



**20TH EUROPA CINEMAS
NETWORK CONFERENCE**

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RESUME

20TH CONFERENCE

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OPENING OF THE 20TH EUROPA CINEMAS CONFERENCE

Nico Simon – President of Europa Cinemas

A film's career mainly depends on its theatrical release and its success. It is of paramount importance that our theatres, your theatres, are state of the art, so as to compete with other platforms, and that those committed to European films find and share ways with network members, on how to innovate in audience development, especially towards youth. We should do this through new digital means of targeting and communicating, attracting and surprising. We are living in a diverse Europe, and innovation might be different from country to country, but everywhere the theatrical experience should be promoted. I would like to address the European Commission and, perhaps even more, the European Parliamentarians. In the beginning, the first MEDIA programme was meant to be limited in time to allow the film and visual sector to grow and to stabilise. Today, the world has changed in a way that nobody could foresee: multiplication of digital platforms, globalisation, internationalisation of markets and so on. In this new globalised environment that escapes Europe's control and will our colourful and rich cultural diversity is at stake. So, if ever, it is vital now to maintain and even to increase support to the industry for the next schemes to come.

Lucia Recalde – Head of Unit Creative Europe/MEDIA, European Commission

As you know, last year, the MEDIA programme, also turned twenty-five. This means there is only one year between the creation of the MEDIA programme and the set-up of Europa Cinemas. This is by no means an accident. Very quickly we realised that a solid network of cinemas and theatres is absolutely essential to ensure the circulation of European works. This makes Europa Cinemas our longest, and by far our most important beneficiary. If we look backwards, I think that the most important assets and achievement of Europa Cinemas is the ability to create bridges: bridges between audiences that access and enjoy artistic, high quality, artistic content. But also bridges between exhibitors across the European Union, and even beyond. Last but not least, by giving the possibility to European citizens to connect with something that is called Europe that, in many cases, is something that is considered very abstract and very bureaucratic. Today, more than ever, this connection with European citizens is of the utmost importance.

One of the most important opportunities in our view is innovation. Clearly this is an area that is key and critical for the future of the network. Innovation means, for example, taking advantage of digital technologies to engage more actively in marketing and promotion. It means exploiting a goldmine of data that you, as a network and as a community, have to understand better to accurately identify what are the preferences and behaviours of your audiences. It also means making the theatrical experience as unique as possible in a context where there is ever more competition, not only at home, but also from mobile telephones. Another area, in our view, that deserves greater attention, is the geographical spread of the network. We have been discussing this already. We are aware that the network for historical and economic reasons is much more present in certain parts of Europe. We need to think about how the network can expand and reach out to other countries, but also within each country where it already exists.

The last element I would like to mention is the importance of collaboration. You have recently launched initiatives to connect with each other even better. The labs are a good

example and this work needs to be strengthened. We also see opportunities for collaboration with other parts of the value chain. We know that there is also some interest in experiments with sales agents and distributors and we strongly encourage, and will try to support to the best of our financial means, this collaboration across the value chain. We know this is all very nice, but difficult to implement without an appropriate budget. Now, turning to the future of the MEDIA programme, I can tell you that we are already making our best and every effort to secure the best possible budget for MEDIA programme after 2020.

We think that we need more flexibility because things are changing so quickly.

We also believe that in some cases it might be good to focus on fewer projects, but projects that really have the potential to really bring about European added value

So, in this context, I would like to be really clear: Europa Cinemas has been for the last twenty-five years and will be, after 2020, one of the cornerstones of the MEDIA programme and MEDIA funding. There should be no doubt about it. At the same time, we need to make your successes much more visible. Europa Cinemas should help us get – or help us make a stronger case – for a more appropriate budget. We must ensure that all the relevant decision makers, at a European and national level, are aware of your success and the work you are doing in terms of promoting European values and European citizen engagement. I would like to finish with a quote, from Wim Wenders, “Entertainment today constantly emphasises the message that things are wonderful the way they are. But there is another kind of cinema, which says that change is possible and even necessary and it’s up to you.” I think we have here, in Romania, a wonderful generation of filmmakers that are exactly doing that, and I am very grateful to see Cristian Mungiu here, who embodies that principle.

Claude-Eric Poiroux – General Director of Europa Cinemas

Today, we will give you proof of our activity and our ability to think about the future.

In 1993, the goals were two-fold: we wanted to set up a network, and ensure funds circulated. Those were the goals from the MEDIA fund and that we gave ourselves.

What is a network? How can it be representative, powerful and visible?

How can the network be useful and interactive - something this is truly useful for each and every one of us?

People talked a lot about networking and, at a time when there wasn’t a virtual network, we were a physical reality, to bring together exhibitors and movie theatres who didn’t know each other. Bit by bit, the network has expanded. We started with twenty-four cities, all capital cities with over 100,000 inhabitants. Twenty-five years later, we are 633 cities.

It is important for European films to be present and to be seen. As a network, we provide an image and an experience. We have to be representative. Our partners must be able to count on us.

If we pool our strengths, we are really powerful and distributors are aware of our action and how we defend European film like we do.

The environment in which we are in is changing, and the question for us is fundamental: cinema today exists because it is in the movie theatre. Cinema is also available on other media, but if we look back at the past, in the ‘50s it went to TV, in the ‘70s it went to TVs and moved onto video or DVD. We’re going to win the battle, we’ve always done this.

SESSION I – THE CINEMA EXPERIENCE IN CHANGING TIMES

Directed by Michael Gubbins – Consultant, SampoMedia, UK

Introduction: Keynote interview with Cristian Mungiu (Director, Exhibitor and Distributor, Romania)

MG: I can't believe it's ten years since the Palme d'Or win. *Graduation* has been doing good business elsewhere. You are now one of the established auteurs in Europe, and your perspective is really interesting, on how you see cinema.

Cristian, maybe we could begin with Romania. Ten years ago, a lot of the talk was about the lack of cinemas, the problems of trying to get films out, even within the big cities. Could you give us an update of where we are with Romania at the moment?

CM: I am very happy to see all of you here. It is a very good sign for European cinema. If, given the state of European cinema today, you found the time to fly to Bucharest to speak about cinema, it is because it is still alive. That's good.

Some ten years ago, after I got that award, I came back to Romania, where I was trying to promote my film. I was trying to screen my film here, because there was a curiosity that was generated by that award, by the Palme d'Or, and I realised very quickly that out of forty counties in Romania, I could maybe reach fifteen. So, I needed to find a solution, and the solution for me then, because the award was very popular, was to organise a caravan and to find the money I needed to finance it, to bring all the equipment, from Germany, I believe, and to tour the country for some thirty days and to screen it to as many people as I could. Of course, we speak about the period in which I did this as on 35mm. I was hoping that this would bring attention from the state on the Romanian exploitation cinema system, in that moment, as we started having a lot of success as Romanian filmmakers, but we couldn't really introduce our films to the local audiences.

To be honest, instead of generating some political decisions that would change the system, I generated a trend, and this became the trend for the next ten years. This became a way for people who decided that it is possible to screen and promote your films here, and especially because we never had the possibility or funds to digitise the theatres.

The admissions in Romania increased, I would say, three or four times [what they were before], but not necessarily the admissions for these kinds of films, that we call Cinema, or European Cinema. This is because, at the same time, with this number of screens, which became quite popular in the multiplexes, we continued losing these individual theatres that we had some twenty-five or thirty years ago. I think there were some 450 single screens in 1989 here in Romania, and there are less than twenty today, and they are in a very, very poor state. And, now, due to a new law, some of them are being taken back by the local authorities, and what we are trying to do is to encourage people to use them and to use them for the purpose of showing films.

The status of the kind of cinema that we are doing is not really good, in the sense that what we call auteur cinema, nowadays, in Europe, is not really popular, and the numbers are decreasing everywhere. I was watching, with a lot of interest, the figures that were presented and, it's good to say that the admissions for American films reaches up to, I would say, 85-90% of all of the films. So, we have spectators coming to watch cinema, but most understand cinema in, simply, terms of entertainment. This is for a lot of reasons and

it's not that it's 'good' or 'bad', or that's somebody should be guilty for this but, if this trend continues – and I'm not only referring to Romania, but if this trend continues in Europe – for the fiftieth anniversary of Europa Cinemas, we may be speaking about very, very few films that would be screened in museums – unless we manage to create an alternative for the kind of interest that we need for this kind of small cinema.

Why is this happening? For a lot of reasons. It's easier for me to tell you why this is happening in Romania. It is happening, most of all, because life has changed, dramatically. And not just in the last ten years. It has changed dramatically since I was a child, and since people had all the time in the world to go watch cinema; when it was popular to go and read books, to hang out with children, and that was really nice. Kids, here, have a lot of other things to do, and many of those things happen in real time, like concerts, or eating out with your friends, things like this. The only thing that is a real alternative to real time is cinema. They can have access to cinema in spare moments when they are not doing something more interesting with their friends. And they can have this access because of the digital revolution; content reaches them, today, very, very easily. So, as much as we have had help from the digital revolution, at the same time, it is one of the reasons why people have lost interest in coming to watch these kinds of films in theatres, because it's possible to watch them in other moments.

So, on top of all of the objectives you have for coming for this three-day conference, I think it is important to point out, especially for smaller territories and Europe-wide, the political decision to fight against this. Because, if politicians continue to insist that the Internet should be so democratic that everybody should watch films without paying, then I think this is going to be the end of the experience of watching films in theatres in a lot of smaller territories.

What we managed to create in terms of cinema is still valid, but it was radical because it was connected with our complete lack of chances of reaching a big audience, to be honest. We started making cinema knowing that we do not have enough places to screen these films and, actually, we were making films for very radical people understanding cinema in terms of the history of cinema, innovating and finding the limits of this art. Not so much a popular cinema that would get its reward from a great number of people coming to watch it, as you can see, for example, in Poland, where local cinema is way more popular because they have such a big audience, and such a big, well-organised network of cinemas, that they can produce popular cinema.

Whenever you have smaller territories, smaller countries, where you have a very small network of theatres, this would be reflected in the quality of cinema that you produce. There is no point in trying to invest a lot in a popular cinema if you don't have the means to exploit it.

MG: Are you saying that film itself cannot find those audiences, or that we need to take steps to make sure that there is that connection with audiences? Is the art form itself the problem?

CM: I don't know if I have all the answers. There are a lot of explanations for this. First of all, we need to start by making sure that we make interesting enough films for the audience, because it's true that we are not always producing the most interesting content. Sorry to say this as a filmmaker, but it became so democratic to produce a film, and most of the films that we produce do not have any kind of feedback from the real market. A big number of

films that we are producing are not interesting enough to be seen in another territory other than home. Not that it's very popular in the home territory, but their chances of being popular in another territory is very small.

As much as we love this idea that we are all very Europeans, cinema still depends a lot on the national languages. We have to admit this. A popular Finnish actor won't bring millions of Portuguese to a small cinema there. This is the situation. So, it's important to keep trying to promote these kinds of things but we need to invest in a lot of other side initiatives, one of them being education. It always refers to education because, if you're trying to introduce, today – as we are trying here, to present more European films to young people, who are not exposed to this kind of cinema from age two until age eighteen - it's merely impossible to introduce this kind of slower language or more complex language to them. So, unless you start with a very early education about the history of cinema, about the diversity of cinema, and you don't manage to get them used, somehow, to this kind of alternative language, it's going to be very difficult to have them as spectators later on.

One problem for me is that the age of the spectators. We need to talk to younger people to understand what they want. The point is, they don't want to come to the same theatre that I was attending in the seventies, which was a 1000 seat theatre, where you go just to watch a film. This situation has changed completely, and this is one of the reasons why the American cinema works so well, because all of the multiplexes are on the fifth levels of shopping malls. So, unless we are able to refurbish these new theatres as places of interest, where you can go and do a lot of other stuff, besides watching cinema, I don't think that we have any kind of future. It's important to go there and, of course, watch a film, but also eat in a Japanese restaurant, have a place to leave your kids, and have a gym room, a library, a small theatre – my theory about why theatre is so popular is because you can't watch it on the internet – if we manage to organise a network of cinemas that is more than just a network of cinemas, then there is a chance that people who are inclined to consume more cultural goods will discover these initiatives.

PANEL I – Entrepreneurialism & Evolving Cinema Experience

Speakers:

Michael Gubbins – Presentation of Europa Cinemas Investment Survey

Lionello Ceri – CEO, Anteo & Producer, Lumière & Co, Italy

Heinrich-Georg Kloster – CEO, Yorck Kinogruppe, Germany

Bero Beyer – General and Artistic Director, Intl Film Festival Rotterdam, The Netherlands

Prof. Kazu Blumfeld Hanada & Diego Kaiser – Hands on Cinema, Münster School of Architecture, Germany

Lionello Ceri – CEO, Anteo & Producer, Lumière & Co, Italy

It is through cinema that we can encourage people to live better. We launched this experience in Milan, where we started nearly forty years ago, with only one screen. Bit by bit, the cinema changed and now it is the “Palace of the Cinema”. It is designed as an experience with a strong social value. It is a meeting place where people delve deeper into ideas. All the cinemas are independent exhibitors and we don’t want to set up multiplexes, but to create places where people come together and meet.

Seven days a week, in a city like Milan, with half a million inhabitants, we open our cinema in the morning. We don’t actually own the premises, we pay rent, but we did some renovation work and the owner has given us permission. It was a major project for our company. We invested six million Euros.

We have somewhere to eat and drink, which is unusual in Italy, and a multi-media room as well. There is also a public library on the performing arts. We think it is important in a public place to be able to read these kinds of books, so there are reading rooms, and rooms also where you can chat about the film you have just seen. There is also an area for children. There are courses for children and a literary café that opens up onto the street. We also have a classroom where we organise classes for teenagers and adults.

It’s not just a movie theatre. We have a garden and, in the summer, we have two open-air theatres where you can watch films with headsets so you can have two screenings at the same time.

Heinrich-Georg Kloster – CEO, Yorck Kinogruppe, Germany

Most of the activities you are doing in Milan, in the Palazzo del Cinema, we are doing it, or have created it in our cinemas in Berlin – not in one single place, but in different cinemas all over the city. We started forty years ago, rescuing cinemas in different parts of the city.

According to the area, we developed our programming. So, if there were students, we would have a student programme with lots of documentaries; if there were a lot of families, we would have children’s activities; and, later in the eighties, we had the first cinema showings of the original versions of the movies. In Germany, all the movies were dubbed, and almost no original versions came to Germany. Thanks to the Berlinale, we had the chance to get the movies with subtitles and to show those. Now we have around twelve, thirteen cinemas, showing movies only in their original versions.

Another aspect of our activities is that we have a diversity of different theatres and cinemas, from big, single screens, like the Delphi International, which have 500 or 700 seats, to two plex cinemas and, now, The Delphi Lux, which has seven screens. Those seven screens, altogether, only have 600 seats. The cinemas are all in different areas with different audiences around them across all ages and with a broad range of activities.

Bero Beyer – General and Artistic Director, Intl Film Festival Rotterdam, The Netherlands

This is my third year as festival director of IFFR. We are very sympathetic to the narrative of cinema across Europe. I am also sympathetic to Cristian's talk. I was a producer before, so I know how hard it is to make a film and how lucky you have to be to make any success. Yes, there is piracy. Yes, there is a declining audience. However, there is hope. For instance, festivals are doing awesome! There are many people coming out.

We are between Sundance and Berlin, but the development and creation of cinema in all of its chaotic forms is what we try to celebrate in Rotterdam, and why are we successful? Because we marry two extremes: we are a huge audience festival. We show about 500 works every year, 250 shorts, 250 features, mid-length, TV, art installations, performances, master classes, talks – whatever we think is relevant, we show. The coolest thing is that people actually show up. So, we have to do a lot of - serving drinks, yes, but, to create this experience that we call the cinematic experience, from the very ground up – and, by that, I mean that we literally invite 10,000 school kids to be part of the cinematic experience as one of their first big events in life, as it was for all of us. But it also means building the right context for each and every film, as I'm sure you are all doing. And you are the hope for us, that a film gets seen, gets critiqued, and gets valued, and, gets seen throughout a longer cycle than just this little crazy blip that is a festival – not just ours, but all the festivals. So, to be able to do this, for every film, we try to create the right context, whether it's in competition or an award.

Also, to be very clear, when a film is very 'arty', or has relevance to young audiences in another way, we try to support it. One of the ways we are doing this is by turning our festival into a professional festival. So, even though we are a big audience festival, there is a huge amount of experimentation that we do on the professional side of things; you may have heard of Cinemart, of the Hubert Bals Fund, of initiatives we run to support the creative community, not just in the Netherlands or Europe, but in the entire world, to come together and do co-productions, new films and alternate ways of creating that cinematic experience that we so cherish.

In many ways, I think Rotterdam, as a festival, and many other festivals as well, are turning into an R&D arena for trying out stuff, because we can. There is already an audience there, a certain critical mass on whom to be experimenting with day and date stuff, with different kinds of curated VOD platforms, with interacting with the audience in a more direct way. To be a little political, if we are in a world that has chosen some orange-haired leader to represent us in some form, how you are represented on screen matters. That we are Europe, that we have free thinking that we have a diverse population – it matters. Whatever we find to make that work, let's make that work, through creating a context and giving that to our audience and saying, 'This is actually you.' Not from the top down, but networked in the new millennium, where there are hubs of creation.

Prof. Kazu Blumfeld Hanada & Diego Kaiser – Hands on Cinema, Münster School of Architecture, Germany

Susanne Schmidt – Creative Europe Desk Berlin, Germany

Last year we started an initiative called Hands on Cinema. We saw a lot of great cinemas but not everyone has a palazzo. We know a lot of small cinemas are not being renovated or modernised in recent decades and this is the point where we started to work together with students from different universities in the fields of Architecture and Design. We had a call out for cinemas to apply, to have a 'refreshment' if they were aware of problems arising from their spatial concepts.

It was mostly about problems with visibility in the neighbourhood and accessibility for disabled people. Most importantly, they had no social spaces for special events. So, the students travelled to the cinemas, spoke to the owners, discussed the problems and their proposed solutions. The cinemas got ideas, a toolbox and the process, though not finished – they did not have a master plan or a cost plan – they got something to work further on. It is an interesting idea to work with students because, very often, they aren't going to the cinema, so they have an outside perspective.

Prof KBH: I think the students do actually go to the cinema. I am an architect and teacher at the School of Architecture in Berlin. Hands on Cinema was an interdisciplinary project with Architecture and Communication Design students. Altogether we had sixty students, from the second year, who are very young students.

There was a clear demand for change. Now, libraries transform into mediatheques or a planning centre, which is a new type of social gathering space.

Through our discussions with young people we see the potential of the redesign of cinema in the future, especially with the current influence of media – For instance, Netflix or TV –. We have to update the cinema to the direction in which it should go.

The cinema space should be more open to the public, have more flexibility, be multifunctional, with a hybrid appearance to society. We focus, mainly, on the transformed use of public space at the cinema, for instance: the foyer, restaurant, café or bar. Even though the space for cinema remains central, those interior public spaces should offer workshops, seminars, markets, reading sessions, events for the town, a bar/club at night, and a new type of casual gathering place. Those public activities should run individually, even though the film is not screening.

In addition, somehow, social media or other virtual public space could play a role within the organic integration into the physical public space.

DK: I am a German Architecture student and will present my work on a cinema in Hamburg. It is a former ship propeller factory. It is in a former industrial area with a lot of cultural changes. After conversations with the cinema operator, we came to the conclusion that there are four main problems; there is not enough space for standing in the ticket area, there is no seating area for customers in between shows, the shops are closed, and the corridor to the cinemas creates a bottleneck. My design is to make the public areas bigger and to create a sitting platform. I made them a model of the space. Using the industrial materials for the propellers, we can create different seating areas with greater visibility and that promotes interaction.

PANEL II – Independence of Choice: Challenges & Opportunities for Cinema

Speakers:

Pablo Carrera – Principal Research Analyst for Cinema Intelligence, HIS Markit, UK

Nina Peče – Director, Kinodvor, Slovenia

Ben Luxford – Head of UK Audiences, BFI, UK

Eric Busidan – Chief of Service, Distribution Mission, Centre National du Cinéma et de l'image animée, France

Domenico Dinoia – Exhibitor & President, FICE, Italy

Pablo Carrera – Principal Research Analyst for Cinema Intelligence, HIS Markit, UK

I'd like to draw your attention to WANDA, a Chinese company. They have 50,000 screens worldwide, which is about a third of all the screens worldwide, in 2016. The second thing to draw your attention to is the nationalities of the biggest exhibition companies in the world. You can't see any European companies in that list – or, not yet. They are mostly North American or Asian companies, and they do have a presence in Europe. WANDA is present in fourteen territories in Europe. Cinapolis, a Mexican exhibitor, has cinemas in Spain. CGV, a South Korean company, has just acquired VUE. Things are changing a lot.

Let's look, now, at what happens in Europe – at the five largest exhibitors. The first one is AMC, owned by WANDA. AMC is an American company. This happened in the last eighteen months. Eighteen months ago, AMC didn't have any presence in Europe, but they bought ODEON and UCI. Then there is the Nordic Cinema Group, in the Nordic and Baltic regions. In a matter of months, they have become present in fourteen countries in Europe. It's important to know that they are also owned by WANDA. The strategy is coming from AMC, the North American company. They own about 9% of the screens worldwide, which is about 15% of the box office. Again, very profitable screens.

WANDA said that they wanted to own 20% of all the cinema screens in the world in the next ten years. CGB said 10,000 screens by 2020; they have about 3,000 now. So, you can imagine the ambition of these companies in acquiring cinemas. What's driving these acquisitions is, first of all, a response to competition, to keep ahead of other companies and to increase profitability. They have two strategies to achieve this. First is to acquire new screens in new and emerging markets. Newer screens means more admissions and, if managed properly, more profit. Acquiring cinemas where strategy or scale can be applied, turning the cinemas into more profitable activities.

Western Europe is not experiencing growth: screens are opening but some are closing to the actual number is not increasing. Everyone can be a target; large exhibitors sometimes buy independent screens.

The next question is: 'How is it impacting the rest of the market?' 50% of AMC cinemas in the US will have recliner seats in the next year. When they bought UCI and ODEON, they are targeting those cinemas too which means that their one example of innovation becomes so common that they set a standard to which other cinemas need to react. Innovation doesn't just come with comfort, it's also through data, food and beverages and will lead to VOD.

These exhibitors have the capacity to pick up innovation, test it and implement it quickly. Being informed is the best way to tackle this. The take away points include that acquisitions are continuing, mostly from North American and Asian companies going into Europe.

Nina Peče – Director, Kinodvor, Slovenia

We've learnt that CINEMA is FILM + AUDIENCE. It means we take the film as seriously as the audience, and we treat them with the same respect. As a public institution, we don't just care about the business, we also have a cultural mission. That is, to provide a public service in the department of film culture, cinema exhibition, and film education.

This leads to a high level of programme diversity, which became even higher with the digitisation of our cinema. We don't just find but know our audience. In the last year, we renewed our communication strategy in order to have innovative understanding of our audiences. The audience is not just one type, they are diverse. It's not just a question of how to communicate about the film, but every screening. There are specific audiences for every film, and there are programmes we can communicate to different audiences. If we know them, we can feed them the information they are interested in.

It is a very small market, and we have a network of Slovenian cinemas, a little over twenty cinemas, which was organised in the past year, and it has a 20% share of all admissions in Slovenia, which is high considering they are mostly single screen cinemas. But they are cultural centres, too. We always choose one film or one programme at the cost of another. Bigger diversity, and this is important, doesn't necessarily mean a bigger audience. If we talk about film culture, education and value, then we have the responsibility as a society, which also means the city and the state, cultural politics have to participate.

Ben Luxford – Head of UK Audiences, BFI, UK

We do loads of stuff, and it's often quite confusing for our constituents. We promote film and the film-going experience. We have London Film Festival and BFI Flare film festival, we have a flagship venue on the Southbank, we run the national film and TV archive. We also have major education initiatives. It is confusing and it got even more confusing, five years ago, when we took on lottery responsibility. It's 'good cause' money, to be deployed into film. We get the smallest deployment of that money at 2% of the overall pot and we put that into major education initiatives and the development, and production of features films and, now, models of film and talent development, and, also, into audience development. We work to five year strategies and we've just launched a new one.

Instead of a distribution, exhibition, film festivals fund, we've just got an audience fund and are focused on the end game. Everyone can apply, as long as they are working to our objectives. There is a headline objective of 16-30-year-old audiences, which is who we want to see coming to cinemas. We have the BFI Audience Network across the UK meaning we devolve funding and decisions to partners in regional hubs across the UK. They know their regions and audiences far better than us. The cultural hubs are based in venues, they lead by best practice and are all Europa Cinemas members. They promote and show everybody the way; how to build these audiences and how to lead.

Main headlines in the UK: more films than ever are being released. This year it will be close to 900 films. This is mad, because admissions aren't growing. Still, the top films are delivering over 90% of the market in terms of box office. Lots of people watching a handful of things. Films battle for 8% of the marketplace, audiences are overwhelmed, and local cinemas have to take the initiative and not rely on distributors who aren't spending the money anymore.

Domenico Dinoia – Exhibitor & President, FICE, Italy

We were told about these huge groups that are buying lots of screens. They are huge global companies, but sometimes David wins against Goliath. It's up to us, through our skills, to show that things can indeed evolve.

Every year in Italy, we have around 500,000 spectators to come to see our films. The American cinema has predominated. Together with the Italian cinema it stands at 15%. The Italian market share has dropped a lot. The number of new releases in Italy is important data, because films being released in Italy are numerous but, most of the box office receipts come from American films. European films represent 80-90% of income in the network and, without our network, it would hardly be possible to see European and art house films. What's even more important is the way in which our cinemas are spread around the country. We have about 3000 screens. We have 645 theatres with just one screen, 310 with 2-4 screens and 108 with 4 or 5 screens. Small structures are present in small towns and cities. In Italy, multiplexes all have the same programming, they all show the same films. UCI cinemas have nearly 500 screens, then there is WANDA, the big international group. There is another group that doesn't deal with programming or management of cinemas, but real estate opportunities. In terms of quality cinema, you have exhibitors and distributors. We need to contact the distributors. They need to participate more, together with us in this adventure. Otherwise there is an important factor that's missing.

Eric Busidan – Chief of Service, Distribution Mission, Centre National du Cinéma et de l'image animée, France

I was invited to be representative of the CNC to talk about our role and the major trends in programming in movie theatres in France in the past few years. These trends have a lot of tensions, too. There is a problem, as Domenico mentioned, between exhibitors and distributors. In France, a year and a half ago, we put everyone into an incubator for a month or so, so they could talk to each other, with a view to reaching an agreement.

In terms of key trends there has been an increase in the number of films, from 552 to 715 in 2016. We have found that there are 14% more films screened, with 9% fewer screenings. The bulk of the cinemas in the network have between one and three screens. A shortening of programming periods of films in cinemas has moved from 87% within 5 weeks to 91% in 2016. The window is becoming shorter and shorter.

Another trend is linked to multiplexes is the increase in the number of American films screened in cinemas.

In light of this, an independent authority that tries to resolve disputes between exhibitors and distributors intervenes in terms of conciliation when the distributor doesn't want to give the film to the exhibitor, or an exhibitor refuses any films, so they might feel that one or other party is exaggerating, and can then join one of the parties as an arbitrator.

The recommendation is a kind of soft law and shows that multiprogramming can work. The local market requires programming commitment. There is another regulatory measure when a cinema wants to open up shop in France, so to speak, it has to get an authorisation. The 2016 agreement was signed in Cannes, between filmmakers, distributors, producers, exhibitors, and is a professional agreement. The aim was to strengthen diverse programming and strike a balance between exhibitors and distributors.

SESSION II – 20 SLIDES’ ARTHOUSE TALES

Directed by Madeleine Probst – Cinema Programme Producer, Watershed, UK /
Europa Cinemas Vice-President

Speakers:

Rachel Hayward – HOME, Manchester, UK

Daira Abolina – Splendid Palace, Riga, Latvia

Gerald Knell – Filmcasino, Vienna, Austria

Matthieu Bakolas – Quai 10 & Ciné Le Parc, Charleroi, Belgium

Rachel Hayward – HOME, Manchester, UK

We’ve been open for two and a half years. It’s a multi-arts centre and we’ve seen increasing audiences and diversity in the programming. It was a merger of two organisations, Cornerhouse and Library Theatre Company, both of whom had outgrown their venues. We have three gallery spaces, five screens, learning and rehearsal facilities and a café/bar. We work with volunteers across a range of ages and backgrounds. We have a Bring the Family strand, our parent/baby screenings and autism screenings, as well reduced pricing to attract younger audiences. The artistic programme, film and theatre programmes are wide-reaching with local and international content. We commission live scores, working with local musicians and pair them with archive footage and classic films.

Daira Abolina – Splendid Palace, Riga, Latvia

We opened in 1927 and maintained the function of cinema, even during times of war. Our cinema has a neo-baroque façade and there are more than 560 seats in the auditorium. We honour the traditional cinematic values, but fully embrace digitisation. We maintain our 35mm projector ready to put to work if needed. We offer lectures on special topics around film and, to engage with our audience, we have turned Splendid Palace into a cinema of events. We segment content, have specific screenings for teachers and students. A series of lectures on genre for high school students has been particularly successful. We are the main premiere cinema for national and international films. There are no accidental viewers at our cinemas, they know what they are coming for. We celebrate our 95th birthday and Latvia’s 100-year anniversary next year. You are invited.

Gerald Knell – Filmcasino, Vienna, Austria

Film Casino has been a single screen cinema since 1911. Two points from our history inform what we want to do today and can do in the future. It reminds us of the golden era of cinema, but it went through the difficult period and, in the seventies, was closed down. It was, in the eighties, home to Yugoslavians, as so many came in the eighties to Vienna. The union paid the rent for the space and they had a cultural space with films, concerts, and parties. After that, a supermarket wanted to move in but it was considered part of adult education – to bring foreign films in and show them – so it was refurbished and reopened in 1989. Now we have to finance ourselves and are a private company. We have our own

distribution branch and distribute them all over Austria. We specialise in European films and independent films from the US. Animation has been very strong and, from the beginning, we have tried to keep it a social space and attract guests in association with festivals. We attract DJs to perform, show 35mm original prints and find new audiences through these showcases. In the mornings, we have free childcare. We have autism friendly screenings. We try to be a social hub and do what other cinemas are not doing in Austria.

Matthieu Bakolas – Quai 10 & Cine le Parc, Charleroi, Belgium

I'll tell you the story of how we moved from an historic place, a single screen, an art house cinema, to a transmedia venue.

The city has 200,000 inhabitants, it's 50km from Brussels, the economic situation is difficult and the unemployment rate is very high. There is no university and it is truly a place where culture is very difficult to introduce among all publics. The single screen belonged to a school, programming was run by a Jesuit father, which explains the audience, which was not very large at the time. In 1991, the cinema was taken over by others and the programming became more professional. There was a real art house proposal, there was a major increase. The historic theatre was totally renovated five years ago and there are 125 seats. In 2016, Quai 10, a new cultural place opened. They have three main media: the cinema, gaming and digital arts. This was possible because the political context was favourable – the mayor in the city decided to focus on culture and turn culture into a tool for redressing the city.

We received funds to renovate and re-do the building. There were no other cinemas in a city for 200,000 people so we moved to a second venue, too.

Quai 10 has four screens. The rooms aren't huge but we can't fill huge rooms every day. There is a 400-metre squared restaurant, family programming, and we run lots of events. What runs through our venues is quality programmes, art house films, European films, always in the original version with subtitles (we are the only ones to do that in our city) and an educational programme about cinema. 20,000 school children come each year.

Gaming makes our project quite unique. It doesn't exist anywhere else in Belgium and in Europe is quite unique. We show the diversity of creation; we show independent games, European games and use it for teaching content. Anyone can come and learn how to create a game.

SESSION III – THE ROADMAP FOR INDEPENDENT CINEMA

WORKSHOP 1 – CINEMA ECONOMICS & INVESTMENT CASES

Directed by Michael Gubbins – Consultant, SampoMedia, UK

Speakers:

Ian Wild – Chief Executive, Showroom Workstation, UK

Hrvoje Laurenta – Executive Director, Kino Europa, Croatia

Sophia Ramcharan – Audience Development, Diversity and Engagement Coordinator, Broadway Cinema, UK

David Deprez – Artistic Director, Lumière Cinema, The Netherlands

Ian Wild – Chief Executive, Showroom Workstation, UK

The cinema is a four-screen arts cinema and we have a workspace for sixty creative industries, with 500 people in the building. We decided to invest in CRM – we bought software that allowed us to interrogate our customers, and that we could use for marketing. We knew we needed to collect more data so we created a membership scheme.

My Showroom is free to join, with a points scheme that can be redeemed in the café or bar, or at the box office. You can pay to get cheaper tickets and more points, plus two free tickets on joining. That's been very successful.

Our Cine twenty-six scheme targets younger audiences aged twenty-six and under. They are £4.50 tickets. It's successful with film like *Baby Driver*. When we started to look at the data we could target more directly, and use the budget in a different way, and use the information to build the audience. Every film has a campaign and CRM allows us to direct market. If you've seen a French film, for example, we'll tell you about more French films, through our e-campaigns.

We're not spending more but doing things differently – producing a brochure was all we did before (writing, circulating, distributing), and now the staff have the time to do other things.

Hrvoje Laurenta – Executive Director, Kino Europa, Croatia

I am doing film distribution but I wouldn't do it if the distributors would buy films we wanted to show. We now distribute our films throughout Croatia. Social media and websites were the only way we could communicate with our audience. Research showed that posters and printed programmes were very expensive and, for less cash, we could present it better online.

Our flyers ended up in the trash can. So, we target our audience on Facebook, Twitter – there are so many platforms - Pinterest, Google +, Instagram, LinkedIn.

Precise data has helped. We use Google analytics and our Facebook is better than our website and we use it to educate our audiences about the films. All our posts on Facebook are educational posts. There are people who don't use social media, but the demographic for social media is getting older.

Sophia Ramcharan – Audience Development, Diversity and Engagement Coordinator, Broadway Cinema, UK

We have to ticket offer for under twenty-fives. If they book online it means we can capture the data of who is buying tickets. Social media was key in marketing the scheme.

In an effort to make the cinema as inclusive as possible we put “special screenings” in the brochure to promote films that were short runs, one-offs and courses.

We re-branded them as ‘Broader’ to make it funkier and more accessible. We consulted with a graphic designer and with our front-of-house staff, who are mostly under twenty-five-year-olds anyway.

People need to see a message at least seven times before they act, and we do that on multiple platforms. If the pricing is low enough then just going along and trying something out seems like less of a problem than if you are charging fifteen pounds.

David Depez – Artistic Director, Lumière Cinema, The Netherlands

We used the launch to promote the opening through communication, crowdfunding and activities. Every activity was a stepping stone to the grand opening event.

People wanted to see their own family history in the industrial building – much like early cinema and everyone wants to feel at home. But you have to experience home in different ways. We looked at Instagram to see what was important to our customers and it was family, food and cats. You have to maintain a strong identity, too. Then, the audience will come to a place where culture and social connections spark. If you enter our building, you enter our philosophy.

WORKSHOP 2 – THE COMMUNITY VALUE OF A CINEMA

Directed by Michael Gubbins – Consultant, SampoMedia, UK

Speakers:

Joanna Zak – Programmer, New Horizons Cinema, Poland

Russ Collins – Executive Director, Michigan Theatre, Founder & Head of Arthouse Convergence, USA

Alexandra Boghiu – Project Manager, Asociatia pentru Promovarea Filmului Romanesc, Romania

Jaki McDougall – Chief Executive, Glasgow Film, UK

Joanna Zak – Programmer, New Horizons Cinema, Poland

Wrocław has 600,000 inhabitants and eight cinemas – no single screens, the smallest has four screens and the biggest has twenty. Two are art house cinemas, and five are in the city centre. The cinema would not exist if Wrocław had not been chosen to be the European Capital of Culture in 2016.

We call ourselves an art house cinema. Our friends call us a mega art house cinema but we

are also a cultural centre. The space is enormous. We do performances in the cinema foyer, flash mobs, we have dance classes, yoga classes, concerts, there is a space for exhibitions – sometimes not professional artists – there is a bookshop, there is board game rental, there is also a board games shop.

For us, it was obvious that, to keep the door open, we had to have many initiatives. This is why we work with a children's hospice, animal and human rights activists and with small companies, etc., etc. We also thought it was crucial to connect with the city and its history and everyday life. We screen art house films about the history of Wrocław. We have 'The City that Talks and Sleeps' programme and an event focussing on the economic struggles of the city. Those two programmes are extremely popular because people really love their city. The most successful decisions we made was to host film awards. It was a glamorous event and the city used it as a promotional activity. So, to convince the audience it's not just events, we had a three months presentation of all of the awards. We screened all ninety films and invited the talent to our cinema.

The other thing we did, this year, when we celebrated our fifth anniversary. When we opened there was nothing spectacular but we thought, let's celebrate this anniversary. We divided the programme into three parts; the first part was curated by the audience – the top fifteen of our Box Office Results; the second was our staff choice, five popular movies; and the third part was very important because we gave our floor to our partners, all the institutions we are cooperating with, and it was a chance for us to say thank you.

Russ Collins – Executive Director, Michigan Theatre, Founder & Head of Arthouse Convergence, USA

Independent cinema is cinephilia and that is people's love, so independent cinemas = love. If you take, collectively, the art house cinemas in the United States there are probably about 1,000 and we estimate a 2.6-billion-dollar economic impact in local communities. That equates to about 40,000 jobs, which is not insignificant. We make this argument to justify our tax-exempt status for any government based funding.

A cinema is a place that is going to encourage social cohesion in a significant way. The people who start cinemas aren't doing it for the money. A lot of times, they're going into downtowns and urban areas that are not in the best of shape. In that way, they are Urban Pioneers. The other person is the mission driven business person who attracts others and promotes social cohesion.

Theatres fulfil that primal campfire desire, the notion that we like to sit around in a group and experience a story by a flickering light. I think that's the reason cinema has survived in theatres for so long, when all of the technology would have indicated that it would have disappeared. This is why they did not and will not go away.

Independent cinemas operate on diversity and inclusion and I believe that safe place makes the social cohesion of cinemas so important.

In the United States, there are very few schools that teach moving art or visual culture. Until we teach film appreciation and media arts studies, we are going to lose generations who are not exposed and will not get as passionate, especially in a movie theatre. The number of university students taking foreign language studies has fallen precipitously in the recent years. This is clearly a major problem and relates to the notion that English speakers in general are lazy about learning foreign languages.

I was surprised to read that digital distribution is harming the number of European films seen in the United States. One thing that will probably change in the next five years is the discussion about channels. We have an almost unlimited number of channels, but not every film is connecting with an audience.

The democratisation of digital cinema is creating an inordinate number of terrible films that curators have to sort through. We, as exhibitors and distributors, need to do a better job to teach our audiences about European film. We can do a better job. The only way we can achieve social cohesion is to be relentlessly creative, and get deeply involved with your community. Have a political system in your town that works, and in how the social structures in your town are built. Become a player in your own town or neighbourhood that is going to get a lot of attention for your cinema, and aggressively seek funding wherever you can get it.

Alexandra Boghiu – Project Manager, Asociatia pentru Promovarea Filmului Romanesc, Romania

One of our projects is called TIFF caravan, which is one of the largest projects in Romania for film promotion. TIFF caravan has crossed cities since 2009 and has been a member of Europa Cinemas since 2015. We try to reach as many cities as possible, usually fifteen to twenty per year. The project takes place from July to September. It is growing with more requests for public screenings and from city halls. We request funding from every city we go to, our screenings are admission free. One of our biggest surprise was one town where we usually screen films every day for one week and this year, every night, there were more than 1300 people.

In one city from the TIFF caravan map we held a small festival. We are also implementing an education platform for young audiences. We organise activities for students and teachers. Our programming includes non-national European films and our world programme is more than 70%, 15% Romanian and the rest are US, Russia and others.

The hardest part of the project is implementing it with all of the local authorisations and paperwork. We also think there is a lack of professional department in the public institutions to understand our artistic needs in organising an event for so many people.

Jaki McDougall – Chief Executive, Glasgow Film Theatre, UK

Like most post-industrial cities, we have our problems. Almost half of the city's residents reside in the 20% of most deprived areas of Scotland and life expectancy at birth in Glasgow is amongst the lowest in the UK. But attendances are among some of the highest in the UK for arts and culture. Cinema culture can play a role in community and social values in creating social cohesion and building trust between different groups in our society.

We, the cultural cinema leaders, are here to change the world, and yet we've somehow managed to ignore a great section of the community. The social demographic of Glasgow is therefore the basis for our work.

Visible Cinema, we use visible sign language and text for deaf and hard of hearing audiences, with screenings and discussions at monthly events with captioned screenings. One in six people in Scotland are deaf or hard of hearing and the Scottish government has recently announced that British Sign Language is to be recognised as a national language in

Scotland. GFT has also researched attitudes to captions at prime times which has given us more confidence to offer more captioned screenings at prime times.

Last year we published a guide for other UK cinemas to use, sharing best practice.

Our Access Film Club is targeted at people aged fifteen plus on the autism spectrum.

Monthly events with speakers are designed as a safe entry point to GFT, but we also know that some of the audience members will only choose to attend those events. We are now running an access lab to get people involved in running the events and the programme.

We have a dementia crisis. We also have a significant aging audience. We've raised €100,000 for a three-year study with academic research attached.

Inclusion is a great word and it sounds like an easy word but inclusion is also a form of exclusion. We, the gatekeepers of film, need to share and develop more with our communities. Lesson number one for Glasgow Film was the mantra, "Nothing about us, without us." This is the most important piece of my personal learning that I can share with you. Collaborate with people who have lived with experience, that includes young people with youth programmes, local people with community activity, those who are deaf and disabled, with autism or Asperger's, and those who have a low income.

To collaborate, you need some basic rules. It only works if you share some basic values. Values do not mean money. It would never work if the only thing you wanted out of the partnership was money. There is very little we do now that isn't a co-curation, collaboration or partnership.

We make choices about which communities and which cultures we want to invest in. We're trying to empower our audience to become participants. To give away our power is not an easy thing to do. We've fought for it and won it and don't want to give it away, but we have to, to create partnerships outside our comfort zone and outside the bubble.

The reason we need to do this is because we can't afford to have fatigue about democracy at this stage. Now is the time for us to become good again to spot what the community needs from us. We have to be the glue to create community and cohesion.

SESSION III – PRACTICAL INNOVATION AND BEST PRACTICE

WORKSHOP 1 – HOW TO BUILD A BRAND

Directed by Jon Barrenechea – Deputy Director of Marketing, PictureHouse, UK

Speakers:

Daniel Sibbers – Head of Marketing, Yorck Kinogruppe, Germany

Jonas Wansing – Hands on Cinema, Münster University of Applied Science, Germany

Matthieu Bakolas – Director, Cinema Quai 10, Belgium

Raphäel Vion – Director and Programmer, Cinéma La Clef, France

Monica Törnblom – Content Manager, Folkets Hus och Parker, Sweden

Daniel Sibbers – Head of Marketing, Yorck Kinogruppe, Germany

We are a group. We were founded thirty-nine years ago. In the Berlin cinema scene, this was a time when a lot of cinemas were founded, and there was a demand for European and international films. We have thirteen cinemas, thirty-six screens and around 6,000 seats. When we did our rebranding, we considered what we had: we had beautiful, old cinemas, traditional down-town venues, or neighbourhood cinemas. We also have new cinemas. Our strengths weren't only the buildings, but that we are locally run, have unique venues with quality programming. We developed a quality seal – a group of students helped us – wherever you see the seal, there is something good behind it. We created a slogan that translates, in English, to explain that, 'with us you are never lost' (it is a play on words – 'In the right/real cinema, you are never at the wrong movie').

We have extended our brand into the social media square. You are talking to people and are competing with their friends - you don't want to just throw advertisements at them. We are interested in culture, overall. We are not mocking our competitors. We have values, we care about our city and, whenever it concerns minorities, human rights, we are there. We don't take part in political issues but we have values and morals. Our most looked at Facebook post ever was when we posted pictures to protest a right-wing demonstration in front of one of our cinemas.

For a new cinema, we didn't have any pictures or anything so we thought about what we could show people was happening. Then we launched a social media strategy. We use Facebook, Instagram, Twitter and, for a new location, it is important to be on the maps – trip advisor, yelp – so we tried to claim the space for the cinema. When you would look it up on google, there would be something there already. You can choose the image and have alerts to respond to comments. We told people what we were planning and then we hired an illustrator to show what kind of cinema it would be and we had a trailer made. We had a well-known German actor. We held a press conference and then used what the press said about us to show the public. In the final days, we presented a countdown and showed one of the seven screens each day, which we shared on every platform. We received some funding for a funny, smart trailer and our partners shared it online, even though we didn't run it on TV.

You don't need an agency, you can use your staff and the resources you have. Use your influence to get others to talk about your project.

Jonas Wansing – Hands on Cinema, Münster University of Applied Science, Germany

I am studying design at the Münster School of Design. The Cinema Lumiere was established in the 1980s in Göttingen. The need for another cinema as an extension of the Lumiere became clear. An old Baptist church was found for this purpose. We have two cinemas, 1.4km away from one another. Our challenge, as a designer, was to find a new name for the cinema and a new visual identity for both of the cinemas. We had to connect them, but also make them distinguishable. So, we saw the two cinemas as brothers.

Matthieu Bakolas – Director, Cinema Quai 10 & Ciné Le Parc, Belgium

Our four-screen cinema has opened a year ago. We have a gaming room and Quai 10 is a media location. There is also a brasserie. It is a place where you can have an experience. The films are of very high quality, but Quai 10 is also a hip venue and cultural project.

Architecturally, it is an attractive setting. It is taller than it is wide and, unlike most cinemas, it has a lot of open spaces and a lot of light.

Our values in gaming are to discover, understand and create. These are the key aspects. Gaming is a cultural and artistic creation. It is the biggest entertainment industry and I want to show you that, in the thousands of video game available, there are good and bad ones, just like in the cinema world. The important thing is that it is fun. We don't tell people what is 'correct' or 'right', we want to attract young people in all their diversity and this is the same mission as what we want to do with cinema.

We prepare work for schools and work to the curriculum for educational films, and we use the same approach for games. We want to have an emphasis on collaboration, on issues like feminism and racism and we wrap it up in a fun way, which is extremely effective. We are not creating a video game but we show users how to use the various codes and how to have fun with them. Video games are an important portal for the academic sectors and the corporate sector. The gaming and digital industries are extremely dynamic.

We showed *Aliens* and had the gaming space open too, bringing film and gaming together. The idea is to live an experience more than to go and see a film. Whatever the film, the proposal around it is unique.

We have several approaches:

- Gaming is a door to something else
- The range of experiences we offer are compatible – they go from one to another
- We adapt our proposal to the public
- We can recruit young viewers, as young as age six, after school groups attend (20,000 admissions)
- We have a moderate price - €6.50 for under twenty-fives
- Good communication on social media
- The place itself, the location and the building (unique architecture, modern, open space) and we are in an up-trend, in the heart of a district being regenerated.
- There is a community thrust – synergy between the project and the community
- We can count 500-700 people as our ambassadors, they advertise our venue

Raphäel Vion – Director and Programmer, Cinéma La Clef, France

Today, in Paris, we are talking about thirty-two cinemas and independent companies. Across seventy-nine screens we have 15% of the admissions in Paris, 3.2million admissions a year. We have created a shared website. We are working on grouped purchasing for insurance, lamps, projectors, etc. We spend five to ten hours a week trying to develop these different projects. We wanted to target new audiences and win back market share. We wanted to change the image of independent cinema; of old cinemas, dusty and old-fashioned, not 'in'. We wanted to fight the 'limited district', which is very French. We started a card, but first we had to do a lot of branding work. We created a new logo and we carried out highly detailed sociological studies on who we were and what we wanted, and who our target audience was – who didn't come to the cinema and why. We tried to understand the audience, and what might attract them more.

This is a prepaid card. Either you buy five admissions for €30 or nine admissions for €48. This means that we have €5.40 or €5 per ticket, and three euros for the management of the association. It is valid every day for six months (€30 card) or nine months for the €48 card. The admissions can be for one or two people. It is not a nominative card, you can lend it to a friend. Twenty-three of the cinemas have adopted it, from 32, representing most districts. You can buy it and charge it at the cinema or online. There is a compensation managed by the association and the software programme. We make money in relation to the cards sold. The biggest difficulty was creating the software to accommodate all of that, and it's complicated. The software development took much longer than expected but it works today and was launched in August this year. After three months, we had sold 7,500 and will move up to an estimated 30,000 for the first year. The city of Paris helps with the promotion. To guarantee the success of this kind of card, it's very important to make sure it works technically. The public want it, our colleagues and partners are interested, and cinemas in the periphery want us to open it up to include them.

Monica Törnblom – Content Manager, Folkets Hus och Parker, Sweden

We have 150 independent cinemas in Sweden. We took over Bio Rio in 2008 and upgraded the cinema, carefully. We re-opened it with management we hired from the theatre and music business. We screened art house and event cinema. We hold film festivals and school screenings. When we look at the numbers, event cinema and special screenings attract more people per screening, which is not surprising as they are exclusive, 'night out' experiences. Bio Roy in Gothenburg is also managed by a woman from a theatre background. Both cinemas have a female core audience of 70%. The revenue from event cinema carries the film screenings. Bio Roy has increased their admissions since the start up in 2007. We believe there is spill over from the event cinema screenings.

To build a solid brand, you need to know your target audience. The two cinemas did a survey of 12,000 people. The average person in Sweden sees ninety films a year but only 1.8 at the cinema. So, why do they still bother to go those 1.8 times? The answer in the survey says they like special events at the cinema almost three times more than the average cinema-goer. The atmosphere and cinematic environment is the most important aspect, even more so than the social activity of meeting with friends. We don't sell film, we sell the cinematic experience. The cinema is a place that defines you as a consumer of culture.

WORKSHOP 2 – CURATION AND EVENTS

Directed by Jon Barrenechea – Deputy Director of Marketing, PictureHouse, UK

Speakers:

Lindsay O’Nions – Creative Learning Curator, Barbican, UK

Greet Stevens – Education and Young Audience Programmer, Mooov, Belgium

Edouard Meier – Founder, Cinema Galleries, Belgium

Joséphine Létang – Managing Director, Carbec Media, La Toile, France

Lindsay O’Nions – Creative Learning Curator, Barbican, UK

I work for the creative learning division, which is the education department. I’m here today to talk about Barbican Young Programmers. They are a group of fifteen to twenty-five-year-olds. They work with us to curate their own film festival, which they call Chronic Youth. They meet from September and come along to twice-monthly programming meetings where they plan their festival but also receive training. The main thing they need to do is get their programme to meet our very rigorous marketing deadlines, as Barbican is a big machine, so it’s a professional time frame they have to work on. They are completely responsible for their film choices. We are there to support them but not to tell them what to put on. They also write all of the marketing copy for their events and do as much as possible. We’re looking for dedication and a willingness to learn and a willingness to collaborate as they programme collectively, the whole group has to agree on what they programme.

It’s important to us to deliver as we have a learning remit. But, for the cinema, the benefits are a more diverse and younger audience, a more diverse programme and it gives us insights into young people’s viewing – what they watch, where they watch and how they access it, what they talk about to do with film. We believe the programme does help to engage the audience of the future. It’s a two-way process; they learn from us and the experts we bring in to talk to them and we learn from them.

Once a month an external expert comes in; distributors, exhibitors, marketing and press experts, programmers – so they get an idea of how the film industry works and what sorts of careers are available to them. We don’t expect them all to go on to be film programmers, or even to go to work in film. Not everybody can work in film programming but we think it gives them other skills and it benefits everybody because they see a wider range of films. They have a broad remit to programme six slots of coming-of-age films. We wanted them to speak to their age group. Not exclusively, but the coming-of-age idea came from them. They run their Twitter feed completely and they’re really good at it. They had over 600 followers after the festival. They create all the Facebook events, run the ads and feeds, with a little more guidance. They also write a blog about the festival and create videos talking about their choices. That got 1,000 views in the run up to the festival. They are at the information desk, meet the public and introduce all their screenings and run all their Q&As. They get some public speaking training from us and they do any press interviews. We had 800 tickets sold over six screenings over two days, most screenings were sold out. For our capacity, that was good for us. 60% of tickets were sold to our Young Barbican Scheme, which is for people under twenty-five. We also know that the majority of

screenings attracted people who hadn't been to the Barbican before. It didn't start out as an activity to deliver us new audiences but it has and it's working out really well.

The biggest thing we've learnt is that the project needs:

- A lot of trust from the young people and from the arts centre
- If it's really going to work we have to hand over as much control as possible
- It attracts a youth audience, because it is attractive in many ways
- It is expensive – we pay all our speakers and we are subsidised so we have a budget
- We have to work within the constraints of film hire and transport and overheads

Greet Stevens – Education and Young Audience Programmer, Mooov, Belgium

We don't own our own theatre, but we are always looking for screens. We curate programmes and also ask youngsters to curate a part of our programme. We started twenty-five years ago with an international film festival. Our audience asked for more as we are based in a location with a lack of arthouse cinemas. So, we sorted out an annual programme, which grew. At this moment, we are a nomadic organisation programming in more than ten cultural centres and art house cinemas, but also in multiplexes like UGC. It is a lot of weekly screenings and an annual festival at eight locations in Flanders, and a regular project with social and cultural partners and young ambassadors. Our target audience is the general public of all ages. We work a lot with schools, from nursery to high school, with universities and teachers. We reach about 40,000 youngsters a year, but we don't see them in our regular programme. There is a big gap between what we do for schools and our audience for regular programmes. We were looking for ways to close the gap, and one thing is co-curation where we give them free hand in making an annual programme. We have young groups in three of our locations and hope to have more. They make their own campaigns on social media. We pay for print and screening fees. Sometimes they show films in an art house cinema, or in a youth club, but they look for it themselves and we only guide them. They have introductions, conversation and free drinks. The festival is held annually in April and they have an evening for youngsters. They programme it and have a DJ for the after party, they present it and host the Q&A, invite a local band to play before the movie and look for local talent to show a short film. We only support them. The evening is free for youngsters, we pay the costs, and they get two free drinks.

Edouard Meier – Founder, Cinema Galeries, Belgium

I am the founder of Cinema Galeries and I'm going to explain what we try to do. It's called 'cross-over curation': we use audiences outside of the cinema.

We have seven companies including production companies and we try to use the ecosystem to benefit our cinema. We try to do it internally, but it's something we could have done through partnerships with other cultural organisations.

We used co-productions to help us fund projects. From that we could convince talent and attract press. Then we attracted people from outside of Belgium to come to the venue.

After that, we co-produced an exhibition ourselves. We organised an entire programme around the release of one movie, at the service of the movie (*Cemetery of Splendour*). Then

the filmmaker curated an exhibition for us and we had a performance and events outside of the cinema. This allowed us to attract new users.

In our opinion, anyone can do this. We are not more publicly funded than any other cinemas we know. We are not a big arts centre, but we find ways to achieve those cross-over projects. Two years ago, we ran a VR festival to try to attract the tech crowd as well, to cross-over with innovation.

Joséphine Létang – Managing Director, Carbec Media, La Toile, France

La Toile is not a cinema but a VOD platform for cinemas, so they can present, on their own website, VOD programming alongside their own programming. 'NetfLux', for example, is the platform of the Cinéma Lux in Caen. We propose four or five films a month.

We think cinemas should be more involved with VOD as they are the cinema preference makers. When people watch the film at home, they keep that link with the cinema. It's a bit like a cine-club or a video club, online. This allows spectators to look more into films. Some people can't come to the cinema like young parents, or someone who has had an accident and has mobility issues. This has been forgotten, this link between the cinema and the spectator. It is a great tool for building audiences.

We've got four countries working together in France, Germany, Picl in The Netherlands and Net Kino in Norway. We are working in collaboration, thinking about the link between VOD and cinema. We exchange best practises and look at the varied markets.

SESSION IV – CINEMA ECOSYSTEM, DATA AND EXPERIENCE ECONOMY

Directed by Michael Gubbins – Consultant, SampoMedia, UK

Speakers:

Pablo Carrera – Principal Research Analyst for Cinema Intelligence, HIS Markit, UK

Jean-Christophe Simon – CEO, Films Boutique, Germany

Kim Foss – Managing Director, Grand Teatret and Distributor, Camera Film, Denmark

Kiri Inglis – Marketing Manager, MUBI, UK

Daniel Mitulescu – Producer, Strada Film & Exhibitor, Romania

Jon Barrenechea – Deputy Director of Marketing, PictureHouse, UK

Pablo Carrera – Principal Research Analyst for Cinema Intelligence, HIS Markit, UK

Go back to ten years ago and think about what devices were connected to the internet. Fast forward ten years, there are two smart phones in every household in Europe and a tablet in every ten households. Most of these devices are now portable, too. Cinema has grown in the last ten years but digital distribution platforms have also grown.

There are three main challenges:

- Windows – the content has to be available everywhere so there is pressure on the theatrical window.
- Leisure and social experience – competes with dinner out, music, gigs, etc.
- Experience – what makes me want to see it in a cinema instead of at home?

The tools you use to tackle these challenges include setting a strategy to respond:

- Technology - digitisation but also 3D, 4D
- Making venues more comfortable in terms of seating and refreshments
- Content – event cinema
- Re-define the role of cinema as a social and cultural hub – other forms of entertainment, arts and culture

This makes cinema relevant and different to what you can find at home. The keyword is segmentation. The film can be as important as the venue itself in arthouse and boutique cinemas. Subscription models bring very little revenue to the independent films, which means it is eroding the individual value of a film. The value per unit is much lower in subscription and cinema stays close to retail (though one DVD could still be seen by more than one person). Knowing that VOD and SVOD eroding the value of film, what is the role of cinema in counter-acting that trend? Cinemas are keeping the value of films up through improving the experience, the technology and the service.

In the next five years, cinema will stay the same but subscription will rise, so cinema must be the flagship for that unique experience, and to keep the value up.

Jean-Christophe Simon – CEO, Films Boutique, Germany

We are a sales company based in Berlin and work with limited titles, twelve to fourteen per year. We had for example *On Body and Soul*, *Francofonia*, and we work with documentaries, too. We have sold films to Netflix and we are involved in co-productions. We are the middle man between the producers and the distributors in various companies. We help in financing films, more and more in the current climate, and we help to create a global strategy to seduce cinemas and distributors. After that we split the rights. We are agents in place of producers and we work with streaming platforms, festivals and sometimes direct with you if there is no distributor in your territory.

My job has totally changed in the last two years. The way we watch films is not the same as two years ago, with new models such as day-and-date and crowdfunding (producers now technically part of the marketing campaign for their distribution – i.e. Agnes Varda's film was in part crowdfunded).

The big player in our market, as sales agents, is China. Five years ago, we were selling films in China for one or two thousand dollars, now we are selling 80% of films in China, unless it has a very political or sexual content. The last change is multi-territory operators. HBO has grown, there is a Sundance channel in more countries, and more TV operators vying for space in more countries.

Now there are *audiences* not an audience – they are changing. It's true that young people aren't going to the cinema, but now we try to attract them with what we consider indie films – something easy and quick, not art house or classic films. One big question is whether or not we are buying films or content anymore.

Kim Foss – Managing Director, Grand Teatret and Distributor, Camera Film, Denmark

I run a cinema and a distribution company. For me, the ecosystem is interesting but has only generated the icing on the cake. We are working on a VOD platform for the website of the cinema but right now that is more about branding the cinema than it is about revenue.

We need the success stories like this film [*Toni Erdmann*] which sold 108,000 admissions in Denmark. Cristian Mungiu's *Graduation*, which I think is a masterpiece, only sold 4,000 tickets. The customers I'm losing are not to other art house films, they are to Netflix and other platforms like this. We are competing in what I call a-socialism; people are staying at home, lying on the couch and making that their big priority.

Challenges include piracy –it's happening only when the films are available out there, not from people filming in cinemas – and politicians are doing too little about this. It is a 'single digital market', we have a threat there, but no one knows where it will end. Also, saturation – there are so many films out there and so little room, and so little time. It's a challenge for the cinemas. I have a cultural obligation – I'm running a business but I need to value the films. We need enough money to sustain a living as a cinema, too.

Kiri Inglis – Marketing Manager, MUBI, UK

We're a curated subscription VOD service and we're quite different to other services in that we offer just thirty films at any one time, instead of a saturated market. There's one film

added to the platform every day – there’s always something new to watch; there’s an ongoing cycle of thirty films to watch at any one time. We’ve entered the theatrical distribution circuit, we’ve been buying films for the past eighteen months in the UK and the US. We are also a database of over 150,000 films. The data we collect from being a database means we can mine and be informed by the data, but not entirely led by it. Curatorial voices are absolutely key. We’ve got 8 million users worldwide (not subscribers). Those are the people we can speak to and who engage with our platform. Our subscription is 80,000 globally and growing. We can also offer valuable insight to producers; what people are watching and what might be successful on our platform.

Our core countries at the moment are the US, the UK, Germany, France and Mexico. We are everywhere, but those are the territories where we’re seeing growth. We are separate to other VOD services in that we are championing great talent. We want to grow cinema culture and drive our subscribers and followers back into cinemas. Rather than replacing cinema, we’re very much looking to compliment it.

Daniel Mitulescu – Producer, Strada Film & Exhibitor, Romania

I am a film producer and a film distributor and I own an open-air cinema. I have a focus on children’s films and I am the director of an international children’s film festival. I have come today from a small town in Romania, where the festival ran for three days, filled with children watching European children’s films. From my point of view, as a producer, but also as someone who releases films, I agree with Jean-Christophe, we have to package the film. I don’t think that VOD is threatening. Cinema is very important because it is an experience.

Jon Barrenechea – Deputy Director of Marketing, PictureHouse, UK

I work for PictureHouse Cinemas, we are an exhibitor with twenty-three cinemas in the UK. We also distribute films. Recently, we separated from our former distribution partners, Trafalgar, whom many of you have relationships with, as they’re a global distribution company. Recently, we’ve rebooted our distribution company, PictureHouse Entertainment. This is a quote from Johanna Koljonen, who spoke two years ago at This Way Up and I loved what she said so much that I booked her for PictureHouse’s own conference. What she says here reflects my own point of view of what our business is as exhibitors: film is the content, sure, but what we’re selling is experiences and the relationships we’re building with our partners.

There are too many films, but this is not true of all markets. Films that are considered major in metro-markets like the UK and the US don’t even get releases in some parts of Central and Eastern Europe and I realise that we are overwhelmed with choice in Western European markets.

Experience not content will save cinemas. It’s not about films, it’s about the relationship we build with our customer. Curation is vital in this choice economy but it’s not the end all. Comfort, ambiance, food, drink, service and data – *data* is the big area for growth in how we develop. As a sector, I don’t think we use it very well. There’s a lot of information flowing out there and we don’t utilise it. Many of us don’t even capture data, or, the data we capture we don’t use or interpret or analyse. For independent exhibitors, it is an opportunity to compete with major corporations and cinema chains, in a way they weren’t

able to before. But to do that, you need to know what you're doing. I would say, if there is one investment your cinema business should make, at this point, is in data.

SESSION V – 20 SLIDES’ ARTHOUSE TALES

Directed by Madeleine Probst – Cinema Programme Producer, Watershed, UK /
Europa Cinemas Vice-President

Speakers:

Marynia Gierat – Kino Pod Baranami, Krakow, Poland
Giacomo Caldarelli – Postmodernissimo, Perugia, Italy
Claude-Eric Poiroux – Les 400 Coups, Angers, France
Ventura Pons – Cinemes Texas, Barcelona, Spain
Maria Poliviou – Olympion, Warehouse 1, Thessaloniki International Film Festival,
Thessaloniki, Greece
Altijana Maric – Obala Meeting Point, Sarajevo, Bosnia

Marynia Gierat – Kino Pod Baranami, Krakow, Poland

We should probably create a network of palace cinemas. The Pod Baranami Palace was built in the 16th century. The name is ‘under the rams’ because this is where the rams were sold. The palace witnessed the history of Poland, including very dark times where the German soldiers stationed in the palace during the war in 1940. After the war, they introduced the Krakow House of Culture in the palace where the story and the tradition of culture started. The first cinema room was opened in 1969. We rent the three rooms from the owner who is an actual and real count. The smallest is thirty seats and at the start of this year we also started programming another location, ten minutes from the palace. We are a first run cinema with festival and repertory screenings. We are fully digitised but retain 35mm. Among our activities, we welcome famous guests. We try to organise screenings for all generations. We start with toddlers and try to welcome them for family screenings, we organise children’s screenings and we have a student film club with introductions from the students and with long conversations into the night. They get a free sandwich and a coffee, and with a free drink at a local pub. One of the events we are most proud of is a silent film festival and, we love it so much, we celebrated 120 years of cinema in Poland as the first cinematic event took place in Krakow and we recreated this event last year. We hold open-air screenings during the summer. Sometimes, we are allowed to use the ballrooms, for example, for a James Bond night. Tonight, we are celebrating the 75th anniversary of *Casablanca* with a screening and wine tasting in the ballroom. We have a ‘I’m Going to the Cinema’ bag and, recently, we created a kid’s t-shirt with the same slogan on it. It is a family business, I run the cinema with my mum.

Giacomo Caldarelli – Postmodernissimo, Perugia, Italy

The project I am going to talk to you about began a few years ago at one of the first Europa Cinemas conferences. What characterises our project is empathy, and the community. We decided not to build a cinema but to build a community – so we made a group that would help us turn this project into a reality. In this space, everything that was done, was done through private investment. We turned to micro financing and we opened a temporary shop on the work site itself, to show everyone what we wanted to do. We imagined something

that didn't exist. We managed to collect 10% of the entire investment from the public before the cinema even came into being. We hold programming assemblies together. Everyone meets and we discuss the choices for our programming. We have three rooms with different capacities and we try to accommodate the views of the public. The group speaks up. This has led to any number of initiatives. We work a lot on communication and organise a sort of happening where people can come and see what we are doing in images.

Claude-Eric Poiroux – Les 400 Coups, Angers, France

The first decision we made when we built the cinema was to call it *Les 400 Coups*. We asked Truffaut if we could, he said yes, and he was deeply moved. He was supposed to come but he died, unfortunately, very soon after we opened it. The cinema was built in the city centre but the district was abandoned at that time. A former garage, a former warehouse, we built four rooms and it's become a new city centre, almost. There are thirty-two bars and twenty-five restaurants in a radius of 150 metres around the cinema. Now it is a place where there is a lot of nightlife, people and activities. The first renovation we did was in 1996, to increase the size of the hall. In 2001, we created the fifth screen, the biggest, 240 seats. The other investment was in 2006. We took over a building on the other side of the street, built two small rooms with 80 seats, but they are very pretty. We wanted to call it *Les 400 Coups* too, but JLG is also referred to on the façade. Jeanne Moreau became a close friend of the festival. We want to enable parents and young audiences to come to the cinema. We have cult films for teenagers and young adults.

From the very beginning, we wanted to be a new kind of cinema. We invite directors and there are debates. This is an independent cinema, we don't get any public funds. It lives off its admissions and we started with 171,000. Today we have 322,000. It's a very good number for a repertory and art house cinema. This year will be our 30th anniversary.

Ventura Pons – Cinemes Texas, Barcelona, Spain

I am a filmmaker, and I've made thirty-two films. I've been to 120 film festivals. I think I can bring the need we have as filmmakers to find the audience. In my town, all the cinemas in the centre have disappeared. We found the Texas cinema, an old cinema that was very popular. It was occupied by Franco. Then, in the seventies, they changed to have four screening rooms and it was closed about ten or fifteen years ago. We have completely rebuilt it. We opened in 2014. We have school screenings in the morning, with almost 700,000 admissions. We have cinemas in Valencia and are opening in more locations. We also have a distribution company.

Maria Poliviou – Olympion, Warehouse 1, Thessaloniki International Film Festival, Thessaloniki, Greece

We operate two venues, each with two screens. We are cultural and historical importance to the city. Thessaloniki International film festival and documentary film festival are leading festivals. They are lively events with a significant percentage of youth audiences. Like Bero Beyer said yesterday, festivals are doing great. So, the question for us is how we keep motivating audiences to attend cinemas after the festivals and also how to expand this base.

We have launched a campaign called 'We love cinema.' What we're trying to say is that, since you trust us during the festivals, you should trust us to propose films and events during the year. Three screens are dedicated to first run films. The fourth screen is dedicated to cinemathèque and special screenings. We are expanding our membership programme. We have a membership base of more than 1000 members.

We have become social on many different levels. We take special care in choosing our venue staff from the pool of people who volunteer at the festivals; sociable young people with an interest in cinema. Since our budget outside of the festivals is limited, and in order to keep our activities rich and diverse, the framework we aim for in our collaboration is for us to provide the venue and the technical and organisational expertise, and the programming as well, whilst utilising funds from the partners involved.

Altijana Maric – Obala Meeting Point, Sarajevo, Bosnia

Our single screen cinema was established twenty years ago. The Meeting Point cinema is a hub for the Sarajevo Film Festival and its main venue. Promoting European film is one of the principle aims of the cinema. International filmmakers come to present their films, take part in Q&As, or to give lectures and talks. Another major aim of the cinema is to promote and screen films by Bosnian filmmakers. Our goals also include the promotion of regional films. Another important part of our work is arranging special screenings for children. We are proud of our educational work. We have a good relationship with schools in Sarajevo. We offer young people a chance to talk about films with filmmakers in our Directors' Monday programme. We host other international film festivals including the Human Rights film festival. Our audience enjoys the film festivals, especially when they are interactive. We open our doors to young, creative people from other creative industries. We hold events for creatives that are not necessarily related to film. We have a film club and they organise exciting events including a film quiz.

SESSION VI – EUROPA CINEMAS CASE STUDIES (OPEN SLOT)

Directed by Madeleine Probst – Cinema Programme Producer, Watershed, UK /
Europa Cinemas Vice-President

Speakers:

Javier Pachón – Cinearte/Cineciuat, Majorca, Spain

Jens Lanestrand – Biografcentralen, Stockholm, Sweden

Matthias Elwardt – Abaton Kino, Germany

Anke van Diejen, Noortje van de Sande – Picl, The Netherlands

Harri Ahokas – Finnish Film Foundation, Helsinki, Finland

Anne-Juliette Jolivet – Les 400 Coups, Angers, France

Javier Pachón – Cinearte/Cineciuat, Majorca, Spain

Spain is always in the top four or five for Europa Cinemas for ticket sales and performance but we don't have an organization that supports art house cinema. There is some support for production and distribution but zero for exhibition. We are a country that doesn't want to watch its own movies – that's what our support says.

Travelling, going to seminars, labs and conferences like this, I get to know other realities. I went to London, two days per organization, including the ICO (Independent Cinema Office) and two major art house chains, PictureHouse and Curzon Cinemas. I could see how big art house chains developed their strategies. I also visited Everyman, the Electric, the Lexi and the Prince Charles Cinema, and what I learnt is that there are models and ideas that you can copy. There is no problem in failing. You don't have to be binary, you can take a bit of it and tweak it to make it work where you are. Emergence properties is small parts coming together to make a bigger thing, and that is key for me. If the biggest online retail store in the world like Amazon is moving towards physical stores then there must be a place for cinemas.

Jens Lanestrand – Biografcentralen, Stockholm, Sweden

I work for Biografcentralen, an art house non-profit organization, established in 2011. We worked with twenty to twenty-five art house cinemas in our network and to create a niche website to work together. This group got bigger and now we are aiming for 340 – all of the independent cinemas – plus 200 film clubs and festivals.

We have a monopoly cinema chain and they have 83% of the market. They have the only cinema website in Sweden. The general Swede thinks it's the only cinema in Sweden, but there are over 340 other cinemas. They are doing a great job, but mainstream "eats" European films. New blockbusters go out to every cinema and every screen. Our goal and purpose is to help art house cinemas and art house films to reach the audience.

We started a couple of years ago with research, interviewed distributors, cinemas and audiences all over Sweden in bigger and smaller cities. In Stockholm, Gothenburg, or bigger cities, they have to go to three or four different websites to buy tickets. Also, about half of these 340 cinemas still have manual tickets, so you are not able to buy or book tickets in advance, which is not the best way to make it accessible for your audience in 2017. It is not

easy; you need to register, have a password, enter your name, address, telephone number, also not good or easy in 2017.

We have worked together with a company to create a website that is an umbrella for all of these cinema companies. We don't force cinemas to change if they have already invested. We see the audience getting tickets in about four clicks and twenty seconds. That is because we have a very simple buying flow and check out. It will get easier for the audience to buy tickets. We have had a lot of money. We said from the beginning, if we are going to create something good, we have to have a lot of money. We got about €700,000 to research, test, and now, on December 13th, we are pretty sure it will be welcomed and work. Make it accessible and make it together.

Matthias Elwardt – Abaton Kino, Germany

We started the film quiz in 2010, and we have had our 34th edition. We do it three or four times a year. We have between 100-150 film fans coming and paying the normal ticket price and about 30% came last Tuesday for the first time. They are mostly film buffs. 80% are from our cinema, and some are the heavier users of multiplexes.

We mostly work with film clips and you can use it for different occasions; a cinema opening, cinema birthday. We respect copyright so we never put anything on the web, but we never had problems with copyright. The second element is a star guest: an actor, actress or director, and we show clips from their work. When the sheets are collected, they do a talk about their work.

Anke van Diejen, Noortje van de Sande – Picl, The Netherlands

We have heard other speakers talking about cinema and VOD, and Picl is a connection between your local cinema and VOD. It is a platform where you can offer a selection of your films on VOD as well, straight from the moment of release, so it is Day & Date.

Some people do not have the opportunity to go to the cinema – they want to go, but they don't always have the opportunity. Maybe parents with young children, older people who can't make it to your cinema anymore, or just young people who can't make it along. They want to see your films, but they can't make it to your cinema. You can reach out and give them a new opportunity, or an extra opportunity. You don't lose them to another VOD platform, but keep them with you.

We have eighteen participating cinemas. Picl is not only about selling views, it is also about strengthening the position of art house cinemas. The world has changed and we all want to reach out to a younger audience. It's no longer a world where we can say, 'You have to see this film at this time, on this day, only over these weeks.'

We come from cinemas ourselves and believe in the strength of that.

Distributors can take Picl with them in their campaign, reaching out to an audience that wants to either go to a cinema or to see it online on demand. Cinemas can also include it in their marketing, on their website. You can choose to buy a ticket for the cinema, or immediately online.

What we found was that 80% of the use is additional. Exhibitors benefit, distributors benefit but, most of all, film lovers benefit. We keep the film accessible for them. Previously, the theatrical window was a black gap, and we want to keep the film accessible for people for more time.

Picl doesn't have a back catalogue, it's only new films that are screening in the cinema at that moment and for a longer period of time – for the whole theatrical window. The distributors make the revenue share with the cinemas, as they do with theatrical screenings. If people go on Picl and choose a film, they have to choose what cinema they give their money to. We also ask a premium price for this VOD, it's the same price as a cinema ticket. If a film is released in a big concern, we cannot distribute it on Picl. But we are able to distribute films that are only released in the Dutch art houses, which is a lot of films.

Harri Ahokas – Finnish Film Foundation, Helsinki, Finland

We are trying to make films and cinemas accessible to all kinds of audiences. We have gathered an accessible forum, which consists of ten organisations. Six of them are organisations for disabled people: vision impaired, blind, hard of hearing, deaf, or people with physical disabilities. Four members of the forum are industry members; producers' union, distributors' union, cinema owners' union and, also, the biggest cinema chain, which owns more than 70% of the Finnish market at the moment. Our main idea is to prepare accessible cinema with those who will most benefit from it: for the people, with the people. Altogether we are about twenty people as some of our members need personal assistance. We are working to get financed audio description subtitling and accessible buildings. We have used the word manual because we want to write a concrete guide so that every cinema owner, distributor or producer knows what to do to make cinema and films more accessible. What is a big concern is that Europe is very fragmented, and one of my questions is: *Should we develop, inside Europa Cinemas, a system to be used everywhere?* First, cinemas don't screen subtitled films regularly, they seem to choose to screen films during working hours. The other question is more social: it seems that so-called 'normal' customers don't like subtitles on domestic films, and this is something that might be a problem. Sony have developed closed caption glasses. I have read they have gone into some cinemas in the United States and the UK, but more research is needed. Subtitles are not only for hard of hearing or deaf people. It will help immigrants, people with dyslexia, people with mental health issues, etc., etc. It might be necessary to make changes to the laws in parliament.

Anne-Juliette Jolivet – Les 400 Coups, Angers, France

We were used to programme heritage films but it only attracted an older audience. We found it difficult to attract younger people. Like all cinemas, we wanted to, so we thought we could programme cult and genre films. We made the most of national re-releases of popular films. We started two years ago and every year we have a sponsor. In season two, we increased the number of films. We had a new sponsor and there was a theme based evening. Season three is underway, with a film critic as the sponsor. To highlight these special screenings, we had to think about communication, in print and in digital form. In print, we have a big poster, one per year, and 4,000 postcards per year. We publish 1,000 flyers for each evening and it is done in house and distributed in town. We communicate on digital media, through photos and clips of appropriate films, you can look them up on our website and Facebook. We also show clips in the cinema. Communication is also based on a network of ambassadors. There is a link between students and the cinema who distribute printed material and communicate with peers online.

SUMMARY OF THE CONFERENCE AND NEXT STEPS

Michael Gubbins – Consultant, SampoMedia, UK

The power of networking is so essential, and it's what Europa Cinemas does, and it's what you do. Cristian Mungiu set us a challenge at the beginning, saying we need to talk about relevance in the current environment. I saw no evidence to back up this mantra that young people won't like film. You have to think of ways of doing it.

Questions that came up:

- *How do we make these cinemas places that people want to go?*
- *How do we create those social spaces?*

When you look through the investment survey, what you see is that developments in our cities where we are based are quite depressingly homogenous. Right across Europe, we have the same shops and the same retail centres. Shopping is not enough to build cultural cohesion, by their very nature they tend to divide. A lot of you have spent a lot of time building the other elements; social spaces for food, reading, music.

There was a time when cinema was meant to die but cinema is, now, in some ways, doing better than was predicted before. The competition between cinemas becomes a challenge and there are times when it's hard to get a hold of films, and this may become a bigger issue because cinema used to be the minority of the money coming in for films, but now it has become the economic centre. Different parts of the value chain will want their piece and that might lead to some issues.

We also heard about consolidation. There is going to be, in the future, more of that takeover and acquisition. A really important point that was made to me is that there is not one single sector called 'Independent Cinema'. The problems some richer countries have are not the same as the issues in other territories. What we're talking about is not one size and how we scale it to work across the board and so that it's relevant to everyone.

In the second set of workshops we were talking about the tools to make the work that we do better. The discussion about tools is going to be about whether or not they work for you. What we're looking at here is, if we're going to be responsive, we have to know our audience. We have to know who they are. We talk about the audience in a very narrow way, as if everyone is the same.

Russ Collins was talking about 'Urban Pioneers', a nice phrase. It's the idea that you're going out into place and there's an evangelising role, talking to those communities, making ourselves relevant. Social cohesion is so important in all of our communities right now. To share and participate is a big deal. Participation is a big one as well.

We heard a particularly inspiring speech from Jaki in Glasgow and in Romania about the TIFF caravan about how you go out into communities. What Jaki said was important, that too much of the conversation is about how we can convince people to come in and do what we do, convince them to become little versions of us in our space. What she was saying was that's not the way to look at it, it's their community, we've got to learn to hand over some of that power. Pricing is one of those tools, it's one of the excluding factors.

Finally, then, we bring together the value chain. One thing that immediately struck me is that we've got a disparate set of problems. Everyone has their own bits that they feel enables them to retain an element of their power, and an element of the business they're

doing. Instead of thinking of cinemas as the retail arm of a long chain, and start thinking of it as much more circular, to inform what kind of productions are being made.

We talked a bit about VOD. You have to work to create demand and it is a damn sight easier to exploit the demand already created by cinemas and individuals who have to deal with customers than to do what you're doing.

MUBI were kind of interesting in seeing value in windows, to take the films you love and to get them onto their site and how important they thought your work was to what they are doing.

- Relevance is really important
- We have to reach out and be more diverse
- We have to look at that next generation
- It is our responsibility to create sustainable businesses

One of the reasons Brexit happened is because of cultural failure. It matters. There has never been a greater need for culture in society. We are the bastions of liberal culture and it can't be narrow. We have to believe that what we do is relevant and that the art that we're doing can make a difference in people's lives.

Everyone in this room remembers when a light went out and when a light went on inside you. You remember that moment when the passion for cinema grew. We need to share that.

Jon Barrenechea – Deputy Director of Marketing, PictureHouse, UK

The two sessions I panelled were really inspiring. Everyone who came up is doing something different and interesting. The first session about how to build a brand was a mixed bag on everything from gaming, to networks in France, and opening a new cinema in Berlin, and the role of a network of a group of cinemas in Sweden.

Questions that came up:

- *Do audiences from other art forms cross over to your cinema?*
- *If you have children playing video games, do they stay and watch films afterwards?*
- *If a fifty-five-year-old woman comes to watch opera, does she come the following day to watch a film?*

In curation and events, questions were:

- *Young audiences, who needs them?* (The Barbican rightly schooled me on the need for them in the future).
- *As we age as a continent, does it really matter?* (It seems so, as there are people out there doing heroic things with young audiences).

Cinemas are wising up to the idea that anyone can have a VOD programme and there are back end systems that can do it for you and we all need to muscle up on our data and use of technology if we're going to survive. The three words I take away from all of this is: collaboration, collaboration, collaboration.

CLOSING OF THE CONFERENCE

Nico Simon – President of Europa Cinemas

The form the conference took this time allowed us to go into some very specific showcases. One of the intentions is to share experiences, and it was done, and it was very important. It is very important that we stated talking about the whole value chain and it needs to become a circle. To address Brexit, shortly, it is a fact, there is nothing we can change about that. Our members, on the continent and the island, are worried about what is going to happen. UK films are very important to get our quota of European non-national films, and for the UK cinemas, to get funded but also to find an audience. It's not very easy in the UK to show non-English, non-American films.

We are going to address that problem with the European Commission, and maybe there will be some solution so keep the films in the MEDIA programme, but right now there is no way. The UK needs to agree to the way of leaving and no commitment can be done before that. My biggest conclusion is that Cristian Mungiu may have appeared pessimistic but I don't believe that and I am not pessimistic. It has become clear from all the speakers, and from the sector, that the theatre stays in the middle of the village.

We survived 120 years of dying so we will survive the next 120 and beyond.

Claude-Eric Poiroux – General Director of Europa Cinemas

The exhibitors confirmed the essential role they play in the future of the cinema, because they combine and defend two closely linked values: films and movie theatres. The movie theatres provide for programming and quality screenings and added value in terms of a welcome environment and activities. The movie theatre is a place for entertainment, for meeting, for a meeting of cultures and social cohesion. We want people to discover more than a film, it must be a total experience, and spectators today, including the youngest, should find every reason to come together in the cinema to talk together and share emotions that images seen at home, on the net, will never be able to trigger with such strength and intensity.

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