Who still goes to the cinema?

Good news for European cinema as it celebrates its centenary: figures for 1994 appear to confirm the upward trend in audience figures within the European Union, which first made itself known in 1993. Although not all the national figures are available as we go to press, estimations show that audience figures in the European Union should have gone over the 670 million mark in terms of ticket sales, representing an increase of 2,4% on 1993. This rise can be put down mainly to the increase in audience figures for the United Kingdom (+ 9,42%), Italy (+ 6%), Spain (+ 1,6%), Belgium (+ 10,5%) and Germany (+ 1.76%). France, however, fell back 4.82% on 1993.

France therefore dropped away from top position in the European audience figures league-table, losing its place to Germany. The market has undergone important changes over the last decade, which have brought about a redistribution in cinema audiences: the falling off in cinema-going in France, Spain and Italy in the second half of the 1980s, the re-unification of Germany and the spectacular recovery of UK audience figures. While in 1985 France alone accounted for a quarter of all western European cinema ticket sales, this figure has now dropped to 20%. The three major markets come within a range of 120 to 135 million tickets sold per year. One interesting point is that France represents the lowest proportion of box-office sales for American-made films (60.4% as against 81.7% in Germany and over 85% for the UK) and the greatest number of sales for national films (between 36 and 40 million tickets sold, compared to 20 to 25 million for Italian films, 10 to 12 million for German films and 3 to 5 million for British films). These figures can occasionally be distorted by one-off big hits, such as the 1993 French success *Les Visiteurs* and *Four Weddings and a Funeral* in the UK in 1994.

It is as yet too early to predict audience figures for 1995, although initial figures show opposing trends: audiences in France went up over the first five months of the year by 1.6% compared to the same period in 1994, while audiences for the first half of the year in the United Kingdom slumped by 14.5% against the first half of 1994. Predictions published by Dodona Research indicated an increase in box office figures of 17.4% over the next six years in Europe, to reach 810 million tickets sold by the year 2000.

Results for 1994 also show stable audience figures in the smaller western European countries for which figures are available (Denmark, Finland, the Netherlands). According to the data provided to the Observatory by the European Institute for the Media it would appear that the slump in central and eastern European countries has continued along the same spectacular lines as since 1989, with Bulgaria down 48%, the Czech Republic down 41%, Lithuania down 39% and Estonia down 32%. Audience figures have, however, been picking up since 1993 in Poland, up 24%, and Slovenia, up 3%.

Apart from classical admissions data, studies are regularly carried out in the major European markets to learn more about the characteristics of cinema-goers. This research could be commissioned by national film centres, professional organisations or cinema chains, but the aims are generally similar: to understand better the demand for cinema in order to react accordingly; in particular as regards setting up cinemas, and to provide information to advertisers. Advertising expenditure in cinemas in 1994, in the European Union, amounted to about 350 million ECUs, or less than 1% of the total amount spent on media advertising. Although this is just a drop in the ocean compared to the total amount invested in advertising, it still represents an additional source of income for cinema operators. Though advertising expenditure is not the same as the revenues actually generated (in particular, agency fees have to be deducted), advertising expenditure, in German cinemas (308 million DM in 1994) can still be compared to box office receipts (1.4 thousand million DM).

Advertising expenditure has increased with growing audience numbers: in 1994 it increased by some 5% in the European Union.

This is why cinema audience research is gradually assuming the same kind of importance as the audience viewing figures for television: the modernisation of cinemas and the burgeoning of multiplexes are helping to bring the cinema back into the advertising mainstream. The great cinematographic networks are now finding themselves in the same position as the private broadcasters; selling their audiences to the advertisers.

Three national studies

Unfortunately a comparison of three national studies (the CAVIAR study carried out in the United Kingdom on behalf of the Cinema Advertising Association; the Médiamétrie study realised in France for the CNC, the FNCF, Circuit A, Mediavision and Procirep; the Astra study carried out in Italy for ANICA and the Presidenza del Consiglio) shows up the methodological differences between the three, which makes any meaningful comparison that much more difficult. Added to this, the studies themselves are generally only available in synthetic form.

The main problem comes from ranking cinema-going habits. The Médiamétrie study divides the public up into keen cinema-goers (at least once a week), regular ones (between once a week and once a month) and occasionals (under once a month). The CAVIAR typology takes an entirely different approach, splitting its public up into seven categories: those who go to the cinema twice a month or more, those who go once a month, once every 2-3 months, once a year, less often and never. What this boils down to is that CAVIAR subdivides the occasionals into more precisely-defined categories.

Another variance lies in the differences in age of the respective audiences: the Médiamétrie study has been studying the French population aged 6 and over, while the CAVIAR study gives its starting age as 7-year-olds and Astra's study starts with 14-year-olds and finishes with the 79-year-olds. The age brackets also vary, along with the socio-professional categories: the CAVIAR study uses the Anglo-Saxon system of ABC1 and CDE2, while the Médiamétrie study considers the different professions and qualifications. The three studies all take into account regional localisation while, of course, allowing for the specific characteristics of their respective countries.

The three studies, however, indicate trends that, although not convergent, do allow comparisons to be made. While France, the United Kingdom and Italy have roughly the same size of population (57.8 million, 58.2 million and 57.2 million inhabitants respectively), the cinema-going public varies considerably between the countries. This shows up in the (provisional) figures for the average number of cinema visits made in 1994 per head of the population in the three countries: 2.19 in France, 2.13 in the UK and 1.71 in Italy.

In France, over half of the population (56.4%) aged 6 and over went to the cinema at least once in the year. In the United Kingdom, 68% of the population aged over 7 claimed they never went to the cinema. This would show that the cinema-going population represented 32% of the total, in other words 16.4 million people. In Italy, 38.5% of the population aged 14 and over (18 million people) went to the cinema at least once in the year.

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Cinema Odyssée (Strasbourg). Courtesy of Mr Faruk Günaltay.

The three studies confirm some already-existing trends: in all three countries, the cinema-going public is evenly divided up between men and women: the audiences are generally young, urban-based and belonging to the better-off categories of the population. This shows us nothing new and we would like to see a more in-depth approach that includes an analysis of how each age-group's habits are developing and how an ageing population can affect audience figures. It might well be worth while taking a closer look at the debate now in full swing among American professionals over the signs that American cinema audiences are getting older: people of 40 and over now represent a higher proportion than ten years ago (6 - 7% more, but this comes down to 3 - 4% if the overall ageing of the population is taken into account).

The three studies also throw up a common category of "frequent" cinema-goer (found by adding the "keen" public to the "regular" goers) who go to the cinema at least once a month. In the United Kingdom, 7% of the population claim they go to the cinema two or three times a year, while 8% see at least one film a month. The "frequent" category would therefore be made up of 7.7 million regular goers (47% of the total cinema audience). In France, the keen category makes up 4.2% of the public (but 29.8% of ticket sales) and the regular goers another 28.4% of the public (or 46.4% of ticket sales). The frequent category in France would consist therefore of some 9.7 million people, or 32.6% of the total audience. In Italy, the frequent category accounts for about 8 million cinema-goers, making up 43% of the total audience.

To sum up, France, the United Kingdom and Italy all have about the same size of population. In 1994, audience figures for France and the United Kingdom were roughly the same, but considerably higher than those for Italy. However, the French cinema-going audience is larger (over one French person out of two goes at least once a year, compared to under one British person out of three and just over one Italian out of three). The relative importance of the "frequent" category is therefore higher in the United Kingdom and Italy than in France, where the occasional cinema-goer is more common, still representing 23.8% of ticket sales.

The "keen" cinema-goer in the UK and the "retrievable" Italian public

The series of CAVIAR studies carried out over the years has revealed two contrasting trends in British cinema-going habits: on the one hand, the percentage of the population who never go to the cinema has been steadily rising since 1984: it went up from 73% in 1984 to 93% in 1994 for the 7-14 age bracket, from 59% to 92% for the 15-24 bracket and from 49% to 83% for the 25-34 age bracket. What can the increase in ticket sales from 54 to 124 million over the same period be put down to? The answer lies in the increase in the number of films the frequent cinema-goers go to see: the percentage of spectators who go to the cinema at least once a month has gone up from 15% of 15-24 year-olds in 1984 to 38% in 1994 and from 4% of the 25-34 age category to 21% in 1994.

The Italian study shows the large number of "retrievable" cinema-goers, those people who had not been to the cinema over the previous six months, but who used to go and who thought they would be going again in the future, who like to watch films and to go out whenever possible. 40% of the "retrievables" live in southern Italy, 15% in central Italy, 26% in the north-west and 19% in the north-east. 52% of the "retrievables" live in towns of under 30,000 inhabitants.

These three different studies show how cinema is to react if it is to survive : continue to attract the occasional cinema-goer in France, get the "retrievables" back on the film path in Italy and capitalise on the growth of the frequent audience in the United Kingdom. It is not within the scope of this article to look at the overall audio-visual market offer, the kinds of cinema available to the public, the number and kind of films shown on television or the development of the video market. Professionals in France tend to explain how French audience figures have held up by referring to the quota of films that can be put out by the television channels. It cannot be denied that the differences are marked: In 1994, 983 films were shown unscrambled on French television as against 1,910 on British television channels. In Italy, in 1993, 2,500 films were shown on RAI and Fininvest, making a total of 3,058 screenings (not counting smaller national or regional channels). According to the ANICA/ASTRA study, only 2% of cinemagoers do not watch films on television, and 70% of them own a VCR for consumption of films on video cassettes. However, the spectacular increase in cinema audience figures in the United Kingdom cannot be explained by the number of films shown on television: the opposite in fact tends to be true, with the development of BSkyB and Flextech pay-channels leading to an increase in the number of films being screened. The United Kingdom is also the leader in the video market. Box office sales seem to have gone hand-in-hand with the advent of the multiplexes.

The modernisation of cinemas would therefore seem to hold the key to future growth. But is this really a universal remedy? Does

**Cinema attendance (1990-1994)
in millions**

Country	1990	1991	1992	1993	1944	*Diff. 94/93*
AT	10.15	10.50	9.34	12.04	12.97	*7.72%*
BE	17.10	16.54	16.56	19.22	21.24	*10.51%*
BG	19.60	13.30	19.50	11.08	5.72	*-48.38%*
CH	14.27	15.41	15.00	15.90	16.20	*1.89%*
CZ	36.40	32.30	30.20	21.90	12.87	*-41.23%*
DE	102.50	119.90	105.90	130.50	132.80	*1.76%*
DK	9.62	9.22	8.65	10.22	10.30	*0.78%*
EE	10.90	7.30	3.40	2.00	1.37	*-31.50%*
ES	78.51	79.10	83.30	87.70	89.10	*1.60%*
FI	6.19	6.00	5.40	5.70	5.60	*-1.75%*
FR	121.77	117.50	115.36	132.70	126.30	*-4.82%*
GB	97.37	100.29	103.64	114.36	125.13	*9.42%*
GR e	13.00	10.00	6.50	7.00	6.00	*-14.29%*
HU	36.22	21.69	15.23	14.80	15.90	*7.43%*
IE	7.40	8.08	8.26	9.31	10.42	*11.92%*
IS	1.23	1.34	1.30	1.24	1.24	*0.00%*
IT	90.70	88.60	83.60	92.20	98.00	*6.29%*
LT	27.73	13.90	6.57	2.31	1.40	*-39.39%*
LU	0.54	0.61	0.60	0.70	0.72	*2.86%*
LV	19.70	11.60	5.20	1.80	1.59	*-11.67%*
MT	0.25	0.20	0.20	0.25	n.a.	*n.a.*
NL	14.64	14.86	13.68	15.87	15.90	*0.19%*
NO	11.38	10.80	9.59	10.90	11.61	*6.51%*
PL	38.00	18.00	11.00	13.70	17.00	*24.09%*
PT	9.59	8.23	7.85	7.39	6.40	*-13.40%*
RO	100.73	57.22	41.02	30.85	25.00	*-18.96%*
RU e	n.a.	1 343.00	645.00	250.00	100.00	*-84.50%*
SE	15.70	15.72	14.88	15.98	15.88	*-0.63%*
SI	2.85	1.79	1.59	2.34	2.80	*19.66%*
SK	13.90	8.40	11.90	9.00	n.a.	*n.a.%*
TR	19.23	16.54	13.24	12.50	13.95	*12.00%*
EUR 15 e	594.78	605.15	583.52	660.89	676.76	*2.40%*
EUR 33	n.a.	2 178.00	1 413.46	1 061.46	n.a.	*n.a.*
US	1 189.00	1 141.00	1 173.00	1 244.00	1 290.00	*3.70%*
JP	145.50	138.33	125.60	130.72	122.99	*-5.91%*

e = estimation

Source: European Audiovisual Observatory

the sharp decline in audience figures in the United Kingdom in the first half of 1995 indicate the end of the recovery or a wearing-off of the novelty effect of the multiplexes? It is evidently too early yet to talk about a reversal of the trend. Some observers see signs of an overall downturn in the fortunes of new cinemas with the 11.87% drop in ticket-sales in the Brussels Kinepolis in 1994, the prime model in Europe for the new-style cinema complex. However, the decline seems mainly linked to the opening of a new megacomplex in Antwerp, the traditional catchment area of the Kinepolis. Multiplexes still have a bright future and an important role to play in bringing people back to the cinema and even in the renaissance of European film-making. It is something we certainly have not heard the last of.

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