



an initiative of the MEDIA
Programme of the European Union
with the support of the Italian Government

THE ENLARGEMENT OF THE EUROPEAN UNION: A STATISTICAL VIEW OF CINEMA-GOING

Cinema-going in Latvia

The National Film Centre of Latvia is a public institution under the Ministry of Culture responsible for elaborating and carrying out cultural policy in the film sector. The tasks that the Centre has to perform imply a need for exact information, expressed in comparable figures about the current state of film production and distribution. The data collection has had to be done in a situation where, following the collapse of the previous, state-run system, a completely new one, based on personal enterprise and a free market was emerging. For this purpose a special unit was set up at the Film Centre - the Film Registry - with two main objectives: to collect trustworthy information and to counter piracy.

The Registry was created on the basis of the assumption that every producer or distributor might wish to know the results of his film screenings in Latvia - especially in view of our wish to join the European Union - and that the growing information society is capable of providing the technical means to put the project into practice. So we started from scratch. Fortunately we were members of Eureka Audiovisual, which launched the pilot project of the European Audiovisual Observatory. Our cooperation with this organisation was very useful.

The National Film Centre of Latvia has taken part in MEDIA Salles' activities of data collection and elaboration for the "European Cinema Yearbook" since 1999 and this has been beneficial to the development of our statistics services. During those years, following the demands of MEDIA Salles, we introduced many new items into our databases and started to collect the relevant data. As a result, we now have a sufficiently detailed view of the audiovisual scenario in Latvia and so, hopefully, do the users of MEDIA Salles' "European Cinema Yearbook".

This also provides very good feedback for decision-making and policy-making, especially now that our government is orienting the industry towards domestic audiences, after having joined the European film support mechanisms, MEDIA and EURIMAGES.

In order to avoid making unsubstantiated statements, here are some examples.

As of 1 May 2004, the European Union will consist of 25 countries with 450 million inhabitants. Whilst welcoming these new members - and in particular all those who work in the world of the cinema - I should like us to remember that the strength of this new and increasingly far-flung Europe, lies in its diversity, as the President of the European Commission, Romano Prodi, has emphasised on several occasions. Diverse peoples and diverse cultures that must find room to express themselves in the European Union, both inside and outside the Continent. The cinema is certainly an area where there is room for the dialogue between cultures. Everyone agrees that a film can open a window on the world, offering a way of finding out how other people live, where they have their origins and what their view of the future is.

In a similar way, cinemas themselves can become a meeting place for exchange and getting to know one another. Yet it is not at all certain that all this potential may take concrete shape. It is in the spirit of boosting the cinema and Europe's movie theatres in every way - cultural, economic and social - that MEDIA Salles works. Thanks to the support of the MEDIA Programme and the Italian Government, since 1991 MEDIA Salles has been working on behalf of cinemas and exhibitors in Europe, developing initiatives for the promotion of European films, for training and for information. As can be seen from the work carried out so far, MEDIA Salles has taken every possible opportunity to address its

attention and actual initiatives towards a wider Europe than the one that has constituted the Union to date. As many as 32 countries are, in fact, the object of analysis in MEDIA Salles' survey of cinema-going in the "European Cinema Yearbook"; the Newsletter "European Cinema Journal" has frequently hosted articles on the countries of Eastern-Central Europe and the Mediterranean Rim; MEDIA Salles' courses for exhibitors - thanks to agreements signed with the MEDIA Programme - have already seen the attendance of professional operators from the Baltic Republics, Slovenia, Hungary, Czech Republic, Poland and Bulgaria, whilst the Hungarian exhibitors' organisation already figures amongst the associations that belong to MEDIA Salles.

This is another reason why we were delighted to accept the invitation from Eurovisioni to take part in the Festival "Torn Curtain", that is held in Rome from 23 to 30 April 2004, devoted to the cinema of the ten new member states. We have thus drawn up this statistical panorama, offering basic information on the sector of cinema exhibition. This is also an opportunity to confirm our commitment to working with the institutions and with professional operators, so that the slogan that MEDIA Salles chose at the very beginning of the association's work,

"Europe gets together in the cinema", may come true for ever-increasing numbers of citizens.

Jens Rykaer - *President of MEDIA Salles*

MEDIA Salles' European coming events

On the occasion of the enlargement, MEDIA Salles has organised two important events for 2004 in some of the very countries that are entering the Union:

FOCUS ON EUROPE - KIDFLIX SPECIAL -

Prague and Zlín (Czech Republic),
in collaboration with the
"Zlín Film Festival 2004"
3-6 June 2004

This initiative addresses exhibitors committed to programming for young people and schools.

Enrolments by 4 May
using the application form
available on the MEDIA Salles'
website (www.mediasalles.it).

EUROPEAN CINEMA EXHIBITION: A NEW APPROACH Budapest (Hungary) 22-26 September 2004

Amongst the main topics of this training course specifically addressing exhibitors: promotion and marketing, analysis of different film genres for different sectors of audiences, theatre management, digital cinema. Application forms, available online at www.mediasalles.it, should be returned to MEDIA Salles by 2 August 2004.

THE ENLARGEMENT OF THE EUROPEAN UNION

CYPRUS

	1995	1996	1997	1998	1999	2000	2001	2002	2003
Number of cinemas	17	18	17	17	16	14	17	16	.
Number of screens	22	24	23	26	30	28	43	43	37
Admissions (x 1000)	778	879	931	1 013	842	1 012	858	854	1 038
Frequency per head	1,20	1,19	1,26	1,36	1,12	1,34	1,13	1,12	.
Gross box office (national currency - x 1000)	1 781	2 061	2 610	2 960	2 587	3 313	3 190	.	3 945
Average ticket price (national currency)	2,29	2,34	2,80	2,92	3,07	3,27	3,72	.	3,80
Gross box office (euro - x 1000)	2 997	3 511	4 499	5 109	4 484	5 787	5 554	.	6 727
Films produced in the country	3	1	2	-	-	1	4	.	.

ESTONIA

1995	1995	1996	1997	1998	1999	2000	2001	2002	2003
Number of cinemas	214	197	179	172	172	74	69	69	69
Number of screens	214	197	180	173	174	76	81	81	81
Admissions (x 1000)	1 011 800	1 004 900	973 844	1 060 485	874 560	1 083 634	1 303 846	1 558 067	1 274 120
Frequency per head	0,68	0,68	0,67	0,73	0,60	0,75	0,95	1,14	.
Gross box office (national currency - x 1000)	15 857	25 869	c. 33 200	46 499	40 512	49 336	75 414	91 202	79 890
Average ticket price (national currency)	15,67	25,74	c. 34,09	43,85	46,32	45,53	57,84	58,54	62,70
Gross box office (euro - x 1000)	1 072	1 669	c. 2 100	2 965	2 589	3 153	4 820	5 829	5 106
Films produced in the country	.	.	1	3	3	.	3	3	3

LATVIA

	1995	1996	1997	1998	1999	2000	2001	2002	2003
Number of cinemas	.	.	.	112	115	108	123	103	.
Number of screens	245	137	114	116	119	111	126	107	106
Admissions (x 1000)	1 020	958	1 268	1 406	1 375	1 457	1 152	1 071	1 133
Frequency per head	0,40	0,38	0,51	0,57	0,56	0,60	0,49	0,46	.
Gross box office (national currency - x 1000)	685	772	1 244	1 635	1 829	2 017	1 829	1 908	2 207
Average ticket price (national currency)	0,67	0,81	0,98	1,16	1,33	1,38	1,59	1,78	1,95
Gross box office (euro - x 1000)	971	110	1 898	2 475	3 040	3 805	3 288	3 190	3 281
Films produced in the country	.	.	.	2	3	4	3	5	2

Data taken from MEDIA Salles' "European Cinema Yearbook - 2003 final edition and Source Document"

In 2002 403 films, of which 99 new productions, were screened in 103 premises equipped for film projection. 32 of these are in film theatres, 36 in culture houses, 10 in educational institutions, 2 in public health care institutions and 23 serve audiences belonging to different institutions, enterprises and associations. 21 of the movies screened were produced in Latvia. Total admissions in 2002 were 1 070 672, with a gross box-office of about 3 190 200 euro.

In 2003, admissions increased by 1.7% compared to 2002, totalling approximately 1 089 000; box-office revenues amounted to over 3 340 300 euro, i.e. nearly 5% more than 2002. Moreover, in 2003 the first multiplex - "Forum Cinema" - opened in Riga, the capital of Latvia, with 14 screens, seating 3 200.

Although last year's figures increased in comparison to those of 2002, it should be considered that people in 38 towns and villages out of 70, no longer have the possibility to see films in theatres and that over 90% of the revenues are generated in Riga. These figures show the undesirable effects of the free market and the need to introduce policies able to correct these unwanted consequences. This is one of the most urgent problems the National Film Centre of Latvia is currently trying to solve.

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*Article published in the Newsletter
"European Cinema Journal", no. 1/2004*

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ION: A STATISTICAL VIEW OF CINEMA-GOING

Cinema-going in Estonia

From 1940 to 1991, cinema-going was the most popular form of entertainment in Estonia. From the 1960's to the 1980's, over 20 million people visited cinemas annually, purchasing up to 19 tickets per capita. According to the available data, there were 675 screens in Estonia in 1985, including travelling cinemas. Up to 250 motion pictures a year were screened in the Country, 150 of which were produced in the Soviet Union and 100 abroad. All motion pictures were dubbed into Russian, with Estonian subtitles. An Estonian motion picture would be seen by an average of 200 000-250 000 spectators in the 1960-1980 period. These numbers decreased sharply with the privatisation of cinemas in the 1990's. By 2001, only 12 full-time permanent cinemas had remained in Estonia. As a result of this and the scarce domestic film production, the average number of cinema-goers per Estonian film went down to 3 000-12 000 by the end of the 1990's. In 2002, the Estonian feature *Names in Marble* premiered and broke all box office records by achieving 136 171 admissions in 2002 and 167 399 admissions by 1st June 2003. Comparing cinema-going in the 1990's to that of the 2001-2003 period, significant growth is to be seen. The first multiplex cinema with 11 screens and 1 968 seats opened in Tallinn in 2001, raising total admissions sharply. In the 1991-2001 period, a little over 80 features were screened each year, 80% of which were from Hollywood.

In 2002, Estonian cinemas recorded 1 558 067 admissions, or 1.14 admissions per capita. Box-office revenues amounted to over 5.8 million euro and the average ticket price was around 4 euro.

There are 6 film distributors operating in Estonia in 2003. Two companies, MPDE and BDG, cover the majority of the market. Both companies focus on importing Hollywood productions, although BDG also imports European films. MPDE is a subsidiary of Finnkino, a Finnish company representing major US studios, which also owns the only multiplex cinema with 11 screens in Estonia. MPDE also manages one 2-screen cinema in Tallinn and one in the second largest Estonian city - Tartu - under long-term lease agreements. MPDE is the leading distributor on the Estonian film market, having most licenses from the major Hollywood studios. The motion pictures distributed by MPDE cover approximately 75% of the total number of admissions and 86% of box-office revenues. Other companies also distribute European films, but have a

LITHUANIA

1995	1995	1996	1997	1998	1999	2000	2001	2002	2003
Number of cinemas	91	78	74	65	.
Number of screens	.	.	115	105	99	88	84	79	83
Admissions (x 1000)	680	470	565	1 594	1 780	2 103	2 367	1 916	1 396
Frequency per head	0,48	0,57	0,68	0,55	-
Gross box office (national currency - x 1000)	11 883	14 798	15 738	16 068	13 422
Average ticket price (national currency)	6,68	7,04	6,65	8,39	9,61
Gross box office (euro - x 1000)	2 948	4 277	4 427	4 654	3 888
Films produced in the country	1	-	1	1

POLAND

1995	1995	1996	1997	1998	1999	2000	2001	2002	2003
Number of cinemas	721	706	686	686	695	687	649	617	.
Number of screens	730	717	698	714	755	824	852	854	c. 880
Admissions (x 1000)	22 613	21 440	24 330	20 318	27 516	20 892	27 650	27 091	c. 25 264
Frequency per head	0,59	0,56	0,63	0,53	0,71	0,54	0,72	0,70	.
Gross box office (national currency - x 1000)	c. 98 100	124 411	c. 168 000	c. 203 300	337 538	248 600	c. 365 000	c. 368 000	.
Average ticket price (national currency)	c. 4,34	5,80	c. 6,91	c. 10,01	12,27	11,90	c. 13,20	13,58	.
Gross box office (euro - x 1000)	c. 30 492	35 016	c. 42 518	c. 50 943	77 863	64 075	c. 100 751	c. 92 474	.
Films produced in the country	23	17	20	14	23	22	19	18	.

CZECH REPUBLIC

1995	1995	1996	1997	1998	1999	2000	2001	2002	2003
Number of cinemas	800	750	730	745	710	686	660	665	.
Number of screens	817	765	747	764	740	743	749	794	c. 829
Admissions (x 1000)	9 253	8 854	9 815	9 252	8 371	8 719	10 363	10 693	12 140
Frequency per head	0,90	0,86	0,95	0,90	0,81	0,85	1,01	1,04	.
Gross box office (national currency - x 1000)	255 000	303 499	437 000	509 000	496 000	593 000	817 700	946 000	.
Average ticket price (national currency)	27,56	34,28	44,52	55,02	59,25	68,01	78,90	88,47	.
Gross box office (euro - x 1000)	7 333	8 877	11 349	14 485	13 762	17 148	24 576	30 623	.
Films produced in the country	23	20	20	14	17	14	18	19	.

Data taken from MEDIA Sales' "European Cinema Yearbook - 2003 final edition and Source Document"

SLOVAK REPUBLIC

	1995	1996	1997	1998	1999	2000	2001	2002	2003
Number of cinemas	360	334	c. 330	c. 330	335	279	276	283	c. 265
Number of screens	365	341	c. 337	c. 337	342	292	289	308	c. 287
Admissions (x 1000)	5 643	4 851	4 041	4 082	3 030	2 646	2 848	3 013	c. 2 968
Frequency per head	1,05	0,90	0,75	0,76	0,56	0,49	0,53	0,56	.
Gross box office (national currency - x 1000)	150 135	154 548	159 230	194 040	160 326	151 529	201 612	245 558	c. 256 139
Average ticket price (national currency)	26,60	31,86	39,41	47,53	52,92	57,28	70,80	81,51	c. 86,30
Gross box office (euro - x 1000)	3 930	3 918	4 156	4 614	3 720	3 529	4 651	5 827	c. 6 222
Films produced in the country	3	2	3	1	5	3	2	5	.

SLOVENIA

	1995	1996	1997	1998	1999	2000	2001	2002	2003
Number of cinemas	98	97	91	90	85	.	70	66	.
Number of screens	.	99	93	93	88	c. 84	92	88	.
Admissions (x 1000)	2 926	2 714	2 503	2 569	1 965	2 077	2 466	2 776	c. 2 260
Frequency per head	1,47	1,36	1,26	1,29	0,99	1,04	1,24	1,39	.
Gross box office (national currency - x 1000)	.	1 274 393	1 189 779	1 298 698	974 912	1 270 976	1 734 267	2 157 442	.
Average ticket price (national currency)	.	469,56	475,34	505,53	496,14	611,92	703,37	777,05	.
Gross box office (euro - x 1000)	.	7 256	6 398	6 967	4 952	5 989	7 885	9 390	.
Films produced in the country	2	3	3	3	4	5	8	9	.

HUNGARY

	1995	1996	1997	1998	1999	2000	2001	2002
Number of cinemas	.	488	506	501	480	.	427	393
Number of screens	584	550	580	625	603	562	622	605
Admissions (x 1000)	13 954	13 279	16 443	14 570	14 388	14 287	15 693	15 278
Frequency per head	1,40	1,30	1,62	1,44	1,43	1,42	1,54	1,50
Gross box office (national currency - x 1000)	2 292 838	2 876 954	4 715 354	5 300 055	6 529 530	7 683 029	9 983 451	11 024 823
Average ticket price (national currency)	164,31	216,65	286,77	363,76	453,82	537,76	636,17	721,60
Gross box office (euro - x 1000)	12 779	14 110	21 068	20 833	25 724	28 996	39 822	46 333
Films produced in the country	.	15	23	24	15	.	.	21

Data taken from MEDIA Salles' "European Cinema Yearbook - 2003 final edition and Source Document"

minor share of the distribution market. BDG owns the Buena Vista license in the Baltic States: Estonia, Latvia and Lithuania. Tallinnfilm, a subsidiary of the Estonian Film Foundation, has the rights to the films produced in the Tallinnfilm studios before 1995, including most of the post-war Estonian film production. In addition, Tallinnfilm also distributes some European art-house films. Up until 2002, the producers of Estonian films distributed their films themselves. In 2002, for the first time, the two local box-office hits Names in Marble and Made in Estonia were handed to the largest Estonian distributors, MPDE and BDG.

The Black Nights Film Festival which takes place at the beginning of December every year offers the best access to European art-house films. The main objective of the Festival, which has been taking place in Tallinn since 1997, is to give visibility to new foreign feature films of high artistic quality.

In 2002, the main programme of the Festival presented 158 films from 48 countries. Amongst the most widely-seen films in 2002 were Heaven (2 075 visitors in 3 shows), Hable con Ella (1 820 visitors), The Magdalene Sisters (1 466 visitors), Lilja 4-ever (1 372 visitors), House of Fools (1 211 visitors in 1 show). A total of 39 500 people visited the Festival in 2002.

The non-profit organisation Cinemabus has introduced alternative film distribution in Estonia since the summer 2001, taking travelling cinema to places in the Country which lack the opportunities to show films and the necessary technical equipment.

The nucleus of Cinemabus involves young film enthusiasts who, besides screening the films, also teach the local children how a film is produced. For more information about this project, see the web site www.kinobuss.ee

Due to the decrease in the number of cinemas and the closing of local cinemas, the new government, formed in 2003, has declared the launch of the programme "The cinema returns" one of the main initiatives of cultural policy.

This step guarantees the State support for the distribution of art-house films and renewed possibilities for showing films throughout Estonia.

The programme also foresees the State support for the purchase of technical equipment for local cinemas and for the screening of art-house films.

The Estonian Film Foundation and Tallinnfilm plan to establish a permanent art-house cinema in Tallinn in 2004.

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Article published in the Newsletter
"European Cinema Journal", no. 4/2003