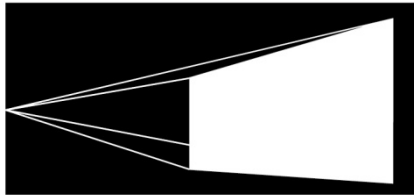


CINEMA D'EUROPA



MEDIA SALLES



“Regional Film Funds – Participation of Local Government Units in the Development of the Audiovisual Industry”

Poznan (PL), 11 March 2010

Presentation by

**Elisabetta Brunella,
Secretary General, MEDIA Salles**

Part 2



A programme of the European Union



DIREZIONE GENERALE
PER IL CINEMA

DGT

Statistics on digital cinema

Digital screens worldwide from 2006 to 2009

Continent	Total number of digital screens as at 1st January 2006	Total number of digital screens as at 1st January 2007	% increase of digital screens between 1st January 2006 and 1st January 2007
Africa and Middle East	1	3	200%
Asia and Pacific	207	354	71%
Europe	204	527	158%
Latin America	16	21	31%
North America	173	1957	1031%
Total	601	2862	376%

Statistics on digital cinema

Digital screens worldwide from 2006 to 2009

Continent	Total number of digital screens as at 1st January 2007	Total number of digital screens as at 1st January 2008	% increase of digital screens between 1st January 2007 and 1st January 2008
Africa and Middle East	3	3	-
Asia and Pacific	354	786	122%
Europe	527	897	70%
Latin America	21	26	24%
North America	1957	4576	134%
Total	2862	6288	120%

Statistics on digital cinema

Digital screens worldwide from 2006 to 2009

Continente	Total number of digital screens as at 1st January 2008	Total number of digital screens as at 1st January 2009	% increase of digital screens between 1st January 2008 and 1st January 2009
Africa and Middle East	3	27	800%
Asia and Pacific	786	1458	85%
Europe	897	1535	71%
Latin America	26	48	85%
North America	4576	5660	24%
Total	6288	8728	39%

Statistics on digital cinema

Digital screens worldwide from 2006 to 2009

Continent	Total number of digital sites as at 1st January 2006	Average number of digital screens per site as at 1st January 2006
Africa and Middle East	1	1
Asia and Pacific	164	1,3
Europe	148	1,4
Latin America	15	1,1
North America	133	1,3
Total	461	1,3

Statistics on digital cinema

Digital screens worldwide from 2006 to 2009

Continent	Total number of digital sites as at 1st January 2007	Average number of digital screens per site as at 1st January 2007
Africa and Middle East	3	1
Asia and Pacific	260	1,4
Europe	358	1,5
Latin America	17	1,2
North America	343	5,7
Total	981	2,9

Statistics on digital cinema

Digital screens worldwide from 2006 to 2009

Continent	Total number of digital sites as at 1st January 2008	Average number of digital screens per site as at 1st January 2008
Africa and Middle East	3	1
Asia and Pacific	475	1,7
Europe	550	1,6
Latin America	22	1,2
North America	854	5,4
Total	1904	3,3

Statistics on digital cinema

Digital screens worldwide from 2006 to 2009

Continent	Total number of digital sites as at 1st January 2009	Average number of digital screens per site as at 1st January 2009
Africa and Middle East	21	1,4
Asia and Pacific	810	1,8
Europe	821	1,9
Latin America	35	1,4
North America	1130	5
Total	2816	3,1

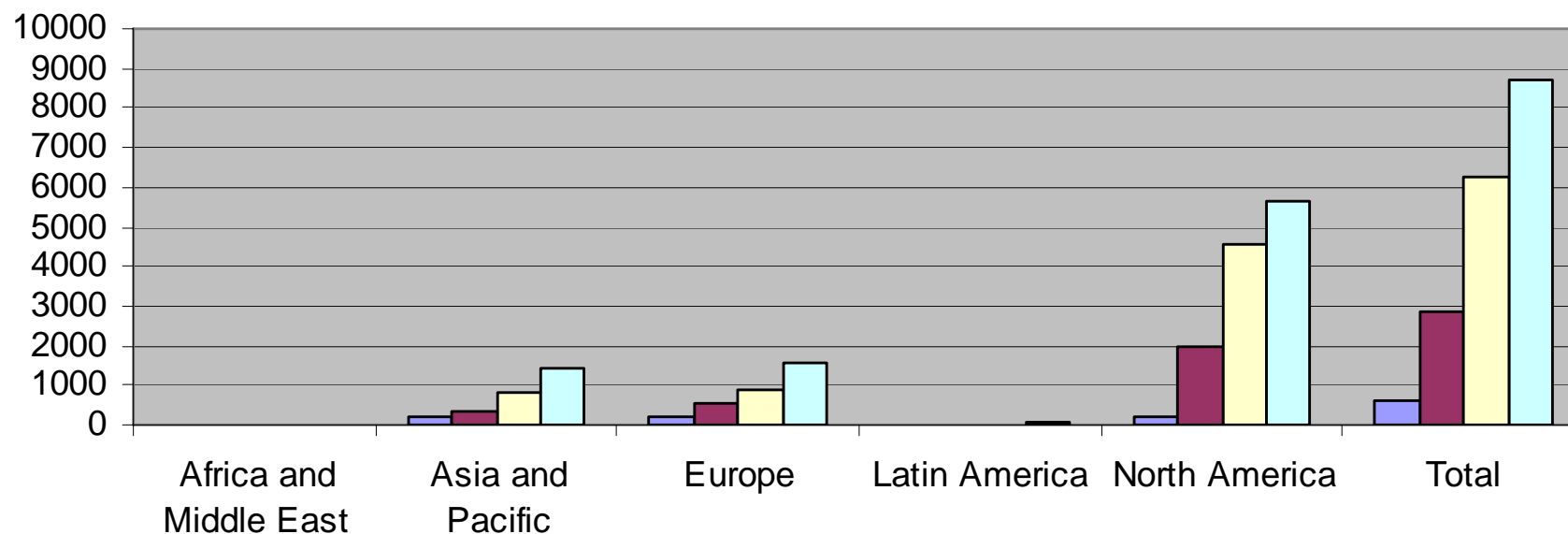
Statistics on digital cinema

Digital screens worldwide from 2006 to 2009: focus on Europe

Year	Total number of digital screens in Europe as at 1st January	% increase of digital screens in Europe in 12 months
2004	30	-
2005	55	+ 83%
2006	204	+270%
2007	527	+158%
2008	897	+ 70%
2009	1535	+71%

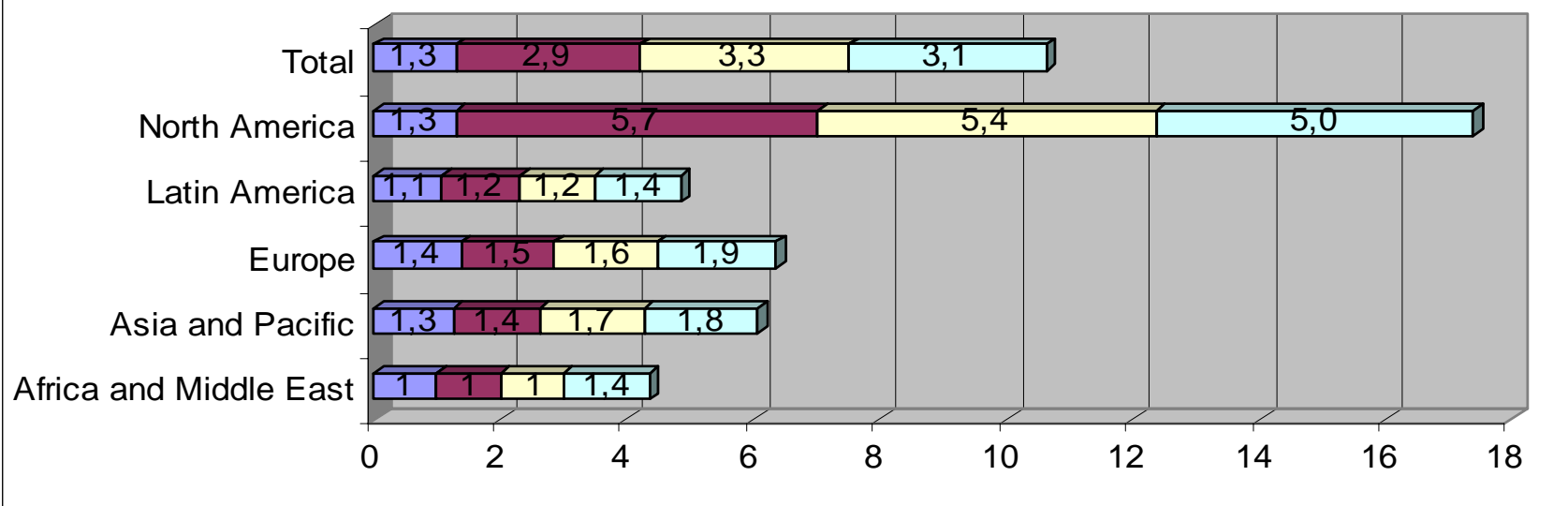
Digital cinemas worldwide

Number of digital screens worldwide by continent



Digital cinemas worldwide

Average number of digital screens per site worldwide



Figures on cinema digitalisation in Europe

The situation as at 30 June 2009

Growth rate in 2008 – full year: + 71%

Growth rate in 2009 – first semester: + 69%

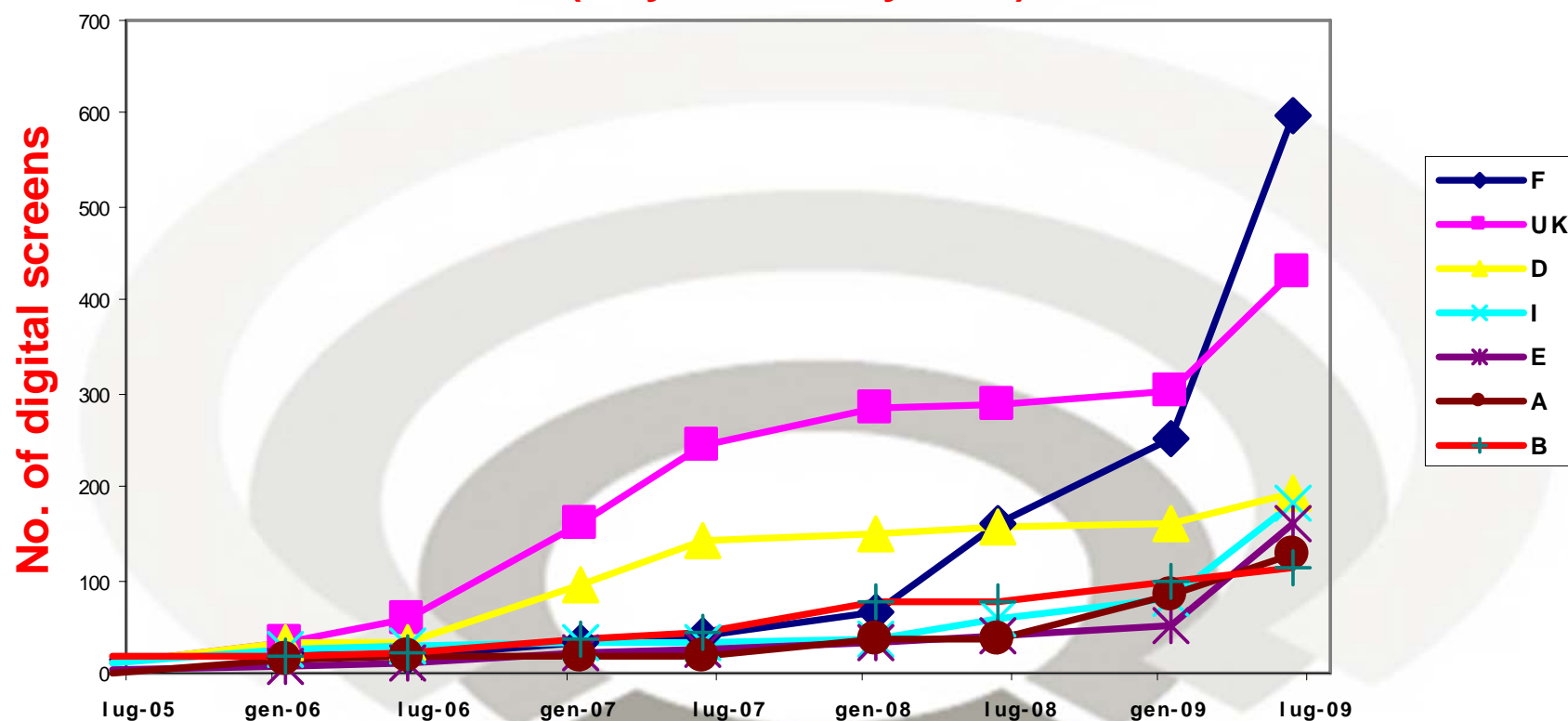
2008 – an average of 50 new projectors every month

2009 – an average of 170 new projectors every month

2008 – average number of digital screens per cinema: 1,87

2009 – average number of digital screens per cinema: 1,93

Number of digital screens in Western Europe by semester (July 2005 - July 2009)



Digital screens in Europe as at 30 June 2009

Country	No. of cinemas	No. of screens
A	40	128
B	18	114
BG	9	19
CH	28	41
CY	1	1
CZ	21	25
D	105	208
DK	13	15

Digital screens in Europe as at 30 June 2009

Country	No. of cinemas	No. of screens
E	107	162
EE	1	2
F	150	598
FIN	18	27
GR	11	15
HR	6	7
HU	15	20

Digital screens in Europe as at 30 June 2009

Country	No. of cinemas	No. of sites
I	132	183
IRL	15	47
ISL	4	7
L	5	22
LT	3	4
LV	1	2
MT	1	2
N	34	58
NL	48	77
P	39	51

Digital screens in Europe as at 30 June 2009

Country	No. of cinemas	No. of screens
PL	64	82
RO	7	24
RS	1	2
RU	125	161
S	17	20
SI	9	9
SK	4	4
TR	31	33
UK	267	432
Total	1,350	2,602

Widespread growth but at different rates

Growth rate in 2009 – first semester

Country	Growth rate in 2009 – first semester
A	+52%
B	+16%
BG	+12%
CH	+46%
CY	-
CZ	1150%
D	19%
DK	50%

Growth rate in 2009 – first semester

Country	Growth rate in 2009 – first semester
E	+224%
EE	-
F	+136%
FIN	+125%
GR	+88%
HR	-
HU	+186%
I	+129%

Growth rate in 2009 – first semester

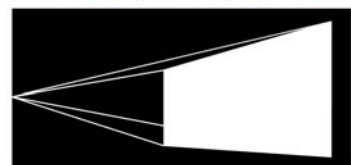
Country	Growth rate in 2009 – first semester
IRL	+24%
IS	-
L	+5%
LT	-
LV	-
MT	-
N	+21%
NL	+43%

Growth rate in 2009 – first semester

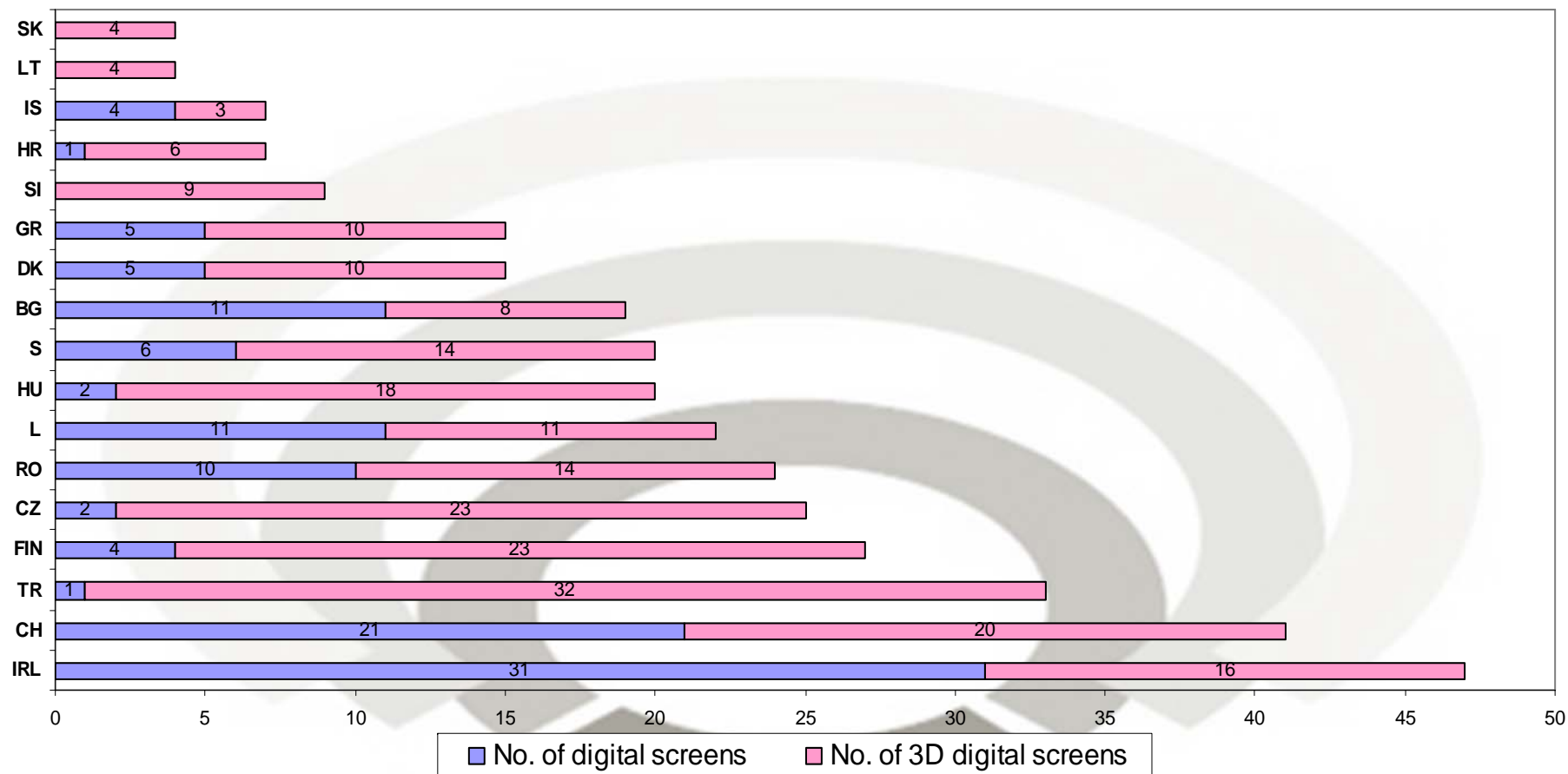
Country	Growth rate in 2009 – first semester
P	+16%
PL	+55%
RO	+71%
RS	-
RU	+79%
S	+150%
SI	-
SK	-
TR	+65%
UK	+43%
Average	69%

Growth of digital screens is affected by 3D

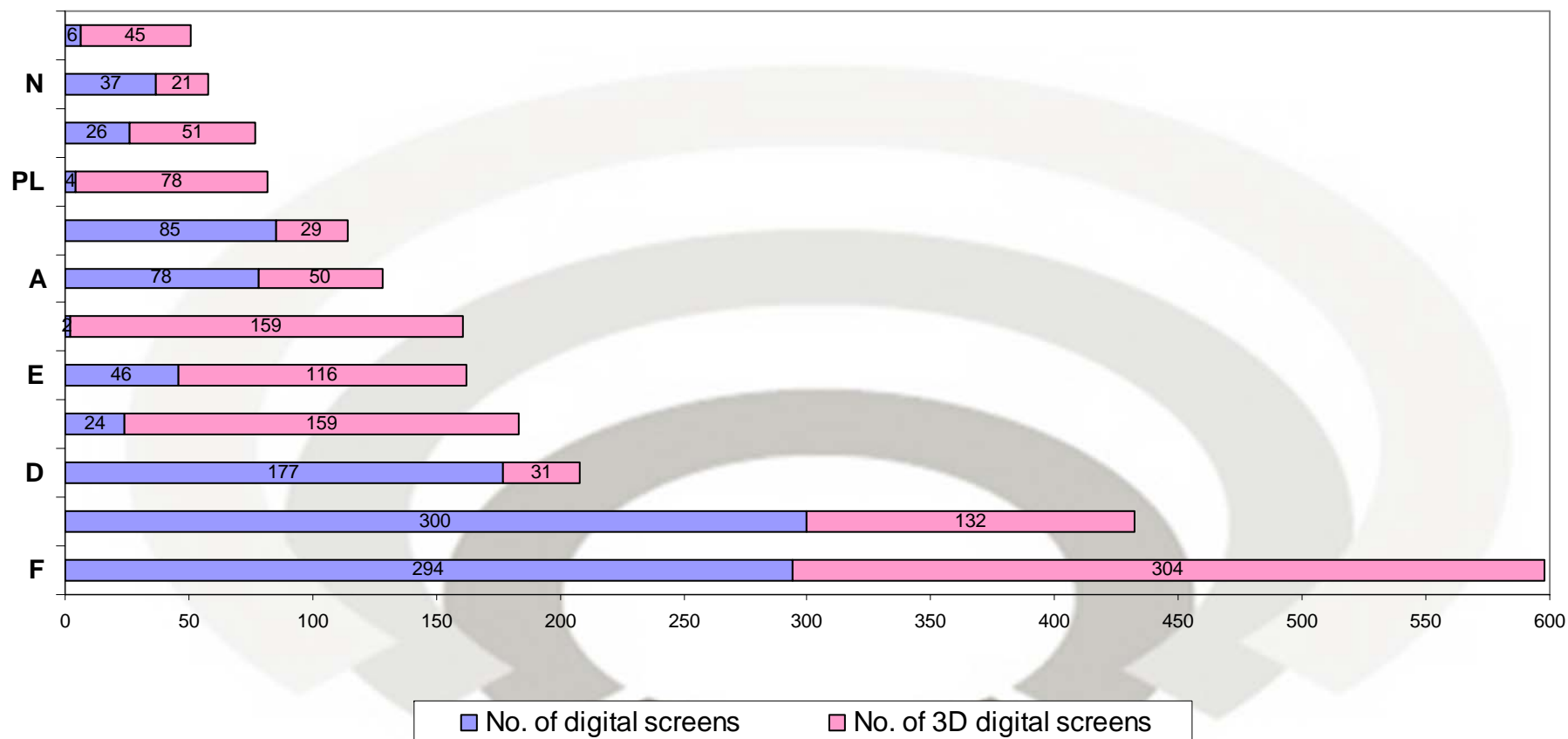
The penetration of 3D digital screens has risen more or less everywhere to reach 55% in Europe.



Total number of digital screens in Europe by country as at 30 June 2009
 Countries with a total of up to 50 digital screens



Total number of digital screens in Europe by country as at 30 June 2009
Countries with a total of at least 50 digital screens



Digital sites and screens in Italy in 2009

	1st January	30 June	1st September	% increase btw 30/06 and 1st/09/2009
Screens	80	183	310	+69%
Sites	46	132	226	+71%

Digital sites and screens in France in 2009

	1st January 2009	30 June 2009	1st January 2010	% increase btw 30/06/09 and 1st/01/2010
Screens	253	598	876	+46%
Sites	72	150	247	+64%

Digital sites and screens in Finland in 2009

	1st January 2009	30 June 2009	1st January 2010	% increase btw 30/06/2009 and 1st/01/2010
Screens	12	27	48	+ 77%
Sites	8	18	44	+144%

France

CNC, the French «Centre national de la cinématographie», has designed a public financing plan for the digitalisation of cinemas which aims to convert ALL the French screens into digital, involving as well the whole distribution sector.

The plan has been rejected by the Authority on Competitiveness

CNC will now work on a selective scheme

Finland

Project: “Network of Digital Cinemas” 2009 - 2010

The Finnish Ministry of Education and the Finnish Chamber of Films have defined the guidelines for the digitalisation which covers the entire cinema chain.

2 M Euro have already been allocated
(1 M for digitalisation, 1 M for cinema renovation)

One objective: no exhibitor must be left behind!

Norway

The Norwegian Government, together with Film&Kino, has published a tender for the digitalisation of ALL the cinema screens in the country.

Spring 2010 installation will begin, converting 420 national screens (out of 430 total) within Autumn 2011.

Europe

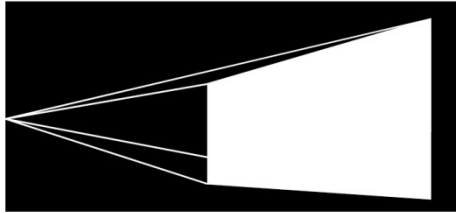
The European Commission closed in December 2009 - through the DG INFSO - MEDIA Programme – a consultation on the opportunities and challenges of the digital era for European cinema.

Objective: to collect information and points of view from subjects involved with cinema digitalisation, to arrange schemes to facilitate this process.

**First results announced at the conference “The Independent Exhibition Sector and the Challenges of Digitisation” - Barcelona, 5 - 6 March 2010.
The complete results will be published at this page:**

http://ec.europa.eu/information_society/media/overview/consultations/index_en.htm

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— TRAINING —

Does digital technology allow new employments of the screens?

Some examples



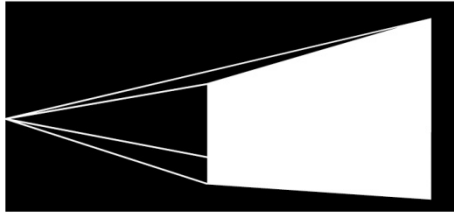
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- A new way to offer traditional contents
- New contents: additional, rather than alternative



DIREZIONE GENERALE
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A new way to offer traditional contents

- United Kingdom, Kino Hawkhurst: 1 screens in a small village in Kent, 1 digital projector
- Weekly programme: 6 different films + an opera

The same person manages all the projections, concessions and ticket counter

- Result: digital cinema allows for the opening of new sites in villages or small towns.

A new way to offer traditional contents

Luxembourg: *Heim ins Reich*, a documentary made for television, went digitally to the big screen and became one of the biggest hits of the season.

Belgium: *Plop en de Toverstaf*, a film made for television and for children, shot in a language with a very small catchment area, goes to the big screen thanks to digital cinema

In Europe: the former cinema company DocuZone, now Europanet, gives visibility to documentaries thanks to digital projection

A new way to offer traditional contents

**Worldwide: 3D movies, an opportunity
to retrieve the investment in technology**

New contents: additional, rather than alternative

**Worldwide, the Opera from the most famous
theatres in the world reaches both big cities
and small centres**

**(i.e. Folkets Hus Och Parker in Sweden or
Microcinema in Italy)**

**New contents: additional,
rather than alternative**

**Worldwide, “visual music” and sports:
live events create big communities of
audiences around the world**

**New contents: additional,
rather than alternative**

**Belgium, Kinepolis: hit TV series
premieres on the big screen
(i.e. thrillers of Pieter Aspe)**

**New contents: additional,
rather than alternative**

**Belgium, Cityscoop, Roeselare: the
cinema as a congress center**

**New contents: additional,
rather than alternative**

The new frontier: live shows in 3D

The promise of digital projection:

- more offer, even in small centres
- more events (worldwide releases)
- more live shows

While means of movies grow, the cinema screen relies on those elements which best define it: the big screen and the conviviality

Many thanks for your attention

MEDIA Salles statistical data is available on the web

www.mediasalles.it

See you in Cannes for
the new statistics on digitalisation as at 1st January 2010

**Or see you at “DigiTraining Plus: European Cinemas
Experiencing New Technologies”**

2011 edition

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