# TOP 50

## European Movies

By Admissions  
Europa Cinemas/  
MEDIA 2023

1



**Anatomie d'une chute**  
Nationality FR, Director **Justine Triet**,  
Countries 26, Cities 534, Cinemas 781,  
Admissions 1091139

2



**C'è ancora domani**  
Nationality IT, Director **Paola Cortellesi**,  
Countries 5, Cities 95, Cinemas 142,  
Admissions 681890

3



**Le otto montagne**  
Nationality EU, Director **Charlotte  
Vandermeersch, Felix van  
Groenigen**, Countries 30, Cities 558,  
Cinemas 805, Admissions 660930

4



**Kuolleet lehdet**  
Nationality FI, Director **Aki Kaurismäki**,  
Countries 28, Cities 514, Cinemas 746,  
Admissions 544571

5



**Triangle of Sadness**  
Nationality SE, Director **Ruben  
Östlund**, Countries 33, Cities 430,  
Cinemas 654, Admissions 541977

6



**Mon Crime**  
Nationality FR, **François Ozon**,  
Countries 27, Cities 487, Cinemas 718,  
Admissions 464332

7



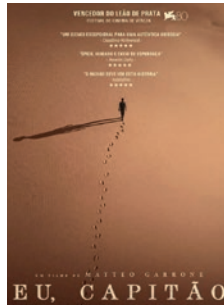
**Il sol dell'avvenire**  
Nationality IT, Director **Nanni Moretti**,  
Countries 16, Cities 323, Cinemas 449,  
Admissions 440839

8



**An Cailín Ciúin**  
Nationality IE, Director **Colm Bairéad**,  
Countries 22, Cities 505, Cinemas  
710, Admissions 408603

9



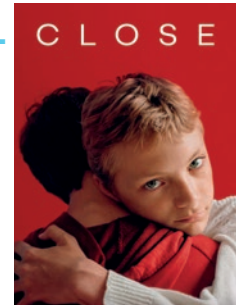
**Io capitano**  
Nationality IT, Director **Matteo  
Garrone**, Countries 8, Cities 150,  
Cinemas 225, Admissions 322591

10



**Jeanne du Barry**  
Nationality FR, Director **Maiwenn**,  
Countries 26, Cities 479, Cinemas 656,  
Admissions 308734

11



**Close**  
Nationality BE, Director **Lukas Dhont**,  
Countries 29, Cities 441, Cinemas 652,  
Admissions 299840

12



**Le bleu du caftan**  
Nationality EU, Director **Maryam  
Touzani**, Countries 27, Cities 477,  
Cinemas 633, Admissions 294525

13



**Rapito**  
Nationality IT, Director **Marco  
Bellocchio**, Countries 14, Cities 307,  
Cinemas 418, Admissions 283708

14



**Je verrai toujours vos  
visages**  
Nationality FR, Director **Jeanne Herry**,  
Countries 8, Cities 217  
Cinemas 279, Admissions 254304

15



**Das Lehrerzimmer**  
Nationality DE, Director **Ilker Çatak**  
Countries 16, Cities 203, Cinemas 315,  
Admissions 247239

N°	TITLE	NATIONALITY	DIRECTOR	COUNTRIES	CITIES	CINEMAS	ADMISSIONS
16	<b>Le Règne Animal</b>	FR	Thomas Cailley	14	180	226	236450
17	<b>Wann wird es endlich wieder so, wie es nie war</b>	DE	Sonja Heiss	7	117	184	235607
18	<b>As bestas</b>	ES	Rodrigo Sorogoyen	23	339	471	224318
19	<b>L'immensità</b>	IT	Emanuele Crialese	26	379	491	200784
20	<b>Chłopi</b>	PL	Hugh Welchman, Dorota Welchman Kobiela	13	86	133	198978
21	<b>Roter Himmel</b>	DE	Christian Petzold	24	362	485	196837
22	<b>L'Amour et les Forêts</b>	FR	Valérie Donzelli	7	160	196	191927
23	<b>Anselm - Das Rauschen der Zeit</b>	DE	Wim Wenders	15	256	334	191652
24	<b>Sur les chemins noirs</b>	FR	Denis Imbert	10	272	357	183751
25	<b>Une belle course</b>	FR	Christian Carion	14	218	304	183597
26	<b>La passion de Dodin Bouffant</b>	FR	Tran Anh Hung	19	296	378	179733
27	<b>Boy From Heaven</b>	SE	Tarik Saleh	25	386	548	178984
28	<b>Interdit aux chiens et aux italiens</b>	FR	Alain Ughetto	16	252	322	178745
29	<b>Astérix et Obélix : L'Empire du Milieu</b>	FR	Guillaume Canet	29	330	393	170778
30	<b>Was man von hier aus sehen kann</b>	DE	Aron Lehmann	5	115	177	169671
31	<b>Yannick</b>	FR	Quentin Dupieux	7	131	160	167200
32	<b>Retour à Séoul</b>	FR	Davy Chou	19	313	403	157372
33	<b>Vanskabte land</b>	IS	Hlynur Palmason	23	328	434	155935
34	<b>Nostalgia</b>	IT	Mario Martone	27	339	434	152751
35	<b>Le livre des solutions</b>	FR	Michel Gondry	16	230	292	151898
36	<b>Rehagout-Rendezvous</b>	DE	Ed Herzog	3	90	111	149534
37	<b>L'ultima notte di Amore</b>	IT	Andrea Di Stefano	13	238	319	149324
38	<b>Les Choses simples</b>	FR	Eric Besnard	8	179	245	144970
39	<b>Second tour</b>	FR	Albert Dupontel	4	112	136	138492
40	<b>Checker Tobi und die Reise zu den fliegenden Flüssen</b>	DE	Johannes Honsell	5	99	147	138449
41	<b>La syndicaliste</b>	FR	Jean-Paul Salomé	15	319	405	137697
42	<b>The Amazing Maurice</b>	DE	Toby Genkel, Florian Westermann	29	386	464	135556
43	<b>Le procès Goldman</b>	FR	Cédric Kahn	8	148	183	132821
44	<b>La Chimera</b>	IT	Alice Rohrwacher	17	206	256	132566
45	<b>Momias</b>	ES	Juan Jesus Garcia Galocha	24	285	323	132373
46	<b>L'ombra di Caravaggio</b>	IT	Michele Placido	20	276	362	132228
47	<b>Holy Spider</b>	DK	Ali Abbasi	29	328	485	130769
48	<b>La Fiancée du poète</b>	EU	Yolande Moreau	3	132	159	126946
49	<b>Les Trois Mousquetaires : D'Artagnan</b>	FR	Martin Bourboulon	27	316	377	124048
50	<b>Il primo giorno della mia vita</b>	IT	Paolo Genovese	13	172	244	123407

# Facts & Figures 2023

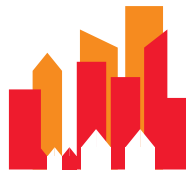
Read the Full Facts  
and Figures online



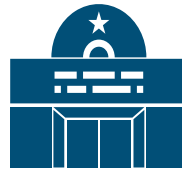
# Europa Cinemas / MEDIA Network



**33 Countries**



**742 Cities**  
**+35** vs 2022



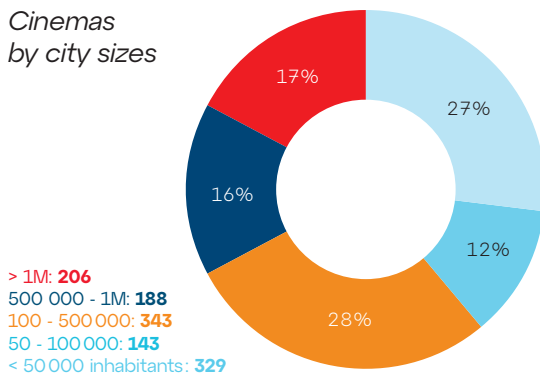
**1209 Cinemas**  
**+41** vs 2022



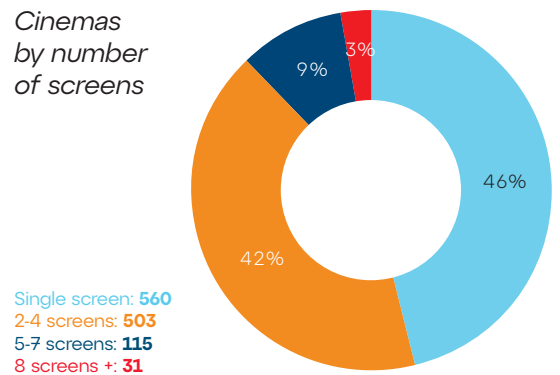
**2846 Screens**  
**+63** vs 2022

## Profile of the cinemas

*Cinemas by city sizes*



*Cinemas by number of screens*



## Network results 2023

**0.87 M**

*European Non-National Screenings*  
28.0% of the total screenings

**1.73 M**

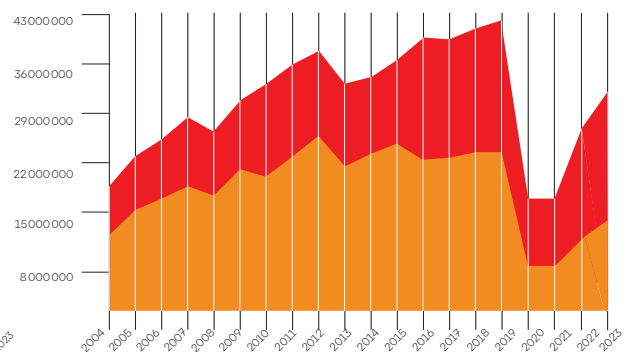
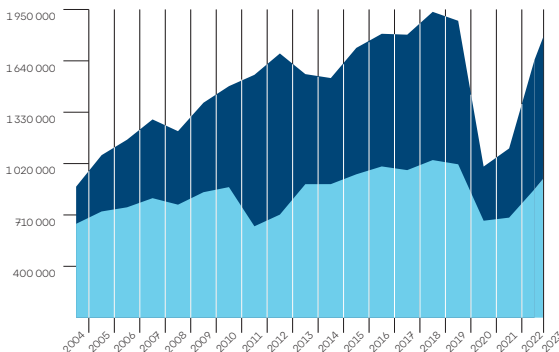
*European Screenings*  
56.5% of the total screenings

**15.94 M**

*European Non-National Admissions*  
23.4% of the total admissions

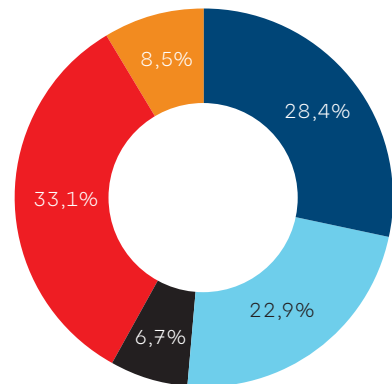
**35.74 M**

*European Admissions*  
52.4% of the total admissions



# Network results before and after the Covid crisis

RESULTS IN THE NETWORK	2017 - 2019	2022	2023
Total admissions (Mio)	76,3	52,3	68,2
Cinemas	1 103	1 168	1 209
Screens	2 681	2 782	2 846
National	23,6%	31,3%	28,9%
European non-national	22,0%	24,5%	23,4%
UK	8,3%	5,5%	6,8%
US	36,7%	29,8%	31,7%
Others	8,7%	8,4%	8,7%



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



**Das Lehrerzimmer**  
67%, 6 countries



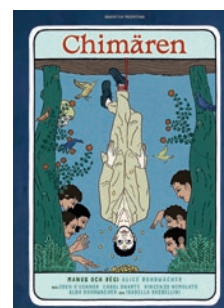
**Triangle of Sadness**  
69%, 27 countries



**The Quiet Girl**  
61%, 19 countries



**Le Bleu du Caftan**  
66%, 23 countries



**La Chimera**  
67%, 6 countries





La Salamandre

## A beautiful network expansion dynamic

After the almost barren years of the pandemic, the number of cinemas applying to join the network – and even more so the number of cinemas admitted following our analysis process – is immensely gratifying. It reflects not only the momentum of these cinemas but also the appeal of the network.

In 2022, we welcomed a total of 44 applications, representing 55 cinemas, followed by 45 applications and 61 cinemas in 2023. Among the most promising contributors are France (19 new member cinemas in two years), Italy, Germany, and Poland. This growth spans an impressive 23 countries, including Liechtenstein, which went back in the MEDIA program in 2022.

These new member cinemas strengthen our presence in key capitals (three MK2 cinemas in Paris, Troisi cinema in Rome, two new cinemas in Berlin, for example), but, more significantly, they facilitate deeper expansion into most of the regions involved. We've observed a slight rebalance in northern Germany, northern Bulgaria, as well as in the 'Empty Diagonal' in France, areas where the network previously had very little presence. Conversely, the network is increasing its already dense presence in Belgium, the Netherlands, and northern Italy.

Overall, there is a palpable interest in the network from cinemas beyond major cities, some of which apply directly from within mini-networks and individual cinema groups that enable them to meet entry thresholds.

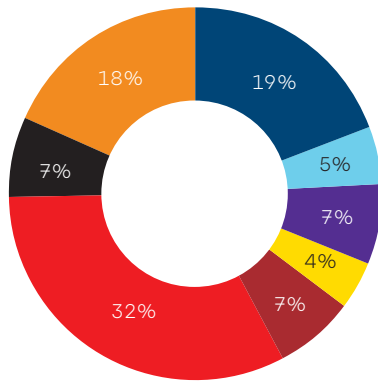
These new members are noteworthy not only for their structural diversity — ranging from associative cinemas to leading chain cinemas in their respective markets to municipal cinemas — but also for their alignment with current exhibition trends. For instance, the **Utopia** in Pont-Sainte-Marie, France, is a fully ecological cinema. The **Astra** cinema in Como, Italy, stands out for its young team who have achieved excellent results from the outset, engaging various target audiences, notably through a cine-club aimed at audiences over 60. On the outskirts of Copenhagen, **Parkteatret Frederikssund** offers theatre for children through a modular space, while in the suburbs of Stockholm, **Bio Bristol** in Sundbyberg shows its commitment through contemporary cinema initiatives.

Given the number of cinemas currently contacting us, this dynamic is certainly set to continue throughout 2024!

**Jean-Baptiste Selliez**

# Nationalities in the Network

United States	32%
France	19%
Germany	7%
Italy	7%
United Kingdom	7%
Nordic countries	5%
Spain	4%
Others	18%



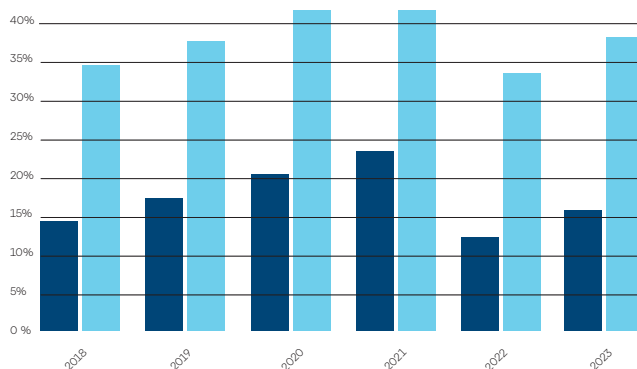
2023 was marked by three significant successes driving admissions across most of Europe. Two are American productions (*Barbie*, *Oppenheimer*), while the third is French (*Anatomie d'une Chute – Anatomy of a Fall*). These contribute to the dominance of French and US films for the year. Nevertheless, as depicted in the graph above, other European nationalities are far from absent: the UK market shares are experiencing a resurgence after three challenging years marked by a scarcity of

titles, with few exceptions. Notably, *Banshees of Inisherin*, *Aftersun*, and *The Old Oak* emerged as standout recent English productions. Additionally, Italian cinema has experienced a notable surge, with four films in the top 50 (*C'è ancora domani – There's Still Tomorrow*, *Il sol dell'avvenire – A Brighter Tomorrow*, *Io Capitano – Me Captain*, *Rapito – Kidnapped*), and one coproduction with Belgium (*Le otto montagne – The Eight Mountains*).

## Diversity in the network

Europa Cinemas members are always committed to screen as many diverse nationalities of films as possible in their cinemas, and this year is no exception. On average, 207 films were screened, 124 being European, representing 15 different European nationalities, and admissions are shared between more films than in the global European market: the 50 films with the most admissions in the network represent just 38% of the total number of admissions. Aside from those already mentioned, other countries that were well represented include Austria (*Corsage*), Iceland (*Vanskabte*

*Land - Godland*), Ireland (*The Quiet Girl*), the Netherlands (*Knor - Oink*), Norway (*Sick of Myself*, *Titina*), Romania (*R.M.N.*), Spain (*20.000 especies de Abejas – 20,000 Species of Bees*, *Alcarras*, *Momias - Mummies*). *Mavka. Lisova pisnya (Mavka: The Forest Song)*, an Ukrainian film targeting young audiences, is also deserving of a mention. All of those films have circulated in over 20 countries. It is also worth mentioning that, for some of these, it is their second year of distribution, speaking to the tendency for European films to have a longer theatrical life.



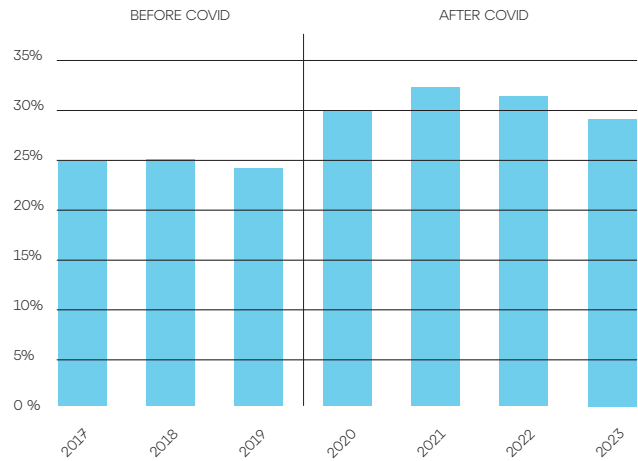
**Admissions concentration in the Top 10 and Top 50 of the Network since 2018**

■ Top 10  
■ Top 50

# Domestic films

Domestic films have shown consistent growth since 2020, with their market shares steadily increasing in the majority of MEDIA countries. Although there was a slight decline in 2023 (29% compared with 32% in 2021 and 31% in 2022), this figure remains significantly higher than pre-2020 levels.

Aside from traditional producers like France, Italy, Germany, and Denmark, other countries have seen a rise in their market shares. For instance, Portuguese films, represented by works such as *Mal Viver* (*Bad Living*, winner of the Silver Bear in Berlin in 2023) and *Viver Mal* (*Living Bad*) from João Canijo, have surged from 9% to 22%.



Similarly, Romania's cinema production has witnessed a notable increase, rising from 7% before the pandemic to 19% of admissions in 2023. This trend reflects a wider European phenomenon, where national films, especially comedies, have gained traction in the absence of US productions in recent years. This benefited many films that found their way into the network cinemas' programming; *Meter i Sekundet* (*The Land of Short Sentences*, Hella Joof) in Denmark, *Paradas* (*Parade*, Titas Laucius) in Lithuania, *Invalid* (Jonáš Karásek) in Slovakia, or *Nunta Pe Bani* (Cristian Ilisuan) in Romania.

We have high hopes that some of these domestic films will find their audience in other European countries, too. For instance, *Smoke Sauna Sisterhood* (Anna Hints), a documentary from Estonia, is the top 1 film in number of admissions in Estonian member cinemas and is now circulating in other countries. It was also among the films chosen for the LUX Prizes. In the same way, *C'è ancora domani* (*There's Still Tomorrow*), an Italian film with five million national admissions, is now scheduled for screening across Europe during the whole year 2024.



Viver Mal

# A year full of hope for the Europa Cinemas Label

The Europa Cinemas Label had a remarkable year in 2023, marking a significant rebound from the challenging years of 2021 and 2022.

In a refreshing turn of events, the Label's films not only regained their previous momentum but also reached new heights within the network. For the first time since the creation of the Europa Cinemas Label, admissions surpassed 500,000, showing a remarkable increase of 19% when compared with the results from 2019.

This success can be attributed to films such as *Das Lehrerzimmer* (*The Teacher's Lounge*), the German film from İlker Çatak, presented at the Berlinale in 2023 and also part of the network's Top 15 films. Additionally, *Yannick* by Quentin Dupieux, first showcased at the Locarno Film Festival in 2023, contributed to this achievement, as did *Un Beau Matin* (*One Fine Morning*) by Mia Hansen-Løve, which was labeled at the Directors' Fortnight in Cannes in 2022.

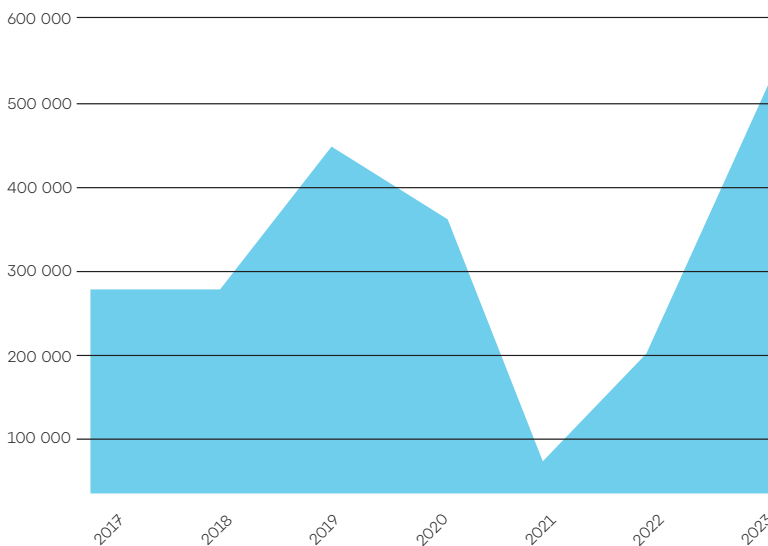


Yannick © ATELIER DE PRODUCTION - CHI-FOU-MI PRODUCTIONS-QUENTIN DUPIEUX-2023

Despite having been released several years ago, there are certain films that continue to captivate audiences. *A Chiara*, an Italian film by Jonas Carpignano, premiered at the Cannes Festival in 2021 and is now in its third year of screenings, reaching 85,000 admissions.

However, the most notable example of sustained success is *Mustang* by Deniz Gamze Ergüven, which released at Cannes in 2015 and has been screened annually since. Starting with around 200,000 admissions in 2015, it has now reached 680,000 admissions. These results demonstrate the long-term appeal and impact of films bearing the Europa Cinemas Label.

Nicolas Edmery



Label Winning Films	Director	Festival	Admissions in 2023 (in total)
<b>Das Lehrerzimmer</b>	<b>İlker Çatak</b>	Berlin 2023	247 239
<b>Yannick</b>	<b>Quentin Dupieux</b>	Locarno 2023	167 200
<b>Un Beau Matin</b>	<b>Mia Hansen-Løve</b>	Cannes 2022	62 178 (131 746)



# Cineville keeps on with its success

What a triumphant year it has been for Cineville Belgium! In 2023, the first full year of its operation, the results speak volumes of its resounding success. Launched in June 2022 across six Brussels cinemas, thanks to the Collaborate to Innovate initiative, the monthly unlimited arthouse pass quickly captured the imagination of cinephiles. It is inspired by Cineville Netherlands, which has flourished since its inception in 2009, boasting a staggering 80,000 subscribers and facilitating 1.7 million admissions in 2023 across 70 cinemas nationwide.



Salle du Palace



The Cineville network in 2023

In Belgium, the growth trajectory has been phenomenal. Subscriptions soared in 2023 by two and a half times the previous figures, culminating in a remarkable 6,302 subscribers by year's end and converting to a staggering 123,000 admissions. The expansion was not confined to Brussels alone; the pass spread to six new cinemas in three Wallonian cities: Liège (**Souvenière**, **Le Parc**, **Churchill**) and Namur (**Cameo**) in May, followed by Charleroi (**Quai 10**) in November.

While nationwide figures showed a commendable 24% increase when compared with 2022 (17 million admissions), albeit still 15% shy of 2019 levels, the growth within the Cineville cinemas in Brussels was nothing short of extraordinary. A staggering 42% surge compared with 2022 and a 25% leap from 2019 exemplifies the remarkable impact.

Take, for instance, **Cinema Palace**, where Cineville visits accounted for 20% of admissions in 2023. The cinema witnessed a record-breaking year, with a remarkable 57% growth compared with 2022, surpassing 2019 levels by an impressive 46%. Notably, **Palace** experienced a significant surge in young audiences, with a 94% increase in under-18 admissions and a 67% rise among students.

Much like its Dutch counterpart, the Cineville pass has proven to be a magnet for younger demographics, with the average user age standing at 34 years, a stark contrast to the 50+ average that we tend to observe in arthouse cinemas across Europe. Following Belgium's lead, Austria also embraced the arthouse pass in 2023, with Germany and other countries poised to follow.

**Adrian Preda**



# Italy is bouncing back

2023 marks the year when we could finally talk about “recovery” for cinema in Italy.



C'è ancora domani

In comparison with 2022, national box office and admissions increased by 61.6% and 58.6%, respectively. Although this still represents a decrease of 16.3% and 23.2%, when compared with the pre-pandemic period, 2023 was celebrated, and held some great surprises.

Firstly, schools returned to theatres and cinemas across our network that were offering workshops for children, such as Move the Movie as part of Collaborate to Innovate, workshops, Book Animation and Stop Motion.

The summer season, usually low in attendance, was bolstered by Cinema Revolution, a well-established strategy from the Ministry of Culture that offers a reduced ticket price of €3.50 to a selection of European films. 2023 was also an especially exciting year for Italian films. Although American blockbusters still dominate the rankings, domestic films circulated widely not only within the country but also abroad, notably in theatres across our network.

*Otto Montagne (The Eight Mountains)* by Charlotte Vandermeersch and Felix Van Groeningen, *Il sol dell'avvenire (A Brighter Tomorrow)* by Nanni Moretti, and *Rapito (Kidnapped)* by Marco Bellocchio all made it into the top 15 European films in our network.

The same goes for *Io, Capitano (Me Captain)* by Matteo Garrone, who, very attuned to the cinematic experience in theatres, accompanied his film at numerous premieres.

October 26 2023, marked a turning point, and a true blessing, in the history of Italian cinema with the release of *C'è ancora domani (There's Still Tomorrow)*. Paola Cortellesi's work quickly became a phenomenon due to its feminist themes, something rarely seen on Italian national screens, and owing to its original artistic direction. The film, released in a context of very tragic news events, may have initiated a new #MeToo movement in Italy. *C'è ancora domani* ranks among the top five Italian films in terms of revenue and will circulate in other countries in 2024.

So, 2023 is a source of optimism for the future of Italian cinemas. With fewer American films on the bill due to the SAG-AFTRA strike in 2023, there will surely be room for local productions.

**Mathilde Narros**

# Joint strategic initiatives and impactful policies in Spain

In recent years, Spain has witnessed a revitalization of its film industry through strategic initiatives and policies, with a significant turnaround in commitment from the central government. This shift is evidenced by the introduction of three key measures.



El Maestro que prometio el mar

The first initiative, launched in 2021, introduced a support scheme requiring a 25% screen share for EU films annually to access funding. With a budget of 14.5 million euros and a year-on-year increase, this programme aims to support exhibitors in their efforts to bring back audiences after the pandemic and promote diversity in national screens.

Building on this foundation, the Ministry of Culture launched the “Young Culture Voucher” in 2022, allowing newly-turned 18-year-olds to access cultural products and activities, including cinemas, with a subsidy of up to 400 euros. This initiative not only promotes cultural engagement among young adults but also injects vitality into the cinema ecosystem because half of the voucher budget can be spent on cinema tickets.

The most recent endeavour, the Cine Sénior campaign, targets the senior demographic by offering subsidized tickets at just 2 euros for those over 65 years old to go to the cinema on Tuesdays, the demographic which was most reluctant to return to the cinema. With a budget of 10 million euros, this initiative



20 000 species of bees

has seen remarkable success, with over 3,000 screens participating and over 900 thousand admissions in six months.

The impact of these measures is palpable. With a nearly 30% increase in admissions, Spain now ranks fourth in Europe for theatrical attendance growth. According to FECE figures, Tuesday admissions have surged by 50% compared to 2022 and by 23% compared to pre-pandemic levels in 2019. Showing that seniors have adhered with enthusiasm to the campaign.

Spanish network members follow the national trend with an audience increase of 31.5% in 2023 compared to 2022. We observe the sustainable success reached by the Viridiana project, with the involvement of so many new cinemas in the scheme and the positive impact it has had on the results of European films.

This rise in activity benefits European films: 50% of network members’ screenings are European, with some titles topping the charts. For example, the network phenomenon *Anatomie d'une chute* (*Anatomy of a Fall*) had 27% of its admissions in Spain made by network cinemas. Additionally, *Triangle of Sadness* and *Il sol dell'avvenire* (*A Brighter Tomorrow*) made 69.5% of their admissions also in the network. Notable local titles include *As Bestas* (*The Beasts*), which continues its incredible career, making its way to the third position in the top by admissions in Spain, followed by the sleeper hits *El maestro que prometió el mar* (*The Teacher Who Promised The Sea*), *20.000 especies de abejas* (*20,000 Species of Bees*), and *Un amor* (*One Love*).

Irene Angel Echeverri

# Young Audiences: A diverse and dynamic landscape in the network

Following the pandemic, which brought a halt to the young audience activities that have long been a feature of the network's cinemas, we have witnessed a strong revival. So much so, that it seems as though the cinemas in the network were trying to make up for lost time or, certainly, to assert their increasingly important role with young audiences.

Studying the annual programming reports, we found that exhibitor efforts have not decreased and are continuous. 70% of the cinemas in the network organised young audience activities, with 89% of European non-national screenings per submitted report. Furthermore, audience response has been encouraging, with attendance at these screenings growing by 21% in 2023 compared with 2022, resulting in an average occupancy rate of 37 admissions per screening and achieving 96% of the 2019 Young Audiences admission figures.

**Given the diverse markets across Europe, the landscape of initiatives aimed at young audiences and film literacy varies significantly from one country to another.**

What remains consistent is the unwavering dedication of exhibitors to cultivate a sustainable European film culture through a myriad of initiatives and approaches. Amidst this diversity, historical programmes initiated by network members persist and resonate strongly with the public. Yet, alongside these established efforts, we witness boundless creativity as new initiatives continually emerge.

Undoubtedly, France leads in public investment in film literacy<sup>1</sup> with 1.9 million students participating in *Ma Classe au cinéma* scheme<sup>2</sup> in 2022. However, exhibitors



Modestas Endriuška © SKALVIJA Cinema Center

have a deep-rooted belief in the role that film can play in the development of citizens' open-mindedness and their critical thinking ability, so there are many initiatives beyond government programmes that are organised across the network.

For example, **Le Méliès** recruits two students from each of Saint-Etienne's high schools to promote the cinema amongst their peers and programme special screenings. Similarly, the **Cinéma LUX** (Caen) and **Café des Images** (Hérouville-Saint-Clair), winners of the Europa Cinemas Young Audiences award in 2019, have adopted the same initiative. **Cinema Jean Eustache** (Pessac) celebrated the 13<sup>th</sup> season of *La P'tite Unipop du cinéma*, an interactive film club with an annual subscription focusing on history, arts and literature topics. In 2022, the project became accessible to cinemas throughout France<sup>3</sup>.

<sup>1</sup> A survey carried out in 2022 around audiovisual tastes and practices of 15-25 year-olds in the Grand Est region throws some light about the results of the investments in film literacy in France. It showed that 38% of respondents identify the cinema as the best way to watch a film, and 48% go to the cinema between three and 11 times per year. Retrieved from: <https://www.lerecit.fr/wp-content/uploads/2024/02/Gouts-et-pratiques-Le-RECIT-web.pdf>

<sup>2</sup> CNC's 2022 report, chapter 6: Public funding, p. 242.

<sup>3</sup> Name and website of the projet: *Unipop de ville en ville* <https://devilleenville.unipop.fr>

Interactive experiences tailored to younger viewers have been adopted in various forms in different countries. In the Netherlands, **Rialto** (Amsterdam) created *LA RIOT*, with the tagline 'by young people for young people', where a group of fifteen people aged between 18-25 write for a dedicated blog about the newest arthouse films and organize monthly screenings with a special programme. In Germany, **Lichtspiele Kalk** (Cologne) explores reality through its series *Reality Bites*, where young film enthusiasts present their own selection of films.

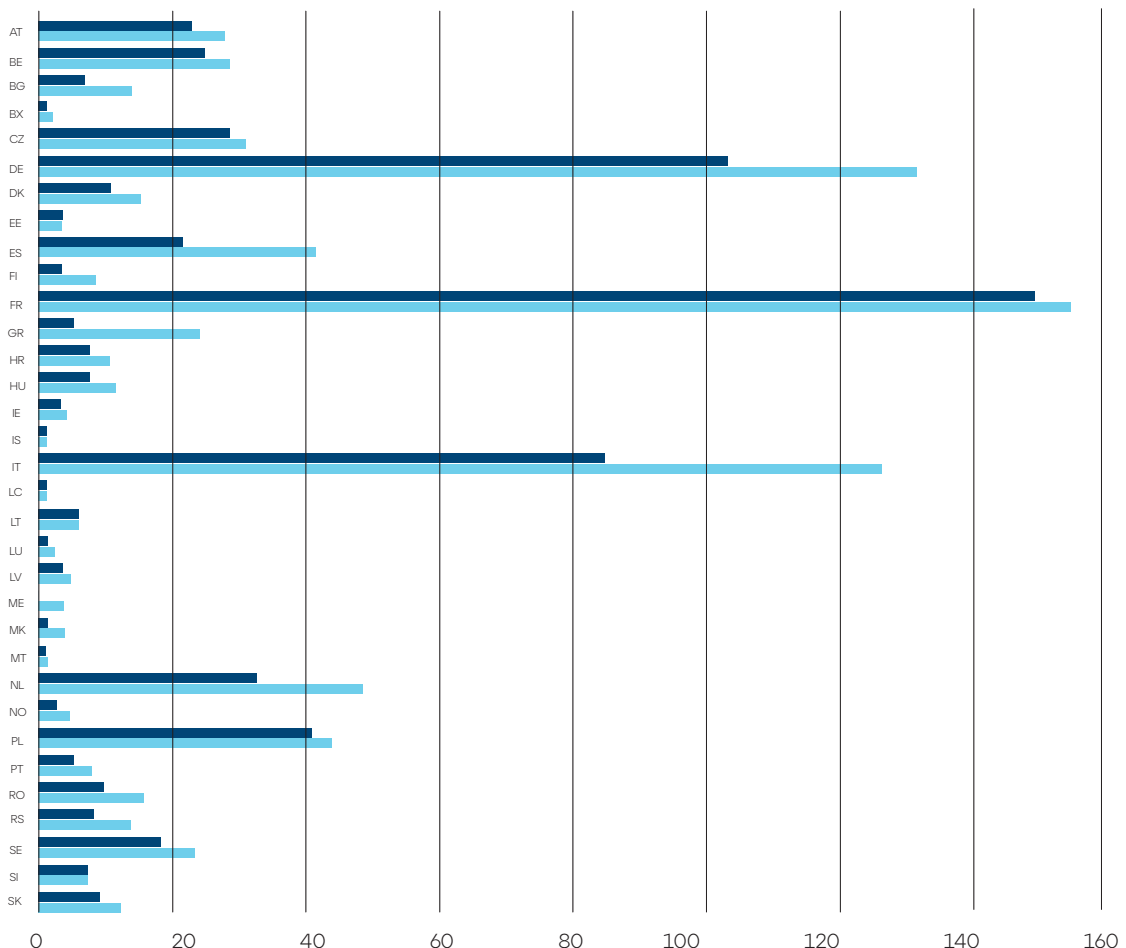
In 2023, and for the 11<sup>th</sup> year in a row, **Cnema** (Norrköping) hosted the festival *Watch a Movie*, organised and curated by teenagers. **Kinodvor** in Slovenia continued *Kinotrip*, a young audience initiative they have offered since 2016.

**In other countries, exhibitors in the network have developed collective film literacy initiatives that have been adopted by other cinemas at a regional level or even at a national level, resulting in programmes supported or recommended by the government.**

To mention just a few of them, *Nowe Horyzonty Edukacji Filmowej* is a complete film literacy programme developed 18 years ago and is present today in around 50 cities in Poland. *Aeroškola*, the largest educational project accredited by the Ministry of Education and Culture in the Czech Republic, was created by **Kino Aero**, **Bio Oko** and **Světazor**. *Mokausi iš kino*, created in 2011 in partnership with local schools by **Skalvija Kino Centras** (Lithuania), takes place today in nine cities and hosts over 18 000 pupils per year<sup>4</sup>.

<sup>4</sup> Skalvija Kino Centras 2023 report: [https://skalvija.lt/wp-content/uploads/2024/02/Skalvija\\_2023\\_Ataskaita\\_Pages.pdf](https://skalvija.lt/wp-content/uploads/2024/02/Skalvija_2023_Ataskaita_Pages.pdf)

■ N° Agreements  
 ■ N° Agreements with Young Audiences initiatives





They also have a virtual screening room to allow teachers to watch the films and engage in a virtual exchange with a professional film educator. Last year, 384 screenings were organized within the framework of this initiative, with 27% taking place in the form of virtual screenings.

In Belgium, where 83% of the cinemas implement a young audience initiative with the second highest average of European non-national screenings per cinema of the network, *Écran large sur tableau noir*, launched by Les Grignoux<sup>5</sup>, has become the film education scheme in the Wallonia-Brussels Federation.

**In countries where public, government funding for film literacy is rare, various network members have benefited from European funds or programmes.**

Thanks to the Next Generation scheme, one historic cinema chain in Spain, *Renoir* developed its own film literacy programme last year. **Cinema Arta** (Cluj-Napoca) and **Olympion** (Thessaloniki) partnered with Cined and the European Film Factory, respectively, to implement and extend their offerings using these programmes' catalogues and pedagogical materials.



Voir Ensemble, Cinéma Le Méliès, Grenoble

<sup>5</sup> Cinemas: Churchill, Cinéma Sauveniere and Le Parc



Cine Arta + info CINEKIDS © Nicu Cherciu / Cinema ARTA Cluj

**In this dynamic landscape, a profound shift is underway as our exhibitors increase their role in fostering dialogue, understanding, and awareness of democratic principles and social change.**

**LUX** (Nijmegen) stands out as a leader in this regard, organising workshops to analyse manipulation techniques in film and media, along with free interactive programmes on sexual and gender diversity for primary schools. Additionally, they offer *Nimma Aan Zee* a free programme for secondary schools aimed at raising students' awareness of climate change.

In Italy, **PostModernissimo's** initiative *Che genere di cinema* also focuses on gender awareness. The success of films like

*C'è ancora domani* (*There's Still Tomorrow*) and *Io capitano* (*Me Captain*), which collectively garnered over 100,000 admissions in actions aimed at young audiences last year, speaks volumes about the issues Italian cinemas are addressing.

Europa Cinemas supports exhibitors in their ongoing efforts to remain relevant to younger viewers, thus ensuring the sustainability of the European film industry. This support is assured through annual economic funding, the Innovation Labs, and Collaborate to Innovate. Despite challenges in launching international collaborations for the development of young audience programmes, we have backed 14 international projects targeting youth. These initiatives have led to the creation of film festivals, workshops, and pedagogical tools for film understanding and community building. Many of them use multimedia techniques and target youth engagement through technology: such as podcasts, vlogs, YouTube video creation, gaming and VR experiences.

While we do not intend to cover the full gambit of projects observed over the past two years, we firmly believe that the examples highlighted here can serve to bridge a gap between countries and initiatives. The experience and expertise of the project leaders should guide us in extrapolating the tools with which to inspire even more similarly successful endeavours.

**Irene Angel Echeverri**



Méliès St-Etienne © Ra2 Photographie



Press materials Young Horizons © Kajtek Czarodziej, Prelekcja Prawa Dziecka, Wojciech Chrubasik



# The Cinema Experience

There is more to filmgoing than simply watching movies. As independent European cinemas try to recapture their audiences following the post-pandemic slump, they are becoming ever more inventive with what they offer the public, beyond what is showing on the big screen.

In Norrköping in Sweden, the neighbourhood movie house **Cinema** has found a novel way of engaging with young locals – through gaming. “The gaming community in our city has previously not been that big. But, recently, it has begun to really grow, with several organisations, companies, and groups that focus on aspects of gaming and different nerd cultures,” says programmer Simona Macuh.

Some of the staff at the venue grew up with gaming and have attended gaming conventions like Dreamhack - so they already have first-hand knowledge of the gaming subculture. “When we were looking to broaden our scope of cultural events, we felt that, as the gaming demographic is growing and this was something we’ve never tried before, we should give it a try.”

The original concept for a “gaming weekend” came from Johan Mild.

There have been two events so far. The first was held in April 2023 and the second in March 2024.

**“The first event was very much a trial run and we were modest in crowd expectation. We contacted a bunch of local organisations related to gaming and asked if they wanted to join. We contacted everyone from a local high school with e-sport courses to a consortium of local indie game developers, and an association whose members play board games in their spare time. To our surprise, all of them said yes.”**

Last year, the town’s biggest game developer Dimfrost Studios was about to release its new game Bramble: The Mountain King. Dimfrost also joined the event, allowing visitors to test the game pre-release in the venue’s largest cinema theatre.

The net result of the gaming weekend is already a success. And, no, attendees, aren’t just the stereotypical young gamers.

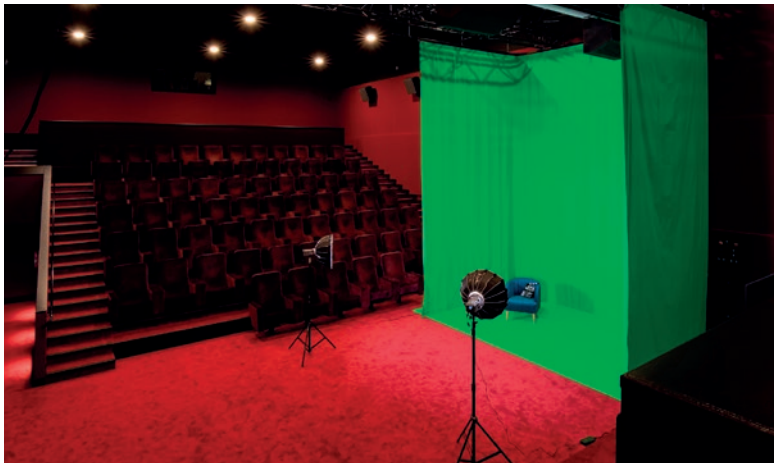
“The crowd is very mixed,” Macuh says, pointing out the range of families with young children, young adults and gamers, people interested in board games, as well as second-hand shoppers. “It’s safe to say that we’ve reached all ages, with the exception of the elderly, although families and younger children are far more represented in numbers.”

Movies are shown during the gaming weekends. “We’d like to think, as the visitors get a closer look at our cinema during this event, that they will like the atmosphere and programme, so they’ll return for films and other events throughout the year,” Macuh explains how the event is both boosting cinemagoing and giving gamers a good time.

Meanwhile, at its venue in Dunkirk, France, **Studio 43**, has created its very own “modular” room which hosts workshops, small concerts, and live performances – and all this activity is always related to encouraging cinemagoing. As cinema director Sylvie Presa explains, the room is a space for “screening, creation, experimentation with new forms of mediation, and image practices in which one can watch films, make them, and understand their production process.”



Cinema



Studio 43 © Frédérique Toulet

Last September, **Studio 43** held sessions for primary, middle and high school students to give them insights into specialist technical aspects of cinema including sound effects and dubbing. There are also plans for editing workshops and animated short film production workshops as well as initiatives around video games, series and podcasts.

These events bring the public face to face with cinema professionals and give them insights into how, precisely, films are made. Since the modular room opened last August, Presa reports a 25% increase in attendance at the venue.

Over in the Netherlands, at **KINO Rotterdam**, screenings are accompanied by exhibitions and specially made trailers. "We specialise in our classic curated programming," says marketing director Züleyha Azman of a venue which, since its opening in 2016, has always shown art house gems alongside newer releases.

When Azman discovered that legendary Dutch cinematographer Robby Müller (1940-2018), whose credits range from Paris Texas to Breaking The Waves, had loved taking polaroid pics, she was immediately curious.

**"I was already looking for a new exhibition four our bar area," she remembers. "We always want [an exhibition] to have a link with film but not an obvious one, not film posters or set photos, but something that has a certain quality."**

Azman promptly got in touch with Andrea Müller-Schirmer, the cinematographer's wife. She visited Müller-Schirmer and discovered that Robby had left behind "a huge archive." He collected everything from newspaper clippings to old scripts. **KINO Rotterdam**



Kino Rotterdam © Züleyha Azman

ended up not only hosting an exhibition but interviewing Andrea, where she spoke about the archive. This was posted online but also shown before screenings of films as "a little bonus" for visitors.

**"The context becomes bigger and more interesting if you do all of these separate things," Azman reflects. "We really treat our visitors to something special – we don't just throw something out there and expect them to come."**

The strategy is working. Attendances are up and the audience extends not just to older film fans who grew up with Müller's movies but to younger cinemagoers, too. "We have an art school and university here in Rotterdam. We also have a lot of young people coming to the cinema...we try to get them excited!"

**Geoffrey Macnab**



# The launch of a new initiative: Training Boot Camps

In recent years, Europa Cinemas has constructed an ambitious, connected programme encouraging collaboration and innovation across its network of 1,263 cinemas in 39 countries. Innovation and Audience Development Labs, network conferences, Next/Change, and reports and surveys are all now well established. Since 2021, the groundbreaking Collaborate to Innovate has added a new dimension.

Now Europa Cinemas has created a critical new initiative: the Boot Camp training scheme. It will help fund self-reliant, localised collaborative projects that will help cinemas across the network build common levels of proficiency, best practice and innovation.

Europa Cinemas CEO Fatima Djourmer said the initiative had been shaped by a Focus Group of exhibitors. "It was designed collaboratively with network members, ensuring guidelines, incentives and objectives are relevant and dynamic," she said. "We now have a unique training scheme, built on free local projects, devised by and for local members, and delivered in local languages."

She said support of the European Commission/Creative Europe has been invaluable. "The consistent support from Creative Europe has helped drive projects that are now achieving unprecedented collaboration and innovation across our network."

Focus Group member Mathias Holtz, of Sweden's **Folkets Hus Och Parker** said Boot Camps offered something new: "Where the labs, for example, bring professionals from all over Europe together in creative and inspiring learning environments, the Boot Camps will enable national and regional tailor-made education and development actions all over Europe."



Sofia Innovation Lab 2024 © Zuleyha Azman



Sofia Innovation Lab 2024 © Zuleyha Azman

The scheme will support a range of training options, as identified by network members. Each initiative will be led by a local network Coordinator who will recruit participants, find experts and partners, identify local needs and create suitable activities. Maeve Cook, of Ireland's **access<CINEMA** said Boot Camps would "find common training needs tackling specific problems in a region or country that are not necessarily an issue elsewhere."

Applications will be considered on a 'first come, first served' basis but special consideration will be given to initiatives from less developed regions and countries with weak access to public and private investment.

Marijana Bosniak, of **Kino Urania** in Osjek, Croatia, said the scheme could create new networks in countries needing to build skills and knowledge. "Cinemas with good practices could show others how they did it, and from there we can identify new goals and work on the skills needed to achieve them."

**The training will boost Europa Cinemas' mission to increase the diversity and circulation of, and audience engagement with, non-national European films But the Boot Camps scheme is tailored to local need. "Boot Camps are designed to be versatile," said Metka Dariš, of Kinodvor in Slovenia. "Cinemas can adapt the 'camps' to fit their needs. They can be included in existing festivals and local cinema network events or they can be an extension of current training and educational programmes."**

What matters, said Ioana Dragomirescu, of **Cinema Victoria** and **Cinema Timis** in Romania, is that applications encourage collective responses to shared issues: "It is a great new tool that lets us address practical issues within our own countries rather than at external meetings where only one person per cinema can usually attend." Boot Camps are designed to strengthen engagement with the full Europa Cinemas' programme, building member confidence and creating partnerships that may, for example, go on to create applications for Collaborate to Innovate.

**Michael Gubbins**



# Bologna Audience Development & Innovation Lab

This coming June, Europa Cinemas is once again partnering with Cineteca di Bologna. Together, we are organizing the 18th edition of the Bologna Audience Development & Innovation Lab, scheduled to take place from Saturday 22nd to Wednesday 26th June 2024. The Lab will welcome 40 exhibitors from all across Europe for four days of exchanging best practice.



© Lorenzo Burlando & Margherita Caprilli

This year's Lab will take place in a physical format during the forthcoming 38th edition of *Il Cinema Ritrovato Film Festival* (22nd June – 30th June), dedicated to revisiting the work of some of the most renowned stars and directors from the history of cinema and delving into the world of lesser-known and underappreciated masters. This edition will be led by Madeleine Probst (Programme Producer, **Watershed**, United Kingdom) together with Mustafa El Mesaoudi (Managing Director, **Cinema & Rex Filmtheater** Wuppertal, Germany).

Open to all European exhibitors, the Bologna Lab entitled "Building sustainable growth through inclusive and data driven approaches" will focus on: new ways of attracting an audience to the cinema; how to bring soaring costs under control; collaboration and networking; and green and inclusive initiatives.

Practical insights, intimate group dialogue, and panel sessions will assist European professionals in finding innovative solutions to specific challenges. Additionally, they will have the opportunity to present and discuss ideas with the wider group. Participating exhibitors can raise their concerns during the Lab, allowing them to step away from daily routines and engage with peers to contemplate their strategies, exchange knowledge, and discover practical solutions through fresh perspectives.

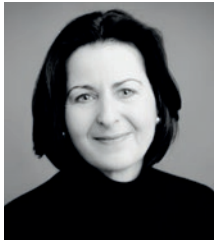
In an ever-evolving digital landscape, Europa Cinemas is adapting its approach with a continuous commitment to sharing. Consequently, Europa Cinemas will record and live stream the Bologna Lab via our YouTube Channel, aiming to provide our members with the opportunity to remain informed and connected, even if they are unable to attend the in-person event.

**Mathilde Narros, Nathan Germain**

# At the 2024 Directors' Fortnight

The Europa Cinemas Label, established in 2003 for the Directors' Fortnight at Cannes, has recognized notable films such as *Creatura* by Elena Martín Gimeno (2023), *Un Beau Matin* by Mia Hansen-Løve (2022), *A Chiara* by Jonas Carpignano (2021), and *Alice et le Maire* by Nicolas Pariser (2019), among others.

Europa Cinemas aims for these films to receive the recognition they deserve in their journey. As a result, the bonus for screening these films was revised in 2023. For further details, please refer to our guidelines, accessible on our website. Meet the four Network exhibitors set to present the 21st Europa Cinemas Label to an exceptional European film at the Directors' Fortnight in 2024:



**Louise Casey Conneally**

(Galway Film Society, Galway, Ireland)

Louise Casey Conneally, Chairperson of **Galway Film Society (GFS)**, has been instrumental in shaping Galway's film landscape.

With GFS celebrating its

60th anniversary in 2024, Louise's leadership has been pivotal in initiatives like Pálás, the city's first Art House Cinema, and Galway's recognition as a UNESCO Creative City of Film. A former Head of the UK MEDIA Desk and Director of Magma European Scripting House, Louise has spearheaded GFS' post-Covid success. Under her guidance, GFS offers a dynamic program of international art-house films, locally produced shorts, and multicultural events, fostering cultural appreciation and collaboration within Galway's diverse population and communities of the West of Ireland.



**Maarja Krass**

(Tartu Elekriteater, Tartu, Estonia)

Maarja Krass, a Communications Assistant at Tartu **Elekriteater** in Estonia, transitioned from studying visual arts to cinema, driven by her passion for

reflective communication through aesthetics. Her curiosity about different cultures led her to study foreign languages, literature, and religion. With a background in art history and painting, Maarja eagerly immersed herself in the world of cinema, completing a traineeship at Zebra Kino in Germany before joining **Elekriteater**. She successfully helps enhancing audience engagement with films, embracing her role as a passionate cinephile in Tartu's cultural sphere.



**Rémi Labé**

(Cinéma Le Navire, Valence, France)

Rémi Labé's journey into cinema began in his teenage years, leading him to study film at university and create short films of his own. After an impactful experience working for a Parisian art

house cinema, he helped developing cinema and film festivals in the French department of Ardèche and Drôme. For two years now, Rémi has been serving as the Director of **Le Navire**, an arthouse cinema in Valence, France.



**Tamara Visković**

(Kinoteka Zlatna Vrata, Split, Croatia)

Tamara Visković, an art historian and philosophy professor, boasts over 30 years of experience in cultural programmes organisation and production in the fields of visual arts, multimedia, film

culture, and cultural politics. She contributes to music and popular art through regular publication of articles and essays while operating as a current Head of Cultural Programs at **Centar Zlatna Vrata** in Split, Croatia.



# EUROPA CINEMAS

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Chief Executive Officer **Fatima Djoumer** – [fdjoumer@europa-cinemas.org](mailto:fdjoumer@europa-cinemas.org)  
Press **Charles McDonald** – [charles@charlesmcdonald.co.uk](mailto:charles@charlesmcdonald.co.uk)