

Cinema dei Piccoli, Cinéma Forum, Drac Magic - Cine Savoy: from Euro Kids Network to Leonardo Project

Three of the five partners in the Lapis Tecno Village project, financed by the European Community within the "Leonardo da Vinci" programme for professional training, are members of Euro Kids Network. The project, which will last three years, aims to produce an experimental model for the distance training of professional figures, such as artists and colour artists, who are needed for the European animated film industry. The project is promoted by the Cinema dei Piccoli in Rome, which is responsible for extending it, together with Cinéma Forum of Chambéry and Drac Magic - Cine Savoy of Barcelona, whilst Spera Fresia of Rome will develop the training model to be experimented by the Lydskolinn art school in Reykjavik.

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tor Loewy (Alliance Atlantis Communications), Tom Quinn (Samuel Goldwin), Daniel Toscan du Plantier (Unifrance), Alain Vannier (distributor) e Susan Wrubel (New Yorker Films). The survey was carried out using American market sources (in particular the "Internet Movie Database" and "The Hollywood Reporter"), cross-checked and compared with the MEDIA Salles European Cinema On-line Database. The striking fact that emerges is the low penetrability of the American market. An initial explanation could be the high degree of concentration: 13 distributing companies control 96% of the market, covering 96% of screens; 12 theatre chains in 1999 recorded 56% of box office. Perhaps less well known is the lack of willingness in the USA to accept foreign language films, despite the varied nature of the market and its vast dimensions (7 000 million dollars box office in 1999, 1 500 million admissions, a pro-capita frequency of 5 visits a year). A way of compensating for the incomplete nature of the data available seemed to be that of following the circulation of five European films of different nationalities and with different box-office results: *The Turkish Baths* (an Italian-Turkish-Spanish co-production); *The Celebration* (Denmark), *Autumn Tale* (France), *Run Lola Run* (Germany) and *All About My Mother* (a French-Spanish co-production). Despite the specific characteristics of each title, the similarities in circulation, distribution and market penetration allow certain common features to be pinpointed as being peculiar to the US market. The first point to be noted is that all five titles came out in at least one theatre in New York, Los Angeles and San Francisco which are thus confirmed as the "show-cases" most open to novelty. The theatres that included them in their programming all fall into the "specialty cinemas" category - that is cinemas specialised in the screening of independent American, and foreign films. Although there is one comforting fact - on making a comparison between European films opening in the USA in '98 and in '99, the co-productions prove to have increased from 22 to 30, and the respective box offices have grown from 8 million to 54 million dollars - it is still the product bearing the stars and stripes that triumphs. 97% of films screened in the USA are produced in the United States and the remaining 3% is shared between all the films from other countries. What, then, are the reasons for the difficulties encountered by European films in the United States? The cultural element no doubt

bears some weight: the low interest in anything that is not "made in USA" is also marked by the fact that only 8% of American citizens have a passport. But this alone is not enough. Nor is the obstacle presented by subtitles which certainly do limit the popularity of the foreign language movie. If it is important to overcome the problem of linguistic barriers - and an attempt is made to do so by purposely filming some European movies in English - it is vital to deal with what is perhaps their greatest weakness. This is the lack of effective promotion. To understand the abyss between American and European films in this respect, it is sufficient to remember that in 1999 the MPAA member companies spent around 24,5 million dollars per picture in "prints-and-advertising", as against an investment of one million dollars, already considered exceptionally high, for European films. The key-word, then, is investment in promotion. And not by means of the occasional investment but through a focused, long-term strategy.

Alessia Dal Fabbro



Round table "European films in the United States: theatrical distribution" at the Berlin Film Festival 2001

How France contributes to children's cinema

It is well known that in France the whole process from film making to exhibition benefits from the financial support of the state, which has become increasingly far-ranging over time. In the absence of a specific support measure for the production of children's films, their exhibition in cinemas is sustained by the CNC (Centre National de la Cinématographie). This is just one credit line, in addition to others, with grants for selective help towards distribution, within a battery of measures on behalf of quality films, independent companies and co-operation between cinemas and schools. To receive support for the

distribution of films for young people (whether already circulating or not) a thorough plan of action is required, as well as documentation that may be used by exhibitors and other organisations involved (brochures, materials for exhibition).

The grant may be as much as 25 000 euro per film. Each year 6 to 8 films receive support. Recent examples are: *La Planète Sauvage* by Laloux, *Pinocchio* by Comencini and a programme of short films on racism. Grants for initiatives involving educational institutions are far higher ("Collège au Cinéma", "Ecole au Cinéma") and aim to encourage cultural knowledge of films at school through screenings at movie theatres. Printing of copies of the films selected, as well as educational literature destined for teachers and students, are financed by the CNC (an average of 850 000 euro each year).

The choice of films is made by a mixed (schools/cinema) commission. Selections range from *Alice* by Svankmajer and the *Wizard of Oz* by Fleming, to *Ladri di Biciclette*, *The Night of the Hunter* and *La Belle et la Bête*, not forgetting recent Iranian productions. This is not only a selection of children's films but a search for quality and the rediscovery of our heritage, always with the aim of satisfying the expectations of younger audiences (children from primary and middle schools up to 15 years of age). Lastly, as part of the action taken to facilitate access to films by independent theatres, the ADRC (Agence pour le développement régional du cinéma) frequently produces extra copies of films for younger audiences. Although this is not amongst its priorities, the ADRC is playing an increasingly important role here in meeting the ever-growing demand by the exhibitors with whom it works. The demand is partly for "family" films (i.e. Disney or films like *Chicken Run*), in line with the original policy of the Agency. However, for some years now, a more closely focused approach and requests by the exhibitors themselves (whose progress should be regarded with approval) have resulted in the printing of films like *La Freccia Azzurra* (5 more copies), *Eugenio* (4), *Kirikou et la sorcière* (21), *Le Château des singes* (10), *Princess Mononoke* (16), *Robinson et compagnie* (6), *Princes et princesses*. 21 copies have been produced of the latter programme of short films by Michel Ocelot, launched after the success of *Kirikou*.

Daniel Sauvaget

The first 2001 issue of our Newsletter comes out on the occasion of the 3rd World Summit on Media for Children, to be held in Salonika from 23 to 26 March. MEDIA Salles is taking part in this event with the initial results of a survey originating in the theatres of the Euro Kids Network. Its objective is to lend a voice to "budding audiences", to their demands and to their expectations. Already over 2 000 children have responded to the MEDIA Salles questionnaire; they are certainly young - aged between 8 and 11 - but capable of grasping the essential points. According to them, what is special about watching a film at the cinema is the "big screen", followed by the "company of friends". This is one of the reasons why a visit to the cinema is more exciting than seeing a film on television. The "experts", but also families and teachers, will certainly be glad to hear that the movie theatre continues to be an attraction to children in an age when it might be thought that computers and videogames are what really captures their attention. The data gives us hope for future rates of cinema-going, particularly when considering that most of the children say that they would like to visit the cinema more often. Less encouraging are the messages that reach us from the classification of films, based on replies to the question "Which of the films you have seen at the cinema did you most enjoy?" Amongst the titles given there are also several that are not specifically for children. This can be seen as confirmation of the frequent complaint by exhibitors committed to programming for children: the offer of films for younger audiences is decidedly lower than the demand. Furthermore, there are few titles mentioned simultaneously in more than one country: generally these are cartoons, comedies or adventure stories, mostly of American origin, with large production and marketing budgets behind them. Once again (or rather, above all) in the "children's" sector, European films find it difficult to cross the borders of the country where they are produced. But if we really want "Europe to get together at the cinema" - as the MEDIA Salles promotional campaign suggests - it is important that our budding spectators be given the opportunity to become acquainted with the different voices of European film-making. This is why the Euro Kids Network was founded in 1996 and why MEDIA Salles supports the exhibitors of its over 300 screens, operating in 16 countries. The attention, confirmed by the MEDIA Plus Programme, towards programming for young audiences and towards educational activities in the movie theatres encourages us to continue our efforts in this direction.

Elisabetta Brunella
Secretary General MEDIA Salles

LITTLE VIEWERS, BIG SCREENS The expectations and perceptions of children aged 8 to 11 with regard to the cinema

The survey "Little Viewers, Big Screens" comes into the area of the research studies that MEDIA Salles has been conducting since 1996 on cinema-going amongst children and young people in Europe, within the European Union's MEDIA Programme and with the contribution of the Italian Government. The aim of this specific phase of the research is to gain a deeper knowledge of the expectations and perceptions of children aged 8 to 11 (an audience to which little study has yet been dedicated) with regard to the cinema. The intention is also to analyse closely the films that the children declare to have enjoyed most out of all those seen at the cinema, in order to discover how our youngest spectators evaluate programming by cinemas and, in particular, quality films that have been especially selected for them in collaboration with schools. From a methodological point of view, the survey has used a questionnaire with closed questions, distributed to children both during initiatives promoted throughout Europe by the theatres belonging to the MEDIA Salles Euro Kids Network circuit, and during screenings at the thirteenth Castellinaria "International Festival of Film for Young Audiences". In particular, the survey was carried out in two phases:

- the first, which has just been concluded, foresaw the elaboration of the 2 283 questionnaires collected during the November 2000 to February 2001 period and the presentation of the results on 26 March during the 3rd World Summit on Media for Children at Salonika in Greece;
- the second foresees the elaboration of all the questionnaires received by MEDIA Salles by July 2001, both as a whole and by individual countries, as well as by each cinema that has returned at least 100 questionnaires. The final results will be presented at the fourteenth Castellinaria festival, to be held in Bellinzona from 17 to 24 November 2001. The first phase of the survey has analysed questionnaires coming from France (19%), Italy (19%), Portugal (14%), Switzerland (13%), Norway (11%), Hungary (7%), Spain (4%), the United Kingdom (4%), Finland (4%), Sweden (3%) and Denmark (2%). The children who co-operated on this first stage of the research project were equally divided in terms of gender, with an age breakdown

of 23% aged 8 or 9, 45% aged 10 and 32% aged 11. Although they appear to watch films mainly on the television or on video cassettes, European children aged 8 to 11 state that they love watching stories on the cinema screen, which is preferred to other means of narration by as many as 69% of respondents.

The research does not point to a high frequency of cinema-going amongst the children and finds that:

- 16% of respondents only go to the cinema with their schools; more particularly, the percentages of children who only go to the cinema to see films that have been arranged with their schools vary considerably from country to country, being highest in Switzerland (26%), Hungary (24%) and Italy (20%);
- of the remaining 84% of children who also go to the cinema on other occasions, 48% declare that they go every time there is a film that interests them. Nevertheless, there is a high percentage of children who only visit the cinema a few times a year (46% of respondents). Children of 8 or 9 years old are the least frequent cinemagoers and visit the cinema only a few times a year in 51% of cases;
- 75% of respondents would like to go to the cinema more frequently; the percentage of children who would like to visit the cinema more often is particularly high in the Iberian countries (86%), Italy (82%) and in the United Kingdom (78%) and seems to increase with the age of the respondents, reaching 82% amongst children aged 11. Moreover, the children's cinema-going does not seem to be part of a more extended leisure-time activity, in the sense that the respondents almost always go straight home after the film (in 67% of cases) and only a small percentage of children go for a walk (18%) or to a café or restaurant (15%) or to visit friends or relations (16%). As regards *the films seen at the cinema*, the survey shows that the children:
- come to know about the film mainly through television advertising (55% of cases) or through posters outside the cinemas (40%); the higher their age, the more important are the roles played by television advertising or advice from friends;
- choose the film together with other people in 57% of cases, acquiring greater independence in their choices as they grow older;
- prefer comedy/entertaining films and action/adventure films (both marked by 50% of respondents), or cartoon films (34%) and horror films (32%); the latter are particularly appreciated by children in the United Kingdom, who prefer them to all other film genres;
- consider the stories presented on screen to be fairly close to children's experiences (38% of replies), even though there is a relatively high percentage of respondents (32%) for whom the films do not depict any particular aspect of real life;

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European Cinema Yearbook: Source Document presented in Berlin

On 14 February at the Berlin Festival, MEDIA Salles presented the ninth edition of the European Cinema Yearbook and the Source Document, its statistical report on cinema-going in Europe. Speakers included Romano Fattorossi, President of MEDIA Salles, Joachim Ph. Wolff, scientific adviser for the European Cinema Yearbook, who presented an elaboration of data regarding the concentration of business in the European exhibition and distribution industry, Elisabetta Brunella, Secretary General of MEDIA Salles, who described the main trends in cinema exhibition in Europe in 1999, and Maria Harman, European editor of Multisala International, the magazine of cinema architecture which, as from this year, will be co-operating with MEDIA Salles on the distribution of the European Cinema Yearbook. The Yearbook shows trends in cinema exhibition in all 32 of the nations examined, amongst which Lithuania appears for the first time. The Source Document, with its 600 pages, adds to and analyses more deeply a series of information provided in the comparative tables of the shorter edition. The data provided for each country includes the overall number of cinemas, divided into types, the classification of the top ten films on each market, the lists of the most successful domestic and European titles, information

- remember having most enjoyed films such as *Tarzan* (6,1% of cases), *Pokémon* (5,6%). The distribution of preferences is, on the whole, fragmented and differs considerably from country to country: *Tarzan*, for example,

proved to be the most popular film in Italy, whilst in France the favourite was *Taxi 2*, in Switzerland *Kirikou et la Sorcière*, in Hungary and in the Scandinavian countries *How the Grinch Stole Christmas*, in the Iberian coun-

tries *Small Soldiers* and *The Nightmare before Christmas* and in the UK *Toy Story 2* (see table). It should be noted that amongst the 30 favourite films for each country there are titles - often of domestic productions - that are not to be found in the overall classification; - particularly in the 8-9 age range, they buy products inspired by their favourite films. The most commonly purchased articles are toys (47%) and school equipment (44%); - in 36% of cases they “very much” enjoyed taking part in the cinema visit organised by their schools and these visits were particularly appreciated in the Iberian countries (50%), in Italy (49%) and in Switzerland (49%). As regards the choice of watching a film *at the cinema*, almost all the respondents (90%) found a difference between watching a film on television and seeing it at the cinema: in particular, they stated that seeing it at the cinema was more entertaining and moving and/or exciting. What the children declare most enjoyable about the cinema is mainly the size of the screen and the opportunity to be with their friends; there follow the darkness, the possibility of buying popcorn and soft drinks and the novelty of the story, whilst less importance is given to the quality of the sound, the comfort of the seats and, above all, the presence of many people in the theatre. The perception of greater excitement, enjoyment and also tension when watching a film at the cinema, instead of on television, is expressed with significantly greater frequency: - with increasing age; - by children who go more frequently to the cinema or who go to the cinema on other occasions, apart from those organised by their schools; - by children who would like to visit the cinema more frequently. It would seem to be important to stress that a higher percentage of those who feel an emotional difference in seeing a film at the cinema enjoy certain important features of what the cinema has to offer more than other respondents. These features include the size of the screen, the quality of the sound, the darkness and the opportunity of being with their friends. These children who are more sensitive to the language of film and to the services offered by the cinema are those who wish to go to the cinema more frequently in the future and who most enjoyed the screenings they saw with their schools.

Paola Bensì
Editor of the research project

The full version of the research project “Little Viewers, Big Screens” will be published on the MEDIA Salles website in the Cinema Research Library at page www.mediasalles.it/crl_main.htm

on the leading exhibition and distribution companies. In order to allow for a more accurate analysis of the circulation of European films outside their country of production, there is once again an analysis by nationality of box office and admissions. This edition of the Yearbook gives an account of the situation of European multiplexes, up-dated at 31 October 2001: there are 597 complexes with at least eight theatres operating in Europe, for a total of 6 320 screens. To allow for a deeper examination of the role of this type of cinema on the general panorama of exhibition for each country, details have been given, where available, of the percentage of tickets sold in complexes with at least 8 screens. It can thus be seen that in 1999 the 16 Belgian multiplexes accounted for 73% of admissions in the country, whilst this percentage is around 39% in Sweden, 38% in Spain, 36% in France, 32% in Hungary, 30% in Finland, 21% in Norway, 17% in Denmark, 10% in the Netherlands, 9% in the Czech Republic and 7% in Italy.

The cinema in Portugal. Public intervention and private enterprise

ICAM - Instituto do Cinema, Audiovisual e Multimédia (former IPACA - Instituto Português de Arte Cinematográfica e Audiovisual) is an organization created in December 1998 to contribute towards the definition of public policies and to support the cinema, audiovisual and multimedia sectors under the aegis of the Ministry of Culture. The law that governs cinema activity in Portugal came into force in 1993, but a new law on the cinema is being prepared, in order to meet the requirements of the coming digital era. In 1998, Portuguese cinema benefited from an increase in public funding. Between 1997 and 1998, the amount of financial support to production given by ICAM grew 36% (analysing only support to full-length films, this amount grew 28,9% between 1997 and 1998. Although it decreased 10,3% in the following year, the nominal growth between 1997 and 2001 is clear: 67%). Since then, the total amount has increased significantly: while in 1997 it amounted to 7 606,67 thousand euro, in 2000 it rose to 14 273,1 thousand euro (corresponding to an increase of 87,6%). In the main category of public support to full length films - Selective Support - since 1998, 684,44 thousand euro of subsidies have been granted. ICAM supports almost every film produced in Portugal; this situation reflects the profound dependence of this sector vis-à-vis public funding. In 1998, 14 full-length films were placed on commercial release (of which, only 2 were not supported by ICAM). In 1999, each of the 15 full-length films released were supported by ICAM. The Portuguese distribution market is highly concentrated: the five major companies (Lusomundo Audiovisuais, Atalanta Filmes, Filmes Castello Lopes, Columbia, Prisvídeo) released, in 1997, 88% of the titles and in 1998, 88,2%. In 1999, this share rose to 90,5%. Atalanta Filmes is the only distributor whose catalogue is characterised by a minority of US films (20,8% in 1998; 28,1% in 1999). More than half (56,6% in 1998 and 59,4% in 1999) of the films released by Atalanta have EU origins: in 1998, French films alone (22,6%) outdid US films. All co-productions released by Atalanta have at least one European partner (not exclusively

from the EU). Some distributors' catalogues comprise exclusively - or almost exclusively - US films. This happens with Columbia Tristar & Warner Filmes Portugal (100% in 1998 and 95,7% in 1999) and also with the other three majors, yet less outstandingly. Concerning exhibition, the main exhibitors are: AMC (American Multi-Cinema); Lusomundo Cinemas; Warner-Lusomundo (a joint-venture between Lusomundo and Time Warner); Medeia Filmes (belonging to producer Paulo Branco) and Socorama. In the last few years, the opening of new theatres has been almost exclusively carried out by these major exhibitors: between 1997 and 1999, Socorama doubled the number of theatres, as well as Warner-Lusomundo. Medeia Filmes has followed this growth rate closely. As to AMC, this company has been operating 20 screens in Arrábida Shopping Centre - Porto since it started its activity in Portugal. Lusomundo owns the biggest national distributor - Lusomundo Audiovisuais - responsible for the release of 35% of the titles on the domestic market (data for 1999). Both exhibition companies belonging to this corporation - Lusomundo Cinemas and Warner-Lusomundo - hold around 18,5% of the total number of cinemas in operation. Until the year 2000, although there was no exclusive agreement between Sonae Imobiliária (leader in the sector of shopping centres) and the Lusomundo Group, every multiplex existing in Sonae's shopping centres was franchised to Lusomundo. In 2000, Sonae Imobiliária branched out with new partners for three new multiplexes. In 1999, Lusomundo also exploited 42 screens in Spain (Warner-Lusomundo España) and three in Mozambique. In late 2000, the Lusomundo corporation (which, besides cinemas and audiovisuals, also owns some of the most important Portuguese press) was purchased by PT Multimédia, the multimedia branch of Portugal Telecom Group (PT), the biggest telecom business organisation in Portugal (fixed and mobile telephones, Internet, cable TV, multimedia). Paulo Branco's group consists of a production company (Madrageo Filmes), a distributor (Atalanta Filmes) and two exhibition companies (Medeia Filmes and Cinemas Millenium). Paulo Branco also owns a production company in France (Gemini Films) and in London (SpiderPictures).

Maria João Taborda
Observatório da Comunicação



From the left: Dr J. Ph. Wolff, Elisabetta Brunella, Romano Fattorossi, Maria Harman (Multisala International)

Top ten films in Portugal (by admissions)

1999	
1	Starwars - The Phantom Menace 662 000
2	Matrix 561 500
3	Notting Hill 532 000
4	Asterix et Obelix contre César 520 000
5	The Mummy 485 000
6	Shakespeare in Love 460 000
7	Runaway Bride 370 000
8	007 - The World is not Enough 360 000
9	Tarzan 360 000
10	Eyes Wide Shut 321 500
Sources: Exhibitors; Obercom	

2000

1	Mission: Impossible II 715 500
2	The Sixth Sense 664 000
3	American Beauty 561 000
4	60 Seconds 513 000
5	Gladiator 410 000
6	Scary Movie 394 000
7	The Perfect Storm 350 000
8	Chicken Run 340 000
9	What Lies Beneath 320 000
10	Hollow Man 315 000

Sources: ICAM, Atalanta, Lusomundo, Castello Lopes, Columbia, Visão/Obercom

European films in the United States: theatrical distribution

How many European films have been distributed in the United States? Which circuits have they accessed and on which are they more or less unknown? What should be the rationale behind distribution? Starting out from these questions and with the intention of finding an explanation for the low market penetration of European films on the US market, MEDIA Salles embarked on the research project “European films in the United States: theatrical distribution”. Published in the second 2000 issue of the review “Cinecittà”, the survey provided the basic data for a round table at the 51st International Film Festival of Berlin, which brought together professional figures from both sides of the Atlantic. Opened by Moritz de Hadeln (the Festival Director) and chaired by Felice Laudadio (President of Cinecittà Holding), the round table saw contributions by Romano Fattorossi (President of MEDIA Salles), Rick Sands (Miramax International), Luciana Castellina (Italia Cinema), Adriana Chiesa (Adriana Chiesa Enterprises), Claudia Landsberger (European Film Promotion), Vic

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