



an initiative of the European Union  
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Via Soperga, 2 • 20127 Milano • Italy  
tel. +39.02.66984405  
fax +39.02.6691574  
e-mail: infocinema@mediasalles.it  
http://www.mediasalles.it



# European Cinema JOURNAL

MEDIA SALLES

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Festivals - big festivals such as Cannes, Venice, Berlin - play a vital role in promoting the cinema in general and European cinema in particular. They provide the opportunity - often a unique one - to get to know films from far-off and often little-known film-makers and also to see works by our own neighbours, our cousins from across the border, since globalization in this case seems to mean for the most part unification of what is on offer - monoculture.

"Of the 500 films produced every year for the cinema in Europe," reads the Proposal for Media Plus, "only 20% become the object of distribution outside the main country of production, equal to a mere 7% of the market."

This is the "problem of European cinema". What can be done about it?

First and foremost information can be spread. Alongside the big festivals, there are many others - the European Coordination of Film Festivals counts over 150 in the various countries of the EU - from the larger ones to the very smallest and from the general to the highly specialised, which make European works known, working to accustom the public to a different range of tastes compared to the single flavour supplied by dominant film production.

Next promotion. The creation of events, opportunities to meet, familiarity with different sorts of production through monographs, film-weeks, retrospectives. This is mainly the direction in which the national agencies work, accompanying their individual initiatives with co-ordinated activities - something which will hopefully become more and more frequent.

Moreover the different markets can be studied, to locate unfilled demands for European films or potential to be followed up.

However, the big leap forward is yet to be made: presence on the market. For this purpose the national and international professional conventions are essential - Amsterdam, Atlantic City, Hong Kong, Las Vegas - where films are presented directly to exhibitors, the final link in the chain of the cinema industry - the people in touch with cinema audiences. Here again European films must be seen, supported, promoted. It goes without saying that the strongest film industry in the world has understood this for a long time and acts accordingly.

In this latter sector, MEDIA Salles concentrates one of its activities, having taken part in professional meetings in the United States and Asia, as well as in Europe.

## MEDIA Salles at the Cannes Market 2000

**10 - 20 May**

Visit us at Village International  
MEDIA Pavilion  
Esplanade Georges Pompidou  
Tel.: 04.92980038

*The European Cinema Journal*,  
no. 2 - year 2000,  
and the *European Cinema Yearbook*  
1999 edition - new reprint,  
will be available at the stand.

**16 May, 3 - 4:30 pm**

previews of the MEDIA Salles research  
on the US market  
presented by  
Sydney Levine (Film Finders)  
at the panel  
*What Buyers are Looking For: Art vs.  
Commerce* at the Variety Pavilion.

**18 May, 6 pm**

aperitif at the MEDIA Pavilion Bar,  
for the launch of the  
*Cinema Research Library*,  
the new section  
of the MEDIA Salles Web site.

The aim is to bring professionals - and exhibitors in particular - closer to European films: trailers and previews of European films have, for the first time, been presented at international meetings which up to now had only seen the presentation of US productions. The use of videocassettes, CD-roms, catalogues and advertising material, participation by delegations of artists and an archive of information on recent European films, accessible over the Internet - all this has meant a tangible, concrete European presence.

In order to boost the action already taken, MEDIA Salles has also decided to dedicate part of its research activities to an analysis of the United States market, in order to gain an understanding of the present situation and what might be the access routes for European films. We should not forget that technological developments are transforming the audiovisual market, too, and that content will increasingly become the object of the market: the European market can become a primary source, thanks to its characteristically wide variety.

Romano Fattorossi  
President of MEDIA Salles

## Cinema Exhibition in Europe in 1999

1999 began in an atmosphere of caution, almost of trepidation. Following a 1998 characterised almost everywhere by an increase in admissions - exceptional in many countries - thanks to the extraordinary success of "Titanic", a drop was expected to affect all markets.

From the 1999 results, although not yet final, a largely varied situation is emerging in Western Europe, with some markets that have seen a drop in audiences and others that have seen an increase or have continued to see increases.

The five major markets, too, - that is those which sell at least 100 million tickets - are no exception to the 1999 trend, which is that of "variety".

Italy and France are countries that have not managed to escape the forecasts. France loses 15 million spectators compared to 1998, a year in which it saw an extraordinarily high increase (+14,2%). It does, however, remain the foremost European market, closing 1999 with a result that is decidedly better than 1997. The provisional data for Italy shows a drop of approximately 11% compared to 1998. In this case, too, the 1999 result is better than 1997. Germany, instead, has kept all the spectators gained in 1998, confirming its position as the second European market. The basic stability of admissions in German cinemas (+0,1%), combined with the drop in France, has meant that Germany follows France closely in terms of the number of tickets sold in absolute terms. The decrease in average ticket prices is, however, a specific feature of Germany's. The reasons for this decrease may be attributed to phenomena such as the progressive development, from the end of 1997 onwards, of "Niedrigpreis-Kinos", which show films 4-5 months after their initial release, at a price of between 2,5 and 5 marks, but also to the fierce competition in areas where there is a high concentration of cinemas.

There are important markets that saw an increase in audiences in 1999: Great Britain (+3,2%), but above all Spain. With a striking rise of +17,1%, equivalent to more than 19 million tickets, Spain records the eleventh consecutive increase in yearly cinema-going. The increase in the number of screens also continues to be of importance, recording a positive variation of 11,9% in 1999. With over 131 million spectators, Spain is closing

(continues on page 2)

“Focus on Europe”, the MEDIA Salles initiative for the promotion of European films on an international scale, will take place at Cinema Expo International in Amsterdam. With the support of the MEDIA Promotion and the Italian Government, and thanks also to the co-operation of national film institutes and sales agents, MEDIA Salles will be promoting the most recent European products. This year participants will once again find plentiful documentation at the MEDIA Salles stand, as well as promotional material and trailers of the titles coming out in Europe in the next few months. They will also be able to surf the European Cinema On-line Database and obtain free information over the Internet on the most recent European films and companies operating in the field of production, distribution, international sales and exhibition. Through “Focus on Europe”, advanced showings of European films on the big screen will be offered to the 2 000 and more

the lead of the third largest market in Europe, Great Britain, which, in 1999, amply recovered the spectators that - contrary to the trend in the rest of Western Europe - it had lost in 1998. 139,5 million tickets were sold in Great Britain in 1999; not since 1972 can a better result be found. The variety of trends is also a feature of the smaller markets, where figures are objectively limited. A situation which is stable compared to the excellent 1998 result (+0,1%) is to be found in Ireland, a market which has gained around five million spectators over the past ten years, achieving the highest per capita frequency in Europe (3,35 in 1998). In the north of Europe there is on the one hand a rise in admissions in Sweden (+1,0%) and in Finland, where the growth rate has reached a record 10%, and, on the other hand, the decreases, although slight, in Denmark and

(continues on page 3)

### The development of multiplexes in Europe

Country	January 1999		January 2000	
	sites	screens	sites	screens
A	9	86	15	145
CZ	1	8	2	22
D	70	694	87	846
E	60	642	99	1 019
F	73	825	84	962
FIN	1	10	3	34
I	8	82	12	125
PL	1	8	4	43
UK	113	1 198	125*	1 330*

\* as at 31 October 1999

### Screens and admissions 1997 - 1998 - 1999

Country	Screens					Admissions (X 1 000)				
	1997	1998	1999	var. % 1997-1998	var. % 1998-1999	1997	1998	1999	var. % 1997-1998	var. % 1998-1999
	A	424	424	.	-	.	13 717	15 219	15 024	10,9%
B	475	497	495	4,6%	-0,4%	22 073	25 386	22 657	15,0%	-10,8%
CH	503	518	471	3,0%	-9,1%	15 552	15 918	15 428	2,4%	-3,1%
D	4 128	4 244	4 651	2,8%	9,6%	143 122	148 876	149 000	4,0%	0,1%
DK	320	331	333	3,4%	0,6%	10 843	11 011	10 915	1,5%	-0,9%
E	2 584	2 997	3 354	16,0%	11,9%	105 045	112 143	131 348	6,8%	17,1%
F	4 659	4 764	ca 5 000	2,3%	5,0%	148 935	170 110	155 000	14,2%	-8,9%
FIN	321	331	362	3,1%	9,4%	5 943	6 395	7 035	7,6%	10,0%
I	2 456 <sup>1</sup>	2 619 <sup>2</sup>	ca 2 740 <sup>3</sup>	6,6%	4,6%	102 566	118 426	ca 105 000	15,5%	-11,3%
IRL	228	261	292	14,5%	11,9%	11 491	12 387	12 400	7,8%	0,1%
L	26	21	21	-19,2%	-	1 186	1 415	1 315	19,3%	-7,1%
N	395	393	398	-0,5%	1,3%	10 948	11 526	11 351	5,3%	-1,5%
NL	444	461	462	3,8%	0,2%	18 934	20 094	18 600	6,1%	-7,4%
S	1 164	1 167	1 132	0,3%	-3,0%	15 210	15 819	15 982	4,0%	1,0%
UK	2 369	2 589	2 758	9,3%	6,5%	138 922	135 217	139 500	-2,7%	3,2%
<b>Total</b>						<b>764 487</b>	<b>819 942</b>	<b>810 555</b>	<b>7,3%</b>	<b>-1,1%</b>
CY	23	26	28	13,0%	7,7%	931	1 013	842	8,8%	-16,9%
CZ	747	764	710	2,3%	-7,1%	9 815	9 252	8 371	-5,7%	-9,5%
EE	111	111	.	-	.	974	1 060	875	8,8%	-17,5%
LV	114	116	119	1,8%	2,6%	1 268	1 406	1 375	10,9%	-2,2%
RO	451	379	315	-16,0%	-16,9%	9 456	6 799	4 192	-28,1%	-38,3%
SK	296	296	311	-	5,1%	4 041	4 082	3 030	1,0%	-25,8%

<sup>1</sup>Screens with more than 60 days of activity per year    <sup>2</sup>Idem    <sup>3</sup>Idem

1997 and 1998 figures: “European Cinema Yearbook – 1999 edition” (<http://www.mediasalles.it>). 1999 data is provisional. Data may be reproduced on condition the source is mentioned.

European exhibitors and distributors on the leading world markets, who meet each year at Amsterdam. This is the fourth time that "Focus on Europe" goes to Amsterdam. Highlights of the previous editions included the screening of the films "La Vita è Bella" (Life is Beautiful) by Roberto Benigni, "Todo sobre mi Madre" (All about my Mother) by Pedro Almodóvar and "Den Eneste Ene" (The One and Only) by Susanne Bier, as well as the round-table "Focus on European Exhibition", sponsored by MEDIA Salles with Dodona Research. This year, too, the opening seminar of "Focus on Europe" on the morning of 26 June, will be an opportunity for participants at Cinema Expo International to obtain the most up-to-date information on trends in the sector. Further details can be requested by e-mail from: [database@mediasalles.it](mailto:database@mediasalles.it)

Norway. In these cases, too, the 1999 results are better than in 1997. A similar decrease in audiences is to be found in Austria, a market that has nevertheless acquired more than a million spectators since 1997. Steeper drops

## **Euro Kids Network 2000**

The European Commission has allocated Euro 600 000 to Euro Kids Network for 2000. The Network – set up and coordinated by MEDIA Salles – is a circuit of cinemas which since 1996 links and supports cinema theatres committed to screening films for children, young people and schools, giving emphasis to European productions. The Network can currently count on more than 300 screens in 16 European countries. Member cinemas of the Network can receive financial contributions worth up to Euro 12 000 per year, on the basis of their programming data in respect of the European films for younger audiences.

MEDIA Salles also offers training and information services to participating theatres, such as the annual meeting of Euro Kids Network members. This gives exhibitors an opportunity to exchange ideas and best practice, as well as to gather information on new product for younger viewers.

In 2000 the Euro Kids Network meeting will be held from 27 to 29 October in Varese, Italy, where the event will once again be held in tandem with Kid Screen, the international convention on cinema for young people and media education.

## **Euro Kids Network 2001**

### **Call for Applications**

The final date for applications to join Euro Kids Network 2001 has been set at 31 July 2000.

The Conditions of Entry and the Application Form can be requested directly from MEDIA Salles offices (E-mail: [eurokids@mediasalles.it](mailto:eurokids@mediasalles.it)) or else from MEDIA Desks and Antennae. They may also be downloaded off the Internet at the MEDIA Salles website (<http://www.mediasalles.it>).

have been recorded in Switzerland (-3,1%) and in Benelux: Luxembourg (-7,1%), Netherlands (-7,4%), Belgium (-10,8%).

It has often been said that cinema exhibition in Europe assumes specific features on each single market: this seems to be particularly true of 1999, despite phenomena such as the development of the "multiplex model" or the concentration of box-office on a relatively limited number of films, which regard practically all countries. An overall trend in frequency has been found on the Eastern European and Mediterranean Rim countries.

Initial data shows an overall decrease, with its peak in Romania. This market has in fact recorded a 38,3% drop. Slovakia, which had seen a fairly modest increase between 1997 and 1998, has lost a million spectators, recording a 25,8% decrease. The Czech Republic, which had already lost spectators in 1998, has suffered a further decline in numbers. With 8,4 million tickets sold, 1999 proves to be the worst year for one of the most important Eastern European markets.

Elisabetta Brunella

## **Presented at the Berlin Festival the European Cinema Yearbook and the Source Document**

On 14 February at the last Berlin Festival, MEDIA Salles presented the eighth edition of its yearly statistical report on European cinema, the European Cinema Yearbook.

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 penetration of multiplexes and the trends in cinema-going, and Jacques Delmoly, head of the MEDIA Program, who emphasised the fact that the MEDIA Salles Yearbook has firmly established itself as a reference tool for operators in the film industry. The objectives of the European Cinema Yearbook are to broaden the types of information given and continue to extend the analysis to a growing number of countries. The final edition consists of two volumes, the first of which provides, by means of numerous comparative tables, the main indicators of European cinema exhibition. It also includes a detailed analysis of the 474 multiplexes operating in Europe at 31 October 1999, revealing, country by country, the number of sites, screens and seats and the names of the exhibiting companies.

It can thus be seen that the multiplex - by which MEDIA Salles defines, for statistical purposes, complexes with at least 8 screens - existed in 1998 and 1999 in 21 of the 31 countries analysed. At 1 January 1999 there were 402 multiplexes, for a total of 4 252 screens, representing 15,9% of all screens in the 31 countries and 16,9% of screens in those countries counting at least one multiplex. At 31 October 1999 the number of multiplexes had grown to 474, for a total of 5 002 screens. The second volume, entitled "Source Document", contains, in approximately 500

pages, profiles of the 31 countries examined, providing forty types of information for each one. Amongst the new features of the eighth edition are the data on Croatia, Yugoslavia and Latvia.

In order to allow for a closer evaluation of the "multiplex phenomenon", as from this year MEDIA Salles has started to include in the national profiles publication of data on the numbers of tickets sold in cinemas with 8 or more screens. It can thus be seen, for example, that the 16 multiplexes in Belgium, whose screens amount to 42,7% of the national total, accounted for 17 million admissions in 1998 - that is 68,2% of the tickets sold in the country.

A further innovation in this edition is the "Breakdown of admissions and gross box office of European films, by nationality", which allows for an evaluation of how European products circulate outside their country of origin.

The two volumes constituting the Yearbook are available at the MEDIA Salles website on the Internet: <http://www.mediasalles.it>



From right to left:  
Joachim Ph. Wolff, Elisabetta Brunella,  
Romano Fattorossi, Jacques Delmoly, Jens Rykaer

## Received and Published "Lucas"

LUCAS - a festival entirely dedicated to films for children and young people - will be held at Frankfurt am Main from 11 to 17 September 2000. The 15 films competing will be judged by three international juries: one will consist entirely of children, another of young people and the third of professionals who are specialists in the field of film for young audiences. The event sets out to give a wide-ranging overview of the international production for young audiences. Information on the competition and on participation at the festival can be obtained from the following address:

LUCAS 2000 Internationales Kinder-und-Jugendfilmfestival  
Schaumainkai 41, D-60596 Frankfurt.  
Tel. +49 69 / 620167 - Fax +49 69 / 6032185  
E-mail: lucas@deutsches-filmmuseum.de

## Subscription to the Newsletter for 2000

If you have received the *European Cinema Journal* by mail, it means that you are on our mailing list and that you will always receive the issues published in the year 2000 free of charge.

If you happened to pick up the *European Cinema Journal* during a cinema event and you wish to be included in our mailing list, please send a message to: newsletter@mediasalles.it, or fax it to: +1 781 9988427

## News From The States

by Sydney Levine  
FILM FINDERS

John Cooper, programmer for Sundance Film Festival will now take on the additional job of programming the first Sundance Cinema in Portland Oregon, a seven screen multiplex. The first film to be programmed is 'Everything Put Together' which premiered at the Festival this January. Further programming developments include their plan to show shorts before each feature and to have a running Sunday all day program of documentaries. There will be a café which will also run shorts and perhaps documentaries. Non-English language films will also be programmed.

The Loews Cineplex theatre chain has started an independent film program in 16 cities as the exhibitor seeks to boost second and third tier market interest in foreign and independent films. Its 'Shooting Gallery Film Series' comes from the Shooting Gallery and is showing 'Judy Berlin' (USA 1999), 'Orphans' (UK 1997), 'Such a Long Journey' (UK-Canada 1998), 'Southpaw' (Ireland-UK 1999), 'Croupier' (France-Germany-Ireland-UK 1998) and 'Adrenaline Drive' (Japan 1999).

European film distributors should see more growth in income than their American counterparts over the next five years, according to forecast by the international investment bank Schroder, as published in Screen Finance February 4, 2000. However American distributors will maintain their 88% share of worldwide revenues. European distributors should see their revenue increase 10,9% per year from \$2,085 billion in 1998 to \$3,5 billion in 2003.

The Germans are coming to town. Four companies opened offices in L.A. in February including Kinowelt USA who has tapped Chris Sievernich to head up the new operation. ARD, a German broadcaster opened its acquisitions office in Santa Monica February 21 headed by Herbert von Spreti. Austrian company DoRo Productions opened in Santa Monica; Telemunchen, Germany's second largest rights trader has opened in N.Y., headed by former CBS Broadcast International President Rainer Siek. His office is also representing TMG partners EM.TV and pan European broadcasting ally SBS Broadcasting. Also in L.A., Intertainment's office is headed by Jan Vocke.

## Landmark Theatres Celebrates It's 25<sup>th</sup> Anniversary by Honoring International Cinema

From one single-screen theatre in Los Angeles, Landmark Theatres has developed into the USA's premiere exhibitor for specialized and foreign-language films, with 52 theatres representing 162 screens.

To celebrate our 25<sup>th</sup> anniversary in 1999 we announced the "Landmark's Theatres' Favorite Foreign Film Poll", explaining the concept as follows: "There is an enormous body of influential and entertaining work from the world of international cinema that merits greater recognition. Honoring international filmmaking is a wonderfully appropriate way to celebrate our own 25-year history." To make the survey truly national we relaunched our long dormant website - www.LandmarkTheatres.com - and enlisted the support of one of the country's largest retailers of books, music and video, Borders Books and Music. A total of some 300 locations across the U.S. included a few non-Landmark Theatres, such as Dan Talbot's vaunted Lincoln Plaza Cinema in New York City. Landmark created a ballot of 600 titles. Filmgoers were asked to nominate their five favorite foreign films of all time from the list, or to write in their own nominees. In order to be eligible, a film had to be made by a foreign filmmaker in a language other than English.

A celebratory prize giveaway encouraged participation. The Grand Prize was a six night/seven day trip for two to Hong Kong, provided by the Hong Kong Tourist Association. We also awarded four First Prizes - trips for two to the Maui Film Festival in Hawaii. Trips to the Seattle International Film Festival, gift certificates to Borders, annual passes to Landmark Theatres and a myriad of local prizes (including foreign language classes, dinners at restaurants featuring international cuisine and internationally made products at local specialty stores).

The Poll ran from August 1 through October 31, 1999. ConsumerQuest, an independent market research firm in Los Angeles, tabulated the results. In over 35 000 ballots, more than 650 films in 16 different languages received votes. They came from 21 countries, with France, Italy, Japan and Germany receiving the most nominations.

On January 16, 2000 Landmark announced the results at the Palm Springs International Film Festival, at a seminar sponsored by

*Daily Variety* and Landmark Theatres and featuring international filmmakers of the calibre of Pedro Almodóvar, Hector Babenco, Milos Forman, Carlos Diegues and Tony Bui.

The voting trend is open to many interpretations. Films seen widely in the States received the most votes, no doubt because many voters had only limited exposure to foreign language films. Titles such as *Wings of Desire* and *Ran* received more votes than later releases like *Kolya* or *The King Of Masks*, refuting the argument that films recently released in the U.S. enjoyed an advantage. But timing may indeed have helped Vittorio De Sica's *The Bicycle Thief*, recently reissued in the U.S., into the top 10. Its success speaks volumes about the value of re-releasing older masterpieces. That classic films like *The Bicycle Thief* and Kurosawa's *The Seven Samurai* received so many votes across such a broad demographic spread suggests that older foreign films can resonate with today's filmgoers. European Cinema dominated overall, but there was also an esoteric preference for films about food, with *Like Water For Chocolate*, *Babette's Feast* and *Eat Drink Man Woman* highly ranked. Unlike the American Film Institute's much-reported 100 Best American Films poll, our Favorite Foreign Film Poll was not restricted to film critics, journalists, scholars and industry professionals.

If a wider discussion about the relative merits of individual foreign language films resulted from the outcome of the poll, the profile of international films will have been enhanced. That was a primary objective of this exercise and one that Landmark Theatres achieved in a unique and successful way.

Cary Jones - Landmark Theatres

Rank	Title	Primary Country	Year	Primary Language
1	Life Is Beautiful	Italy	1997	Italian
2	Cinema Paradiso	Italy	1988	Italian
3	Il Postino (The Postman)	Italy	1994	Italian
4	Like Water for Chocolate	Mexico	1992	Spanish
5	Das Boot (The Boat)	Germany	1981	German
6	Babette's Feast	Denmark	1987	Danish
7	Gods Must Be Crazy, The	Botswana	1981	Afrikaans
8	Seven Samurai, The	Japan	1954	Japanese
9	Shall We Dance?	Japan	1996	Japanese
10	Bicycle Thief, The	Italy	1948	Italian
11	La Femme Nikita	France	1990	French
12	La Cage aux Folles	France	1978	French
13	My Life as a Dog	Sweden	1985	Swedish
14	Central Station	Brazil	1998	Portuguese
15	Run Lola Run	Germany	1998	German