

ON THE CZECH REPUBLIC

week, and 50,000 people came to see them. On an average week that multiplex has 15,000 visitors. It confirms a great interest in foreign films, older films, independent films, so it will continue. David is, however, reluctant to have multiplexes stepping into the scene of the arthouses, and although some such titles are suitable for the multiplexes, prints are not always made available – unless the distributor's negotiations with independent cinemas have failed.

Note of interest: South Africa is a few years ahead of the development in the “new” east European territories and Ster Kinekor, though a multiplex company, is in South Africa not unfamiliar with venturing into arthouse territory. Having about 45 multiplexes and 85% of the market, they try to reach also what one could call the corners of the target groups and have built two or three sites called *Cinema Nouveau* which are multiplexes designed as arthouses – from entrance to interior to offering carrot cake instead of popcorn. Ster Century in the east European territories, though, is still focusing on “the general harvest”.



EUROPEAN CINEMA EXHIBITION, EBELTOFT 2002

ON DENMARK

Mette Schramm runs two cinemas, a small one with 150 seats which is a municipal cinema, and a private one with four screens and 600 seats all in all. She's also the president of the Danish Exhibitors' Association. She grew up in the business, beginning at the age of 17 with changing light bulbs in the ceiling - not that she was taller, cinemas were not high-ceilinged then! – she has been a projectionist and an usher, sold tickets, worked in the marketing department of the big Danish chain Nordisk Film, and has also been a film editor.



cinemas make all the money. The situation is quite competitive, but not as bad as it could be. When CinemaxX opened two multiplexes in Denmark we feared for a foreign invasion and that everything would destabilize. Fortunately this did not happen, and the market was able to absorb the new cinema in Copenhagen. The one in Odense unfortunately folded after only ten months. Everyone survived, and if you compare with other countries where real problems with over-

screening occurred, it's a good thing that we're not always in front because we avoided the catastrophe seen in other European countries. And I don't see new foreign operators in exhibition in the near future. Maybe CinemaxX or Nordisk will each build on another site or two, but I doubt if there's is going to be a big invasion."

"The four-screener opened last year, and we expected most of the audience to be young people. It turned out, however, to be much broader than that, but also, surprisingly, the older audience actually drinks coca cola and eat popcorn. Incidentally, in my other cinema, no-one ever turns up to see the French films, but they express great appreciation of the fact that we show them. Likewise, they appreciate that we have red wine and carrot cake, but that does not mean they buy it.

Denmark has approximately 167 cinemas, 350 screens. We sold 11.5 million tickets last year. And 30% of that was for domestic films. We have a very strong domestic market. The cinemas are a mix between privately owned ones and municipal cinemas. About 20% of the cinemas in Denmark make about 80% of the turnover, so a very small proportion of the

Louise Dyre is from Scala in Svendborg on the island of Funen. Practically born into the business, she has tried almost all chores as well. She was an usher, she was at the concession stand and at the box office, and she was an assistant manager in the large CinemaxX multiplex in Odense. Now she's back in the four-screen Scala which is the only cinema in Svendborg, a small town of only 45,000 inhabitants. It opened in 1956 as a one-screener as the third cinema in town. In spite of its age, it's a new cinema as it was completely rebuilt in the fall of 2001 to THX standard, although not certified.

EUROPEAN CINEMA EXHIBITION, EBELTOFT 2002

ON DENMARK

"As for Odense, I worked in another cinema, the 7-screen Rosengaard Bio which came to co-operate with the new CinemaxX a few months before they opened. Until then we feared what was going to happen. Odense is a big city for Denmark, but not by European standards. Then we opened the new CinemaxX 7-screen cinema only 500 meters from the 9-screen cinema run by Nordisk. This was tough competition, and it was a continuous fight to get the films we wanted. But in the end they resigned. This kind of competition is just not possible in Denmark in a city of that size. Danes go to the cinema about 2.2 times a year, and the Germans had calculated with 4 or 5 times a year. In which case there would have been a market. One main problem is that CinemaxX has three architects, one of whom created the cinema from his office in Germany. One month before opening one of the concessions had to be changed because they had not taken into consideration the Pick & Mix way which is so popular in Denmark. They had planned for candy in packages, and sweet popcorn which does not sell in Denmark, so they had not really spotted the market right. And it took time for them to find that out. "

Challenges in Denmark are exactly the same as in Norway, right down to the agreement between exhibitors and distributors considered to be in conflict with rules of competition. It is extremely important to find a way to get small as well as big cinemas into digital in a harmonic way. Three points are important. One is good product. Secondly, good cinemas, be it new or renovated ones. Thirdly, the focus has changed with the arrival of many tv channels. Before, tv was the subject of talk. Now, at least in

Denmark, films – and particularly Danish films, have become a social reference. These three elements combined create an impact on the cinema market.

And for Danish cinemas it's extremely important to keep a flow of Danish films, as they are so popular. And we fear that the flow may stop, because we now have a new government which has in other areas cut subsidies for cultural activities. The subject of cutting subsidies for the film industry has not been mentioned, but we are very aware of it. Our last issue of the trade magazine was all about Danish films and how fantastic and how important they are. We interviewed people from small cinemas about the importance of Danish films from their point of view, we interviewed people from the film environment about finding and grooming new talent. In short, we made an issue of it, with the purpose of supporting the Film Institute's efforts to convince the politicians to go on supporting Danish films. And next week, right here in Ebeltoft, we're having the national Danish seminar, themed around Danish films – for the exact same purpose – to emphasize the importance of Danish films to the cinemas. The very high market share of 30% is caused by this special quality which a successful Danish film has – to be able to pull in an audience which does not normally go – the ones who go only once a year or once in two years will come, and that is because the attitude towards Danish films has changed. They have become must-sees.

One initiative is the Cinema Club Denmark. People buy six vouchers and can exchange

ON DENMARK

them in the cinema for half priced tickets. Last year five of the films were pre-decided and one was optional. It's been on now for 7 years and is a huge success. We attempt to attract people over 40 years of age, as the young generation is declining in numbers. This year we have 170,000 members, and we probably succeeded because we're not selling tickets actually, but rather some sort of subscription at around 8 euro which gives them access to 6 films at half the price in any cinema in Denmark – regardless of what the tickets actually are in that particular cinema. Basically it's two Danish ones, two European ones, and two mainstream American ones, chosen very carefully to reach the target audience, and we've always had success with having Julia Roberts in the first one, so it's become kind of a tradition! 70% of the members are 40 plus, and 20% even 60 plus, and as 70% of the members go to see other films outside of the club during the period and bring a non-member to the cinema as well, it really gets people in there. Naturally, this becomes a self-increasing process, because once they're in, they also see trailers. More than 40% of the subscriptions are sold in fours or more, so it's become something to join with friends, colleagues, or family members. But we have to keep it up. A study showed that if people of this older age group stop being members, they also stop going to the cinema. Last year we introduced a website – the CRM method – the older ones are perhaps not using the internet that much, and they are not comfortable with paying their subscription by way of the internet, but we sold 10,000 subscriptions on the internet, and we expect to sell about 40,000 this year.

Exhibitors and distributors are united in doing a summer campaign, and the Norwegian success certainly is an incitement, but we have to start from scratch, since we do not as the Norwegians have an organization that keeps things going each year. We would have liked to use television, but we suffer from insufficient funding. So we advertise on radio and invite the young people to take part in an SMS competition which we hope will be a big hit, and it will also enable us to track the success, as we can measure the number of SMS'es. We've also managed to get nice prizes, the major one of which is a trip to London where the winner will attend a gala-opening. Which one is a surprise. But the campaign is on a rather small scale. During summer we also have the privately run initiative Fri Film, showing films in squares or in parks for free – to increase interest in films.

We also have an E-cinema group in which are representatives from exhibitors, distributors, and the Film Institute, and technical staff from the big cinema chains. The Filmguiden magazine is actually published by the Danish cinema advertising company, but exhibitors and distributors are participating in it. Distributors do a lot of market surveys, some of them in cooperation with the Film Institute. They arrange meetings twice a year where exhibitors and distributors meet to screen coming attractions and talk. We've also established a Business College education, the students of which will become marketing economists and be able to gain a medium level job in a cinema, a distribution company, or a production company – focused on marketing. Exhibition

ON DENMARK

participated in establishing this, but the leading force has been the distributors. Hopefully people who will run cinemas in the future will have the economic knowledge to run a business *and* the love of films. The cinemas publish a trade magazine, also with the distributors, and we have a website. We're in the process of making a database of all the Danish cinemas and have by now spent two years on it. We've been to about 75% of the cinemas and have all the information about their screen sizes, chairs, and equipment. When digital comes, we hope that this will be a tool to help us do it the right way. We provide technical assistance for the cinemas, and they can have our adviser out to advise them on renovations and new equipment, that sort of thing. We have a projectionist education which is only a short course, but we're trying to establish a longer one – based on the Norwegian book which we have now had translated, and hopefully we'll have the education up and running in about six months, because there's a great need for that. We arrange educational courses in the form of outings. For instance we have had guided tours at the Film Institute and at Zentropa productions, where exhibitors had the opportunity to talk with renowned cigar-swinging producer Peter Aalbaek - right up Mads' alley! And of course we're very involved in this very seminar, and we take exhibitors on travels – last year to Berlin, this year hopefully to Milan – to visit technical manufacturers or cinemas. Very strange lighting they go for at CinemaxX!

These are initiatives done by exhibitors and/or distributors. Nordisk, because they are so big, do their own initiatives and their website, www.biozonen.dk, is very interesting, and they've done terrific work on that. Their marketing department was previously just placing ads in the papers, but has now changed into a department that does all kinds of events in their cinemas locally. Their cinemas all show very mainstream films, but they also made a series of art films and had them travel from one cinema to the next one which is also something they've never done before. And this is obviously because they have also realized that there are different kinds of audiences. Also, in general, there's a lot more focus in Denmark on the image of the specific cinema, and managers are evaluating their cinemas and establishing what are their core products. This is something that perhaps the small cinemas may have been doing, but the big ones never did it before. Not that they are trying to change into arthouses, but they are a lot more focused on more than one group of people.

Then there's the Film Institute, showing films for school children, supporting renovation of small cinemas, supporting extra prints for small cinemas.. they are also to some extent involved in and support almost any initiative that we engage ourselves in. Arthouse distributors are small and less professional, so part of DFI funds allocated to arthouse distribution went to the big distributors. And artfilms from the professional distributors perform a lot better. They find an audience and are more often successes.

ON HUNGARY

Tibor "The Tiger" Biró acquired his nickname on the September seminar. He is from Miskolc which is the second largest city in Hungary and has 200,000 inhabitants. He runs a 2 screen absolutely beautiful municipal arthouse with one big auditorium and one small, originally built around 100 years ago. It was the first cinema in Miskolc. The big auditorium is equipped with Dolby as well as DTS, the small one with Dolby only.



Miskolc has two multiplex cinemas, each of which has 8 screens and more than 1,000 seats. Both are in the city centre, as is Tibor's cinema, and when they opened two years ago, he decided to change the profile of his cinema in order to survive the new situation. Since then they have focused on European and Hungarian films, supplemented with other independent films and on occasion some carefully chosen Hollywood films. They have a film club, very successful as Miskolc has a big university with more than 10,000 students, and they arrange series of directors' lifeworks as well as other thematic series, such as early Soviet films and science fiction films from Eastern Europe. They also have national film days, showing product from Italy, France, or other countries. Such days may be combined with exhibitions, concerts, and perhaps the possibility to taste the food of that particular country. Special screenings in co-operation with local schools are quite frequent.



Ticket prices have to be kept at a rather low level, regardless of whether the programme is an artfilm or the occasional Hollywood product which has already been at the multiplexes four or five months earlier. While Tibor is all for films of great value being shown at low prices, and it is a non-profit company, it does make it difficult for the cinema to make ends meet. Hence support received from the Europa Cinema network, from the local government, and from the Hungarian Motion Picture Fund is absolutely necessary for the cinema to survive.

The Hungarian market has undergone a lot of changes. Multiplexes dominate in the capital and in the major cities.

Budapest now has 11 multiplexes with 99 screens and 22,000 seats. The main operators are IT Cinemas from Israel, the Multiplex Operation Company which is a joint-venture Hungarian-American company, UCI Central Europe, and Budapest Film. Ster Century's cinemas were bought by UCI Central Europe, and Ster has now left the Hungarian market. UCI has digital projection facilities in one screen in a multiplex in Budapest which opened just a few months ago. No films have as yet been projected digitally though, and the large number of new multiplexes with traditional equipment will probably prevent the Hungarian market from going digital in the near future.

ON HUNGARY

Film distribution is controlled by two big and seven smaller companies. Intercom has more than 50%, and UIP has 31%. 2001 was a better year than earlier years. The advent of multiplexes have caused many traditional cinemas to close. In Budapest only a few have survived as arcinemas with the help of local government. In the countryside only those cinemas who were able to redevelop or change their profile still exist. The general problem is that the multiplex chains are connected with the distribution companies. For example IT

Cinemas and the Multiplex Operation Company co-operate closely with UIP and the Intercom. The result is that traditional cinemas always get prints after the multiplexes. Relevant authorities are now investigating this situation.

The most successful domestic film last year was a Hungarian historical film which had 200,000 visitors throughout Hungary. 20,000 of these came to Tibor's cinema to see that film.



EUROPEAN CINEMA EXHIBITION, EBELTOFT 2002

ON ITALY

Allesandra Fantoni was born in a movie theatre. Her parents met in a cinema, and when they got married they bought the Cinema Edera. This was during the worst period for cinemas in Italy, and in the rest of Europe as well, in the early 70's. It is in what is nowadays the centre of Treviso – 30 kilometres from Venice, 90.000 inhabitants, and a new university – but then it was in the countryside. In order to survive and be able to get prints, they turned it into an arthouse. So 30 years ago it started building its own audience, and it has succeeded and is now one of the oldest arthouses in Italy, probably the oldest one in the northeast of Italy, and it has two screens. For the past three years the family has also had a new theatre with three screens six kilometres from Treviso, in the surrounding area. It's more commercial but still oriented to high quality films.



and did special screenings for them in the mornings. But it was competing with a Disney film and with *Harry Potter* – much bigger titles. But we have had success with campaigns in schools, and being an arthouse we have had to find audiences that would appreciate minor films. 30 years ago my parents started grooming children to go to the theatre, inviting them in, so when they grew up they were accustomed to a more varied and specialized repertoire. Unfortunately, the

public opinion of cinema in Italy has been left in the hands of critics who do not like cinema, so I think cinemas should make their own reviews and specify to their audience why this particular film is on the programme and what is good about it, because if we leave that to critics only, they will ruin the business. It is interesting that customer related marketing is talked about as if it were born out of the information technology when it is really an old marketing method. My mother has been doing it for years. Knowing each customer by name she's really able to give personal advice, and they use her as a walking database, calling her to ask what they should see."

"Every time I talk about Italy, especially when I'm in a foreign country, I find myself complaining. I found it very inspiring to hear about the Norwegian initiatives. In Italy we can only dream of it. The situation is very complex, mainly because there's no free market. In Italy we don't do much marketing, but if we do any kind of retrospectives, we invite directors. We are a member of Europa Cinema which has fundings for initiatives for young audiences, but it's hard to find animated or other European films made especially for those audiences. Last Christmas we had a very good Italian animated film which did not make any money. We made campaigns in the schools

Rita Stella runs a single screen cinema with 1200 seats right in the middle of Milan. It is owned by a family company, but it used to be run by an external company, as it was not the core business of the family company. Five years ago Rita was doing something completely different, but the family decided to run the cinema themselves and to keep only the programming with the external company,

EUROPEAN CINEMA EXHIBITION, EBELTOFT 2002

ON ITALY

because in Milan three big chains do the programming, and nobody of the family was really in the cinema business and able to just pick up 1200 seats like that. And in Rita's own words: "We play mainly blockbusters, but this year we made for the first time some kind of mistake... no. It happened, I know. It wasn't planned. It was *Enigma*. And I was very happy with it, but when I'm happy... there's no box office."



"I would like for cinemas to do their own reviews on the radio. Italians love radio, and it's becoming a very strong media. It gets good results at low cost, I very much agree with that. But up till now my promotion has only been the product itself. I have a café, and then I have a beautiful site. It's just been renewed, but that's it. The thing is, I've got the blockbuster, so you come and see it, and I'm right in the middle of town, and all the older cinemas are there. So previously, the audience from outside of Milan would just take a walk downtown and look at the nice, big shops and have a drink at the right café. What I believe and have always believed, is that this street where all the cinemas are is in itself a multiplex. It's a galleria, so you don't have rain pouring down. It's got all the best shops and the best warehouses, restaurants, and everything. And if all the exhibitors had managed to think up some joint initiative, that would have been wonderful, but it never happened. Everybody was always so concentrated on their own business. I also believe that multiplexes and the traditional screens are two different markets, and they

should be put together to enhance and make grow the whole market.

I think that a lot of problems will arise with multiplexes establishing themselves close to Milan and around it. Historically all the cinemas were nice, big ones, located in the centre of the city. Now people move from the centre towards the outskirts. Exhibitors normally claim that just the youngsters will take their car, and that the middle aged

audience will never do that. Not so. I feel that if the multiplexes have the economic strength and take various initiatives, they'll be able to get the attention and take the audiences away from the centre. They can get their interest and make them take the car and move, even if it's foggy, windy, rainy, or whatever. But I do believe that if existing cinemas in the city focus on what they've become – not what they were – but what they are and what they could become, they still can be... not winners, it's not a matter of win or lose... but they can increase the audience and that's what the main thing should be. It's not stealing one person from each other. That makes no sense. Not, it's increasing from one person to two – who will then at various times go both places. That's the way to success for the whole business."

Italy has 4.000 screens in 1.000 cinemas. Many cinemas are single screen cinemas who are having a hard time with the emergence of many multiplexes over the past four or five years. So the market is very diverse with a few big chains, some of which are related to

EUROPEAN CINEMA EXHIBITION, EBELTOFT 2002

ON ITALY

distribution. There is this special intermediary in Italy, the programmer. It can be someone in distribution who programs perhaps 200 cinemas spread over the north of Italy or even in the same region. So they are very powerful. Sometimes they are exhibitors themselves, and sometimes they are just programmers, but they always have strong relations to distributors firstly, and then to exhibitors. Cinemas have a say in who is going to be the programmer, but once they've made an agreement, they have no say in choosing the films. The cinemas must show what is given to them.

Comment: It's known all over Europe. You own a building, and you have a cinema, and you just ask another exhibitor to book the movies also for your cinema. In France, for instance, all the three major chains also program cinemas that do not belong to them. Cinesa is booking Kinopolis cinemas in Spain, and Hanspeter's group also programs cinemas not belonging to the group. In Denmark a few cinemas have made agreements with other exhibitors – or with a distributor – to do the programming. It is fine as long as it's another exhibitor. The situation in Italy is a different ball game entirely.

70 or 80% of the films shown are American, and the Italian share depends somewhat on what domestic films are released. For the past couple of years the market has performed disappointingly, and some say it will be worse this year. There has been a lack of Italian films – and it's not just *the* film that competes for the Oscar. There could be three or four good ones in a year and maybe even more, and Italians appreciate domestic films very much. If such films fail to appear, the whole market drops a little, and people just don't go. The

period between December 24 and January 10, that's really the peak period where people go and see an Italian movie – not necessarily a good Italian movie, but after they've seen that, they go and see all the other movies. If they miss that, they probably forget about cinema for that holiday.

Italian cinemas are all organized in an association, but unfortunately the leaders of it are not going about it in a democratic way, and many times they work in the interest of the big chains or the distributors. And it has now been split in two organizations. One is for traditional screens, and one is for multiplexes, so sadly it's as if exhibitors are pulling in two different directions. Also, the traditional cinemas have an attitude problem. They were used to huge audiences, people queued up outside the cinemas in spite of their old equipment and their poor interior, and the owners effortlessly made lots of money. They still run their businesses the same old way, even though the audience has changed and have higher demands now. And in the end they will close, faced with the competition from multiplexes and cinemas who have adapted to the new situation.

There is the Summer Arena, open air showings that are very successful. Some of these are done in very beautiful surroundings in the shape of Greek theatres. But they are necessary also because of the big seasonality problem. *Spiderman* opened in Italy during the Ebeltsoft course, and that will be last film to open until September.

The business would welcome a half priced day, but it is not possible to introduce this, as regulations are against distributors and exhibitors making such an agreement between them.

EUROPEAN CINEMA EXHIBITION, EBELTOFT 2002

ON LATVIA

Harijs Upenieks is from Valmiera and **Gunta Lazdane** from Jekabpils, both towns of about 30,000 inhabitants, and they each run small singlescreen cinemas.

A bit of historical information: The first showing of a film in Latvia took place in 1894 and the first feature film was shown in 1913. Latvia is one of the "new" European countries, and neither film production nor exhibition has yet reached the level of the rest of Europe.

Two or three feature films are produced every year. In 2001 53% of the films shown were American while 47% were mostly European. This sounds like an almost equal share, but 89% of all admissions were for American films. Only 11% went to European and other films. The problem is in the distribution of these films.

There are about ten distribution companies in Latvia, not all of them distributing European product. Three of the distributors handle American films only. European films are not profitable for distribution because of large expenses for marketing. Advertising is minimal - or non-existent. And audience fails to materialize, since they are not informed of the films. The result is not good, and the Latvian exhibitors take comfort in remembering that there were



times when European films dominated in Latvia, and American films were a rarity.

Cinema in Latvia faces a lot of problems. Many cinemas close. Out of 915 cinemas only 123 remain open. Visits per capita were at one point as high as 7.4 a year and is now 0.5 a year. It could be explained by the lack of a strong cinema policy and interest from government and municipalities who offer little or no support. Other significant aspects are

the financial situation of the country and the economics of the population. Big films are released in three prints, smaller ones in one or two prints only, and it can take months or even years for a film to reach all cinemas. Of course video pirates take advantage of this situation, making things even worse for the cinemas.

More domestic films and Scandinavian films are in demand, not only in the capital, but also in the rural areas, and in general more European product is needed as a contrast to the Hollywood films. At present technical improvements such as stereo sound have been installed only in cinemas in the capital. It is hoped that Latvia's entrance into the European Union will affect the prospects of the cinema business.

ON NORWAY

Heidi Aagard is the director of the consulting department in Film & Kino which is the Norwegian Association for film and cinema. She readily gave some statistics. Norway has 244 cinema buildings with about 600 screens, supplemented by an ambulating cinema for about 200 locations. What's special about Norway is that 86% of all the cinemas are municipal. There is a film hire agreement between Film & Kino, the cinemas, and the distributors. It makes life quite

easy on the film hire. A very wide film repertoire is shown in all cinemas, and a very low rate of American films, 55.6% only. The share of Norwegian films is only about 5%. So about 40% of the films are from the rest of the world. And the number of visits per capita per year is very high, 2.8... though exceeded by Spain.

The challenges for cinema in Norway are at the moment very much concentrated on the film hire agreement which may or may not be in conflict with the EU law, and Oslo as the main cinema in the country has actually reported Film & Kino and all the other cinemas and all the distributors to ESA, so there's an ongoing and very exciting case there. Another major challenge is of course the new technology, the E- and the D-Cinema. Heidi is also working on the possible synergies of national projects



and national marketing. There are too few children's films in Norway, which is a problem, and there's a challenge to keep a continued focus on art and quality films. Last, but not least, there are the competing leisure activities.

The summer campaign, mentioned in detail in the report from last year's course in Ebeltoft, was established to get new films in the months of May, June, and July where distributors did

not want to launch films. So in connection with a big national campaign they were persuaded to, on the initiative of Film & Kino. Project management was one year in Bergen, and it's been sort of ambulating who has the responsibility, but this year it's Heidi's association again. It involves talking to the distributors individually and also in groups, and a very professional company is doing the marketing. And this has increased sales dramatically, in the area of 30% - by means of a huge campaign on tv and the use of many different methods to get the message across - and the fact that there are a lot of prints, and most importantly of new films. This year, however, films like *Star Wars* have their own international campaign, so distributors don't want to join forces any more, and that is a problem, but hopefully they will see the light again.

ON NORWAY

The Great Cinema Day is one day in November or October at half price in all cinemas throughout Norway. This has been a big success and created huge recognition in the population. It is not done to boost sales on that day, but rather to heighten the awareness of cinemas in the entire population, and it's really working well. Of course there is a number of local campaigns and projects supported by Film & Kino. They also have a number of new marketing initiatives and are just about to introduce a CRM scheme in Norway too, in co-operation with the distributors and the cinemas. In many different respects the three parties work as a team. Film

& Kino builds the technical platform, and each cinema will be able to put in content. It will be a great thing for everybody, especially the small cinemas who cannot fund this themselves. Heidi's association also has a trial project for small cinemas in danger of going out of business, taking on programming for them. This is in a very early stage, and she'll be able to tell more about this next year. Public funding... the main funding is from Heidi's association. To a limited degree also from the Norwegian Film Institute, but most of the cinema business receives funds from Film & Kino.



EUROPEAN CINEMA EXHIBITION, EBELTOFT 2002

ON POLAND

Pawel Wachnik is responsible for four multiplexes in Poland with 45 screens. The first one was opened in 1999, and for the time being they are not developing new ones. It has been and still is very difficult to find money for investment after the change of the political system, also in the cinema business, and when Ster Century from South Africa decided to invest, the Polish managers were given the opportunity to create new behaviour and visitor patterns



and this is the reason that Pawel plays independent films in his multiplexes. It gives the audience for artilfms the opportunity to experience also the multiplexes. And people investing in a cinema in a city have a choice. They can go for the money and show *Spiderman*, *Lord of the Rings*, and *Harry Potter* – or they can go independent and make no money. Pawel's idea is to make the two genres meet and train the audience for this. Which is why his multiplex in the City Center of Warsaw shows all types of movies on its 14 screens. Pawel does not feel that at present a market like Poland should draw a straight line, distinguishing between commercial multiplexes and arthouses. Some distributors do, though, and sometimes he has trouble getting prints for films that he knows will do good business.

Anna Pekala is the managing director of an arthouse in Warsaw. She also represents Gutekfilm which is a Polish distributor of independent films. They release films directed

by Jim Jarmusch, Lars von Trier, Wim Wenders, and the like. They have two cinemas, one arthouse with two screens and one small single screen cinema, all located in Warsaw. The arthouse is a part of the European Cinema network and receives support from them. Anna would like to see a clear definition of multiplex and arthouses in terms of genre.

Poland had 800 one-screen traditional cinemas in 1999 and is now down to 680. The market is now dominated by multiplexes. There are only 5 or 6 arthouses and about 20 multiplexes with an average of about 10 screens each. Admissions were 23 million in 2001. In 1999 admissions were 27 million, half of which were taken by two domestic productions which played in multiplexes for a year and a half. Ticket prices are too high in Poland at about 6 euro in multiplexes and 4 or 5 in arthouses, and as an average salary is about 500 or 600 euro, people cannot afford to go to the cinema. So it's a big challenge to encourage people to go to the cinema. Another problem is that there is no government support for cinemas. There is no Polish Film Institute, so distributors and exhibitors are completely dependent on revenues. Because of this they focus entirely on their own business, and there has been no common strategies or co-operation between the two. Independent films are shown in multiplexes as well as in the arthouses which is a problem for the arthouses. Visits per capita is

EUROPEAN CINEMA EXHIBITION, EBELTOFT 2002

ON POLAND

0.5, exactly as in the Czech Republic, and it is hoped to increase this. Distributors and multiplexes are discussing initiatives towards this, and the association of one-screen cinemas is now involved as well. The business also has a problem in that the government plans to put a 6.9% licence tax on all box office money. Which was the reason that exhibitors and distributors got together in the first place, so maybe something good will come of it after all.



A lot of research has been done by Ster Century to identify audiences – the latest study in co-operation with distributors – and the result is a book of 150 pages with suggestions of how to up the market. They have this summer introduced a low price Tuesday - very low at 2.50 euro – and try to convince the rest of the market to join this campaign, as the results after four weeks is really impressive. Figures are 159% up between Tuesday no.1 and Tuesday no. 4 and what's more important, Mondays and Wednesdays are not down, so they're are not cannibalizing themselves. Before the holidays Ster Century sent 300,000 leaflets to schools, informing of the programme during the holiday and offering a special price. They also send to schools monthly leaflets about films, and although they do state that these films can be seen at Ster Century cinemas, the main focus is on information about the films, and the main purpose is to create a positive attitude towards films.

Credit card penetration is not very high, and banks are reluctant to accept payment by credit card anyway. Websites therefore offer no payment facilities, only reservations. But mobile phone penetration is very high, and Ster Century is in talks with mobile operators about buying and paying tickets via the mobile. Customers will then be charged on their phone bills.

Ster Century feels that it is necessary to be constantly visible everywhere – newspapers, magazines etc., because distributors limit the effort to 150 billboards, some short information in the press, and 50 spots on the radio. And this is the same for each movie. Arthouse films, though, occasionally get special treatment. The promotion for *Amelie* was really great which is the reason that it did really well. There were articles about French films, interviews with French actors, publicity on music television and in special magazines for young people – quality magazines, not the ones for the popcorn crowd. *Amelie* was everywhere, and focus was on the artistic value, not on commercial persuasion. Anna's arthouse theatre took advantage of a very strong relationship with the university in Warsaw. As students are their core audience, she arranged in connection with *Amelie* a special festival and drew even more attention to that film. And after that film every French film has done well in Poland, so there's a message for distributors there to do something special.

EUROPEAN CINEMA EXHIBITION, EBELTOFT 2002

ON SLOVENIA

Bojan Vivod is the general manager of Celjski Kinematografi. The company has 20 employees and is based in the town of Celje which has a population of 50,000. They run three cinemas and three restaurants in Celje as well as one cinema in Izola. One of the screens is showing only arthouse fare, and the yearly number of admissions is approximately 200,000. The cinemas are newly renovated, but two of them are in locations protected as historical buildings which put certain limits on the renovations. Still they have reached a standard which Bojan compares to Ebeltoft. Plans are for their first multiplex in Celje with 8 screens and 1,700 seats which will within the next year be joined by two more multiplexes. In light of this the company has recently added two new employees to handle publicity materials and decorations in the cinemas.



The cinemas have a nice website and encourage people to visit it by offering free tickets if they win on a game of roulette – but they can play only once a day. Special events are very frequent on opening dates, and very good relationships with local radio stations and newspaper allow for lots of publicity.

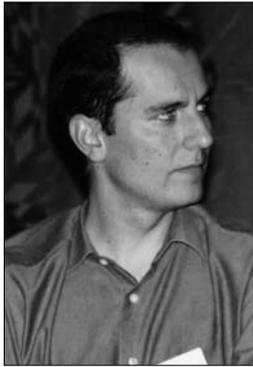
Slovenia is a small country of 2 million inhabitants. The gross domestic product is around 30,000 euro per person, and the average salary is around 750 euro. Slovenia achieved 2.6 million admissions in 2001. The first multiplex was opened one year ago, with 12 screens and 3,200 seats, and it's been a huge success, pulling in 1.6 million admissions. There is no foreign investment in this territory.



EUROPEAN CINEMA EXHIBITION, EBELTOFT 2002

ON SPAIN

Alex Jimenez has only been in the cinema industry for five years. In 1997 he joined UCI – known as Cinesa which was the name of a Spanish company that was bought by UCI more than 10 years ago. Since January he's been their business analyst of Southern Europe, which includes Spain, Italy, and Portugal. He finds it quite interesting to have the opportunity to look at different territories, as they are dynamic markets where many new screens have opened in the past few years.



Cinesa has 186 screens in Spain in 20 multiplexes and three or four downtown cinemas which are older and smaller. In Italy they have 42 screens in four multiplexes. The first one of these was opened in 1999, and their first one in Lisboa, Portugal, was set to open on the 21st of June.

In Spain Cinesa had in 2001 at least 250 new screens and will open another 250 this year. This is the way it's been for the past few years, but the market is now close to becoming saturated, although some small locations still has room for new multiplexes or new cinemas. There are cinemas now, however, which fail to meet their numbers, simply because of

overscreening. On certain locations you'll find three huge multiplexes within a 10 or 15 minutes ride. So Alex can see that there will be situations of failure, but it looks as if some companies need to fail on more than one project before they'll learn and stop building that way. But all the new multiplexes have increased the market, and the frequency in Spain is one of the highest in Europe, 3.6 visits per year – although at the moment it is below last year which is a bit of a surprise, as it has been growing for the past five years. The same thing is happening in Italy, actually, but Cinesa believes that by the end of the year attendance will have increased after all because of all the new screens. Only by two or three per cent, though, not significantly. Spain has one main association for cinemas, but Alex feels that exhibitors are not too happy with it and may form another one.

"For the opening of *Spiderman*, we will have a group of people dressed up as Spiderman climb through the cinema and create an event this way. During the biggest attendance periods we always have special promotion, this can be a free glass related to the film, or a poster, or whatever. We have a digital projector in one of

ON SPAIN

our cinemas in Barcelona, and we have projected an opera there as well as an important football match between Real Madrid and Barcelona. Both went really well, and there was a radio station really interested in promoting the match, so that was really successful. So it's a way to get other revenue streams to help the economy of the cinema. But we feel that we have to be very aware of who is going to develop the digital system, who is going to organize it, though I think it's an all win situation which will have benefits for everybody. We have a loyalty scheme. We have issued about 80,000 cards, and approximately 60,000 of those are active, i.e. they have been used during the past three months. And we use this to promote certain films to these customers. In some cinemas 15 or 20% of the customers use the card, so that's a very good share. The card is free, and those who come often to the cinema

are rewarded – after a certain number of visits they get a combo, after a certain number of visits a free ticket or another type of free prize. It's quite expensive to run this scheme, and some disagree on whether it really works or it doesn't. Some people are in favour, while others think it's just giving away money. Anyway, it's supposed to create loyalty, and if the competition does it, we'll be at a disadvantage if we don't. We co-operate with a large bank which has a lot of ATM machines around Spain from which people can buy all sorts of tickets. And even buying that way, customers can select their seats. Our seats are numbered, as a survey has shown that people prefer numbered seats. Also if seats are not numbered people will rush in to get a good seat instead of buying concession, and with numbered seats you can avoid all these single empty seats between customers. "



ON SWITZERLAND

Hanspeter "The Roman" Sigg

was educated to become an attorney of law in Zürich. 26 years ago he had the opportunity to take over a distribution company which was at the time distributing Paramount Pictures in Switzerland. In 1980 he took over the Swiss-German part of a rather big group that had financial difficulties. It operated in Zürich and Winterthur. A couple of years later the Zürich cinemas were sold, and Hanspeter focused on Winterthur in the Zürich metropolitan area. Later he took over cinemas in Schaffhausen, Werdenberg, Sargans, and lately also four arthouse cinemas in Luzern. At the moment the group has 25 screens and about 650,000 annual admissions. It runs all cinemas in Winterthur and therefore has to play everything that is offered. The group has acquired a stronghold in arthouse movies, a strategy enforced over the past few years. In Schaffhausen Hanspeter competes against an 8-screen Kinopolis multiplex which opened two years ago by showing exclusively arthouse films in original versions.

"For many years admissions in Switzerland were relatively stable with 15 million guests annually. This number began to increase two or three years ago. Last year we were at 17



million or something like that. Right now Switzerland has 7 million inhabitants, so the number of admissions per capita is about 2.4 officially, but personally I think it would be around 2.7 or 2.8, taking into account all the open air films which are very important in the summer in Switzerland. It is a completely different experience, and, provided the weather is good, these open airs are a tremendous success. It is a rather risky business, because the cost of establishing

the whole thing, projection included, is easily 100,000 Swiss Francs. But in good weather you get 1000 to 1500 people without difficulty. In bad weather you may end with 25, and you've still put up the money in advance. But we cannot do without open air shows. They have become very popular, the repertoire is usually the best films of the past season revisiting, and it's usually the final chance of catching those titles on a screen, as they have disappeared from the screens of ordinary cinemas. There was a very huge open air in Zürich at the lake, a very nice moving screen coming out of the water, more or less – it was flat at the beginning, then straightened up, and then at nightfall the public enjoyed the film being projected across the lake.

ON SWITZERLAND

Further, there's a special initiative in Switzerland called *Zauberlaterne*. Founded in Neuchâtel, it has spread and is now in about 25 towns throughout Switzerland. The idea is to invite children to free movie events where somebody from the organization takes care of them and shows them around the place. The intent is to initiate the kids to the world of cinema, for the 5 year olds, then the 8 year olds, and the 10 year olds. It's limited to those in primary school, and the business can be completely sure that if such projections are done for free, it's an investment in the future of the business.

I consider the actual situation of the Swiss cinema industry to be in rather good shape. The exhibitors, especially the bigger ones, usually have very good and modern equipment. But about two thirds of cinemas in Switzerland are still single screen cinemas in the countryside, while the remaining third are bigger groups, among them my group which has about 5% of the market share of the Swiss-German part of Switzerland. A new Swiss cinema law was planned to take effect on July 1. It will probably be postponed, as the government did not publicize it in time. The Swiss constitution calls for priority to be on quality and variability of choice, and 1,200 prints of the same film occupying screens is inconsistent with this. The plan is to put a levy of 2 Swiss francs – quite a lot – for blocking the market with additional prints. In effect if more prints are put out than

is actually needed on the market, it is thus punished by dues of 1/5 of the admission price, and legislation of this type could badly effect the multiplexes.

Located within the metropolitan area of Zürich I have very little special events, as these are usually done in the centre of Zürich. But a very popular comedian has just taken over the ancient theatre in Winterthur only 50 meters from my main cinema, to develop a comedy house, and of course I look forward to the added attraction of Winterthur by this. He just came to town, and has recently made a very good movie, and we had the opening in our cinema with him attending.

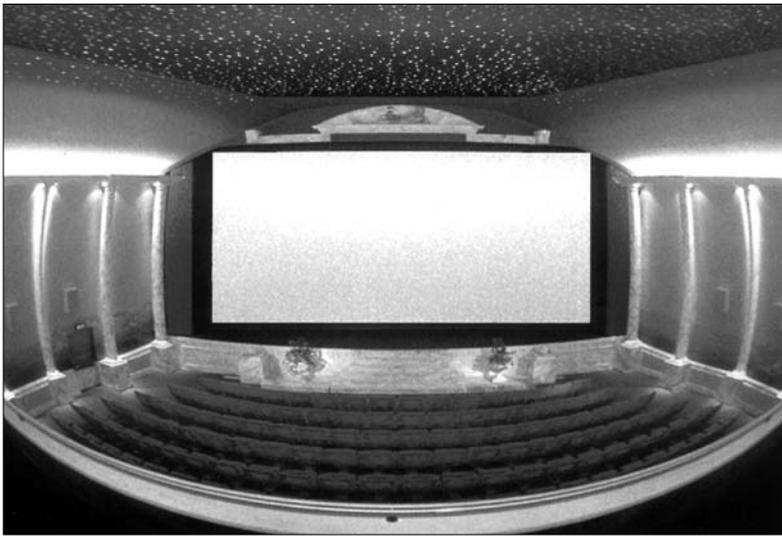
We had a very interesting study done in Zürich with 2000 people, asking them about their preferences when they go out. 17% preferred going to restaurants for dinner or a drink. Second place was the cinema, 13% - and all other events came afterwards. Sports was astonishingly low, between 8 and 10 per cent, somewhat depending on the age group. So I started in my cinemas a strong relationship with Three Star which are good restaurants. And there is another group in Zürich who began as restaurants and started to incorporate arthouses. Especially in the arthouse section it works perfectly, and if you calculate just statistically you should never have cause to worry. With a good restaurant and a good movie, especially arthouse, you should reach

ON SWITZERLAND

about 30 per cent of the preference of the public for going out. So I try to add restaurants to the cinemas, especially the art houses, and to develop bigger cinemplexes.

The biggest one which is now being altered, will develop from six to nine screens. They are rather small cinemas, the smallest one only having 35 seats, but they allow me really long runs, and I have had a few films on for more than a year and a long time after they vanished from the Zürich cinemas. During rebuilding the biggest one I also try to change it into a sort of theme park. I have chosen the theme of a Roman town – Winterthur is a Roman town, so I took over the name of Vitodurum. Part of the multiplex has already been changed, and by

the end of next year the entire multiplex will have changed into a kind of Roman surrounding. I came in a toga at the opening party for the first part, and the staff was dressed in Roman attire as well. One auditorium gives the impression of an open air theatre on Kapsunion, and the entire movie house is an ancient temple of Jupiter, holding in his hands a disco globe which sends lightning into the audience. There are Roman columns everywhere, and the place is decorated in great detail. The audience has responded very positively to it. Inspired by what hotels in Las Vegas do to pull in visitors, I want to give them something different – *the Wow! experience* – as is also the idea of all the fun parks or theme parks around the world. It is just never done in cinemas.”



EUROPEAN CINEMA EXHIBITION, EBELTOFT 2002

ON THE UK

Michael Vickers, funnily enough, was running Blake's cinema 26 years ago before moving to Kent to start his own business. Reeltime Cinemas has eight cinemas in the south of England with 19 screens. They are purely commercial standard cinemas playing *Star Wars*, *Spiderman*, the like. But they do mix it in some respects. In Bristol the Watershed is the main regional film theatre. They tend to book the films in for two or at the most three weeks, and Michael is happy



to say that he moved *Amelie* directly from the Watershed into his three-screen Orpheus. They played it for two weeks, Michael played it for 28 weeks – which happened to be the longest run for that film in the UK. Besides being an independent cinema he also works as the director of film for SBC International Cinemas which is a new multiplex company with several screens and more to open. Added to that they recently opened a nine-screen cinema in Portugal which he books from London. Michael is doing absolutely nothing on digital at the moment. He has never done anything else in his life except work in a cinema or book films, and if you took him away from the cinema he'd probably not know what to do.

“I usually book a cinema about a week in advance, so we're unable to publish a programme in advance like City Screen cinemas do. But having said that we do a lot of one-day specials, called *take-ones* which we publish a month or so in advance over an eight week period. Distributors want a guarantee for each film. The minimum in the UK is £80, i.e.

this is the minimum film hire you can pay. We tend to play it in places like Cannock north of Birmingham, not the most upmarket situation you can find. They're not used to seeing a subtitled film, and the only way we can afford to play there is if we take a print for eight weeks and play it one day in each cinema. So we pay the guarantee and then pay the transport company to move the print from theatre to theatre to theatre. That way we only have to pay the percentage of the box office, because in a place like Cannock some of the films will only draw about 12 people... 12 very enthusiastic people, I might add, but still only 12 people.

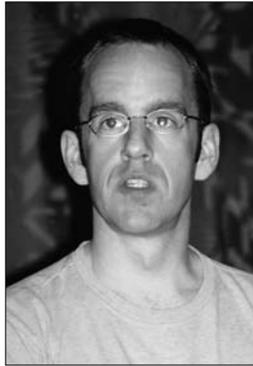
In one of our locations the local newspaper was forever getting the advertisement wrong, and it's never the newspaper's fault. You have advertised the film in the paper, so it is obviously your fault. We started an e-mailing listing. And the last count at one particular site after just over eight weeks was nearly 500 e-mail addresses, so each week we e-mail the specific programmes out, but basically we take part in all the nation-wide initiatives.

Unfortunately, the major companies tend to go for market share at any cost. On a particular island which is part of the UK – which happens to have a very large regatta once a year – we have a three-screen cinema, and there is a multiplex built on the island. They should never have built eleven screens, that's their problem, not mine. But we woke up one morning to find out that our seat prices suddenly had

EUROPEAN CINEMA EXHIBITION, EBELTOFT 2002

ON THE UK

become more expensive than theirs, and the following week we found that every house in the town had been leafleted, offering free admission to the multiplex. This had only been done in the town where our cinema is located, and if they really want the few admissions we do, they must be desperate. I assume it's only to get 100 per cent market share, and unfortunately they've got a fight on their hands. So I told the distributors this was an excellent idea, and



Blake Smith is the manager at the Duke of York's Cinema in Brighton which is 92 years old. It was built in 1910 by people who owned a theatre by the name of "The Duke of York's" in London. Establishing the first purpose-built cinema in Brighton, they gave it the same name, perhaps to benefit from the reputation of a real theatre. It's now the oldest, running cinema in Britain.

could I leaflet the rest of the island, giving free admissions in this particular town. They said: "Whatever you do is fine, but make sure you pay for every free ticket." I believe they wound up paying rentals on their give-aways. Distributors have now put a restriction on it and charge us for complementary tickets. They were just papering the house, and that of course had to stop. All they did was trying to get people in to buy popcorn. So the film is being used as a loss leader, and quite rightly the distributors are saying no. If distributors hand out the cinema's seats for promotion they have to do it with the co-operation of the exhibitor. Nobody can run a business if whoever is giving all the seats away.

The phenomenon of 50+ patrons isn't something that suddenly happened. Those born between '46 and '50 were the post-war baby boom, and they were told many years ago that there would not be enough money in the pension schemes to pay them when they get to retire because there's too many of them. We should have been aware of this for a number of years."

"Brighton is quite a diverse town. It has two universities and several colleges. It's also a holiday resort and a commuting town for London, because it's only an hour away. So it does have a very diverse community living there and can easily support an arthouse cinema which is basically what we are, although the term arthouse isn't popular in Britain, it has connotations of snobbery, so it's not one that we tend to use very often, but there's no other word, really, that suits what we do. At the time I took over management we were having admissions of just under 100,000 a year, and the cinema was on the edge of making a profit. Unfortunately the cost of running a one screen cinema makes it quite difficult to make a profit. We don't receive a great deal of funding, but we do receive money from Europa Cinemas to show a certain percentage of European films, and occasional grants from the local Arts body and the local council, but mostly for educational work and not for what we do generally. So we are a commercial outfit and we do have to make money or certainly break even in order to survive. Since I've taken over, due in part to marketing initiatives, but also to a change in

EUROPEAN CINEMA EXHIBITION, EBELTOFT 2002

ON THE UK

the kind of product available, things have improved greatly. In the first year we moved to 109,000 a year, and then the following year which was last year we did 116,000 admissions. This year, projecting from the first quarter, we're looking at something like 140,000, so that really is quite incredible. To have increased by 40 % in three years is really quite astounding. One might certainly put it down to the increase in crossover product. We don't just show European arthouse movies, but also American blockbusters, though not the big Hollywood blockbusters. This year our biggest film was Gosford Park, closely followed by Mulholland Drive – and we have quite a mix of different types of film, and I think that really helps, because it brings in different audiences – the student audience, an affluent middle class audience, and also retirement groups. A film like Gosford Park brings in a much older audience that goes to the cinema perhaps only once or twice a year – but they can turn out in very large numbers for a film like that. So we are successful and becoming more successful.

We have formed reciprocal marketing agreements with other venues in our town that we think would have a similar market, so not the Odeon and not the UGC, but for example there's a theatre in Brighton called Comedia, and they do alternative comedy and avantgarde theatre. We give their members discounts, and they give our members discounts, and we have adverts in each other's brochures for free, purely reciprocal. We have mail shots in each other's programme mailings too, so we're pushing each other because we think we have some sort of crossover market there, and it creates loyalty outside your immediate membership. The box office staff for each place also has staff ticketing agreements so that Comedia staff

can see films at our cinema and our cinema staff can see theatre at Comedia, and then we can recommend it to customers, so there's a very pleasant ambience and a feeling of camaraderie between these small venues, and we think that association works very well.

We arranged with a distributor to have a talker screening which was advertised on the Classic FM which is a national UK radio station that plays popular classical music, so it has a market of people in their late 30's right through to 60's. So it does target the young old ones. And I think it was really important to choose the right film, and we chose a Mike Leigh film about Gilbert & Sullivan which has an association with the music and the age group, and Mike Leigh is a popular arthouse director. Basically it was an offer to come and see the film for free as a preview, and it was a sellout show. We had 330 people on a Sunday morning. It was an additional screening, so we didn't lose a show – and it brought in 330 people who had probably never been to the cinema before. They seemed surprised that the cinema was there, and "Oh, it's not an old fleapit, as it used to be 20 years ago. It's really lovely now. How did you do it? I can't believe that people spent money on the theatre." So it worked really well – and we had these 330 people who would probably tell something like 10 friends, so we got maybe 3000 people finding out about the cinema from what was basically a free campaign on a classic music station on the radio. And I think if it can work in Britain, it can probably work in other countries as well.

I know my audience fairly well, but I still get surprises. Up until recently we hadn't shown Bollywood films, and when we experimented with it, we didn't expect much success,

EUROPEAN CINEMA EXHIBITION, EBELTOFT 2002

ON THE UK

because there is not a huge Asian population in Brighton. But people came from further afield, towards fifty % of the audience were of an Asian background. Incidentally we have experienced no problems between different groups such as Indian and Pakistani ones – as one might have feared. Because it was also subtitled in English we had a substantial white audience as well, so I sometimes get surprises, but generally I know who the audience is.



We have about 2000 members of the cinema, and our average admissions are about 2500, so I would say that most members come once a week or every two weeks, so I probably recognize anything from a third to a half of the people I'm serving because they come all the time. So you do get to know the audience very well, and City Screen in general is very front line. We don't just sit in an office and wonder what's going on outside. We serve the public, and we're there in the lobby and behind the box office. And if people are disappointed, they blame the film makers, the director, or the actors. The cinemas don't really control the marketing of the film. I understand that the cinema has chosen the film and may have the responsibility, but the feedback I get is that the customers generally don't blame the cinema. And I talk with them. I serve them myself."

Sylvianne Smith, fondly nicknamed Fräulein Schmidt because of a spelling error, works for City Screen also. Her cinema is slightly different. It opened in October 1999, and it took a good

18 months for anybody to realize it was there, but now it's doing really well with 100,000 visitors last year, and Sylvianne believes they'll beat that target this year. City Screen seems to have a thing about choosing sites that all look different. This cinema is a glass building, all glass – very hot in the summer, freezing cold in the winter, and actually on the waterfront in Southampton which makes for a beautiful view – and on the site of the original box office for the

Titanic. So *Titanic* is always very popular. They could play it all year round, and they probably will do it again. Sylvianne's observations are incorporated under the heading of City Screen.

Paul "Ray Charles" Homer has worked for City Screen for about three years now. He recently moved to the Metro, in the West End in central London, but before that he toured around and has worked for their Stratford on Avon cinema for a couple of years and a couple of other cinemas in London. What's interesting about the Metro is that it was set up in the 80's by a charity, the Cinema Company who are basically a left wing, radical distribution company, but since then it's sort of slowly gone down hill, and City Screen has just taken the management contract over in November, so they are in the process of trying to rebuild the cinema and sort of rebrand it. It's an effort on programming, marketing, and physical work on the building as well. Paul is not always wearing sunglasses, but lost his real glasses on the way to the seminar. His observations are incorporated under the heading of City Screen.

EUROPEAN CINEMA EXHIBITION, EBELTOFT 2002

ON THE UK

The City Screen way.

There's a lot of empowerment within the company for the managers to just do what they feel is best for their local market. Obviously there are rules and regulations and a need for those, but it's quite flexible and there's a lot of respect from head office for doing the things we feel is best for our market.

Because the majority of their venues are cultural cinemas or independent cinemas, and the

people who are generally interested in that type of cinema want to plan their lives a little bit more, we very deliberately produce a six weekly principle brochure with film titles, film descriptions - if possible with timings, so you can get this brochure six weeks before you want to watch a film and you know exactly when the film is going to be on, and you can book the film that day. We find that people really respond to this and they really like the idea of being able to plan. That's our main marketing tool, and we're ignoring e-marketing for the present time. The brochure goes out across every city – to cafés, bars, clubs, libraries, colleges, and universities.

The other main thing that we do in terms of marketing is loyalty. Most of our cinemas have a very loyal audience base, and our main method of securing that is a membership scheme, so for £15-20 a year people become members of the cinema and get various benefits... two free admissions at any time in



those 12 months, discounts every time they come, and talker screenings. Discounts at local restaurants. We co-operate with lots of local restaurants, and they'll give discounts to people that hold a membership card. It's individual and on the initiative of local managers, but most sites do it.

The membership gives us a postal mailing list, so we do post that programme to all our members, and we have a free mailing list as well to educational establishments, and hotels, and guest houses, so we get the programme as wide-spread across the towns that we're based in as we possibly can.

Relating to e-marketing, we've just introduced a new box office system across the company. In the UK the big supermarkets know what you're buying, they have reward cards, they know what you're buying and what you want – it's a similar sort of idea, we know what our audiences are watching, so we know we have audiences that like Goddard films or Coen brothers films, and hopefully we've also got their e-mail addresses, so when new films come out by those directors or something similar to that, we can go straight to those people. We can target them, so we can reduce our marketing costs whilst increasing our targeting. And we're looking over the next few years at sort of expanding that system, so that we know our customers better and better and better, thereby increasing admissions.

EUROPEAN CINEMA EXHIBITION, EBELTOFT 2002

ON THE UK

The most interesting about the membership scheme and the loyalty is that in towns where we are in direct competition with another cinema which gets a film first, we'll have customers come in and ask about it, and when they hear we'll have it two weeks, they'll wait and come to us. Apart from that loyalty it's the environment of the cinemas. All our cinemas have bars, lounges, so you can go and get a pint, sit in a sofa before or after the film. It creates an environment where people can relax in, and it seems to be not just the film but the whole environment which people seem to respond to. It's actually a place where people can go by themselves. We create an atmosphere where you can sit there even if you come just to read the paper. Anyone can feel comfortable. The place has a social focus as well.

The cinemas are very diverse in everything, from the oldest right through to cinemas that have just opened up in the last year or two. A number have also won architectural awards, such as the cinema in East London which was elected one of the top five buildings when it opened in '98. That again is part of the concept – it's a bit more expensive, but people seem to respond to these buildings.



You can market that as well. It's more than just a film – I think that's what we're about. One cinema - which happens to be Paul Brett's

favourite cinema in the world – is in York. It has beautiful screens and beautiful leather sofas, a beautiful café, and a beautiful position on the river in the centre of York, and with public money this building was restored into a fantastic social centre. And in the basement is a large

space which during the restoration was divided into three very flexible areas, so there was a juice bar, an internet café, and a cresh or kindergarten, and depending on the time of day and depending on the time of year, each of those thirds grew in size, so for instance the internet café on a Friday would be the majority of it. Monday to Friday during the daytime, most of it would be a cresh with a bit of a juice bar. Ironically, due to very bad weather, the river rose to a level that it hasn't been at for 400 years and completely flooded the basement. Luckily, there were no children in there at the time. As a result it was deemed to be dangerous to have that amount of computers in the area, but it works well as a basement additional bar, so it's an extra bar now. They have poetry evenings and DJ's down there and that sort of thing. They also have a youth group down there as well, so they've sort of adapted the use of it.

Admissions are good and have not been affected by weather this year at all. The restaurant too has a very high per capita take. Most of the cinemas take about £1 per customer on the kiosk and bar and prepare to take nearly £2 per customer, because a lot of the customers do eat proper meals there as well as buying from the kiosk and bar. There was a month this year when they took more at the bar and restaurant than they took at the box office.

I think there are currently proposals for funding for cinemas to digitize to an extent. City Screen is considering it, but it is far too expensive at the moment, so it's a question of waiting for the technology to come down in price, and then we'll do something. Most cinema

ON THE UK

operators know it will be a very long time before prints are purely in a digital format, and the expense of running a traditional 35mm projector as well as a digital projector are phenomenal. I think we all recognize that we will have to change in the future, but we're sticking with the 35mm until it becomes necessary to change, although interestingly as a company I think we do now have one digital projector for DVD and DigiBeta at our Cambridge site. But that is the extent of it.



Paul Brett is the head of Cinema Services at the British Film Institute, but is contracted out for 50 % of his time to the new body, the governing body for film in the UK, the Film Council. He has been a distributor, so he knows both sides of the coin, but his job is to build relationships between the British Film Institute and the 28 regional film theatres which it looks after and to maintain relationships with multiplexes as well as with the commercial cultural cinemas such as those operated by City Screen, Zoo, and Mainline. During presentations and Q&A sessions Paul generously shared his vast knowledge of the business with participants. Some of his observations and comments:

"The general situation in the UK is great. Admissions are 25% up in the first quarter, so I estimate 180 million for this year, a staggering increase of almost 20 %. The big

commercial companies are doing absolutely fantastic. There are of course pockets of overscreening, but by and large the market forces have brought that down. And still, London – compared to Berlin or Paris – is underscreened. The situation for British production is extremely buoyant at the moment. We've also acquired a very significant Asian audience who is growing fast and it's possible that in three year's time the Bollywood films could represent as much

as 10 % of the market share, simply because there's very rarely a week where a Bollywood film in Hindi is not in the top 10. Actual statistics: There are approx. 800 cinemas and about 3000 screens in the UK. The population is 60 million people in the UK which means that last year the number of admissions per person was 2.6, and we believe that this year it will become over 3 for the first time in decades. It was 1 admission per person only 15 years ago, but then again – to put that in context – when my parents were courting each other just after the war, the number of admissions in the UK was 1.6 billion which meant that people went to the cinema on average 35 times a week... a year! They seemed to go 35 times a week which basically – to answer your final question – explains why I'm here.

I think that the reason for this growth is that Hollywood is focusing on family films. Where Europe has something very strong to offer is on films for the older audience, films such as

ON THE UK

Gosford Park – and I also think that we should really look to the work of the Nordic countries which I admire so greatly because of producing films for children and for the younger family audiences. In Europe we have animation which is as strong as anything in Asia or in America, and we're not very good at exporting it. We should really talk about how we can circulate films for children.

Different approaches... I worked one shift in a multiplex in Warrington on the day that *Jurassic Park* opened, and I learned more about cinema that day than any other day of my life, because I could see that everything about the cinema was designed to get people from the box office to the popcorn and into their seats – and then out of the building as soon as possible. It's about turnover and they are marketing homogeneity. Each of their cinemas look the same, and the trend now is that the major exhibitors realize that uniqueness is a benefit, so they're trying now to imitate the independent sector. Especially in Europe there is a tendency for the occupancy of our cinemas to be focused on Friday night, all day Saturday, and Sunday afternoons, so that the business during the week, especially in the multiplexes, is almost non-existent. Thus, audiences realize that these horrible, popcorn smelling, coca cola ridden places in fact are really nice during the week, because there's nobody there, and so they're attracting an audience that want quietness and want some space and so forth, so they're going to start looking at the architecture of their cinemas – not to, if you like, maximize the profit per square meter, but to maximize the offer per square meter. And I think that's the way of looking to the future.

But it's totally different business, and that's why I stress the word independent. Because it's a life style that you're offering, and if Disney ties up with McDonald's, independents should team up with restaurants that their customers like to eat in, because they certainly aren't McDonald's.

When you're able to send an e-mail out to a significant proportion of your regular audience you'll avoid the hassle of printing and circulation and distribution of brochures. I think that is going to be a very major trend. But one slightly frightening scenario: I had lunch with the marketing director for the biggest chain in the UK. They're working on a scheme which is to send a text message to your mobile on a Tuesday, saying: "Paul, do you want to come this Friday and have your normal seats, P21 and 22, and a large popcorn and a medium cola ready in the seats when you get there?" You'll only have to press one button to say yes, and your credit card details will be taken, and that is what the transaction will be like. But if you think of the labor costs of getting that sorted out and transported into the cinema at the right seats... that point illustrates the two different approaches – the independent one as well as the major's approach.

Digital cinema is going to be an awfully long way off. I explained about funding for film societies in my presentation. As for cinemas, if you're building a cinema, whether it is an independent or a multiplex, the cost of analogue technology, the oldfashioned celluloid projector, per screen is in the region of 40-50,000 euro – and you can rest assured that, properly serviced, that should be working

ON THE UK

properly in 30 year's time, whereas the equivalent digital technology today, paid for unsubsidized, is in the region of 150,000 euro. And you know for a fact that you'll have to replace that with improved technology in just a few years. And there's the subject of piracy. Digital means beams of ones and zeros, and once you have that format, it is piratable. And the younger the hacker, the easier he seems to be able to do it.

That said, I believe that the year 2005-2006 is going to be the crunch. For two reasons: Firstly, that is the estimated release of Playstation 3 from Sony. The processing on this one will be 1000 times greater than that on Playstation 2. More significantly, it will have broadband capability and be able to play DVD's and movies through the telephone wire, in the living room – not on the computer. Secondly 2005 is the year that *episode III* – hopefully the final! – of *the Star Wars saga* will be released, and George has learned his lesson this time, because he projected there would be 150 cinemas showing *episode II* digitally, and in fact it turned out to be 38. His projection is that there will be *no* celluloid copies of *episode III* in American cinemas. Which again will not happen, but there will be a big push this time to make sure that digital provision is made available. Here's the final point, an independent cinema in South London called The Ritzy played *Star Wars ep. I* digitally in a deal done through Boeing, famous for US defence and planes. They're doing a delivery system from the producer through distribution to exhibition with guaranteed total security. There was also a subsidized system put in, but it was just for that film, and the problem is that that cinema is *not*

where you go and see *Star Wars*, so it was a mismatching of the film to the cinema, but Boeing made a political point by saying "We're talking to everyone and offering it to everyone."

AIM is All Industry Marketing, formed in the year 1985. It is behind initiatives to get schools privileged access to films and have study guides on paper, CD-ROM, and the net in order to learn about cinema and the cinema going experience. Aim has continued for the last 17 years looking at initiatives such as National Cinema Day which is directly stolen from the French idea of the Fete de Cinema where you get admission for free. In the UK it's £1 or 1.5 euro – and out of AIM a year ago was created the CMA, the Cinema Marketing Agency. We love acronyms in the UK! The CMA is a new initiative which is seeking to do the half price cinema day. But at any given time some distributor will have a problem with it. If this could be taken in confidence... a distributor has a film that is going to be released on a Wednesday because his plan is that each installment in this trilogy each year will be released worldwide on the same day, so it would be very unfortunate for him if his opening day of the biggest film of the year would be a half price day. Likewise, certain exhibitors choose Wednesday as their half price day, and they've spent many years building their brand around their cinema so they object to changing it, so it's exactly the problems that were being referred to by Julian Stanford and his colleague. On the positive side, on a monthly basis distributors and exhibitors are meeting under the guise of the CMA or AIM to discuss issues, and progress is being made. Rome wasn't built in a day, and these agreements, as Julian very

eloquently said, there are massive legal issues around.

Segmentation by sex and choice of media... In every country, even the muslim countries, it is the woman that makes the decision about the form of entertainment, and especially in the cinema. That's why naked men or topless men are now being used to reach women, as naked women have been used to sell advertising and to sell products for centuries. And women go to see action films and so forth to see male stars. So it's not true that action films are just for young men... in fact young girls enjoy it just as much. But specifically, in terms of media, the demographics and the profile of radio is extremely similar to cinema, so heavy radio listeners are very heavy users of cinema, and it's the easiest medium to target specifics – older women, younger women. And by interest of course, because radio stations tend to be more diverse than other media. It's relatively cheap, and cinema sounds good on radio, so

they like it. Television is the most effective, but it's also the most expensive. Press is the least effective and relatively expensive, but traditional – so it's very hard to launch a film in a country without the producer saying: "But why wasn't the ad in my paper this morning?" It almost a comfort thing. Posters are extremely effective, reaching a large audience very quickly, but you need to have a very strong image. And of course all of the above is out of the hands of the exhibitors. We are at the hands of the distributors and their sense, their availability of spending money and so forth, but to reach the customers, I would without any doubt think about women and how they would be doing the cinema experience, and if you keep them happy they will bring the other members of the family.

And I was not on the mobile when I reentered the auditorium after the coffeebreak during Ole's presentation... I just shut that window down. "



EUROPEAN CINEMA EXHIBITION, EBELTOFT 2002

EUROPEAN CINEMA YEARBOOK – AND GROUP WORK

Each participant received a copy of the *European Cinema Yearbook* which has been published by Media Salles since 1992. It is a goldmine of all the main figures of cinema going in Europe, the current edition incorporating data from 1989 to 2000. Published in Italian, English, and French, it is available free of charge on CD-rom to anyone with an interest in cinema and can also be downloaded from www.mediasalles.it. It is no longer done in print form, which does save costs – also in spreading it - but those who prefer it on paper can print out the entire book. One section of it is devoted to the impact of multiplexes in the cinema business, in this defined as having at least 8 screens. The Media Salles website also holds other information such as the *European Cinema Journal* in which figures are updated every three months. The journal offers various articles about the business, and Elisabetta Brunella invited all participants to send feedback of all sorts, suggestions and contributions, be it for the next course or any topic of cinema.

As promised by Mads Egmont Christensen in his introduction, participants were divided into four groups and given the task of managing a six-plex in the fictional country of Borduria, the name of which is taken from one of the comic books in the Tintin series. They were asked to be creative. Results were presented late Saturday afternoon.

Group 1 decided for a complete refit and rebuild on a rather futuristic style where slides and light would change the entire appearance in about 15 minutes to cater for different audiences. In order to lure people back in, auditoriums had no side exits. Their version of the Bordurian capital had 30,000 students. As the population was 60,000, the percentage of students was actually larger than any other place in the entire world. Which was probably the reason why they sold drugs at the concession stands, though under no circumstances to children under eight years of age. This also helped to keep average student visits at 16 times per year and retain that audience during holidays, and it attracted VIP's and stars who would make use of the heliport on top of the cinema. Transportation tickets were refunded, and since all the customers were stoned after the visit, free bikes were available for their rides home – which again made hospital facilities necessary. The cinema made use of website, loyalty cards – top prize a trip to West Borduria – segmentation, events, and festivals.

Group 2 divided the cinema into an arthouse theatre, Mercurian Venus, and five mainstream theatres called Jupiter, Saturn, Uranus, Luna, and Pluto. The interior decorations were themed accordingly. The lobby would be in the shape of a planetarium dome and be used to show the stars as seen at midnight from Borduria on the National Day as well as a Bordurian Hall of Fame, displaying all the national celebrities. There is no prize for guessing which participant came up with this layout. Plans were to buy out the pizzeria to make a screen 7 and become a proper multiplex – and the butcher out of consideration for vegetarians and to get more concession space, necessary because the many Danish tourists demand Pick&Mix. State of the art equipment, including 1 digital screen, 120 cm between rows of seats. Film courses subsidized by the university, Mother&Baby cinema sponsored by "Pampers", pensioners' club including free transport, child supervision while parents watch films. Website, online sales, SMS offers, email listings, loyalty schemes. Brochures paid for by distributors' ads. Events, Bordurian Film Festival sponsored by the ministry of culture, Open Air Festival sponsored by the local brewery.

EUROPEAN CINEMA EXHIBITION, EBELTOFT 2002

Group 3 moved the entrance to create an appearance of more space, more air. Glass building to allow light into the lobby. ATM machines. Bar facilities in the last row in one auditorium. They rebuilt the cinema completely to 8 screens and in the process created a Playstation area, outside areas, extra concessions, and galleries. Movable roofs allowed in-house open air screenings, and they also dug under the cinema to create extra space... probably after a field trip to Switzerland. A special play area and sleeping lounge for kids was created and supervision provided while parents watch films. Special screenings for Mother&Baby as well as for hard-of-hearing elderly people together with young film lovers (Turn it up!) Free pick up transport offers. Website allowing for customers to rate films, online sales, membership schemes shared with the local theatre. Co-operation with university on screenings, library and editing facilities. Discounts for students. Advertising on the radio, in the local paper, and on local tv. Brochures and posters at the site, on universities, at restaurants and nightclubs. The cinema had digital and 70mm in 3 screens, DVD, Digi Beta, and Beta SP facilities for non-professionals, and *naturally* THX and all digital sound formats in all screens. Sadly, scrutiny revealed a slight miscalculation in the budget, and this group would have been better off by sticking to their original plan of selling this ideal cinema and live happily ever after in the Caribbean.

Group 4 moved the 70 seater and was able to find space to create a 500 seater in their "Utopiall" cinema, located in Pleasantville. They had different architects designing each auditorium, and each has its own style. Space was also found for an ice cream shop, "Elisabetta" – ice cream is very much in demand in Borduria, so it needs a strong brand name. One screen was equipped with digital, one screen with 70mm. A regular arrangement called "Meet producers, directors, and stars" was financed by live tv broadcasts from the beautiful lobby. Easter and Christmas specials, horror nights and other theme initiatives. Tie-ins with premieres included Belgian beer and Belgian chocolate for the opening of *Like Beer for Chocolate* and a folk dance festival for the opening of *Lord of the Dance*. Special services include valet parking, Rent-A-Granny, a Customer Relations Officer, wardrobe, restaurant tie-ins, and very reasonable prices at only 3.5 Borduros. Special initiatives include the Cinema Wedding with options of screening *I Married an Axe Murderer*, *Four Weddings and a Funeral*, or *Runaway Bride*. This initiative is based on real events, but names have been changed to protect the guilty. Cinema Funerals will be offered when Vertical Integration has a breakthrough and provides *Four Funerals and a Wedding*, since the one title of *Six Feet Under* enables no choice. The entire range of website and filmclub possibilities was used, including a Frequent Film Freak programme, they had an all year outdoor campaign "All Roads Lead to Utopiall", and a proud logo: "We put the *Pleasant* in Pleasantville." However, this group also turned out to have budget problems, and at the time of the presentation Michael Vickers had already left for London to find extra financing.

Surprisingly all groups made a point of creating easy access to all booths for projectionists. This topic was never mentioned during the course. Although the groups obviously had great fun - much needed after a very intense course – they did actually between them take into consideration every topic touched upon during the course, thus proving a very high degree of absorption, learning and understanding – and not less so in being creative.

The group presentations concluded the seminar and were followed by a magnificent candle-light dinner – great food, in great surroundings, and above all in great company.

THE BOND WILL RETURN



FROM EBELTOFT WITH LOVE

**Wednesday, June 5****19:30 - 20:00**

Welcome to the European Film College and general information about the course.
By *Elisabetta Brunella, MEDIA Salles; Mette Schramm, The Danish Cinema Association and Jens Rykær, Principal, EFC*

20:00 - 21:00**VERTICAL INTEGRATION**

The influence of exhibitors on CONTENT must increase as the European film community is changing from the cottage industry of yesterday into an integrated corporate business.

By *Mads Egmont Christensen, Course Moderator & Producer, Mecano Film, DK*

21:00 - 23:00

GROUP WORK: What would the ultimate briefing to the producer look like, if the Cinema-owners were asked ?

Thursday, June 6**09:00 - 10:30**

THEME I

MARKETING PAN EUROPEAN DISTRIBUTION

- similarities and differences in European markets
- opportunities and bottlenecks for a pan-European marketing approach

By *Julian Stanford, UIP, UK*

11:00 - 11:45**WORKING WITH YOUR LOCAL DISTRIBUTOR**

Presentation by *Michael Berg, UIP, Denmark & Julian Stanford*

11:45 - 12:30

QUESTION & ANSWER SESSION

with *Julian Stanford & Michael Berg*

13:30 - 14:30**AUDIENCE RELATED INITIATIVES, CREATIVE FORMATS IN EUROPEAN CINEMAS.**

PART I - INTRODUCTION

An international joint investigation of exhibition issues including a survey of the present state of the art.

The situation in ENGLAND & IRELAND

A panel discussion with representatives from participating countries. Followed by general discussion.

Moderated by Mads Egmont Christensen

14:30 - 16:00**LOYALTY, CRM AND ON-LINE MARKETING**

"GETTING TO KNOW YOUR CUSTOMERS"

By *Emanuele Gianluca de Plano, Co-founder of TixOS Ticketing Systems and Strategy Business Developer, France*

16:30 - 17:30**E-CINEMAS - THE DIGITAL FUTURE**

A status as seen from the cinema-owner's perspective. By *Marc Tijssens, Kinepolis*

17:30 - 18:30

QUESTION & ANSWER SESSION

with *Marc Tijssens*

followed by Round Table Discussion.

21:00 "About a Boy"

Screening + casestudy

Friday, June 7**09:00 - 10:30**

THEME II

THE AUDIENCE

What are the demographics of the cinema audiences of today; and what are the preferences in an entertainment industry that has become a 24-hour-a-day activity? General aspects of planning philosophies as applied in advertising and marketing in order to reach the consumer.

By *Ole E. Andersen, Principal, The Danish Advertising School.*

11:00 - 12:30

QUESTION & ANSWER SESSION

with *Ole E. Andersen*

followed by Round Table Discussion.

13:30 - 15:30**AUDIENCE RELATED INITIATIVES, CREATIVE FORMATS IN EUROPEAN CINEMAS**

PART II

(The investigation of exhibition issues continued)

The situation in ITALY, DENMARK, SPAIN, AUSTRIA, SWEDEN & NORWAY.

A panel discussion with representatives from participating countries. Followed by general discussion.

Moderated by Mads Egmont Christensen

16:30 - 18:30

GROUP WORK

THE INTERACTION BETWEEN AUDIENCE ASPECTS AND MARKETING ASPECTS

of an especially designed case

PART I & PART II:

DEFINING THE PROBLEM, BRAINSTORMING & IMPLEMENTATION**21:00 "Insomnia"**

Screening + casestudy

Saturday, June 8**09:00 - 10:30**

THEME III

EXHIBITION MANAGEMENT WHO OWNS AND CONTROLS EUROPEAN EXHIBITION

An overview of the present situation in Europe. PANEL DISCUSSION with participants from the European major exhibitors.

11:00 - 12:30

PANEL DISCUSSION +

QUESTION & ANSWER SESSION

13:30 - 15:30**AUDIENCE RELATED INITIATIVES, CREATIVE FORMATS IN EUROPEAN CINEMAS**

PART III

(The investigation of exhibition issues continued)

The situation in CENTRAL & EASTERN EUROPE.

A panel discussion with representatives from participating countries. Followed by general discussion. *Moderated by Mads Egmont Christensen*

16:00 - 16:45

CASE STUDY

The British Film Council's Specialised Exhibition & Distribution Strategy

Presented by: Paul Brett, UK

17:00 - 18:30

GROUP WORK

THE INTERACTION BETWEEN AUDIENCE ASPECTS, MARKETING & MANAGEMENT

ASPECTS of the especially designed case

PART III:

PREPARING THE PRESENTATION**18:30 - 20:00**

Plenary session on Group Work

Sunday, June 9**09:30 - 11:30**

PLENARY SESSION

Trends and feed-back from the course.

TRAINING COURSE JUNE 2002

Organizers:

MEDIA Salles
Elisabetta Brunella, Secretary General
Anna Maria Pasetti

Danish Cinema Association
Mette Schramm, President

The European Film College
Jens Rykær, Principal

Project managers:

Jonna Jensen
Mads Egmont Christensen

Coordinator:

Irene Paaske

Moderator:

Mads Egmont Christensen

Editor and note taker:

Flemming Andersen

Layout:

Bettan Sandström

Photos by Claus de la Porte.

Other illustrations courtesy of presenters
and participants.

More charts will be made available in
the electronic version of the report on
www.danske-biografer.dk

007 by kind permission from
Gloria Film, Denmark.



LIST OF PARTICIPANTS

Surname	First name	Company/Cinema	Country
Brett	Paul	British Film Institute	Great Britain
Smith	Blake	Duke of York Cinema	Great Britain
Homer	Paul	Metro Cinema	Great Britain
Smith	Sylvianne	Picture House Cinema	Great Britain
Vickers	Michael	Reeltime Pictures LTD.	Great Britain
Stella	Rita	Cinema Apollo	Italy
Fantoni	Alessandra	Cinema Edera Srl.	Italy
Feely	Una	Kino Arthouse Cinema	Ireland
Horacek	David	Ster Century	Czech
Biró	Tibor	Cine-Mis Ltd	Hungary
Vivod	Bojan	Celjski Kinematografi	Slovenia
Wachnik	Pavel	Ster Century Cinemas	Poland
Pekala	Anna	Gutek Film	Poland
Billek	Viktor	Polyfilm	Austria
Sigg	Hanspeter	Liag Capitol AG	Switzerland
Jimenez	Alex	Cinesa United Cinemas Int.	Spain
Andersen	Flemming	Caption	Denmark
Gerlach	Martin	Empire Bio	Denmark
Kruse	Mogens	FAFID	Denmark
Dyre	Louise	Scala Svendborg	Denmark
de la Porte	Claus	Panic Entertainment	Denmark
Hagemann	Louise	Danish Film Institute	Denmark
Bredow	Jimmy	Danish Film Institute	Denmark
Håkonsson	Britt	Reprise Teatret	Denmark
Upenieks	Harijs	Valmiera Cinema	Latvia
Lazdahe	Gunta	Ltd Auns	Latvia
Aagaard	Heidi	Norw. Assoc. for Film & Cinema	Norway
Halvorsen	Elisabeth	Bergen Kino	Norway
Andersson	Dag	Finlandssvenskt Filmcentrum	Finland
Vrazalic	Vana	Vans	Yugoslavia



infocinema@mediasalles.it



post@danske-biografer.dk



insec@efc.dk



EUREKA
AUDIOVISUEL
secretariat@aveureka.be



EUROPEAN CINEMA EXHIBITION, EBELTOFT 2002