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MEDIA SALLES

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MEDIA

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At the opening of the 60th Venice Film Festival and on the occasion of the Italian Semester of Presidency of the European Union, the Minister of Cultural Affairs, Giuliano Urbani, invited his European colleagues to a Seminar to reflect and debate on the situation of the European cinema market.
A reflection on the existing situation – where the analysis also made use of data from MEDIA Salles' "European Cinema Yearbook" – which took concrete shape in the possible outlines of action delivered by the 25 Ministers gathered in Venice to the European Commissioner, Viviane Reding, at the end of the intense workshop. "The way ahead does not lie in protectionist measures, but in the will to co-operate and create networks to facilitate the distribution of films", declared Minister Giuliano Urbani to the press at the end of the session.
We discussed the issue with Gianni Profita, Director General for the Cinema and co-ordinator of the workshop.

Professor Profita, there does not seem to be a lack of audiences in Europe (over the past 10 years they have grown by over 50% in Western Europe), nor of films produced.
And yet, European films not only encounter difficulty in matching American profits, but also find it hard to move outside their own country of origin…
Without doubt, on an expanding market, since the beginning of the 90s most of the profits have still remained the prerogative of US productions, whilst those of European productions mark time.
Moreover, whilst it is true that the number of co-productions between the countries of the EU has increased, most of the films produced are still only released in the country where they were produced and the box office is generally concentrated on a few successful films.
Is it a problem of titles then? Would an increase in successful films be sufficient to create a balance in the situation?
Several factors combine to produce this situation. If one is connected to the titles, we should not neglect the difference between the two types of production: to the high-budget US films, designed to draw as many spectators as possible, in Europe corresponds a greater range of offer, from art-house films to low-budget productions, of debatable quality, but capable of attracting a certain sort of audience.
Another decisive factor is the difficulty of creating an efficient distribution network in a continent like ours, characterised by wide cultural and linguistic differences.
Let us start with the titles. What type of European film conquers the box office?
It is a fact that the greatest successes of the European cinema, rather than being large productions, can be traced back to films of high artistic quality or those which have succeeded in combining high quality with a product appreciated by the general public.
We can remember the success of quality European films with relatively low costs, such as the English *Full Monty* or *Black Cat, White Cat* by the Slav Kusturica or the prize-winning *La vita è bella*, and, recently, phenomena such as *Respiro* or *Chocolat*.
Significant examples: basically these are films with close cultural ties to the country in which they originated, but which tell stories where the narrative significance reaches beyond national boundaries…
This does, in fact, confirm the fact that dissimilarity in Europe is not, in absolute terms, an insuperable obstacle, and that the cultural wealth of the various member countries can be transformed into a precious heritage. But in order to do this, we need a greater ability to promote films that, although bearing the stamp of their local origin, can be appreciated in countries that are very different from one another.
How far can the growing attention to international co-productions serve to improve this situation?
Economic integration, of which co-productions are also a sign, is doubtless a decisive factor, though not the only one, for achieving true cultural integration.
Frequently the films of the old continent are conceived and produced for a single type of audience, or for only one country, due also to a problem of costs, because each European country represents a limited

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During the Cannes Film Festival, on 22 May at the MEDIA stand, MEDIA Salles President Jens Rykaer presented the Newsletter "European Cinema Journal" no. 2/2003, with the first data on cinema-going in 2002.
Rykaer also outlined the MEDIA Salles initiatives planned from June onwards: the Focus on Europe events at Cinema Expo International – Amsterdam (23-26 June) and at the Giffoni Film Festival – Giffoni, Salerno (Italy, 17-20 July) and the Rome edition of the training course for cinema exhibitors "European Cinema Exhibition: A New Approach" (24-28 September).

CINEMA–GOING DURING THE SUMMER: GERMANY

Summer has just gone by: this was the season when audiences are usually at their lowest throughout Europe. However, the extent of the phenomenon varies greatly from country to country. Many different initiatives are taken to deal with this drop in spectators.
We discuss this question with Andreas Kramer, Director General of HDF (Hauptverband Deutscher Filmtheater – National Association of German Exhibitors), who is one of the speakers at the Rome edition (24-28 September) of the training course "European Cinema Exhibition: A New Approach" promoted by MEDIA Salles. HDF is amongst the organisers of Kinofest, an initiative whose main objective is to promote films during the summer season.

Dr Kramer, how big were the audiences in German cinemas during the 2001 and 2002 summer seasons, also compared to those of previous years?
The total admissions for 2002 are still very high, despite the decline of 7.9% compared to 2001, whose success has to be attributed to the release of *Der Schuh des Manitu* in that year. Considering just 2001, it's evident that it remains one of the best years for cinema in years and this is ultimately confirmed in the total figures for the year, i.e. almost 178 million tickets.
The comparison in visitor numbers during the period June to August for 2001 and 2002 needs to be commented on. It has to be seen in connection with the years preceding 2001 (see Table on page 4, *ed.*). If a comparison is made of the summer months only in 2001 and 2002, a drop in admissions in absolute terms can be seen in each of the three months. This trend continues throughout September and October. The figures stabilise in November at around 54.4 million viewers. As mentioned above, an evaluation has to take into account the completely unexpected success in Germany of the film *Der Schuh des Manitu* rendering summer 2001 exceptional. However, if we consider the weight of monthly admissions in the overall results for the year, both in June and in July, 2002 was a better year than 2001.
What is HDF's objective?
Our aim is to make the cinema attractive on a broad basis even during the quiet summer months, so that we do not have to rely only on the release of blockbusters in the autumn to make up for the slump in audiences in the preceding months.
Did you organise any particular promotional offers during the summers of 2002 and 2001?
In July 2001 "Kinofest", modelled on the

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market for large investments guaranteeing safe returns.
On the contrary, in the United States, the internal market alone already guarantees safe profit margins for any film. Clearly these same films can be sold in Europe at relatively low prices, since the expenditure has already been recovered at home, with a significant market test, and perhaps good profits have been made, of which some can be reinvested for promotion in other countries. European producers have partly attempted to limit the US advantage by recurring, to an increasing extent, to agreements on international co-productions; the European Union, too, has attempted to provide incentives for these agreements by means of a system of facilitations. However, it is clear that, for structural reasons, the United States enjoy an advantage that is difficult to make up for on this point.

In the light of the meeting of European Ministers in Venice, what significant steps can be taken at a national and community level to help European cinema?

Without doubt, first and foremost cooperation must be encouraged, both between nations and between the different sectors involved in the film's life, with greater attention to promotion, which generally has a very tight budget, and to the development of new technologies, in which digital film stands as an important frontier.
Also of particular importance for the re-launching of European cinema is co-distribution through specific intervention, both at a political and at an industrial level, with the aim of increasing the impact of European films on the market outside their country of origin.
At the end of this very meeting in Venice, Italy signed agreements on co-distribution with Spain and India and has begun talks with Russia.
And in order to increase co-operation significantly, projects such as those arising from the MEDIA Programme are of fundamental importance. They do, in fact, work on promoting European films and developing and sharing the competence necessary for creating a global European market – their prime mission. Italy, convinced of the importance of this task, and which has for years hosted the MEDIA Salles project, is making efforts during the Italian Semester of Presidency, to promote greater attention on the part of the whole Community to the synergic development of the various national situations towards a global European market. These themes will, in fact, be further debated at Taormina next November, with particular emphasis on new European tools for support, in the light of the issues connected with the extension of Europe to the new countries.

In Venice, MEDIA Salles also took part in the European Ministers' seminar on new technologies ("New possibilities and challenges arising from new technologies for the circulation of European cinema and the fight against piracy") and, on 5 September, at the opening session of the IXth Euro-Mediterreanean Conference on the Cinema, "The Cinema as a Vehicle of Multiculturalism". There follows a summary of the two talks by the Secretary General, Elisabetta Brunella. The full versions are published in the "Cinema Research Library" section of the MEDIA Salles' website (www.mediasalles.it).

EUROPEAN FILMS IN 2002: THE DIFFICULTY OF CROSSING BORDERS

With over 931 million tickets sold in 2002, the 16 countries of Western Europe analysed by MEDIA Salles confirm the positive trend that has characterised the past ten years. And if growth on the Western European market as a whole has reached almost 60% (there were 585 million admissions in 1992), some territories have recorded even more flattering increases over the decade, from the 69% in Spain to the 121% in Ireland and 138% in Luxembourg.
Less positive signs emerge from the results of European films, whose fortunes, on examining market shares, have followed a two-yearly cycle over the past 7 years. Outside their countries of origin European films only crossed the threshold of 10% of total admissions in Western Europe in '97, '99 and 2001.
The research on cinema trends in 29 countries of Western and Eastern Europe in 2002, carried out by MEDIA Salles for the special edition of the "European Cinema Yearbook", devotes particular attention to the circulation of European films.
Amongst other things, it can be seen that the most important role in contrasting the supremacy of American cinema (which nevertheless imposes itself with consistently high market shares, between 65% and 70%) is played by domestic films. It is true that, in view of the tendency for the statistics on domestic films to include titles for which the country under examination was co-producer only, the market shares of domestic films tend to be inflated, whilst those of European films tend to appear lower than they really are. However, the box office percentages recorded for the former in 2002 speak for themselves: in France domestic films reached 34.8%, in Great Britain and Ireland 24.4%, in Denmark 24.1%, in Italy 22.1%.
If a comparison is then made between the number of tickets sold by a film in its own country and the number sold abroad, both the importance of domestic films in drawing spectators inside the country and, at the same time, the difficulty they experience in crossing national borders clearly emerge.
Even bearing in mind the delay in international circulation (so that a coherent reading is only possible if a period of at least two years is taken into consideration), it can be seen that the common destiny of domestic films appears to be that most of their admissions (more than 90%) are gained in their own country. An exception, together with very few other titles, is the Spanish film *Hable con Ella* which, being a rare exception, gained most of its admissions, over 80%, outside its country of origin.
This difficulty in establishing a presence on screens in other countries only seems to have a lesser effect on French and British productions (and these are frequently co-productions with the United States).
To quote an example, even the European film that sold most tickets in 2002 (over 19 million in Europe, of which over 14 in France), *Astérix et Obélix: mission Cléopâtre*, released in France at the end of January, took six months to reach screens in Spain and Poland, and ten months to reach Italy. Only in Belgium was its release simultaneous with that in France. Another eloquent indicator is the number of prints of European films that are distributed. Thus, for example, another great success outside its own country – the film *Le fabuleux destin d'Amélie Poulain*, of which 612 copies were distributed in France in 2001, had 26 copies in Austria, 64 in the Netherlands, 32 in Belgium, 10 in Finland, one in Iceland and Luxembourg in the same year and, the following year, 141 in Spain. These figures are a far cry from those typical of an American blockbuster: for example, over 900 prints of *Spider-Man* were distributed in France and 515 in Spain.

DIGITAL SCREENS: SLOW AHEAD

Digital screens are slow on the increase. In North America, where 1,000 screens were foreseen for May 2002 – the date on which the digital version of *Star Wars: Episode II,* expected to be the focal point of the growth process, was released – in August 2003 only 80 had been opened. And these are the majority of them, since there are 162 screens throughout the world: the remainder are mostly to be found in Asia (55), to a lesser extent in Europe (16), in Latin America (9) and in Australia (2).
From MEDIA Salles' research, based on screens adopting the DLP Cinema technology by Texas Instruments, it can be seen that, although the percentage variation throughout the world in about one and a half years approaches 400%, the situation is not as rosy as it might appear at first sight. Firstly, the increase has only been significant in North America where, from November 2001 to August 2003, the total number of digital screens has risen almost fourfold (from 21 to 80, with a 281% increase), despite a dip in the overall number of screens in the country, beginning in 2001. But the growth process that by 2004 should have made US digital theatres 5% of the total (represented by over 35,000 screens in 2002) is far from becoming reality. A decidedly cautious welcome has been reserved for digital technology in Western Europe, where the increase in screens adapted to the new technology was only 27% (from 11 to 14 screens), compared to an overall increase in screens of 36% in the last 7 years. And although Asia, in particular China (where 34 of the Continent's digital screens are to be found), has shown signs of confidence in the new technology, in general it seems appropriate to speak of some caution on the part of exhibitors in changing to digital screening. There are two main reasons which may, at least partly, explain the situation (although it must be remembered that they are also an effect of it):
- firstly the costs involved in setting up a digital screen (around 100,000 euro) – still extremely high compared to the sum (50,000 euro) considered in economic analyses of the sector to be capable of allowing digital screening to become competitive compared to analogical screening;
- secondly, the scarce and irregular supply of films in a digital format: in fact a total of 69 films have been distributed in DLP Cinema technology from '99 to the present. Moreover, of these, 56 come from the United States, 6 from Japan, 4 from China, 2 from

France (with 1 US co-production) and 1 from Italy. In addition, in many cases amongst the films produced in the United States, those distributed in digital format have only been made available in English, unlike the analogical copies, and have not enjoyed truly international distribution, reaching only one or very few territories.
If these statistical figures are then combined with the information emerging from professional meetings devoted to digital cinema both by MEDIA Salles and by other organisms, as well as with the results of audience surveys, more light can be shed on the experimental status of digital cinema.
A positive view of digital technology by the general public emerges, for example, as well as a growing degree of confidence in the visual quality it provides. But whilst these elements weigh in favour of the "digital revolution", others delay the process. These include the fear of piracy, which is growing with the spread of the broad band – with the risk of repeating the experience of the "Napster phenomenon" in the world of music – and concern that the introduction of digital technology may modify existing business models and the balance between the various operators involved in the film's life. Doubts are also increased by uncertainty as to whether the transformations will favour greater flexibility of programming and express themselves in a better offer to the public, both quantitatively and qualitatively. In other words, there remains the problem of understanding whether cinemas will be able to offer greater variety, also including films for which distribution is not at present so profitable, or whether the advantages in terms of distribution will favour an even more crushing presence of titles that already manage to cover over 30% of a country's screens.

THE MEDIA SALLES' SEMINAR AT CINEMA EXPO INTERNATIONAL 2003

An overview of the trends in cinema-going in 2002 in 29 European countries and investigation of the theme of market strategies for creating audience loyalty. Once again this year, on 23 June, MEDIA Salles opened the Focus on Europe event at Cinema Expo International, in Amsterdam, with a seminar on cinema exhibition in Europe.
The following speakers took part in the seminar, introduced and chaired by Elisabetta Brunella, Secretary General of MEDIA Salles: Michael Vickers, Treasurer of MEDIA Salles; Joachim Ph. Wolff, Vice-President of MEDIA Salles and Chairman of the Research Foundation of the Netherlands Cinematographic Federation; Michael Chalmer, Marketing Manager of Nordisk Film Biografer A/S, in Denmark; Brian Jones, Director of Euro-Plex, in Switzerland; Kjell Arne Orseth, Director of Filmweb, the Norwegian portal specialising in the promotion of films and ticket sales.
This edition includes an article by Orseth on Filmweb, created especially to encourage an interest in the cinema in spectators of all ages, to offer the press and interested media the information necessary for preparing news and to provide distributors with more accurate and more easily accessible figures and reports, as well as giving exhibitors a service for recording data at lower costs than those available by mail and telephone.

FILMWEB
The Norwegian cinema market meets the audience on the Internet

When the Norwegian cinema exhibitors' organization, Film&Kino, received an offer from Coca Cola to create an Internet portal for promoting films and selling tickets, they realized they had to make a choice with regard to who should control this new and exciting opportunity.
Instead of accepting the tempting offer, Film&Kino joined forces with the distributors' organization and the five largest exhibitors. Filmweb was created to encourage an interest in audiences for the world of cinema and to establish the technical platform required to offer services to the industry.
The interesting experience so far is the incredible response from the audience and the media, and the savings resulting from joining industry and audience services.

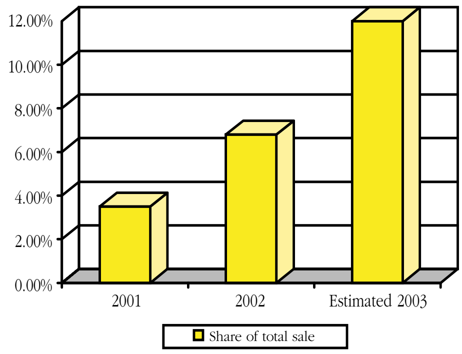
The Media
In Norway most cinemas traditionally advertise in local newspapers. Filmweb has established a service for all distributors where the media have the opportunity to get all useful information through the Internet. The result so far is: more interest from journalists – more than 500,000 downloads per month – with regard to using material presented by the distributors, as it is easy to find and use.
Moreover, this service has saved the distributors a lot of money in printing and distribution expenses, as all information is easy to access.
In the future the industry also plans to include press releases in this service, which hopefully will create even more interest in films.

The Film Industry
In 2003 the industry decided to gather all information about box office and MPA reports digitally through Filmweb.
Box office is now either reported automatically through the ticket systems or manually through the web. The reporting service has enabled distributors to receive faster and more accurate reports than previously and exhibitors have reduced costs compared to reporting by mail and telephone.
Filmweb also provides links to all industry-related web sites and Intranet for organizations in the industry.

The Audience
By making a common portal for information about films and all major cinema operators in Norway, Filmweb was an instant hit with the main audience.
The introduction of ticket sales on the Internet was supported by high availability of Internet (over 50% of Norwegians have an Internet connection), reliability of the services and security in using credit cards for digital transactions.
The fact that bookings only have never been introduced in Norway has also acted as an incentive for ticket sales. Today ticket sales on the Internet are available at most major exhibitors, covering 70% of the total market. Moreover, the fact that the Norwegian cinema market is under-screened in several of the major cities has also encouraged the use of the Internet to secure personal preferences with regard to choice of screen and seating.
So far ticket sales in Norway have generated a market share of 7% for ticket sales in 2002.
Estimates for 2003 give reason for further optimism as the share is expected to reach 12%.
The advantages for the audience are obvious. Ticket sales on the Internet are easy to access, personal preferences are secured and time is saved.
Through the use of vending machines located in the cinema, spectators who have bought a ticket on the Internet avoid spending time queuing at the box office and there is no need to pick up the tickets at a certain time prior to the screening.
The exhibitor will have advantages such as direct transactions, more efficient use of their seating (all "no-shows" are paid for), less need for staff during peak hours and the possibility to trace customer preferences.

Kjell Arne Orseth
Managing Director – Filmweb AS

Growth in Internet ticket sales in Norway



THE NORWEGIAN MARKET

2003 started out with a very positive note for the Norwegian cinema market: in just three months domestic films (such as, for example, *Olsen Gang Jr. – Go Submarine* e *Wolf Summer*, the leading two films in the Norwegian Top-Five) achieved a success surpassing that of the whole of the previous year, with 831,000 admissions. Truly high figures, considering that domestic films in Norway in 2002 had lost, in comparison with 2001, almost half of their audiences, sinking to 7.45% of total admissions[1].
In the month of February alone, the market share in 2003 rose to 20.5% whilst in the same month the previous year it was 2.3%.
It is estimated that in 2003 a total of 18 domestic productions will be released, as against the 15 releases in 2001.
The Norwegian Film Fund has an annual budget of approximately 38.2 million euro, of which one third is reserved for new projects with a high business potential.
As regards screens, which numbered 394 in 2001, there has been an increase of 1.8%: in 2002 there was a total of 401 screens. Admissions, on the other hand, dropped considerably (-3.5%), from 12.48 million in 2001 to 12.04 million in 2002. The number of multiplexes has remained the same from 1997: 4 complexes with a total of 37 screens[2].

1 Sources: Nordic Film & TV Fund; Film&Kino.
2 Source: MEDIA Salles, "European Cinema Yearbook".

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French “Fête du cinéma”, took place in Germany for the first time. During these two days (Sunday and Monday) films of all genres were shown in cinemas at particularly low prices. In the first year the cinemas were somewhat reluctant to participate, but in 2002 over 3,000 of a total 4,792 screens took part in the festival.

Can you already tell us something about last summer?

Figures for the 2003 summer season aren’t still available, and the number of visitors is difficult to estimate. In general, it is noticeable in Germany that the customers´ money is not flowing so freely and that people are particularly reluctant to spend money on cultural events.

Regardless of this, there was a third Kinofest in 2003…

Yes, and for the first time it took place during a week-end, from 27 to 29 June. It was an initial attempt to attract visitors during an otherwise quiet time for film and cinema and to increase the visitor numbers at least during one week-end. Here the price was the deciding factor in attracting families with children, groups and people who are not habitual cinema-goers. The slogan was, in fact: “Three days, three euros”.

Any ideas for the future?

It would certainly be interesting to try and organise a “festival of the cinema” at a European level one week-end, with a slogan emphasising the international nature of the event. The crucial point, in order to involve a large number of spectators, would be the role of the distributors. And an effective advertising campaign would be equally important. We should be glad to exchange ideas with our colleagues in the various European countries on this subject.

Admissions in Germany from 1998 to 2001

Year	Year total	June	% of total	July	% of total	August	% of total
1998	148,875,873	6,114,701	4.1%	10,636,797	7.1%	12,595,233	8.5%
1999	148,995,876	10,836,782	7.3%	10,942,711	7.3%	14,435,664	9.7%
2000	152,533,174	9,378,817	6.1%	13,581,168	8.9%	11,568,203	7.6%
2001	177,925,484	11,476,494	6.5%	13,382,665	7.5%	17,490,979	9.8%
2002	163,909,668	10,932,541	6.7%	13,374,265	8.2%	11,474,936	7.0%

Source: FFA.

AT GIFFONI THE 3RD FOCUS ON EUROPE – KIDFLIX SPECIAL

Fifty exhibitors from different parts of Europe – from Portugal to Finland, from the UK to the Netherlands –, four days devoted to children’s films, in the context of one of the most important international meetings for children’s cinema, the Giffoni Film Festival: from 17 to 20 July at Giffoni (Salerno, Italy) this was the setting for the third Focus on Europe – Kidflix Special, organised by MEDIA Salles. Amongst the topics dealt with in the seminars, also through the presentation of successful experiences, the use of Europe’s film heritage in series especially for schools, the promotion of theatres, the achievement of efficient synergy with schools and institutions. During the course of the event, the participants were able to attend screenings of a panorama of recently-produced European films prepared especially for them by the organisers of the Giffoni Film Festival, watch pre-screenings of European films chosen from amongst the titles competing in the various sections, such as *Wondrous Oblivion* and *Science Fiction*, and meet the young spectators seated alongside them in the cinema. MEDIA Salles also presented the results of the pilot survey “Internet and the Cinema”, carried out on a sample of 213 young people in collaboration with the Club Amici del Cinema of Genoa Sampierdarena (Cinema Don Bosco). The growing use of new technologies for information and communication and the increasingly frequent use by cinemas of one-to-one marketing techniques, by e-mail and SMS has determined increasing interest in the cinema-going profiles of the spectators who are most interested in the new technologies, that often coincide with younger audiences. The MEDIA Salles project, for which Paola Bensi, lecturer at the Università Cattolica of Cremona (Italy), was responsible, intends to respond to this interest. And since the use of new technologies also involves adults, the research will be carried out simultaneously on both segments of the public. Further information on the project and on the application is available in the “Euro Kids” section on MEDIA Salles’ website. In addition, during the event MEDIA Salles presented to the exhibitors a catalogue of children’s films, which can also be consulted in the same section of the website and is periodically updated.

Cristiane Reynaud, of **Cinéma Méliès, Nemours – France**, receives **first prize** at the “**Euro Kids 2003**” awards during the Focus on Europe – Kidflix Special event at the Giffoni Film Festival. On her right, **Ferdinando Cicolella** of **Cinema Cicolella, San Severo – Italy (2nd prize)** and **Lorenzo Ciesco** of **Ciné 220, Brétigny sur Orge – France (3rd prize)**. The “Euro Kids” awards were presented by MEDIA Salles to the cinemas organising the best activities for children in the last year. The film ***One-Way Ticket to Mombasa (Menolippu Mombasaan)***, the first full-length film by the Finnish director **Hannu Tuomainen,** received an award with a view to encouraging the circulation of quality products for young people. The film had great success in its own country with around 150,000 tickets sold in 10 months. The Swedish Non-stop Sales is responsible for international sales.

EXHIBITORS’ COURSE IN DENMARK

From 4 to 8 June, in Ebeltoft, Denmark, the first of the two 2003 editions of the exhibitors’ training course “European Cinema Exhibition: A New Approach” took place. The course was promoted by MEDIA Salles and organised in collaboration with the European Film College and DB, the Danish exhibitors’ association.

At the headquarters of the European Film College, approximately 40 professional cinema exhibitors from 16 countries met for an exchange of experiences and to examine in greater depth various current topics regarding cinema exhibition, which are briefly outlined below.

MANAGEMENT AND MARKETING TECHNIQUES

Human resources as a lever for public relations in marketing was the topic of the theoretical talks by **Patrick Terryn** of the **Kinepolis Group** and the consultant **Henrik Meng**. **Peter Ålbæk Jensen**, producer and General Manager of **Zentropa**, explained the vision that has opened the way for the production of films which have brought Danish cinema to the forefront at an international level. **Chris Hilton**, Director of the **Odeon Cinema** in **London**, outlined the management of the two cinemas in Leicester Square and **Robert Kenny**, Director of the **Curzon Cinemas,** which specialise in arthouse movies, described detailed programming by themes and audience types. The picture of the situation in the UK was enhanced by the long experience of **Film Education**, outlined by its Director, **Ian Wall**.

The new management of the **Empire Bio** in **Copenhagen**, a former warehouse converted into a trend-setting cinema, was presented by its Director, **Mette Schramm**. Also significant is the small-scale experience of the **Cinema Paradiso** of **St. Pölten (Austria)**, a town which is the site of a large multiplex. **Gerald Knell**, the Manager, says: “Our efforts are concentrated on linking the cinema to other cultural institutions and discovering the right formula for including screenings in wider-scale events, with an offer that thus becomes more competitive than that of a multi-screen cinema”.

The novelties from **Nordisk Film Biografer** (DK) were also interesting: the audience-loyalty programme by BioZonen, whose club members number 85,000, and the new B2B department, which organises services for offering to companies at a national level.

DEVELOPMENT TRENDS

On the basis of his experience with **AMC**, **Bruno Frydman** looked back over the evolution of multiplexes, comparing Europe and the United States. This global view was completed by the presentation of the home markets in Hungary, Germany, Sweden, Norway, Austria and Slovenia.

DIGITAL TECHNOLOGY

The comparison between *Electronic* and *Digital* is of great current interest: **Nicolas Hamon** of the **Barco**, compared the existing technology (quality/costs); **Patrick Terryn** identified the strategic objectives of a large group for investing in digital technology. **Rickard Gramfors**, on the other hand, presented the projects of the Swedish **Folkets Hus och Parker (FHP)**: a circuit of 267 single-screen cinemas concentrating on electronic screenings to make distribution more effective and thus to allow more varied programming even in small-town cinemas.

TRAINING COURSE PROMOTED BY MEDIA SALLES

“EUROPEAN CINEMA EXHIBITION: A NEW APPROACH”

Rome, 24-28 September

Second 2003 edition of the training course for exhibitors promoted by MEDIA Salles and organised in collaboration with EFC – European Film College – DB – the Danish exhibitors’ association – and the ANEC.

Presentation of the MEDIA Salles’ Newsletter no. 3/2003.