

Italian Feature Films on National Public and Commercial Broadcasters

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Abstract

Taking into account the EU policies aimed to strengthen the industrial-financial condition of its audiovisual system, the Italian broadcasters' economy and the historical development of its relationship with the national film industry, our study will tackle the Italian free-to-air television policies in national feature films broadcasting. The study analyzes the trends of Italian feature films programming in the national free-to-air television market during the last 10 years, referring to the following issues: a) volume and origin of feature films; b) broadcaster (public and commercial); c) time slots.

The results show how Italy has been experiencing a much more dramatic downturn in fiction programming in respect to the other European countries and it discloses that the increase in national TV fiction programming is accompanied by a contraction of domestic feature films slots (despite the good state of health the Italian film industry has been experiencing during the past decade) and an increase of the American ones.

Keywords: Women, Spain, Civil War, Journalism, 2nd Republic.

1. Introduction

Italian cinema has increasingly become the target of criticism, debate, studies and subsidizing plans due to its lack of success with the public despite the apparent revival it is currently experiencing. This interest is partly driven by the fact that study of recent history shows how Italian cinema has not always been synonymous with localism and failure but, on the contrary, in the early 1970s it has seen days of glory both at home and abroad (Waterman-Jayakar 2000). Moreover, this success was not only economic but also artistic thanks to the works of famous auteurs (Antonioni, De Sica, Fellini, Visconti) that dictated trends which would influence world cinema in the following years.

Two reasons can be found for the national public's disaffection for Italian films from the end of the 1970s. Firstly, home video, pay TV and video on demand took a long time to catch on in Italy and have never really won widespread popularity. In particular, pay TV has always suffered from the close ties binding the public to the free-to-air television. The stunted growth of pay channels has consequently deprived the Italian film industry of additional resources to finance its products that appear to have lost their appeal in the domestic or international market. Secondly, the deep-rootedness of the free-to-air television in Italian society has made the small screen the fulcrum of audiovisual entertainment, keeping people away from

theatres, increasing the turnover of television companies and, above all, creating an economic dependence of the Italian film industry on the television one.¹

This study will investigate the reasons why this relationship arose and shed light on current trends in the Italian television market, in particular as regards national films for whose production television has become an almost inalienable reference point. To this end we will first define the elements lying behind the origin of the relationship between cinema and television in Italy within Europe and we will then look at Italian film production in the last decade and the quality of its circulation on the national free-to-air broadcasters².

2. The origin of cinema's subservience to television: Italy in the European context

The development of television in Europe was tightly controlled by the respective national governments to vouchsafe the provision of a public service. The concept of "public service" was grounded in the idea that the production and broadcasting of television programmes should be a public asset of national importance by dint of which the state could intercede, exercising forms of direct control and financing its operations in order to guarantee the principles of pluralism, diversity, independence, impartiality and universality of the service. Seeing themselves as an arm of the government with a cardinal social mission, the public television companies (at the beginning the only ones that existed and for a long time the strongest in the European market) never used film production companies for their programmes, choosing self-production and vertical integration instead. For some years cinema and television never crossed paths.

The responsibility for this choice cannot be attributed simply to the short-sightedness of the industrial and political system and to their unawareness of trans-media synergies but also to a recent past which was still very much alive in the minds of many and which prompted them to look at the world of cinema with suspicion. Indeed, not only the wariness of immorality that emerged in the 1930s (e.g. the encyclical *Vigilanti Cura* of 1936), but also the memory of how this medium had been used for propaganda purposes by the totalitarian regimes before and during the Second World War hung over this medium. Paradoxically, after the war the political organs began to fear the political uncontrollability of the medium (Ortoleva 1999) to such an extent that they were reluctant to spin risky webs between the new-born, budding television and cinema, also because the reticence to cooperate was mutual. Over time and with great difficulty the world of cinema had in fact earned its own artistic legitimacy, an endorsement by the "high culture" that

¹ The two reasons indicated do not rule out, but rather imply the validity of other theories aimed at explaining the decline over time of the Italian film industry (the outbreak of two world wars, artistic vocation of Italian films, public funding, language barriers to export, etc.) The two reasons studied in the article were chosen because they can help explain what happened at a specific moment in time when Italian films asserted their position in the domestic and international market and then yielded market shares once again to foreign productions.

² As regards the European trend, particular attention has been paid to France and United Kingdom because they are, according to the data of the European Audiovisual Observatory (2007), the two main West European countries concerning number of inhabitants and financial performances of the television companies. Germany, that should be included in the sample, has been not considered due to its important regional television supply that could invalidate the comparison with the other countries.

had assigned cinema the task of building and representing the national identity of the European countries in the aftermath of the war, and which therefore disdained television whose products mainly consisted of quiz shows and low-cost popular programmes. This does not mean that relationships were strained or disinclined to collaboration. Indeed, we know that in Italy the popular quiz show "Lascia o raddoppia" was moved from Sunday to Tuesday so that that the public could continue to go to the cinema on Sundays, the day which traditionally registered the highest takings. Rather than hostility or indifference, we could talk about different perceptions and missions: cinema operated in the sphere of the visual arts while television had the task of educating and informing (Ortoleva 1999).

The initial distance between cinema and television was gradually replaced from the end of the 1970s by a progressive dependence of the big screen on the small one. The growth of television demand, along with a series of contingent social phenomena, contributed to the declining numbers of spectators at the films theaters and the ensuing economic precariousness of the cinema industry. These difficulties were overcome by the commitment of television to produce feature films. As Fabrizio Perretti and Giacomo Negro state (2003), television companies ideally took the place of the American majors which in the years immediately after the Second World War had invested in European film projects to avoid the obstacle of the quota systems adopted to limit the penetration of foreign products. Television thus began to take possession of the creative resources and physical spaces of the film industry (e.g. the Cinecittà studios in Rome, once devoted to the production of films, which passed into the hands of television producers towards the end of the 1970s). The reasons for the reconciliation are due to the cultural vocation attributed to television and which had gained ground over time. Thanks to this vocation television aided the cinema, promoting its works (as it did also with the theatre), safeguarding its heritage by screening films and guaranteeing economic investments (Ostrowska-Roberts 2007). The intercession of television, however, also fulfilled other logics referable more to convenience than anything else. Indeed, television began to become interested in cinema when it had already gained a level of economic power that allowed it to negotiate from a position of supremacy and when it decided to substitute live shows with fiction (Ortoleva 1999). Television companies thus soon found themselves investing on three fronts: a) the traditional activities of development and creation of products addressed directly to the television market; b) the development and creation of theatrical films (usually developed through subsidiary companies, co-production and co-financed projects); c) the pre-acquisition of television broadcasting rights. We can therefore maintain that even if Italian television may have taken away spectators from the cinema, it did not kill it (Sorlin 2001). On the contrary, the advent of television coincided with a marked growth in Italian cinema not only in terms of quality and popularity but also as regards international presence. Over time television found itself the main source of finance for the film industry, both in Italy and Europe, a characteristic which is still true today.

As it has been stated, the development of television in Europe was tightly controlled by the respective national governments to vouchsafe the provision of a public service. However, from the 1980s, European governments could no longer ignore some important technological progress (i.e. improvements in the transmission and the reception quality; better management of hertz frequencies), economic (i.e. new ideology of competition), social (i.e. the crisis of the welfare state) and political changes (i.e. commercial television companies could guarantee the multiplicity of supply needed to satisfy the ever more diverse cultural demand of the audience). "In many quarters, it was therefore claimed that competition and comparison could define space for freedom and pluralism better than a monopoly could" (Richeri, 2002: 181). For these reasons, the 1980s were marked by a gradual deregulation of the European television market which ushered in a new season of opportunities and threats for sector enterprises.

Opening up the television market to private enterprises caused a sudden increase in new commercial channels and hence a broadening of the range of products offered to the public in their homes; however, at the same time, the problem arose of how to fill the time slots of the new programming. This had two consequences. On one hand television companies had to forge relationships with sectors specialized in content production (publishing, cinema, sport, music) "raising television to catalyst in the gradual osmosis of the communication sectors" (Pilati-Richeri 2000: 100); on the other, opening up to American products to meet the new programming needs became inevitable. In fact, the costs of producing programmes were very high and few subjects were able to sustain them and the related, albeit limited, economic risk. For almost thirty years government monopolies had prevented the establishment of independent television companies and this meant that, after market deregulation, the national public companies were the only ones able to self-produce their programmes. The only possible option for the new private operators was, therefore, to purchase programmes abroad, and above all from across the Atlantic. American products had two important advantages on the self-produced European ones: they were inexpensive and they gave important guarantees on audience success thanks to the previous performance in their domestic markets.

Italy was the trailblazer of this process. In the mid 1970s, leveraging a legal vacuum, singular economic conditions and multi-faceted social turmoil, Italy was the first European country to open up the television market to private operators with a resulting increase in the range of products on offer. In the wake of this deregulation Italy became the main global importer of extra-European fiction (Richeri, 1986) thanks also to the special bond that the three Fininvest, now Mediaset, channels created with the three US networks: Rete4 with ABC, Canale5 with CBS, Italia1 with NBC (Segrave, 1998).

The United States had acquired unparalleled know-how in the audiovisual sector owing to the success of its film and television production both of which were concentrated in the hands of the Hollywood majors. Indeed, in the early 1970s the Federal Communications Commission and the Justice Department had issued

a series of measures aimed at limiting the power of the three main networks (ABC, CBS and NBC) and at impeding the creation of a monopoly in the television market. In short, the set of adopted rules (*Prime Time Access Rule, Financial Interest and Syndication Rules* and *Consent Decrees*) limited the hours of prime time programming that the networks could self-produce, excluded their participation in the syndication market and required them to outsource the production of the programmes broadcast by their network. The only enterprises with audiovisual know-how and that were able to economically shoulder television production costs through economies of scale were the Hollywood majors to which the networks commissioned most of their production. Apart from the complex negotiations, disputes and political implications surrounding these measures, we can now safely state that from the mid 1970s their adoption led to a relationship of close collaboration between the film and television industry in which both economic and strategic interdependence was mutual.

This did not happen in Europe and currently in most European countries television companies are required by law to invest in film production projects in an attempt to redress the imbalance created between the two industries. Investment choices differed from country to country and company to company. In France, television operators are encouraged to co-produce films to shorten the time between the screening of the film in the cinema halls and its broadcasting on the small screen. Moreover, since 1990 the five terrestrial television channels (France2, France3, Arte, TF1 and M6) are required to invest not less than 3.2% of their turnover in the purchase and co-production of European films, of which 2.5% in original French works. To guarantee the independence of film producers from television companies, the latter can take part in the production of films only through affiliates set up specifically for that purpose and investing a share of not more than 50% of the total budget of each individual production. The standards for pay TV like Canal Plus are different. In this case the channel is obliged to allocate 12% of its annual resources to investment - in the form of pre-acquisition only - in exclusive rights of European feature films of which 9% for original French features.

Similarly to France, Italian television broadcasters, irrespective of their type of broadcasting, must allocate a share of not less than 10% of their net annual income from advertising to the production and acquisition of European audiovisual programmes. 40% of the above-stated share must be assigned to feature films. Tighter measures are applied to the public television company, RAI, which must invest a share of not less than 15% of the total annual revenue in the production of feature films, fiction, documentaries and cartoons through a unit created ad hoc in 2000, implementing law 122/98: RAI Cinema. In particular, 20% of this share must be devoted to films aimed at theatrical release (Unified Television Act of 13 July 2005; Service Agreement 2007-2009 signed by RAI and the Ministry of Communications, 5 April 2007). It is estimated that in the three year period regulated by the 2003-2005 service agreement RAI Cinema invested

on average 50 million euro a year in the production and acquisition of Italian and European feature films, an amount which rose to 80 million euro under the new 2007-2009 agreement. Of RAI Cinema's investments, between 31.3 and 38 million euro a year have been allocated to the production of Italian products while the rest has been used for the acquisition of Italian and European cinematographic works.³ As regards private competition, Medusa Film, Mediaset's production and distribution unit, invests an average of 65 million euro a year in film projects, almost double that of RAI Cinema.

In this situation United Kingdom is anomalous in that it has no similar regulations even although the same practice has been adopted since the early 1980s, demonstrating that television wields the power in the European media system. This is confirmed by the fact that, in Europe, government subsidies are normally granted to those projects that already have a part of financing available; in most cases this means when a television company is involved in the project. In others words, it is often the television companies that decide which projects will be carried through and which won't, holding the fate of the sector in their hands (Dale 1997).

All European countries also implement the safeguarding policies envisaged by the European "Television without Frontiers" Directive which requires television broadcasters to allocate the majority of their time to European fiction products of which at least 10% must be of independent origin, and authorizes member states to introduce even more restrictive rules in order to achieve linguistic policy objectives.

This subjugation of the film sector to the television one exposes the former to real uncertainty over its future. Indeed, if the public loses interest in the films or if the premise of legitimacy represented by the appreciation of film products by the audience of the small screen fades, it would become increasingly difficult to maintain the obligation imposed by law on television companies to finance a sector in crisis. Moreover, if on one hand the entrance of television companies in the cinema market represented a providential new source of financing for the cinema, on the other the strategic error was made of providing spectators with films that were more suited to a television public. Television companies have produced films for the big screen thinking mainly of their distribution on the small screen, of the combination between films and advertising, and of a client that was no longer the cinema spectator (Botti-Valdani 1996; Usai 2002). The cinema industry has suffered twofold. On one hand the dependence on the television sector has grown and the average investments made by television in the development of individual film products have dropped due to the tendency to bring them into line with television standards (Perretti-Negro 2003). This confirms the theory advanced by Waterman and Jayakar (2000: 518) according to whom free-to-air television cannot effectively support film production. On the other there has been a sort of aesthetic standardization of cinema and television products. Since the beginning of the cooperation between the film

³ Parliamentary deeds, XV legislature, Rai Watchdog discussion, meeting of 20 February 2007

industry and television's one there has been an ongoing exchange of directors, scriptwriters, actors and other professionals between cinema and television (Cigognetti-Sorlin 2007) which has generated forms of mutual influence and a partial loss of specificity between the media. This homogeneity brings with it the risk of delegitimizing the cinema experience in the eyes of the audience who, products being equal, may prefer to stay at home: it is more comfortable and convenient.

To sum up, while in the United States economic policies inspired by strategic farsightedness turned the initial rivalry between the cinema and television into profitable cooperation, in Europe television and cinema have not been able to forge a relationship able to tackle the changes in the wider media system.

3. The Italian case

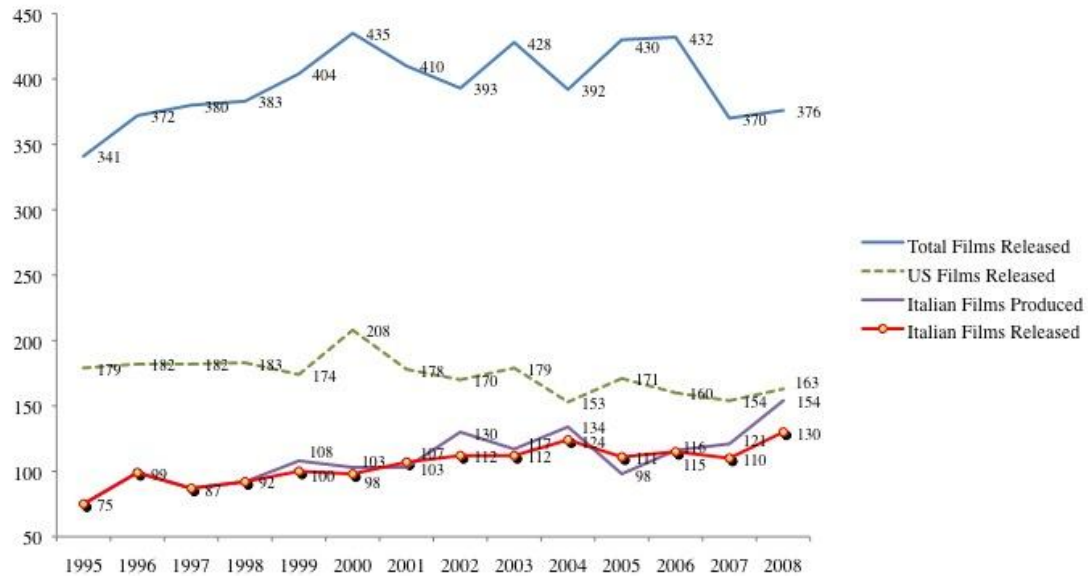
3.1. The Italian theatrical market: production, distribution and reception

It was in the mid 1990s that Italian cinema began – albeit rather timidly – to show signs of recovery after more than twenty years in the doldrums. Over the last decade the Italian film industry, like the other main European film industries, has increased its production and distribution efforts and recovered market shares, winning them back from American productions.

According to the latest data of the National Association of Cinematographic, Audiovisual and Multimedia Industries (ANICA), 2008 confirmed the positive trend that began in the mid 1990s: in 2008 investments in all-Italian feature films amounted to more than 253 million euro, an increase of 221% compared to the 78.8 million euro in 1995, with an average per film of 2.1 million euro compared to 1.3 million at that time (+62%). If we include co-productions, Italian investments in its national cinema rose from 122.6 million euro in 1995 to 330 million euro in 2008 (+169%), of which 259 came from private investors and 72 from State funding, equal to 22% of the total investment.

In 2008 154 Italian feature films were produced, 27% more than in 2007 (121 films) and 105% more than in 1995 (75 films). All-Italian films (i.e. produced entirely with Italian capital) numbered 123, an increase of 105% over 1995 (60 films). The area which registered the most consistent trend in this sense are co-productions: these more than doubled in the period considered (15 in 1995, 31 in 2008), confirming that the Italian cinema is healthy and that it is even starting to attract foreign investors. In this sense the dependence on the RAI-Mediaset duopoly is gradually relaxing in favour of a wider market in which not only pay TV (Sky), but also foreign players such as the American majors (above all Disney, Universal and Warner Bros.) and banking institutions participate.

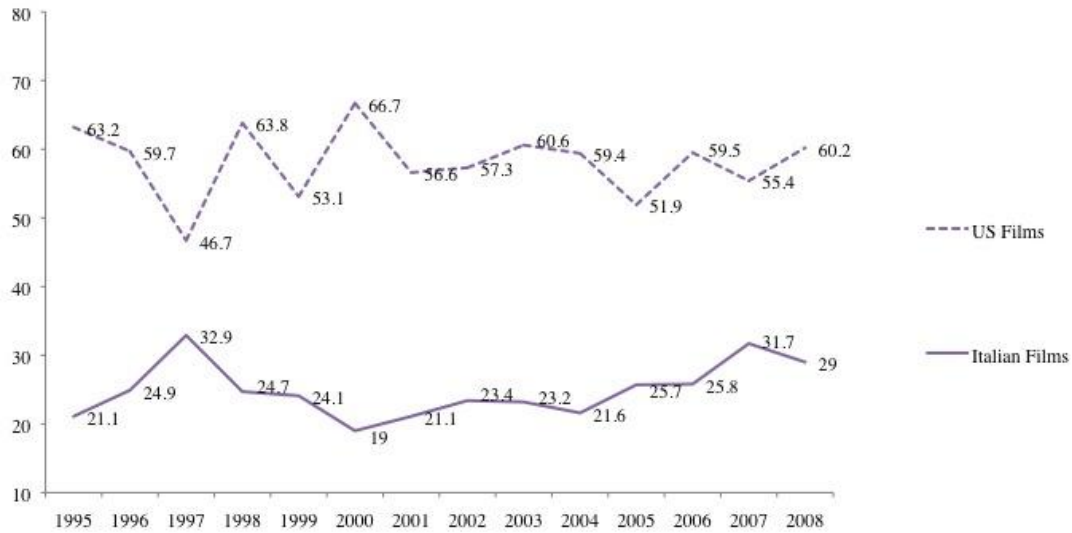
Graph 1
Italian films produced and theatrically released (1995-2008)



Source: processing of ANICA and AIO data.

Like in the rest of Europe, the greater production efforts have also been accompanied by a marked increase in the number of feature films released and growing box-office success: from 2000 to 2008 the number of theatrically released films grew 63% (increasing from 176 to 288 released titles), while the admissions grew 122% (increasing from 13'092'250 to 29'090'241). Italian cinema, supported by the European one, has managed to win back significant market shares: since 1995 the Italian market share has grown by 8 percentage points, rising from 21% to 29%, while the American share remained relatively stable (though it experienced great year to year fluctuations with a slightly negative trend): a trend which is confirmed for national products in all the main European film industry markets.

Graph 2
Market shares of national and US films in the Italian market (1995-2008)



Source: processing of ANICA and EIO data.

Although these have been years of significant growth for cinema in Italy and, above all, excellent results for national production, in television – its main production partner – analysis of the schedules of RAI and Mediaset in the last decade shows that on the small screen Italian cinema has gradually and alarmingly weakened.

3.2. Feature films on television

Looking at European television as a whole, a significant reduction was registered between 2000 and 2008 in the space devoted by free-to-air television to fiction in general (series, TV films, feature films, cartoons, etc.). The trends of the genres within this category vary significantly from country to country depending on the specific industrial characteristics of each reference market; however, one common feature of all the main European television markets is an increase in national TV fiction programming to the detriment of national feature films.

Analysis of feature film broadcasting on French television shows that there has been a limited reduction (2%, from 722 to 708 films) with the shares of national and American films remaining steady (50% and 35% respectively). In United Kingdom there has been a 13% reduction in the number of feature films

broadcast (from 2,467 to 2,156) with a decrease of 30% for national films and an increase of almost 50% for American ones. Finally, Italy, as we will see later, registers the most striking reduction in the number of films broadcast. Despite the general reduction in the broadcasting of fiction and feature films in Italy, it still remains the principal genre in terms of product range and time devoted and continues to occupy more than 30% of the channels' schedules.⁴

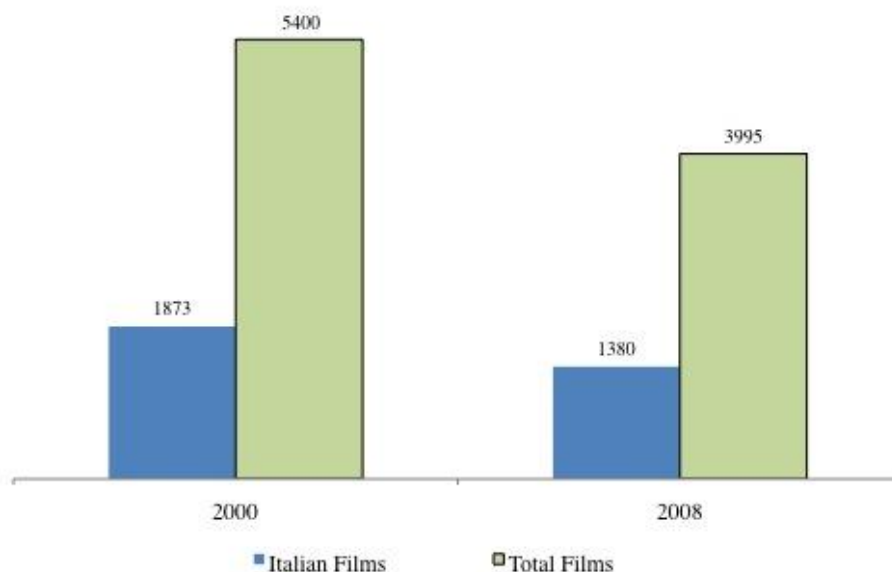
If we consider the main players in the free-to-air television sector, RAI and Mediaset,⁵ the second one appears to be the main broadcaster of fiction with around 16,000 hours broadcast in 2008 compared to the 6,000 hours of its public competitor. Examining the total hourly volume, the space devoted to the two genres varies greatly between the public and commercial broadcaster in terms of both shares and origin: 47% of all fiction broadcast by the two free-to-air broadcasters is in fact distributed by Mediaset while RAI broadcasts only 22%; a gap which is even wider if we consider the broadcasting of films: RAI broadcasts 1,353 hours of films (7%) compared to Mediaset's 5,021 hours (24%). However, considering only products of Italian origin, the situation is almost the very opposite: 35% of national fiction is broadcast by RAI, compared to 30% by Mediaset. This marked imbalance is confirmed also for the broadcasting of Italian films: compared to the 26% (1,051 hours) of film hours broadcast by Mediaset, RAI broadcast just 9% (368 hours). The channel which pays most attention to Italian cinema is Rete4 (445 films/year), followed by Italia1 (237) and Rai3 (218). Of the channels considered, Rai2 broadcasts the fewest films in general and fewer Italian films (9), specializing - as regards the later - above all on premières.

Analysis of the film schedule of RAI and Mediaset has brought to light three main difficulties that characterize the relationship between national cinema and free-to-air television. The first difficulty lies in the sharp drop in the broadcasting of films in general from 2000 on. In the period in question a reduction of 26% was recorded in the number of films broadcast, the biggest in Europe. This trend is even more pronounced if we consider only Italian films, which saw a reduction of 33% on the Italian small screen.

⁴ From 2000 to date the seven Italian free-to-air broadcastrs (Rai1, Rai2, Rai3, Canale5, Italia1, Rete4 and La7) have broadcast 36,285 films for an average of 4,032 films a year.

⁵ RAI channels: Rai1, Rai2, Rai3; Mediaset channels: Canale5, Italia1, Rete4.

Graph 3
 Number of films broadcast by the free-to-air television, whole day (2000, 2008)



Source: processing of ANICA data.

The reasons for this reduction, which is more pronounced than the European average, in the presence of Italian feature films on national television are threefold and related to the general decline of broadcast audience (in particular prime time audience) which begun in the early 80's. Firstly, Italian feature films – and all feature films in general – are being repositioned due to the growing power of the distribution windows which precede free-to-air television (pay TV, video on demand, home video) and the consequent audience fragmentation: the main trend appears to be the migration of feature film towards pay TV. Secondly, the failure to stem the diffusion of audiovisual piracy has contributed to inflate the appeal of premières on television. Finally, the nature of the television product has changed profoundly, partly due to the success and rapid diffusion of new genres of programmes. In this sense there are above all two elements that have favoured the shift in attention of television operators, both public and commercial, towards new formats:

- a) Audience ratings are higher for television fiction and reality shows than for feature films.

- b) Following the pressure exercised by advertisers, and to stabilize advertising revenue thanks to the predictability of the ratings, programmers have tended to favour formats which can be best interrupted for commercial breaks owing to their prefabricated modularity (Montanari 2007: 56).

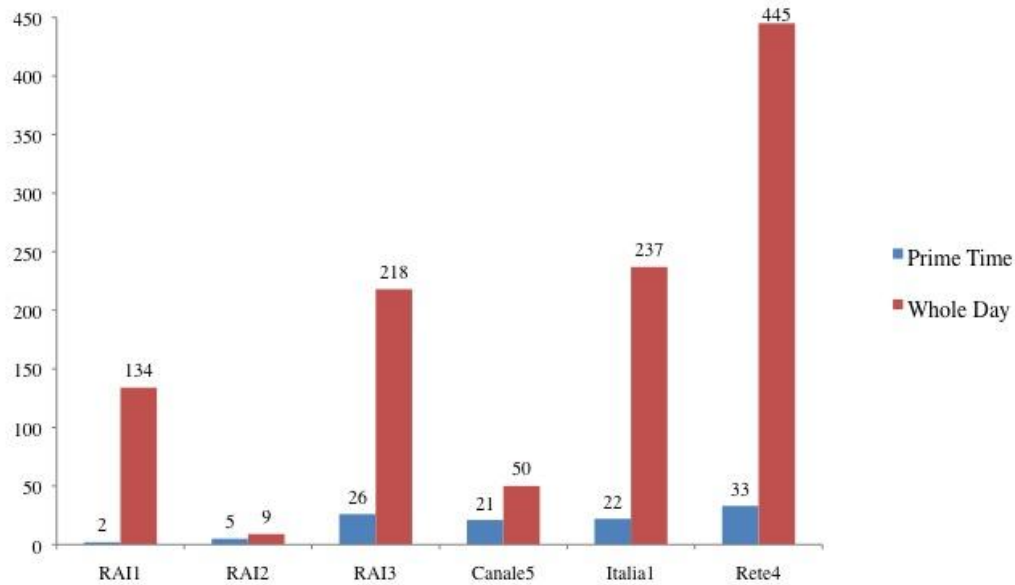
If we consider the origin of the feature films broadcast on television, the strength of US productions is confirmed: the share of American films, always the majority, rose from 47% in 2000 to the current 51% (2,028) while Italian films remained more or less stable, fluctuating between 35% and 34% (1,380). In particular, the presence of American films is significant on the Mediaset programming not only in absolute terms but also compared to RAI's one: American films occupy on average 60% of Mediaset's programming compared to 45% of RAI's.

However, data about Italian cinema on television are worrying not so much in general terms – indeed, the programming shares indicated by the European directives and national law provisions are respected – but because of the time slots at which the films are broadcast. If we look more closely at the time slots in which national films are broadcast, we can clearly see the second complication in the relationship between national cinema and television operators; i.e. the secondary role assigned to Italian products in the time slots that traditionally have the largest audiences. Indeed, Italian films have been relegated to the late evening and night-time slots (more than 40% of the Italian films were broadcast between 2:00 am and 7:00 am, compared to 32% in 2000) while prime time programming drops from 10% to 8%.

Italia1, RAI1 and Rete4 are the channels with the most Italian feature films broadcast in the night time slot with shares on average in recent years of 90%, 70% and 45% respectively of the total number of films broadcast; RAI3 airs around 45% of the Italian films in the morning slot, between 07:00 and 13:00, while Canale5 and RAI2 are the only channels that broadcast a significant share of Italian films during prime time (42% and 55% respectively).

Graph 4

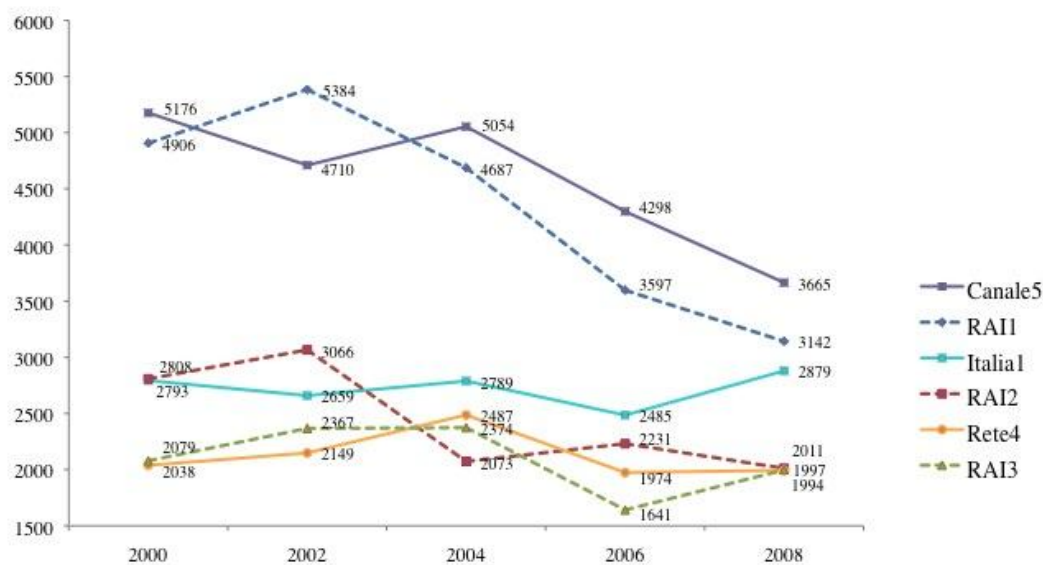
Number of Italian films broadcast in prime time compared to the whole day (2008)



Source: processing of ANICA data.

A third complication emerges from analysis of the year of production of the feature films broadcast by free-to-air television. Of the Italian films, only 3% are premières, the remaining 97% are films from the broadcasters' archives. Most of the Italian films broadcast were made between 1950 and 1979 (on average 60%) while films produced between 2000 and 2008 - although these are the ones with the highest ratings - represent just 16% of the films broadcast.

Graph 5
Italian films broadcast in prime time: average audience by channel,
in thousands of viewers (2000-2008)



Source: processing of OIA and ANICA data.

In more detail, examining the average audiences recorded between 2000 and 2008, there has been a marked reduction in the number of Italian films broadcast in prime time (20:30-23:00) in particular as regards the audiences of the flagship broadcasters Canale5 and RAI1, which registered a reduction of 29% and 36% respectively. Italian films broadcast on RAI1 recorded the highest average audience in the period in question in 2001 thanks above all to the première of Roberto Benigni's international success *La vita è bella/Life is beautiful* (Benigni, 1998) which attracted 15 million small screen spectators. Canale5 instead recorded the second best audience in 2003 with *Chiedimi se sono felice/Ask Me If I'm Happy* (Storti, Baglio, Poretti, Venier, 2001) (8 million viewers) and other premières with high audience ratings such as *L'ultimo bacio/The Last Kiss* (Muccino,) and the second showing of *Tre uomini e una gamba/Three Men and a Leg* (Storti, Baglio, Poretti, Venier, 1997) with almost 7 million spectators. These audience figures have not been beaten in the last 5 years. The average audience of Italian films broadcast by RAI1 and RAI2, after the peak reached in 2001, tended to drop gradually and the second channel was overtaken - also owing to the reduction in the number of Italian premières - first by Italia1 (in 2003) and then also by Rete4 and RAI3 (in

2004). In the period in question the average audiences registered for Italian films broadcast by other channels – Italia1, RAI3 and Rete4 - remained basically stable.

On the whole, the reduction in the time devoted by the broadcasters to Italian cinema corresponds to a marked reduction in reception, above all on the public channels: in the period in question the average audience of Italian feature films broadcast by RAI in prime time dropped by 29%, from 10,063 million in 2000 to 7,150 million in 2008; the trend on the Mediaset channels was the same although more limited, with the audience dropping by 15% from 10,007 million in 2000 to 8,538 million in 2008.

The differences in audience figures depend not only on the time slot of the broadcast but also on the genres of feature films aired. As regards the programming choices of the public channels, RAI1 and RAI3 prefer a more authorial type of product as *La stanza del figlio/The Son's Room* (Moretti, 2001) and *L'ora di religione/The Religion Hour* (Bellocchio, 2002), or emerging films as *Il cielo cade/The Sky Will Fall* (Frazzi, 2000) and *Tutta la consocenza del mondo/All there Is to Know* (Puglielli, 2001) while RAI2, despite the fact that it broadcasts a fairly limited number of films, opts for prime time airing of Italian films addressed to the younger generation as *Santa Maradona* (Ponti, 2001), *Casomai/If by Chance* (D'Alatri, 2001), etc. Of the Mediaset channels, Canale5 mainly broadcasts box-office hits of the previous season in prime time, often winning the evening slot; Italia1 is characterized by the broadcasting in prime time and late evening slot of films starring famous actors targeted at young people and adolescents; Rete4, despite the high number of feature films broadcast, proposes a limited number of recent films, usually preferring films from the archives.

4. Conclusion

This study opened with an analysis of the historical, political and economic variables that resulted in the dominance of television in Europe's media system, relegating cinema to a position of financial and strategic dependence on the small screen.

Analysis of the Italian case confirms and exasperates the European trend of the waning interest of free-to-air television broadcasters (the most important in terms of economics, visibility and reception) in broadcasting national feature films. A trend which is common to both the public and private sectors and whose causes can be traced in particular to the increase in the distribution windows that precede the showing of the films on free-to-air television, in the audience fragmentation and in the appearance of new formats and the reinforcement of others.

The data given above demonstrate that both RAI and Mediaset (the latter to a lesser extent) are reducing the spaces and thus the possibility of success of Italian feature films on the small screen. This phenomenon

appears – at first sight – rather surprising if we consider that a) television is the main financial source for the national cinema (in particular, RAI Cinema is the main producer of films in the country and the broadcasting of its films does not actually entail any cost for the company RAI), and that b) the healthy moment being experienced by Italian cinema in the theatrical market demonstrates its capacity to rebuild a relationship with the audience.

This new trend has inevitable repercussions on the film industry and at the same time questions the legitimacy of the current regulatory system. If Italian films are no longer able to grasp the television audience attention, broadcasters could appeal against those measures that force them to economically support the film industry, leaving it to fend for itself and find new sources of financing. On the other hand, it should be remembered that the Italian television companies considered (public and private) are vertically integrated and that their activities are not limited only to the television market but also include film production and distribution and in some cases also exhibition (Medusa Film). Consequently, the economic advantage won by television companies in the production and distribution of films in the movie theatres and in the home video market is part of a business strategy shifting distribution toward the more efficient, direct-pay, early distribution windows and allowing them to decide to what extent to continue the exploitation and valorisation of the feature films when they arrive on free-to-air television. This second scenario, characterized by the current tendency to create multimedia empires, makes any idea of antagonism between cinema and television obsolete, defining the discussed trends as a symptom of the return to health of the film industry through diversification of revenue streams.

In the coming years it will be indispensable to verify if the tendencies underway and identified in this study are part of a transitory phenomenon or if they represent the scenario of the years to come. Secondly, it appears advisable to investigate film economics within the television industry; that is, the costs and benefits, as well as the relationships between broadcasters (public and commercial, free-to-air and pay TV) and audiovisual producers able to coordinate film production with the acquisition policies by the broadcasters. Only in light of this information will it be possible to establish if the film industry (still) needs to protect itself (or be protected) to tackle television's disinterest or if the new shaping of the wider media system has made feature films immune to the fate of their broadcasting on unencrypted television.

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