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GENERATION



youth on film

WHITE PAPER



KINOGRAPH

OXVILLE
CINEMA

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Studiezalen.
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SEZO

SUM-

MARY



GEN Z is a European project that aims to bring young audiences to films and cinema by building on their desires and viewing preferences . It was launched within the scope of the “Cinemas as innovation hubs for local communities” call for projects by the European Commission, published in August 2019.

The three partners – **Oxville Cinema** in Amsterdam, **La Friche Belle de Mai/Le Gyptis** in Marseille and **Kinograph** in Brussels – decided to join forces as they were sharing common features and facing the same desire to get to know their young audiences better, as well as to drive up the latter's attendance in movie theatres.

In order to get youths involved in the life of those cinemas, and to develop a relationship with them, the latter decided to create programmation clubs. Each partner focused on different age groups: 8 to 12 for Oxville, 11 to 17 for Le Gyptis and 18 to 23 for Kinograph. The first phase of the project consisted in developing surveys aimed at these specific targets (whether they were cinephiles or not) in order to better grasp their media consumption habits and interests Once those parameters were identified, the cinemas moved on to the second phase by recruiting youths to build the aforementioned clubs.

Despite strong disruptions brought upon the initial timeline by the covid crisis, the three partners nevertheless managed to engage their respective clubs in various activities around programming or content creating, while sharing tools and good practices.

As a follow-up to these on-the-field, practical experiences, it emerged that the dissemination of GEN Z is also a crucial phase of the project. Indeed, through a mid-term event bringing together several film professionals and the present White Paper, the partners wish to promote their experimentations and the project’s outputs to other professionals.

In conclusion, and based upon their recorded experiences with the youth clubs, the partners recommend deconstructing preconceptions about young people and their media consumption habits, to be adaptable and flexible and to accept that building a relationship takes time, to develop workshops accordingly with the age of the participants. Finally, participating cinemas should go beyond the programmation activities to include promotion as well as to push young people as real ambassadors for venues.

**IN-
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In July 2019, the European Commission launched a €2M call for proposals to create innovative cultural hubs around cinemas, notably in areas where cinema and cultural infrastructures are limited.

The call specified that this preparatory action, called “Cinemas as innovation hubs for local communities”, would value (among other) projects with a focus on youth, new practices and, of course, European collaboration.

The “glocal” dimension of the call appealed to the different partners that were to get together to create GEN Z. In spite of the idiosyncratic frameworks resulting from the different local realities between Marseille, Amsterdam and Brussels, the former presented a series of common challenges. In that regard, the most prominent issue resided in young audience development.

Indeed, in the wake of their experiences, the cinemas **Le Gyptis**, **Kinograph** and **Oxville** discovered that the films they usually screen are mainly aimed at and attract children (under 10) and an adult arthouse audience. On the one hand, in terms of arthouse cinema, the production of films geared towards tweens and young adults fails to meet their audience. On the other hand, the partners of this project have a single-screen status, which locks them out of deals with mainstream film distributors demanding higher volumes. This shortcoming is highly problematic considering that young audiences respond extremely well to high-budget blockbuster-type productions.

Last but not least, over the last ten years, the public’s relationship with cinema screens has totally evolved under the pressure of the multiplication of media production and consumption. New practices are often left to commercialism (theme parks, virtual reality offers that are not economically accessible, etc.). Furthermore, with the inexorable progress of modern technology, the means of creation and production have multiplied to the point where anyone can film what surrounds them, most often unaware of the impact of the resulting images and what they reflect. These practices have shaken the cinematographic milieu to its very core, begging the question as to what the definition of cinema as an artform is. To add to the list of challenges faced by the film industry, the impact of piracy has skyrocketed over the past two decades, due to an increase in access. For all these reasons (and then some), it seems natural that the public should feel disconnected from the economic reality of the entire film production and distribution chain.

These changes call into question arthouse cinemas or small cinemas, which often already generate real cultural action. Young people today are, and will be both fundamentally and profoundly affected by these new practices. As a direct consequence, cinemas throughout Europe have seen young people deserting screening rooms. We can even observe that, with the decline of television as a common vector, audiences have lost the sense of shared experiences. This translates into the disappearance of both a form of community and conversation around media consumption. These cultural shifts can be seen as drivers for social impoverishment and reinforcing the modern malaise of loneliness.

The quasi-hegemony of social networks as new ways of sharing content takes away from originality, from real creativity by imposing a basic mode of display, without reflection on the staging, on an aesthetic and elaborate purpose .

In order to try and respond to this impending divorce, cinemas must reinvent themselves today and try to find ways to attract young people again. It is vital that the latter should be enticed to rediscover cinema as an experience, as a means to enrich their understanding of the world around them, to share and be presented with a fruitful and argued confrontation to personal points of view.

GENERATION Z therefore consisted in creating a new cinematic and cultural offer in cinemas by involving young people in the programming. We believe we had something to give to young audiences (film literacy, image education), but also that we had a lot to learn from them : what do cinemas, as spaces, represent to them nowadays? What do they want to watch on the big screen?



THE PART- NERS

1. Call for proposals: Preparatory Action “Cinemas as Innovation Hubs for Local Communities”

In this framework, the European Commission launched in July 2019 a € 2M call for proposals to create innovative cultural hubs around cinemas, notably in areas where cinema and cultural infrastructures are limited.

It endeavoured to rethink the cinema experience, to encourage innovation and to strengthen the position of cinemas as a major local cultural player, not only in the audiovisual field but also more broadly as access to cultural and entertainment content as well as services. One of its specific goals was thus to build the audience, and more particularly to strengthen the links between cinemas and young viewership, through educational or entertainment activities adapted to the specific needs of the local population.

The preparatory action had 3 objectives:

- Testing new ways of rethinking the cinema experience and creating innovative cultural venues;
- Developing audiences and building communities through interactive experiences;
- Supporting cinema equipment and digitisation.

The expected results of this action are:

- Creation of innovative cultural hubs centred around cinemas, involving collaboration between the latter and other operators across the cultural and creative sectors;
- New ways of engaging with existing audiences and reaching out to new audiences, especially young people, by offering quality and diverse European creative content as well as educational activities;
- Innovation regarding the cinematic experience leading up to the development of new cultural consumption models;
- Supporting the social and economic development of local communities through organising events, debates and special educational screenings and/or events; including beyond the lifespan of the project;
- Enhancing cross-border collaboration among cinema operators as well as between cinemas and other cultural organisations including in areas with limited cinema infrastructure.

46 applications were submitted under this call, 5 of which were granted funding:

- CINE (Cinema Communities for Innovation, Networks and Environment) Project (€ 488K)
- Connecting Cinemas in Rural Areas (€ 489 K)
- Ciné Hub by Generation Z (€ 287K)
- Movies in Motion (€ 262K)
- Resonance Cinema - Cultural Hub for Curious Mind (€ 474K)

The funding is seen as complementary to the Europa Cinemas network funding, which provides training and networking opportunities as well as financial support for cinemas that screen an above-average number of non-national European films.

This call was the first of this Preparatory Action. A second € 1.5M call was launched in June 2020, focusing on:

- Rethinking the cinema experience in the aftermath of the pandemic with a view of creating innovative cultural venues, in particular with cooperation between cinemas and VOD platforms;
- Audience development and building communities through interactive experiences by offering a wide range of cultural and educational activities.



2. A Cooperation between peers



In France, Le Gyptis, with the Friche la Belle de Mai, had several previous experiences of workshops and activities, including a 4-year experience with a programming club. Le Gyptis also has a stable audience of insiders involved in the life of cinema. It is managed by the Friche la Belle de Mai, a multicultural site that is very popular with young people and brings together around 70 associations and organisations involving all artistic practices. Le Gyptis is perceived as spearheading a long-awaited cultural renewal for the City of Marseille, since the site is located in the poorest district of France. In example, the Playground attracts this underprivileged public every day, with equipment provided free of charge and open 365 days a year, Mediators are present to welcome visitors, guide them and offer them workshops implemented on site. Within these spaces and with the help of mediators, Le Gyptis set itself on a course to identify young people interested in participating in the programming workshops.

It was also able to rely on several “pools” of crossing publics. Le Gyptis had previously launched several actions aiming at opening up spaces for youths, which were created 5 years ago in the Friche, “The Platform”. The latter were linked to the public areas of the site which are coordinated by social mediators. Those initiatives are in link with an ecosystem of local actors such as UnisCité, conducted by civic services and reached a dozen of teenagers, a program of film direction with the local social centre or high schools with “cinema” option.



In Belgium, Kinograph is a single-screen cinema which opened in May 2019. It is an atypical place: a theatre from the 1970s located in the former barracks of Ixelles' gendarmerie, a site that has recently been taken over by the See U transitional occupation project. One of Kinograph's main mission statements is to provide a field of experimentation for new forms of

content and formats, in a dynamic, user-friendly and collaborative way. Located in the university district of Brussels, between the ULB (Université Libre de Bruxelles, French-speaking) and the VUB (Vrije Universiteit van Brussel, Dutch-speaking), Kinograph is in a prime spot in terms of reaching the 18-23 age group. The latter, known as the “young adults” demographic tend to have plenty of free time and energy to go out but do not necessarily have the financial means to. Furthermore, being born in the Internet age, said young adults are heavily accustomed to illegally downloading and streaming content. The programming club will allow a dialogue with these young people in order to better understand their desires in terms of content (web series, concerts, gaming ...). It will also foster a cultural mix between several communities that rarely interact despite their sharing the same neighbourhood :

- ULB students, French-speaking
- VUB students, Dutch-speaking
- Erasmus students, who sometimes have difficulty connecting with local people.

Having experimented with a first programming club in spring of 2019 (open to all, but with students representing 1/3 of the group), Kinograph took away an important aspect in terms of logistics: a weekly frequency represents a rhythm that is a little too sustained for these young people who juggle between studies, a job and an active social life. Another observation was to note that pursuing and feeding conversations outside the framework of the meetings via social networks (mailings, private Facebook groups...) is an efficient way to consolidate the group and maintain its reflection and exchanges between meetings.



In the Netherlands, New-West is the largest district in Amsterdam. Boasting over 155,000 inhabitants, it is comparable to cities like Haarlem and Amersfoort. In order to enjoy a film experience, inhabitants need to commute to the surrounding neighbourhoods; there hasn't been a cinema in New-West since the closure of Cinema on August Allebéplein in 1999.

Oxville Cinema was consequently created in October 2018 to answer this lack of access to culture. Finding a home in Theatre de Meervaart, Oxville Cinema transformed one of the latter's permanent theatre halls into a screening room. A brand new cinema screen designed for 270 seats was acquired complemented by a 3.1 audio system. Between the opening in October 2018 and the closure due to COVID-19 restrictions, a total of 124 screenings were organised, equating to a recorded 4,403 admissions. This represents an average of 36 admissions per screening.

So why “Oxville Cinema”? “Oxville” is a literal translation of “Osdorp”, the neighbourhood where the facilities are located. Through this playful way of referencing the territory, Oxville additionally addresses the local residents as actors; the primary desire is to build a community of cinephiles in an underprivileged neighbourhood while extending its influence on external visitors. For these reasons, Oxville has unabashedly claimed the title of Community Cinema. In 2022, Oxville will open their temporary location in the New-West district hosting 45 seats. Their next target is to open a brand new and permanent location in the same district in 2025 with five screens and up to 320 seats.

Oxville Cinema not only offers a weekly cinema programme, it also intends to create a cultural centre for the residents of the New-West district, across all ages. By targeting an audience that would be as wide as possible, the Oxville endeavours that no one should be left behind. Between October 2018 and June 2019, 14.6% of admissions were children (12 and under). 10.8% of admissions were holders of a membership card designed by the municipality for seniors and low-income people. In other words, Oxville has undoubtedly opened the doors of the movie theatre to people who would not normally go to the cinema. By reaching out to local welfare institutions and community centres, combined with the low admission price, Oxville Cinema is able to attract new audiences to its site.

Carlo Dias (one of the founders of Oxville Cinema) witnessed the rapid changes in the way children consume motion pictures today. Not only are they constantly surrounded by screens, but the way content is consumed is also very different from the way it was when he grew up in the 20th century.

The Internet has, without the shadow of a doubt, permanently done away with the media gatekeepers of old (i.e. traditional broadcasters today), which is why Oxville will be working primarily with the under-12s.

Through collaboration with local initiatives and social institutions, Oxville Cinema is implementing a bottom-up dynamic to attract local residents. Cinema can play an integral role in this compelling process by covering different themes and stories, fostering empathy and introducing new perspectives.



The three partners joined forces thanks to a common vision and common features:

- One-screen cinemas
- All were created recently : 2014 (Le Gyptis), 2018 (Oxville) and 2019 (Kinograph)
- Similar programming (arthouse and cross-over)
- Located in large cities but outside city centre, in neighbourhoods where the cultural offer is limited
- Actively involving their local community in the lives of the cinema : volunteering, programming clubs, school screenings, organisation of special events,...

3. Reconnecting with young audiences through GEN Z

This is the main, long term part of the project. As mentioned previously, at the heart of GEN Z is the willingness to increase direct interaction with young Europeans. The objectives of the latter are two-fold. First, this dynamic aims to transform mere spectators into active stakeholders. Secondly, through art and debate, those very stakeholders can create a dialogue of enrichment for better understanding the world and facing conflicting perspectives.

All partners share a common interest in exploring what cinemas represent for the youth, seeing their relationship with the young audience as a two-way exchange. On the one hand, they can offer film and media literacy to Gen Zers who were born surrounded by screens of all sizes. On the other hand they believe the audience of tomorrow can help reinvent the cinema as a space for exchange and discovery.



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The idea of creating workshops with young people of the neighbourhood, focusing on aspects such as programming, critiquing and filming themselves quickly emerged.

However, due to their specific context and locations, their focus targets different group ages.

- Le Gypsis is located in the Belle de Mai Neighborhood, 3rd district of Marseille, one of France's poorest area. It is involved in the daily life of the neighborhood and, throughout the years, retained a local public ranging from 3-year-olds to adults. However, teenagers are often absent from screenings, despite the fact that the project was launched precisely to explore new ways of involving teenager's practices in the theatre in order to include them in a new programming.

The workshops have been developed with 12 teenagers aged 11 to 17 from the neighbourhood, none of whom displayed any regular cinematographic practice. Under the coordination of the association Image Clé, participants saw themselves alternating practice and screenings in order to create a connection between digital practices and cinema. First, Image Clé explored the notions of "image" and "screens" with the youngsters, such as Youtube videos, webseries, gaming, etc.

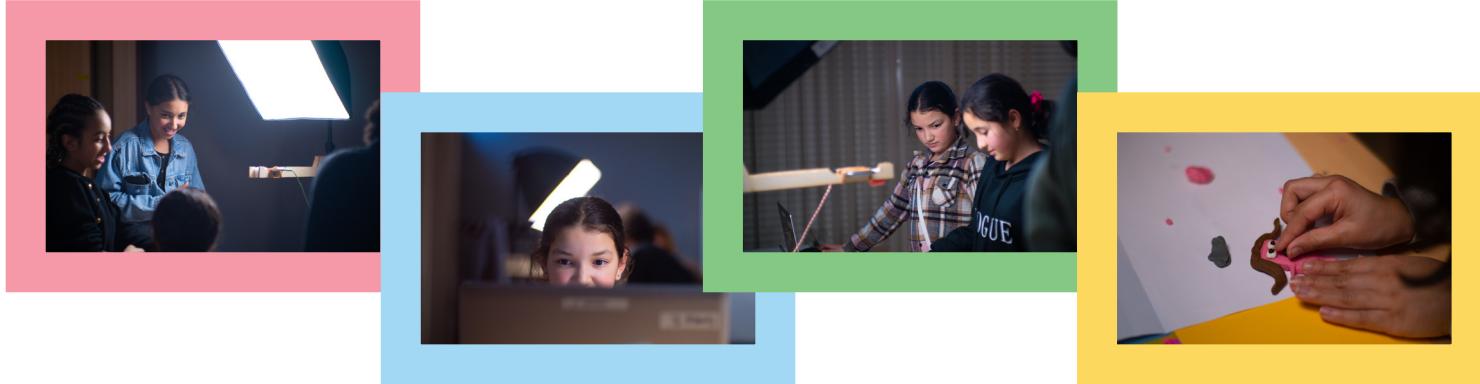
Then, through experimentation, links between said mentions and the teenagers' interests were established as a means to discover what role cinema can play within those interactions.



- The New-West district in Amsterdam offers the opportunity to delve into various disciplines from an early age, but there is little or no offer for film. One could point out a paradox in the aforementioned situation, since visual culture is playing an increasingly prominent role in our society. Together with Kinograph and Le Gypsis, Oxville Cinema therefore set up cinema hubs at a local level and, in their case, socially challenging districts in which children aged 8 to 12 are brought into contact with the big screen. Via GEN Z the latter are in control of what is projected onto the big screen. Young people look at motion pictures in their own unique and diverse way. Together with the young participants of GEN Z, we can translate their own and unique world to the big screen. In this way we introduce them to the magic of cinema, while the public gets reciprocally acquainted with their world.



- During the series of 18 workshops spread over the course of 6 months, 15 children aged 8 to 12 discover hidden talents. Thanks to the latter, one can see them grow into proud, mindful makers and storytellers. As their self-confidence increases, they feel recognized and strengthened in their abilities. Moreover, their newly acquired skills are highly transferable to helping them in key moments in their lives. We encourage participants to discover talents from their own experiences and interests and then point out to them new possibilities and challenges. During the first part of the workshops, the children are given various tools so that they can discover where their interests and talents lie. In the second part, the former then work towards organising their own festival. During the latter, participants have the chance to not only project their selection of films, but also to feature their own work, all edited on smartphones and tablets. This serves as a prime opportunity to eventually bridge the gap between themselves and the big screen.



- Kinograph is only a few minutes walk from both the French-speaking (ULB) and Flemish-speaking universities (VUB) of Brussels. Since students make up most of the neighbourhood's population, the cinema naturally aims to attract a public of young multicultural adults.

The latter could clearly be observed when weeknight screenings of highly hyped-up crossover films such as THE JOKER brought an audience that was mostly comprised students. On the contrary, this cannot be observed with arthouse releases, which will attract students that are cinephiles and already engaged in other cultural activities.

The challenge for Kinograph is to reach beyond niche markets and to generate awareness among students that a cinema exists nearby. Students as an audience pose a challenge, because they are offered a lot of leisure activities (music, bars,...) but might not have the means to partake in cultural events, due to lack of money and/or time. Furthermore, one shouldn't exclude the fact that maybe the cinemas' offer as it exists today is not enticing enough for them to go out and spend money, especially in competition with piracy, VOD and streaming.



EVALUATION AND ACTION FOR AN INNOVATIVE PROFESSIONAL CULTURE



Looking at the larger, European context and their individual experiences resonating with each other, the partners launched the GEN Z project with mainly three complementary approaches : Cultural Action with publics facilitating their participation in programming activities, evaluation of the youths' practices towards screens and sharing learnings with professional peers and institutions.

1. Surveys

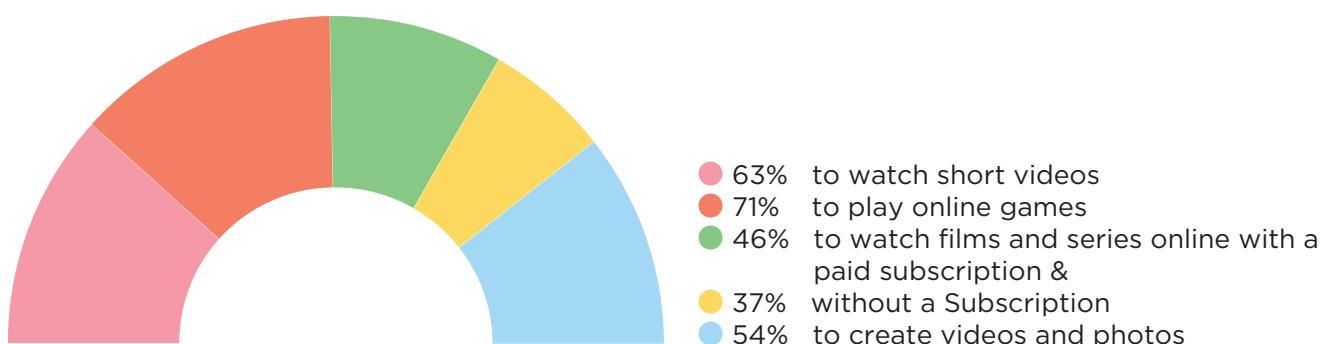
Le Gyptis and Kinograph launched a survey amongst their target audience children aged 8 to 12 targeted by Oxville, young people aged 13 to 20 for Gyptis and young people aged 18 to 23 for Kinograph.

For Oxville's audience, going to the cinema is above all a family outing. 40% of respondents reported that they go to the cinema less than twice a year, pointing to the distance from the cinema as a main obstacle. However, it should be noted that, despite their low attendance, they still mention cinema-going as one of their preferred leisure activities.

Le Gyptis and la Friche la Belle de Mai, disseminated the survey through different channels so it could be as representative as possible of the general public. Social mediators broadcasted the survey in public spaces and used this approach to recruit potential teenagers who showed interest in the project. Alongside this, the teams went directly to high schools, in classrooms to talk directly to the youngsters and disseminate the survey.

For our project, it was essential to develop social media accounts related to the practices of the young people present at the workshops. Having identified the most popular social media platforms as Snapchat, Instagram and TikTok, the partners decided to develop individual Instagram accounts for each group.

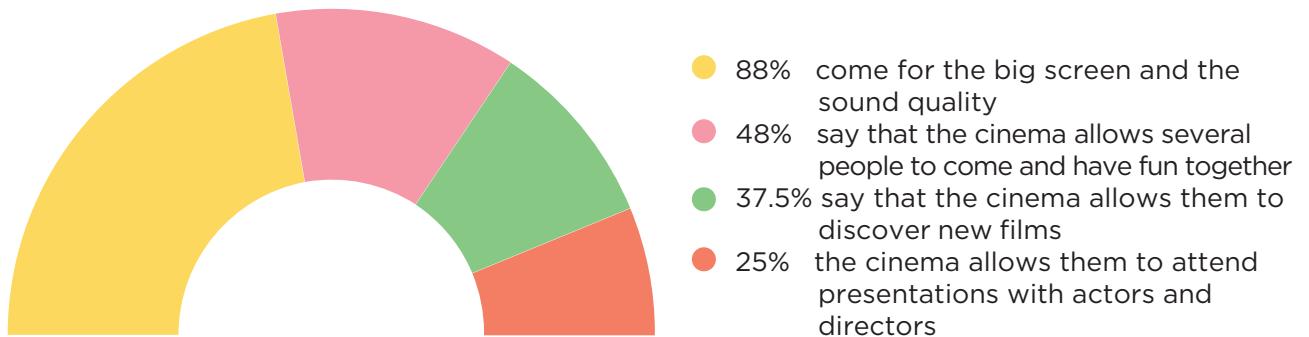
The survey showed that screen uses are varied. Teenagers screen uses can be broken down as follows :



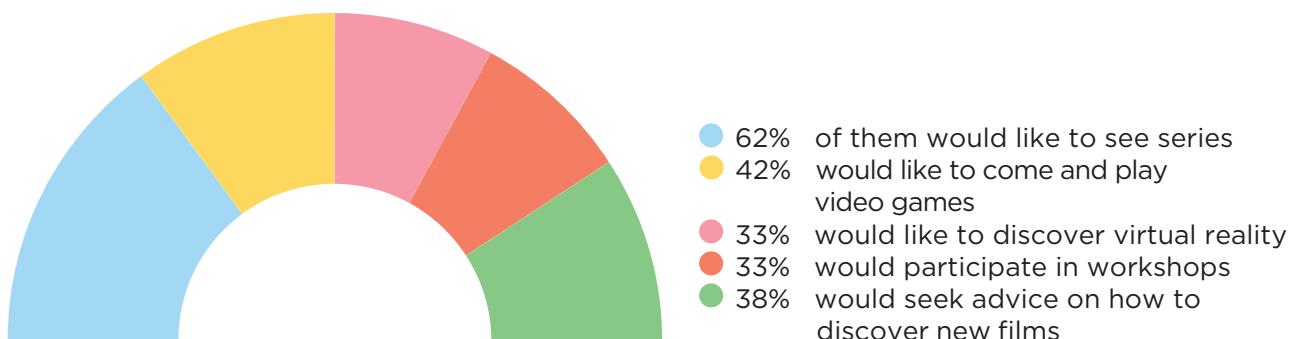
What is interesting to see is that all the people questioned cumulate these practices on a daily basis. None of the respondents use their smartphone for a single practice. The screens most commonly used are television and smartphones. 68% of young people watch films on the latter two, against 29% for tablets and 58% for computers. 62% of those questioned watch films on a television and 50% via streaming (television or smartphone). Only 17% of young people said they use a VOD platform while a mere 20% download the content they consume.

The interviewees were asked to describe what “cinema” means to them. In the vast majority of cases, cinema is perceived as a place, as in a place to share, where friends meet and gather, but also as a technological structure (screen, room and sound system) that allows for a comfortable and undisturbed viewing experience. It is therefore a privileged place. Some respondents connect the notion of cinema to actors, actresses and art, but these aspects are marginal compared to the conviviality of the place.

This was confirmed when we asked teenagers to tell us what the advantage of a cinema is:



When we asked young people to project themselves on future activities which could take place in a cinema :



Kinograph made sure that their survey wouldn't be answered by cinephiles only, but be representative of the student population in Brussels. To achieve this, they disseminated the poll through their partnership with the universities and thanks to a paid campaign with website student.be

147 respondents took the survey, 62% of whom were aged 18 to 22.

Some misconceptions were actually proven wrong :

- students do not watch films on tiny screens : TV and computer are mainly used. Smartphones and tablets only represent a small part.
- Gen Zers, in comparison to the previous generation (millennials) are not so much involved with piracy : paid SVOD is the main channel to watch films at home.

On the other hand, some suspicions were confirmed:

- the price is the main negative factor preventing them from going to the cinema
- series rather proved much more popular than feature films

Finally, when asked about the added value of cinema, the number-one reason was “Big screen and sound system”, then “going out with friends” and finally “discovering new

things". In other words, all the different dimensions of the cinema as a place (quality of screening; shared moment; editorialisation) appeal to them.

Let's also note that several students mentioned "watching a film without being distracted" as an added value of cinema : Gen Zers tend to themselves deplore the omnipresence of screens, which poses an obstacle to fully immersing oneself in a film.

2. Mid-term event : From the mobile to the big screen

Initially planned in Marseille in February 2021, the mid-term event took place online, on May 11 2021.

This professional event, entitled "From the mobile to the big screen", consisted of various roundtables with film and young audiences experts coming from France, the Netherlands and Belgium.

In each roundtable, a partner of the Gen Z project sat as a speaker, sharing the experience of the movie clubs and the conclusions that could have been hitherto drawn.

The composition of the roundtables went as follows:

Round Table 1 - From the evaluation of young people's practices to image education

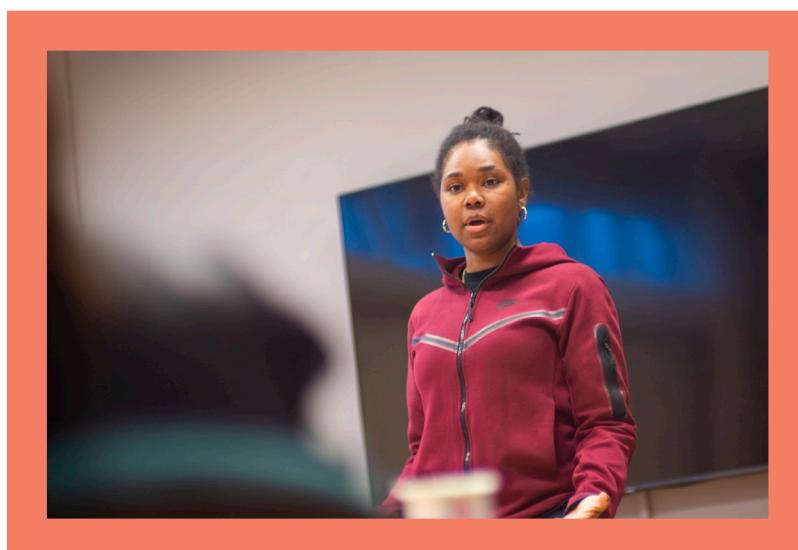
- Kian Pattiapon – Marketing Manager of Oxville, Amsterdam
- Baptiste Charles - Cinema & new media advisor FR Ministry of culture BXL
- Pauline Augrain - Digital Director for Centre national du cinéma et de l'image animée

Round Table 2 - Cultural, artistic and digital education (here and now)

- Andrès Jaschek, Workshop coordinator for Generation Z project in Marseille, Image Clé Association
- Eva Laurillard, Projects Manager of Taartrovers, Amsterdam
- Marine Servent - ULB Culture, Brussels

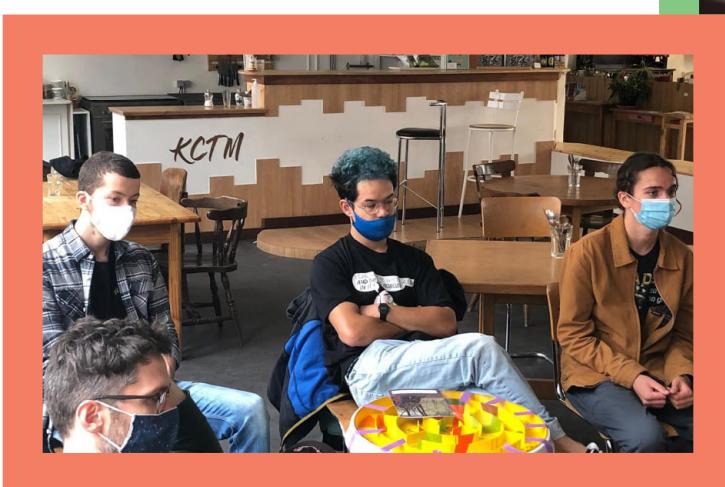
Round table 3 - Enlargement of audiences and attractiveness of cinema for young people

- Clara Léonet - Co-founder of Kinograph, Brussels
- Benoît Labourdette - Filmmaker, educator, expert in new media and cultural innovation, Marseille
- Manon Portos Minetti, Film programmer and U.S. History scholar, Amsterdam



This event aimed to share the partners' experience in this project, the learnings and doubts raised during the activities with the public and confront them to experts' analyses. First, by going back to the project's aim and confronting it to reality, the participants highlight the necessity of involving image education professionals to try first to connect with young people's practices and cultures instead of looking for knowledge and references gaps. By levelling up individual culture and practice to academic expectations, the possibilities of programming and innovation/creative process can be more operational and most of all, appropriated by the public. Young people are not in a passive position anymore but active in their cultural choices.

Regarding the digital and screening practices, the professionals and invited experts agreed to notice a destabilisation in the relationship between trainers, educators and the youngsters. Indeed, recognising that the public can be more expert in and aware of their cultural expectations is putting professionals in another position of listening and adaptation. The top-down practice of transmission pushed by institutions and professionals for years revolves around a completely different relationship to the public. The educators, in GEN Z, were not only in a teaching role but also in a position of "facilitator" in order to provide the tools to the participants to be active in their choices.



Also, the project's results and perspectives, confronted with expertise, fostered the idea that sectorialisation of cultural practices is acting against the willingness to open cultural discoveries. Digital practices and cinema, in their practices and sectors, are not opposed but complementary. Inserting, "non-cinematographic" practices in the cinema theaters is one of the most effective choices to enlarge the public. First to operate their choices in a cinema as a space but then be more sensitive to artistic crossovers. For example, by being in charge of programming a complete event, the teenagers in Marseille, who were never coming to the cinema, proposed to play and share video-games on the big screen. The links to films and anime using the same technical material or effects with the video-games have been really easy to make and allowed the teenagers to discover other universes and genres.

Moreover, the partners signalled a gatekeeping culture in existing cinema infrastructures that makes it less attractive for a new and younger audience to visit the cinemas. By letting a new and younger audience participate in the development of the programming, this will automatically generate more interest. The eventual consequence of this is to open the gates for new audiences that did not visit these cinemas initially.



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1. GEN Z experience and first feedbacks



As the studies showed, youngsters still have an interest in cinemas. However, it is noted that:

- the content they watch encompass a multitude of new formats
- even though they appreciate the cinematic experience for the same reasons the generations before them did (sharing an experience with friends and strangers, in qualitative conditions of viewing), they also express a yearning for experiences which extend beyond passive viewing.

Because the partners wanted to get to know better their young audiences, and taking into account the fact that GenZers are have an “active” practice of media (creating their own content via YouTube, TikTok,...), the idea of creating programming clubs and workshops as a space of exploration and dialogue quickly took shape.

One of the potential weaknesses we identified when developing the idea was the restriction of the project’s reach to the 10 to 20 participants who take part in activities, and not the young community as a whole.

However, as an extension of the programming aspect, the partners wanted to have their participants actively involved in the communication part in the hope that the latter would become ambassadors for their peers. Moreover, this could be the opportunity for cinema to get a better idea of what youths want to see on the silver screen, as well as understand how to best reach them, whether in terms of channels (which social media? to print or not to print?) but also in terms of tone, visual identity,...

The partners also decided to work with different age groups, focusing on the target they are already most at ease with. Since a few years’ gap is significant for children and teenagers, it was logical to divide the workshops per age group.

The idea was also to exchange best practices between the partners at the end of the project : Kinograph and Oxville can learn from what Gyptis found out with teenagers, and vice versa. This, however, must be done keeping in mind that each country/neighbourhood presents its cultural specificities which cannot be 100% replicated elsewhere.

The development of the clubs was described as such for each partner:

2. Gathering youngsters around cinemas during the pandemic

The implementation of GEN Z is inseparable from the Covid crisis : the partners received confirmation of the grant in March 2020, i.e. exactly at the same time as most of Europe was entering lockdown.

The Covid crisis had a huge impact on every sector and field of activity, hitting harder two of the main elements of GEN Z projet:

- Cinemas had to close their doors in all three countries where the partners were located. Reopenings took place at different paces.
- The youths targeted by the project come from less privileged backgrounds (especially in Marseille and Amsterdam) In quite a few cases, those participants didn't have the material capability to attend the online meetings.

As often in situations of crisis, the partners were forced to reinvent the project, such as in the Netherlands where covid restrictions spared projects involving children. However some events ended up being cancelled in order to make space for screening and festivals that Oxville managed to organise specifically for kids and their friends or direct family members.

La Friche were deeply impacted by the longer and more restrictive cinema closures imposed under covid. The Friche teams first tried out a digital meeting with the kids, but were quickly confronted with the digital divide. Not all teenagers were not equipped with computers, or they had to share it with parents and siblings. Some of them also expressed a certain rejection towards digital meetings, preferring real physical appointments in the cinema theatre.

The club progressively managed to meet back in the cinema but, due to the slow pace of this process, only one event was organised with them over the summer. The latter was however experienced as a real triumph for la Friche's programming.

As a result, the workshops were extended until the end of the year thanks to European funds and National funds for 2022.

Kinograph could never go beyond the survey and recruitment phase : universities closed their doors in October, followed quickly by cinemas, which made it impossible to launch the clubs face-to-face.

Fearing a lack of involvement from the students had the initial plan been maintained online (i.e. programming an event, but not knowing when and how it would take place), Kinograph thought about other ways to engage young people with cinema, such as:

- Creating a blog, Kinokonfiné, where participants shared articles such as “top 10 films to watch in quarantine”, reviews, interviews,...
- Holding exhibitions in the cinema “Outside In”
- Appointing the members of the club as part of the GEN Z jury for the “Young Filmmakers Festival”
- Hosting several online screenings

All in all, multiplying activities at different scales proved enriching when it came to capturing this young audience. We have to highlight that one of the most challenging aspects of this dynamic was to try and combat online fatigue among participants. As lockdowns extended, it became increasingly difficult to engage young people, even if they did have access to their own computer.

It seemed like even GenZers got tired of viewing content online or exchanging through a screen, and that comforted us in the idea that real face-to-face meetings and gatherings in cinema were much needed.



3. Recommendations

In conclusion to our experience with the Gen Z project, here are some observations and recommendations the partners can make for local cinemas wishing to reach young audiences through activities.

Deconstruct your preconceptions

The survey phase was important because it allowed us to challenge our preconceptions regarding the tastes and modes of consumption of young audiences. This also includes piracy habits, types of screen they prefer to watch films on, etc.

Technologies and types of content are evolving fast, and the modalities of the relationship between young people and cinema that was observable two years ago might already be obsolete today.

Be adaptable and flexible

It is essential to take a step back from the position of “knowing” by regularly alternating the provision of knowledge related to cinema and putting it into perspective with the public’s knowledge. The latter include integrated sound and image editing tools on smartphone applications, the role of music and sound in video games, media analysis Youtube videos, etc. During the activities, we can observe a lot of positive feedback when educators adopt a position of facilitators for the participants. Such a role entails introducing some elements that the youngsters do not master while at the same time valorising the latter’s knowledge and uses in a bottom-up dynamic.

Building a relationship requires time and adaptation

Adaptation is a key skill to maintain, even outside the context of a pandemic. Group dynamics is king, which makes it crucial to dedicate the necessary amount of time to understand what the needs and operating modes of the youngsters are. Vice versa, participants need time to understand what is expected of them. Flexibility is equally capital, as one has to adapt to the schedule of participants, which can dramatically differ between younger people or adults (i.e. school calendar, exams at university,...)

All in all, we recommend working with the same group over the course of several months instead of changing regularly. A possible outcome of this approach is potentially reaching fewer people. Nonetheless, compromising on the number of participants results in an increase in the strength of the latter’s involvement, so much so that they eventually become true ambassadors of their cinema in the long run.

Different age groups, different activities

The younger the audience, the more important it is to develop concrete activities, focusing on a stronger “hands-on” creative approach. However, as we move up the age brackets, club activities centred around discussion and analysis can blossom more freely, allowing the flourishing of creative ideas.

Make them ambassadors

Lingering too long on the programming part will only come to the detriment of involving your audience in the promotion of the screenings. Such involvement ranges from designing posters, filming teasers, distributing flyers,etc. Similarly, a greater amount of energy should be allocated to running the event on the decided day.

This A-to-Z approach will make them even more involved in the success of the event, propelling them to the status of true ambassadors of the cinema.



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NEX

CONTEXT

1. European context

1.1 Origins and objectives of the European MEDIA programme¹

In the 1980s, the European film and TV market went through a deep crisis: cinema attendance was declining swiftly, US movies were dominating the market, the audiovisual market was facing new challenges due to rapid technical innovations.

Aware of the need to create a common legal and economic framework, the various European institutions then put in place measures to support European production, recognising independent European film production as an important cultural and economic factor for a diverse, innovative and economically strong Europe. While the Council of Europe created an initial co-production fund (which still exists today as Eurimages), the future European Union experienced in 1989-1990 the Pilot Phase of what would become the MEDIA programmes.

Initially focused on the distribution of European works, the programme gradually expanded to include project development and training (1996), before integrating promotion activities (2001).

Since 2007, the programme includes specific measures to support the adoption of new technologies and responds to the challenges of a European audiovisual sector subject to profound changes and structural difficulties (market fragmentation, lack of private investment).

For example, in 2012, the European Parliament approved the allocation of an additional €2M for the launch of the Preparatory Action “Circulation of films in the digital age”, which allows the exploration of Day & Date solutions, i.e. the simultaneous exploitation of works on multiple distribution media.

As of 2014, the programme has been integrated into the Creative Europe framework programme, which brings together the MEDIA, Culture and MEDIAMundus programmes. A new cross-sectoral strand also supports the financial guarantee mechanism from 2016.²

For 2014-2020, the MEDIA strand still supports the development and distribution of European works, as well as training initiatives and promotion activities, but it also covers VOD platforms, cinema networks, film festivals.

In addition to the previous priorities, the 2021-2027 MEDIA programme also adds support for:

- cooperation across the value chain of the audiovisual industry and at EU level in order to scale up enterprises and European content globally;
- nurturing talents – wherever they come from;
- engagement with audiences of all ages, especially with the younger generations.

In 2019, the MEDIA sub-programme supported 25% of all film productions in the EU, as in the previous year. More than 2,200 professionals received training, more than 430 film scripts were developed, 44 TV series were produced, 290 films were distributed, and 75 festivals and dozens of companies experimenting with online distribution models were supported.

The MEDIA programme used to be jointly run by the European Commission Directorate-General for Education and Culture (DG EAC) and the Education, Audiovisual & Culture Executive Agency (EACEA Unit P8), which was in charge of the operational management of the MEDIA programme.

¹ MEDIA is an abbreviation from French: Mesures pour Encourager le Développement de l'Industrie Audiovisuelle - "measures to support the development of the audiovisual industries"

² The Culture strand provides support for European cooperation projects, networks and platforms as well as for literary translation. The strand also supports the European Capitals of Culture, the European Heritage Label and the European prizes in the fields of cultural heritage, architecture, literature and music. The Financial Guarantee Facility of the cross-sectoral strand aims to facilitate access to private funding for European SMEs and organisations in the cultural and creative sectors.



Since 2014, as a sub-programme of Creative Europe, MEDIA is run by the European Commission Directorate-General for Communications Networks, Content and Technology (CONNECT), which also reflects the digital dimension of the programme.

1.2 The response of Europe to the rapid change in audiovisual behaviour

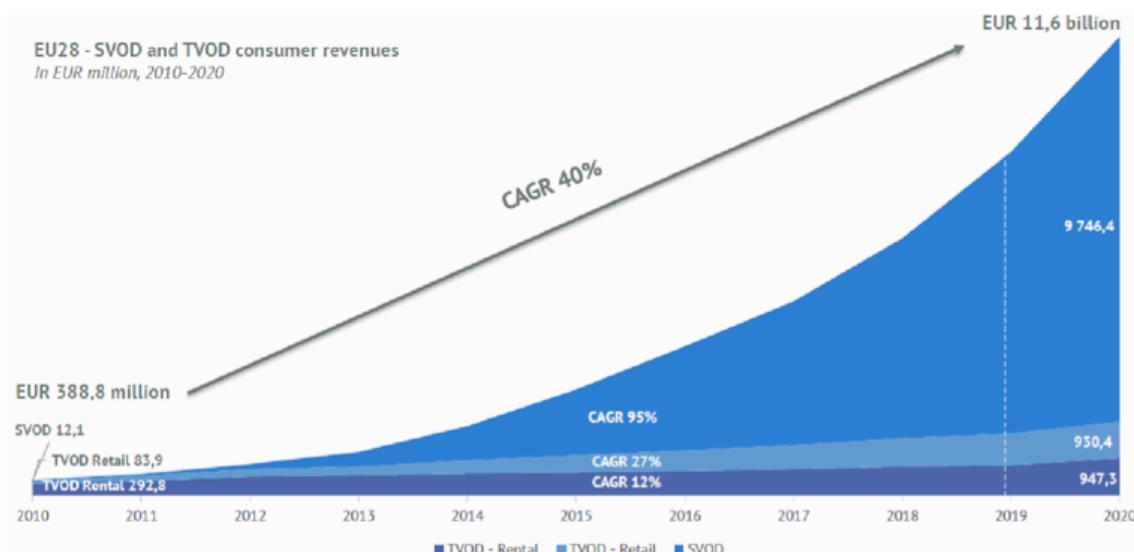
The widespread use of individual portable screens, combined with the development of fixed and mobile high-speed broadband, accessible to the greatest number of people, has led to rapid changes in the distribution and consumption of audiovisual content.

The time spent watching linear television on a TV set is rapidly decreasing in favour of individual and on-demand consumption.

According to the European Audiovisual Observatory, SVOD has become the main growth driver of the European VOD market since 2013 if not the main driver of the European audiovisual sector as a whole for the last 2 years:

- From €12M in 2010 to €9.7B in 2020, the European SVOD market has registered a CAGR of 95% over the 2010-2020 period and accounted for 84% of the overall VOD revenue in Europe in 2020.
- 140 million Europeans subscribed to an SVOD service by the end of 2020. Although the European Audiovisual Observatory counts 200 different SVOD services in the EU (some of which are available in several countries, i.e. a total of 460 catalogues available in all 28 countries), the European SVOD market is highly concentrated and structured around an oligopoly: Netflix, Amazon, Apple TV and Disney+ together account for 84% of total subscribers.

Evolution of SVOD and TVOD turnover in EU Member States (including the UK)



Source: European Audiovisual Observatory according to Ampere Analysis

Young audiences are the fastest to turn away from traditional media and adopt new behaviours. For example, in France in 2019, the 50+ spent an average of 5 hours and 12 minutes a day in front of a TV screen, compared to only 1 hour and 43 minutes for the 15-34 and 1 hour and 28 minutes for the 4-14.³

Meanwhile, time spent watching nonlinear videos is increasing sharply among younger people, to the obvious detriment of the amount of time they spend watching TV. In France, the 18-24 only spend 48% of their video time on TV, whereas the 55-64 spend 94% of their video time watching TV. However, the former still spend 31% on SVOD services and 21% on Internet video.⁴

Although cinema attendance seems to be more resilient, various studies point to a certain ageing of cinema audiences. A British study shows that the share of the 35+ age group has risen from less than a third in 2010 to over 40% in 2019.⁵ In the meantime, the share of the 15-24 decreased from a third to a quarter.

The same trends can be observed everywhere.



Beyond the changes in audiovisual practices, these developments also mask a growing taste for US content.

On SVOD services available in Europe, around 50% of films and TV series come from the USA. On global services (gathering the greatest share of the subscribers), European content represents less than 25% of total titles, compared to 40-50% on local platforms.⁶

In addition, it seems that local series are underperforming compared to their US counterparts. For example, in France, national fiction accounts for only 7.3% of all series watched, while taking up 16.7% of all series available. Conversely, American series, which make up 38.6% of the offer, represent 55% of the series consumed. Moreover, the share of American series decreases as the age of the viewer increases: 79% of the most consumed series by 15-24-year-old are American; this proportion drops to 61% among those aged 50 and over. The same phenomenon can be observed in cinemas. In 2019, in France, more than 60% of the audience for French films was made up of senior citizens (61.3%) and less than 20% of under-25s (18.7%), whereas the latter accounted for 33.9% and 38.8% respectively of the audience for all films. Conversely, 46.5% of American film audiences are under 25 and 23.4% are over 50.

- Faced with these developments, which are generating profound changes in behaviours, particularly among young audiences, the European Union is reacting in order to encourage young people to return to cinemas and rediscover a collective experience, but also to rediscover quality European productions.

This preparatory action, which should also enable cinemas to get closer to young audiences to better understand their expectations and needs, thus aims to respond to this fundamental need to restore the taste for sharing cultural experiences based on European content.

OTHER RESOURCES AVAILABLE



GEN Z website : <https://cinemahub.eu/generation-z/>



Mid-term Event on YouTube: <https://www.youtube.com/watch?v=9QjsR7fOy98&t>



GEN Z YouTube : https://www.youtube.com/channel/UCSBdUYen8-_T3NOSSp63UYA



KinoKonfiné blog by Kinograph : <https://www.kinokonfine.brussels/>



³ Source: Médiamétrie

⁴ Source: CNC according to Ampere Analysis and Médiamétrie (Q1 2021)

⁵ Source: Cinema Audience Agency (CAA) Film Monitor, 2010-2019

⁶ Source: European Audiovisual Observatory according to JustWatch, Filmtoro, La Pantalla Digital, EUROVOD catalogue data

-Data for May 2020

