CINEMA D'EUROPA
MEDIA SALLES

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MEDIA

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EU EXTENSION: OPPORTUNITIES AND RISKS

During the Council of the EU Ministers of Culture on 24 November, the Italian Minister Giuliano Urbani presented the main objectives of audiovisual policy, established with the help of the meetings held during the Italian term of Presidency on 30 August at Venice (Italy) and at Taormina (Italy) on 15 and 16 November.
The latter conference, which was attended by 150 experts, concluded by drawing up guidelines on four "critical" topics: cultural diversity, the role of televisions in promoting the cinema, support policies for the audiovisual industry and the relationship between national funding and Community resources. These are topics whose importance is even more evident during a phase that sees the extension of the MEDIA Plus Programme until 2006 and the definition of the Programme's "new generation", due to start in 2007, in addition to the entry of 10 new countries into the European Union. The opportunities and risks of EU extension for the audiovisual industry were, in fact, the common background against which the various topics were discussed. In relation to this, **Gianni Profita**, Director General for the Cinema at the Italian Ministry of Cultural Affairs, pointed out that "the strong point of a European policy on audiovisuals is its ability to maintain and encourage cultural diversity, at the very time when the Union is welcoming 10 new countries". This makes it more urgent than ever to "work together, with a political approach, in other words concentrating not only on economic issues, but also on social and cultural ones".
Whilst Profita hands over to his Irish colleague, **Sabina O'Donnell**, representative of the country that will follow Italy in the Presidency of the Union and during whose term of office the extension of MEDIA to 2006 will be voted, he has proposed Rome as the venue for a meeting in 2005 "to be an important occasion for reflection and study at a time of decisive changes such as those that the European audiovisual industries and markets are experiencing". Recalling the entry of her own country into the European Union thirty years previously, O'Donnell emphasised that "Ireland will be ready to offer a warm welcome to the new countries entering the EU during its term of Presidency. It will be a particularly important moment, since the economic and social scenarios will undergo quick changes. This is another reason why it will be useful to follow the political guidelines drawn up during the Italian Presidency". The Director of the MEDIA Programme, **Jacques Delmoly**, according to whom "these meetings are necessary to elaborate a European audiovisual policy", stressed the "necessity, in order for a young policy like this to develop and gain legitimacy, of centres for reflection on strategies – like those in America – and of precise statistics, where the transparency of the data is necessary".
These are both issues considered by many to be of prime importance.
Joachim Ph. Wolff, for example, in his presentation of the Yearbook edited by MEDIA Salles, the organisation of which he is Vice-President, confirmed that "it is a priority to dispose of common tools of analysis for the cinema market, as well as common rules on classification which make it possible, for instance, to render the interpretation of a film's nationality clear and free of ambiguity". In addition, **Primitivo Rodriguez**, President of the FEECE (Federaciòn de Entidades de Empresarios de Cine de España), speaking of the importance of occasions for reflection, emphasised the need for European exhibitors to play a significant role in these, "because if a film is successful in the cinemas, its life off the big screen will be profitable, too, and the whole of the audiovisual market will benefit from this". Amongst the proposals is that of automatic support to cinemas for the dissemination of European films. "This may not be easy to put into practice", said Rodriguez, "and it may take time. But it must be discussed; an attempt must be made to open up new roads, since, without adequate support for cinemas, European films are unable to increase their market shares". This is a problem which, whilst being extremely topical in Western Europe, is even more strongly felt in the Eastern countries, some of which are about to enter the Union.
In this respect, **Jacek Fuksiewicz**, Director of the Department for the Cinema and Audiovisuals of the Polish Ministry of Cultural Affairs, expressed his hope that "entry into the European Community will help Polish films to circulate and penetrate the European market".
The hope was echoed by **Balázs Zachar**, Vice-Director of the Hungarian Ministry of Cultural Heritage, who placed emphasis on the fact that, faced with wide differences in the development of the cinema sector in the countries entering the Union, work should be carried out to build "common economic bases and possible forms of cooperation, through the elaboration of national policies on the one hand, and the creation of contacts with the other countries on the other". MEDIA Salles, which has been following trends on the cinema markets in the countries of Central and Eastern Europe for several years, reserving space for them on these very pages, has an important new development in view: Budapest will, in fact, host the exhibitor training course **"European Cinema Exhibition: A New Approach"**, in collaboration with the European Film College, Magyar Filmunió and the Danish and Hungarian Exhibitors' Associations, **from 22 to 26 September 2004** (see page 4). It will be an opportunity for collaboration and exchange, made all the more significant thanks to the joint support that will be provided by the MEDIA Programme, the Italian Government (already supporters of previous editions of the course) and the Hungarian Ministry of Cultural Heritage.

MEDIA SALLES' NEW YEARBOOK presented at Taormina

On 15 November the "Meeting of experts on the reform of the instruments to encourage the European audiovisual industry", organised in Taormina (Italy) by the Directorship General for the Cinema during the Italian term of EU Presidency, hosted the presentation of the new edition of the "European Cinema Yearbook – 2003 advance edition", produced by MEDIA Salles.
After the introduction by Gianni Profita, Director General for the Cinema, Joachim Ph. Wolff, Vice-President of MEDIA Salles, outlined the content of this twelfth edition of the Yearbook. It emerges that in 2002 the number of tickets sold on the 18 markets of Western Europe grew by 0.9%, rising from 958 to 966 million.
Instead, admissions dropped in Eastern European countries and on the Mediterranean Rim, recording an overall dip of 4.6%, and falling from 106 to 101 million tickets sold from 2001 to 2002.
As for screens, this edition of the Yearbook offers an even more detailed comparison of Europe and the United States. It emerges that a decrease in the number of American cinemas (-5.7%) between 2000 and 2002 corresponds to an increase in Western Europe (+6.4%) – consistently with the ongoing increase here over the past few years. From 1995 to 2002, for example, there was a 35.6% increase in cinemas in Western Europe.
However, in both territories, although to different extents, there has been a growth in the number of multiplexes: in the 32 European countries analysed in the Yearbook this type of cinema increased by 12% from January 2002 to January 2003, reaching a total of 836 complexes, situated mainly in Western European territories.

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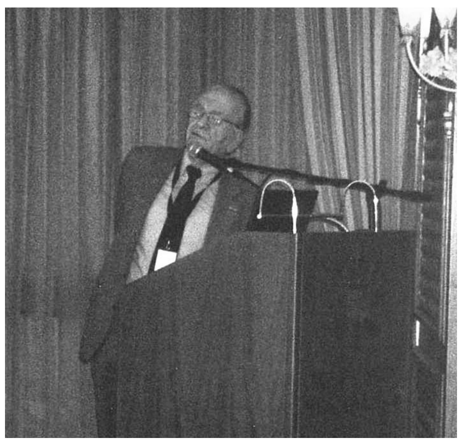

Dr Joachim Ph. Wolff at Taormina (Italy) during the presentation of MEDIA Salles' "European Cinema Yearbook – 2003 advance edition".

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TICKETS: DOWN WITH PRICES
In Belgium a new audience survey

Four new multiplexes opened between September 2001 and December 2002: a 13-screen complex (owned by UGC) at Louvain-La-Neuve, 11 screens at Maasmechelen (owned by Euroscoop), the Acinapolis at Jambes (10 screens, belonging to the Vanschel Group) and Utopolis at Turnhout (8 screens, belonging to Utopia Belgium – Cinecity NV). There were also many investments in the modernisation of theatres. Yet 2002 was not a good year for Belgian exhibitors: the considerable spending did not coincide with a corresponding increase in audiences, which increased by 1.4% (24.379 million tickets, 344 thousand more than the previous year but still well under the 25.4 million of '98). Those affected therefore wished to gain a clearer picture of the situation. The task of looking into the causes of this drift away from cinemas was given to an independent organism: the ICHEC (Institut Catholique des Hautes Etudes Commerciales) of Brussels. Thus, in accordance with the joint decision of the Fédération des Cinémas de Belgique (FCB) and ABDF, the distributors' organisation, a two-phase research study developed, involving 5 cities at the same time. On looking back, further proof of the necessity of this analysis was the 7% drop in admissions during the first nine months of 2003. And although the exceptionally hot and sunny weather together with the lack of titles with wide appeal probably influenced this considerable drop, the research has helped exhibitors and distributors to shed light on a number of other causes which seem to have contributed to the drift away from the big screen.
The first phase in the research, of a qualitative nature, which was concluded in December 2002, was followed by a second, concluded in February 2003, which examined in detail the findings of the explorative phase, asking interviewees to "quantify" their responses, i.e. to evaluate the elements emerging from the first inquiry on a scale of 1 to 5 (where 1 represents an extremely negative view and 5 an extremely positive one).
The result is that though the quality of sound and vision was judged very positively by most of the interviewees (41.7% assigned 4 points and 32.7% 5 points), it is ticket prices that seem to be amongst the main causes of disaffection for the big screen: seen as too high by over 60% of interviewees (30.4% assigned only one point and 30.1% 2 points), they also lack flexibility, failing to adapt to different types of cinemagoers (for instance frequent cinemagoers and families).
"Thanks to the research", explains Guy Morlion, Secretary General of the FCB, "we have identified the negative elements on which work needs to be done". In first place appears the competition by dvd and home cinema (a high influence for around 62% of the interviewees) and the variety of leisure activities on offer (very significant for 51.2%, insignificant for around 9% only). Although clearly neither of these two factors are the direct fault of exhibitors, better promotional strategies and theatre management would undeniably help to combat them. Also on the black list, along with the question of ticket prices, is the atmosphere of the theatres, not generally considered to be hospitable (whilst it is of no importance to around 45% of the interviewees, for almost 31% it is viewed as negative or extremely negative), and the role of film reviews (negative for 33%, of little significance for a further 33%). "But in order to understand where we should go from here", continues Morlion, "we must carefully weigh up both the negative elements and those for which audiences express appreciation, focusing on the latter". Thus, in first place amongst the "favourites" are to be found free pre-screenings sponsored by the media (over 85% consider them positive, 52% would even pay to see them), followed by the possibility of booking over the Internet (which 78% of the interviewees are in favour of), going to the cinema with the school (78%), ancillary activities during screenings (75%) and subscriptions that make it possible to save money by buying a fixed number of admissions in advance (an initiative that almost 70% of the interviewees are in favour of).
Which cinemas, then, do audiences prefer? 58.6% of the interviewees choose multiplexes for their evening out at the cinema (but the percentage rises to 71% in the 18-24 age range), 11% prefers a small cinema, mainly because it is less expensive and more welcoming (and amongst the under-18s 14.8% make this choice, which is preferred by parents). 29.5% makes no 'a priori' distinction ("First I choose a film, then I look to see where it's on"; "I choose according to the programme and screening times"). As for the frequency of the interviewees' cinema-going, over half of them (52.1%) does not go more than once a month, 35% between one and two times and only 12.5% three or four times a month.

"MOVIE CARD"
At the cinema more often, spending less

Europlex is the second biggest exhibitor in Switzerland and the biggest in the French-speaking part of the country. It operates a total of 36 screens located in cities like Geneva, Lausanne, Nyon and Morges, distributed in 16 cinemas including, amongst others, a 7-screen and an 8-screen multiplex as well as an arthouse. Europlex covers 65% of the market in Lausanne, 30% in Geneva and 100% in Nyon and Morges.
Apart from trying to create a "Europlex family", of cinemas and spectators, based on a coordinated image, by using the same staff uniforms and standards of service, for instance offers at the bar and a policy of incentives through pricing, Europlex has another very important loyalty tool, which, at the same time, encourages cinema-going: the "movie card". The "movie card" looks like a regular credit card with a small chip on the back. It costs 10 Swiss francs to produce. The standard version is sold at 12 francs and the special version, with a film theme to it, which is designed mostly as a collectors' item, comes out 5 or 6 times a year and sells for 20 francs.
Roughly 80,000 of these cards are in circulation at present, particularly in Lausanne, and in rough proportion to the number of cinemas in each of the other towns. Last year, out of 1.4 million tickets sold, 450 thousand (or 33%) were sold to spectators with the "movie card".
How does the card work and what advantages does it offer the spectators and the cinemas? The idea is simple: firstly it has to be charged with cash, from a minimum of 30 francs, with no upper limit, and can be used to buy tickets and items at the bar. Once purchased, it is always valid, can be recharged indefinitely and is guaranteed against loss or malfunction for the first three years.
Charges to Europlex clients' cards currently account for over 2 million francs. Although the administrative work is far from simple, it represents a great boost to Europlex's treasury. Each time the spectator pays with his movie card he receives a 2-franc discount off the regular price. This means that a full adult ticket is reduced to 14 francs and a child's ticket to 10.
As well as the ticket price reduction, the "movie card" holder gets a free subscription to "Live", the magazine published by Europlex, which contains 50% film information and 50% advertising.
In addition, the card entitles the holder to free invitations to special movie card nights – between 4 and 6 per annum - with pre-screenings of films for which no charge is made by the distributors in return for advertising in the magazine.
The magazine makes money for Europlex principally because the despatch to the 80,000 addresses is paid for by the Crédit Suisse in return for advertising in the magazine. Moreover, since the bank's logo appears on the card, Crédit Suisse pays a significant sum in sponsorship and buys cards to use in starting packs for youngsters who open accounts in the bank's branches.
All in all the "movie card" can be considered a good all-round deal for the various beneficiaries. Europlex is happy, because it helps create loyalty and supplies cash in advance and sponsorship income. It also provides a considerable database which Europlex has only just begun to exploit. The customer is happy because it gives him a tangible price reduction at the cinema for minimal investment – paid back after only six visits. It also gives him the feeling that he is the member of a club. The Crédit Suisse is happy, too, because it puts their name right in front of an important target group. The distributors are happy because of the advertising that "Live" brings to their film.
One limit of the "movie card" is that it is non transferable and only confers its advantages on the holder. Recently, however, changes have been made, with the introduction of the "Europlex Friends" subscription, that enables the "movie card" holder to charge his card with 100 francs and in this way buy 10 tickets at 10 francs each, which he can use to invite friends and family to the cinema over a 12-month period.
Over 5,000 of these subscriptions have been sold since the introduction of the "Friends" formula at the beginning of March this year. This means half a million Swiss francs in cash and 50,000 tickets to Europlex cinemas.
The effects of a card like this are difficult to gauge. However, Europlex believes that it is a sound way of boosting customer loyalty, in view of the fact that the chain has successfully retained market share, despite the opening of some modern and attractive multiplexes, which have penalised other exhibitors.

Brian Jones
Managing Director
Europlex Cinemas – Switzerland

POLAND: EXHIBITORS AND DISTRIBUTORS MEET

"Welcome to Europe!" is the greeting that will be heard by nearly 40 million Poles in May 2004. Although it is just a courteous phrase, it will undoubtedly satisfy those industry representatives who are hoping that, after Poland's accession to the European Union, Poles will purchase consumer goods at the European average.

Unfortunately, the same satisfaction may not be shared by those hoping that Poles will visit the cinema as often as their European neighbours.

The truth is rather painful: Poles are going to the cinema less and less often.

Detailed analysis of the decreasing number of visits shows a number of reasons, including:

- limited number of domestic productions;
- lack of second- and third-run cinemas, which would allow for certain movies to be shown for a longer period of time, thus resulting in higher admissions. In practice, most of the distributors want their movies to be shown primarily in multiplexes, as these generate quick profits. This results in multiplexes showing both commercial as well as artistic or more ambitious movies, which means that the concept of art-house cinema seems not to be working in Poland;
- and finally – the most important reason – lack of common goals for the entire market, or rather, lack of a common definition of such goals. As a result, any improvements undertaken by a single body do not result in industry-wide transformation.

All these problems contribute to the dissatisfaction of everyone involved in the cinema business in Poland. Both distributors and cinema owners are dissatisfied.

Beginning with 1999, many companies invested in the cinema industry in Poland, hoping that 28 million viewers annually would be a mere precursor to 30 or even 35 million in the years to come. However, the investment of such immense resources in a country where economic growth does not follow the increase in the numbers of new screens appeared not to be prudent.

After another year of unsatisfactory results in the cinema industry, the "Polish Association New Cinemas" – an organization that groups multiplex representatives – has decided that the time has come to start working on improvements. The natural outcome of that decision was the idea of an industry-wide meeting dedicated to the analysis of the market problems in the attempt to find a cure for the "I don't visit the cinema" disease.

Thus, on 15 October 2003, the Association organized a meeting of all the representatives of the distributors, single-screen cinemas and multiplexes.

It should be stressed here that it was the first industry meeting with such an extensive turnout – only one independent distributor was not present.

During the meeting a number of very interesting discussions took place, the subjects of which included:

- joint marketing activities by operators and distributors to promote movies in order to increase their potential;
- support of distributors' promotional activities in smaller towns. At the moment 80% of national marketing campaigns are focused on the Warsaw market;
- an attempt to promote the cinema on television through promotional campaigns of selected movies, but also through promoting cinema-going as an interesting way of spending free time (in Western Europe television is an essential means of cinema promotion);
- expanding cooperation between the "Polish Association New Cinemas" and the Association of Film Distributors to develop common positions on key issues;
- changing the practice of organizing preview screenings at the cinemas. These could, for example, be screened only on weekdays, whilst the week-ends would be devoted to new releases. The objective would be to raise admissions and avoid confusing spectators with vague information on the films' release date.

It is clear that time will show whether or not the meeting will help to change the current situation. It may equally end with promises only. But let's be optimistic… as we all know it is the cinema that best succeeds in combining culture and entertainment!

Paweł Wachnik
Managing Director
Multikino – Poland

Paweł Wachnik, Managing Director of Multikino – Poland, at the 2003 Rome edition of the training course "European Cinema Exhibition: A New Approach".

EU EXTENSION: CINEMA-GOING IN ESTONIA

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 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.

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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.

Eda Koppel
Estonian Film Foundation

Margit Vremmert
Tallinnfilm

NEWS FROM MEDIA SALLES

(continues from page 1)

The percentage growth on American territory (+1.2% during 2002) is far lower than in previous years but sufficient to reach a total of almost two thousand complexes (1,911).

Within the multiplex category, on both territories it has been mainly the larger complexes that have increased. Megaplexes (16 or more screens) have, in fact, grown by 16% in Europe (from 51 to 59) and by 10% in the USA (from 431 to 474).

Complexes with 8 to 15 screens have, instead, increased in Europe only (+12%), whilst in the United States they have seen a slight dip (-1.4%).

The density of multiplexes (i.e. the ratio between the number of multiplexes and the total number of cinemas in existence) has reached 32% in the United States (1,911 complexes with 8 or more screens out of a total of 6,050), whilst in Europe it has settled at 6% (836 multiplexes out of 14,726).

The "European Cinema Yearbook – 2003 advance edition" is also available on the MEDIA Salles' website (www.mediasalles.it).

FESTIVALS AND BEYOND
The MEDIA Salles' contribution

Kino Expo 2003 (Moscow – Russia), the Italian Film Festival (Annecy – France), the International Film Festival of Flanders (Gent – Belgium) and Eurovisioni, the International Festival of European Cinema and Television (Rome – Italy). Four important appointments to which MEDIA Salles made its contribution. A careful analysis of cinemas opened in Europe and the USA, carried out on the basis of data published in the "European Cinema Yearbook", was the content of the talk by Elisabetta Brunella, Secretary General of MEDIA Salles, during Kino Expo 2003 last September. During the debate on the distribution of Italian films in France and French films in Italy at Annecy, Elisabetta Brunella touched on the question of the reasons behind the international success (or lack of success) of Italian films (for example, *Pane e tulipani* or *La stanza del figlio*) and how this is closely connected, amongst other things, to the presence of aspects linking the film to the country and culture of the audiences abroad, to promotional strategies and to the distributor's ability to impose himself on the market.

The circulation of films in Europe and a comparison between the European and the American markets were the main themes of MEDIA Salles' contribution to the Festival of Flanders and to Eurovisioni last October. Here attention was focused on the fact that, if ticket sales in American cinemas increased by over 10% in 2002 and box office by as much as 13%, reaching 9.5 billion dollars and recording the highest growth in the last 20 years, and if in Europe the market share of films "Made in the USA" is around 70%, an analysis of the situation must take into account the increase in American marketing strategy. In the USA, the P&A budget for a film by the majors has almost doubled in 5 years, growing from 6.5 million dollars in 1985 to 12 in 1990, subsequently continuing to rise more than that of production and reaching a ratio of 1 to 1.5 (or 31 million dollars spent on marketing and 47.7 on production) in 2001.

TRAINING COURSE
The 2003 Rome edition

Last September Rome (Italy) hosted this year's second edition of "European Cinema Exhibition: A New Approach", the training course for European exhibitors promoted by MEDIA Salles and organised in collaboration with the ANEC – the Italian cinema exhibitors' association, the European Film College and the Danish exhibitors' association.

In his opening address to the approximately 60 people present – both exhibitors and teachers – coming from 16 different countries, Gianni Profita, Director General for the Cinema at the Ministry of Cultural Affairs, emphasised the importance of initiatives that build up international cooperation and promote European cinema.

Walter Vacchino, President of the ANEC and Vice-President of MEDIA Salles, expressed his own satisfaction with the initiative: "I like to think that the building of Europe also comes from meetings like this".

The course proposed topics such as: theatre management, technological innovation, vertical integration and marketing. A prominent aspect in this field was the promotion of cinemas during the summer, a season which has always been critical for European cinemas, though with significant differences between them. Amongst the positive experiences is that of the French "Fête du Cinéma", outlined by Eric Marti of the U+Me agency, which organises the event on behalf of the FNCF, the French exhibitors' association. Launched in 1985, over the past decade the "Fête du Cinéma", with the "3 day" formula adopted from 1993 onwards, has had an important influence on the number of tickets sold, which vary from the 2,300,000 in '94 to the '99 peak of 4,300,000. The experiences in digital screening related by Laura Fumagalli, Marketing Director of the Arcadia in Melzo (Italy), and V. J. Maury, Director General of Palace Cinemas in Hungary, raised both the necessity of defining high quality standards, and the potentials that digital screening seems to offer for alternative audiovisual products, which capture the interest of a new audience that has had few dealings with cinemas up to the present. Amongst these possibilities, *visual music* would seem to be the one that possesses the richest potential for future development.

EXHIBITOR COURSES
2004 editions in Belgium and Hungary

In 2004 there will be two exhibitor training courses promoted by MEDIA Salles. The course entitled **"DigiTraining Plus: New Technologies for European Cinemas"** is a completely new initiative specifically devoted to digital cinema and organised in collaboration with Barco, which will be held in **Kuurne in Belgium from 31 March to 4 April 2004**. The course's main objective will be to give participants detailed and up-to-date knowledge in the fields of screening and digital cinema, favouring a European point of view. Special attention will be paid to the technical and technological aspects of digital screening, to economic and commercial aspects, to the market potential (in particular the offer of digital products and alternative content), as well as to legal and contractual issues relating to changes in the distribution chain of the "film product".

Budapest will be the venue for the edition of **"European Cinema Exhibition: A New Approach"** to be held **from 22 to 26 September 2004**. Promoted by MEDIA Salles, this course will see the collaboration of the European Film College and the Danish exhibitors' association, which have taken part in the organisation of previous editions, as well as that of the Hungarian exhibitors' association and Magyar Filmunió. The Hungarian Ministry of Cultural Heritage will add its support to that given by the MEDIA Programme and the Italian Government. Amongst the main topics of the training project are: promotion and marketing, which films for which audiences, theatre management, the European dimension. Lessons will be held in English and in Hungarian. Both courses foresee a series of seminars led by professional operators and experts of various nationalities, group work, the exchange of successful experiences and visits to cinemas. All the training initiatives promoted by MEDIA Salles are open to exhibitors from countries belonging to the MEDIA Programme.

The exhibitors and the speakers at the training course "European Cinema Exhibition: A New Approach" promoted by MEDIA Salles - Rome (Italy), 24-28 September 2003.