

THE ROLE OF THE AUDIENCE IN THE TURKISH FILM INDUSTRY*

ABSTRACT: According to consumer-centered marketing theories, “the consumer is the king”. As there are so many alternative brands in the market, it is vital to understand the reasons for customers’ choices. Likewise, in the film industry, the audience is “king” heaps of times. The filmmakers rely on popular genres, characters, actors, and directors to gain the target audience’s appreciation. However, when it comes to art, cultural and creative industries, implementing customer-focused strategies has caused controversy. If cinema is an art, how important should the expectations and needs of the audience be?

This study addresses the audience’s role in the Turkish film industry. Following a literature review of the Turkish film industry’s history and current structure, the study interprets the audience profile and box office data using statistical analysis. The study shows that the audience has been influential in almost every period of the Turkish film industry and at every stage of the value chain, from planning to distribution.

KEYWORDS: film industry, audience, audience profile, box office, genre, marketing public relations

INTRODUCTION

In mainstream cinema, there is a common belief that moviegoers dislike bleak, disturbing films; they prefer action, comedy, and romantic movies featuring celebrities. However, it is hard to refer to a homogeneous audience to make such generalizations. At the end of the 19th century, the audience that /which filled movie theatres in Paris was mainly poor and unemployed. In parallel, that was the time when nearly ten million immigrants were resettled in the USA. As nickelodeon movies were new, cheap, silent, and had no language difficulties, they became a popular spare-time activity for immigrants (Buscher, p. 16). On the contrary, in the Turkish Republic’s first years, the audience was a modern, polite and wealthy mass wearing suits and bowler hats (Kirel, p. 103).

Over time, there have been significant breaks in the Turkish audience’s profile following social, political, and economic conjuncture changes, directly affecting the movies’ genre and content. From this point of view, the Turkish film industry has been a compelling case reflecting the effect on the audience. Today, filmmakers adopted the audience’s taste and appreciation as an integral element of the film industry. Producers and directors, who want their films to achieve booming box office income, consider the audience’s taste and demand.

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THE EVOLUTION OF THE TURKISH FILM INDUSTRY

The first examples of Turkish films were produced in Ottoman Empire during World War I. In 1916, based on the models introduced in Germany, Enver Pasha initialized the establishment of a film production unit within the army. This office (named Merkez Ordu Sinema Dairesi) remained the sole film producer until Kemal Film, the first private film company, was founded in 1922 (Esen, p. 22). Hereafter, Turkish cinema has gone through many periods: experienced golden ages, significant crises, and major economic collapses, and accomplished outstanding national and international artistic achievements. Turkey's first professor of cinema, Onaran, classified the history of Turkish Cinema into four periods: The Theatre Artists Period (1923–1939), the Transition Period (1939–1952), The Age of Filmmakers (1952–1963), and New Turkish Cinema (1963–1980) (Onaran, p. 10). Future scholars have adopted this classification and the subsequent decades appeared to be defined as the Period of Contradictions (1973–1980), the Post-Coup Period (1980–2000), and Contemporary Turkish Cinema.

1. THE THEATRISTS PERIOD (1923–1939)

After the establishment of the Turkish Republic in 1923 under the leadership of Mustafa Kemal Atatürk, a series of political, religious, cultural, social, educational, and economic policy changes were implemented to convert the new Republic into a secular, modern nation-state.¹ Cineaste Muhsin Ertugrul undertook the mission of representing the ideals of the Republic and creating a modern society using the field of theatre and cinema. He created a theatrical cinematic approach through historical films and adaptations of Turkish literature. His movies paved the way for the films produced in the following years to walk on similar narratives and themes (Teksoy, p. 472). The industry had focused on the film adaptations of famous writers' works such as Halide Edip² and Nazım Hikmet.³ In this period, the audience and its tastes were not in the foreground. The newspaper announcements appealed to the audience's nationalist feelings instead of the directors or actors. Parallel to the period's conjuncture, the state supported the production of documentary and propaganda films about independence, the new Republic's reforms, and accomplishments.

¹ Some of the reforms can be classified as follows: 1) political reforms, such as the abolition of the office of the Ottoman sultanate, abolition of the office of the caliphate held by the Ottoman caliphate, full political rights for women to vote and be elected, the inclusion of the principle of laicity; 2) cultural and educational reforms involving the centralization of education, adoption of the Latin alphabet, regulation of the university education, change of headgear and dress, closure of religious convents and dervish lodges; 3) legal and social reforms, e.g., abolition of sharia courts, the introduction of the new penal law modeled after the Italian penal code, introduction of the new civil code modeled after the Swiss civil code; 4) economic reforms such as reform of the international time and calendar system, the international system of units.

² Halide Edip (1884–1964), a Turkish novelist and political leader. She was known for her novels criticizing the low social status of Turkish women. During the Turkish War of Liberation (1919–1923), she noticed the importance of informing international public opinion and decided to participate in the national struggle by establishing a news agency.

³ Nazım Hikmet (1901–1963), one of the most important poets and influential figures in 20th-century Turkish literature. His mastery of language, the introduction of free verse, and a wide range of poetic themes strongly influenced Turkish literature in the late 1930s. He is also known for his plays and scripts, which are mainly Marxist-inspired. He was a grand grandchild of the Polish emigrant Konstanty Borzęcki/Caleleddin Pasha.

2. THE TRANSITION PERIOD (1939–1952)

During World War II, Turkish decision-makers who had recently experienced the devastating effects of wars adopted “active neutrality” as a consistent strategy, and managed to keep Turkey out of the war. Turkish filmmakers who were studying or working in Europe returned to Turkey. They started producing original screenplays instead of adapted ones. The innovative camera moves and angles were adopted instead of the fixed wide-angle shots of the previous period. Thus, the narrative language of films has transformed into cinematic narration. Movie actors replaced theatre actors. The industry’s new directors, producers, actors, technicians, studios, and laboratories positively contributed to the quality of the movies and the production volume (Esen, p. 45).

3. THE AGE OF FILMMAKERS (1952–1963)

In the 1950s, described as the “era of filmmakers,” Turkish Cinema began to be transformed into an industry that employs more people and produces more films. Yeşilçam,⁴ mainly a street in Beyoğlu Istanbul, became a district where many actors, directors, crew members, and studios were based. Esen stated that in the 50s, liberal prime minister Menderes had the ambition of re-making Turkey into “Little America.” The movies that reached crowded audiences more easily, successfully projected the American lifestyle and consumption habits (Esen 2010, p. 63). The magazines have allocated more space to the cinema, organized competitions, and created new stars. Thus, marketing public relations strategies promoting celebrities increased; Ayhan Işık and Belgin Doruk became the stars of Turkish cinema thanks to Akad’s famous film “In the Name of the Law” (1952, Lütfi Ö. Akad; see Teksoy, p. 479). Following the 1960 coup, a discussion regarding the depiction of reality in Turkish cinema started. Inspired by Italian neorealism, films dealing with social issues were produced. “Revenge of the Snakes” (Tur. *Yılanların Öcü*, directed in 1962 by Metin Erksan), “Dry Summer” (Tur. *Susuz Yaz*, directed in 1963 by Metin Erksan), “Migrant Birds” (Tur. *Gurbet Kuşları*, directed in 1964 by Halit Refiğ) are important examples of this period. Motion pictures’ artistic quality improved as well, and the films gained a national identity. “Dry Summer” won the Golden Bear at the Berlin Film Festival.

4. NEW TURKISH CINEMA (1963–1980)

In this productive period, a new production style called “Regional Management” was born with the initiative of the producers who adopted the low-cost, high-profit policy. The system solved the chronic financing problem of Yeşilçam, and the number of films rose rapidly. With 241 movies produced in 1966, Turkish cinema is at a level that can easily compete with Hollywood and Bollywood. According to Özön, Turkey ranked fourth in the world in terms of annual film production in 1966, after Japan (442), India (332), and Hong Kong (300) (Özön 1985, p. 368).

⁴ Metonym for the Turkish film industry, named after Yeşilçam Street in the Beyoğlu district of Istanbul.

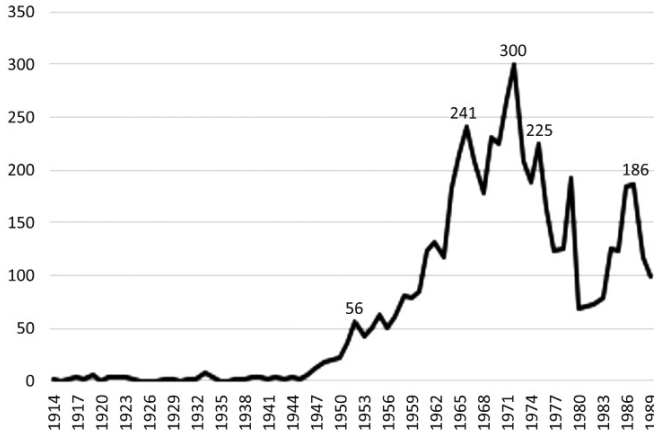


Chart 1.

The Number of Films Produced in Turkey

Source: Own elaboration on the basis: TÜİK – Turkish Statistical Institute (<https://data.tuik.gov.tr/>).

The workflow of this production form sheds light on the subject. The system's success is the regional operators that keep the audience's expectations. The operator estimates a projected box office revenue for each film project by anticipating the audience's response. Then he pays the producer approximately 50% of the projected profit in advance. The producer who gets the advance payment shoots the movie (Aslan, p. 21). The scenarists write the script by mathematical methods as well; they place the scenes expected by each region in proportion to the advance payment received from the regional operator. Thanks to this system, the audience's wishes and demands are followed closely, and the audience is directly included in production. Having communicated with the public one-to-one, regional operators maintained two-way communication between the audience and the producers.

Another strategy was casting famous singers in the movies. Obviously, the marketing potentials of the singers were ahead of the quality of the film. Regional management could have been defined as a national "financing model" in which the cinema is financed and shaped by its audience. On the other hand, while this model revitalized Turkish cinema in the short term, it caused a decrease in the quality of motion pictures in the long term (Tunç 2014). For this reason, it met with heavy criticism. However, it has been very influential not only in the number of films produced but also in the number of screens and the production styles adopted in the following periods.

In 1961, there were 213 movie theatres in Istanbul (68 closed and 145 open-air), but in 1975, the number increased to 373 (137 closed and 236 open-air). However, the political, economic, and sociological changes started to affect the film industry profoundly in those years. Besides, with the establishment of TRT, Turkish Radio and Television, in 1964, the increasing interest in television drove the masses away from the cinema, screens began to close, and the industry shrank dramatically. This period offered a vital opportunity to establish a concrete infrastructure for the Turkish film industry. Nevertheless, long-term strategies could not be implemented, and the earnings were quickly consumed or transferred outside the cinema sector. Thus, the industry had missed an ample opportunity to revive (Abisel, p. 105).

5. THE PERIOD OF CONTRADICTIONS (1973–1980)

During this period, the political conflicts between the left and right wings, also the government's repression and censorship caused many directors to withdraw from the industry. According to Esen, the audience was drawn to television's cheap and entertaining world and their homes' safe environment. The industry tried to overcome the depression with sex movies. The target audience had become migrant men who were dragged from villages to big cities. Distracting them with sex films was an excellent way to prevent them from being politicized (Esen, p. 135). However, well-known political actor and director of Kurdish descent Yılmaz Güney's films – "The Hope" (Tur. *Umut*, 1970) and "Friend" (Tur. *Arkadaş*, 1974), heralded a new era in Turkish cinema. As mentioned, Italian neorealism had already been adopted by socialist realist filmmakers from the beginning of the 60s by some directors like Atif Yılmaz, Metin Erksan, and Halit Refig. However, they were mainly criticized for producing traditional Turkish films by inserting some social problems and a few realistic scenes. Yılmaz Güney, on the contrary, developed a mature and authentic realist political film language. While criticizing the degenerate bourgeois lifestyle and reflecting on interclass encounters and social contradictions, *Arkadas* gained a new audience consisting of intellectuals and students. It also had the highest box office return (1,200,000 TL gross revenue) of all time. Güney reached the peak of his career when "The Path" (Tur. *Yol*, 1982), which displays a series of shots edited in a documentary fashion from an observer's perspective and shows the defects of the socio-political system through the story of an average Kurdish man, won Palm d'Or in Cannes.

Nevertheless, Ertem Eğilmez's multi-star comedies became popular (Onaran, p. 185). Ertem Eğilmez was a legendary director of Turkish cinema and a PR master as well. While he was adapting the bestseller novel *Hababam Class* (Tur. *Hababam Sınıfı*) for the cinema, casting auditions were done for the book's popular characters, and every move was announced in newspapers. Thus, not only had he created curiosity and expectations about the movie, but he also brought legendary artists to the film industry.

In 1977, director Atif Yılmaz brought a new poetic and social approach to human relations with an adaptation of Cengiz Aytmatov's *My Poplar in a Red Scarf* (Tur. *Selvi Boylum Al Yazmalım*). All critics appreciated the film because of its successful narrative language and sincerity. The interest in Turkish cinema abroad showed a remarkable increase with Yılmaz Güney's movie "The Herd" (Tur. *Sürü*), which received awards at many international festivals in 1979.

6. POST-COUP PERIOD (1980–2000)

The political turmoil that Turkey experienced after the military coup on September 12, 1980, significantly impacted the film industry. Many theatres were raided, and many movies were banned. According to Esen, the most significant blow to the cinema in these years was the Hollywood coup instead (Esen, p. 73). The regional management system prevented international cartels throughout the country until the 1980s. However, the 80s were the years of transition from a statist economy to liberal capitalism for Turkey. In 1987, the American distribution giants were granted the right to enter the Turkish market without an intermediary. Afterward, Hollywood became unrivaled in the Turkish market (Töre, p. 4). In 1984, domestic films' share decreased to 53%, dropping to 34% in 1989 and 16% in 1994. (Tanrıöver 2011).

Sex movies that emerged in the 70s and their porn stars disappeared suddenly, replaced by arabesque movies with famous singers. The audience of this genre was mainly slum-dwelling immigrants that left their homes in the countryside, mostly in the eastern parts of Turkey, which is predominantly Kurdish, to work in big cities. Arabesque films are tearful, prayerful films whose scripts are inspired by the words of arabesque songs' lyrics. The leading characters are performed by arabesque singers who sing famous songs throughout the movie like a video clip. These films have succeeded in attracting the migrant audience to cinema screens and have been watched on video cassettes at homes and in coffee shops. They became a shelter, especially for those who migrated to foreign countries. The filmmakers have noticed this market very well. These cheap arabesque films became the salvation for Turkish producers (Esen, p. 180).

However, despite the rapid decline in the quality of mainstream films, independent auteur cinema was emerging simultaneously. From 1985, the number of films began to increase again. To keep the cinema industry alive, in 1986, The Law on Cinema, Video and Music Works, which mainly aimed to end piracy in the field of videotape and control this market, came into force. At the end of 1989, the Cinema & Copyright Directorate was founded under The Ministry of Culture and Tourism and started to provide financial support for films, documentaries, and animations. In the 90s, the Film Council was established. Turkey has also become a member of a fund, EURIMAGES, which is administered by the Council of Europe and finances mainly co-production activities. These were critical steps, particularly for Turkey's art-house film sector struggling with financial problems. Eurimages supported 99 Turkish films with over EUR 21 million between 1990 and 2013 (Kanzler, p. 46).

In parallel, film festivals began to create their audience. Turkish movies competed in festivals abroad and won many international awards (Tanrıöver, p. 53). For instance, "The Path" (1982), focusing on honor killings, local traditions, and vengeance, directed by Şerif Gören and Yılmaz Güney, won the Palm d'Or in Cannes, as did Nuri Bilge Ceylan's 2014 "Winter Sleep" years later. Two other films by this renowned director, namely "Distant" (Tur. *Uzak*, 2003) and "Once Upon a Time in Anatolia" (Tur. *Bir Zamanlar Anadoluda*, 2011), were also awarded Grand Prix. Fatih Akın received the Golden Bear for his 2004 film "Head-On" (Tur. *Duvara Karşı*) at the Berlin Film Festival and Best Screenplay at Cannes for "The Edge of Heaven" (Tur. *Yaşamın Kıyısında*). 2018 "Butterflies" of Tolga Karaçelik won the Grand Jury Prize at the Sundance Film Festival. Thus a new generation of independent filmmakers has emerged. According to Ottone, despite the absence of common programmatic or aesthetic manifestos, this new generation mainly addresses identity issues with various storytelling styles and approaches (Ottone, p. 51). Despite their massive international success, these films could not compete with mainstream films at the box office (total number of tickets sold: "Head-On" 296.000, "The Edge of Heaven" – 289.000, "Winter Sleep" – 304.000, "Once Upon a Time in Anatolia" – 160.000, "Distant" – 60.000, "Butterflies" – 135.000).

These films were mostly produced by their directors' production companies supported by EURIMAGES and/or The Ministry of Culture and Tourism. There is also a significant number of Co-production projects. The German-Turkish Co-Production Development Fund, for example, established in 2011 as a joint venture between İKSV,⁵ the Medienboard

⁵ Istanbul Foundation for Culture and Arts (İKSV) is a non-profit cultural institution. Since 1973, the Foundation has continued its efforts to enrich Istanbul's cultural and artistic life. İKSV regularly organizes the Istanbul Film Festivals.

Berlin-Brandenburg and the Hamburg Schleswig-Holstein Film Fund is a good example which supported 53 German-Turkish co-productions with 873,500 Euros in 10 years. However, according to the Film Industry Report 2016 of IKSŞ, as there is no direct support system for co-productions, a broad portfolio of producers who are willing to make international productions could not be created (IKSŞ, 2016).

THE STRUCTURE OF THE TURKISH FILM INDUSTRY

The Turkish Film Industry entered the new Millenium through the developments in production, distribution, and screening processes. The increase in the box office and theatres in the 2000s is related to American-origin companies' entry into the market. The number of screens rapidly declined in the early 1990s and increased to two thousand in 2013. The total audience, which fell below 10 million, increased to 15 million in 1998, and to 23 million in 2006. It has been over 30 million since 2008 (Töre, p. 5). Martin Kanzler reported in 2014 that although it was far below the European average of 1.8 tickets per capita per year, with 0.7 tickets, the Turkish film industry was the second-fastest-growing and the seventh-largest industry in Europe (Kanzler 2014, pp. 6–8). In 2018, the audience reached 70.4 million, and tickets per capita per year rose from 0.7 to 0.9. In the meantime, the average of the European Union has also increased from 1.8 to 1.9.

Despite the insufficient public support for industry, the production volume is also expanded rapidly. The number of Turkish films in theatres, which had barely reached 10 million viewers with less than 30 movies produced in a year before 2005, increased to 180 movies in 2018. To compare, the top 10 countries according to film production between 2014 and 2018 are shown in the table below. The table shows that the production in India, China, and Japan is above Hollywood. The 5-year growth rates of South Korea and China are significant, while the UK experiences a sharp decline.

Table 1. Top 10 Film Producers in 2014–2018

| | Country | 2014 | 2015 | 2016 | 2017 | 2018 | Annual Growth % | |
|----|----------------|--------------|--------------|--------------|--------------|--------------|-----------------|-------------|
| | | | | | | | 5 years | 1 year |
| 1 | India | 1,966 | 1,845 | 1,903 | 1,986 | 1,813 | -2.0% | -8.7% |
| 2 | China | 618 | 686 | 944 | 970 | 1,082 | 15.0% | 11.0% |
| 3 | Japon | 615 | 581 | 610 | 594 | 613 | -0.1% | 3.2% |
| 4 | USA | 482 | 495 | 511 | 549 | 576 | 4.6% | 4.9% |
| 5 | South Korea | 232 | 232 | 339 | 494 | 454 | 18.3% | -8.1% |
| 6 | France | 258 | 300 | 283 | 300 | 300 | 3.8% | 0.0% |
| 7 | Italy | 201 | 185 | 224 | 234 | 272 | 7.9% | 16.2% |
| 8 | Spain | 224 | 254 | 254 | 279 | 264 | 4.2% | -5.4% |
| 9 | Germany | 234 | 236 | 256 | 247 | 247 | 1.4% | 0.0% |
| 10 | United Kingdom | 364 | 361 | 327 | 315 | 202 | -13.7% | -35.9% |
| | Total | 7,455 | 7,648 | 7,893 | 8,026 | 8,204 | 2.4% | 2.2% |

Source: Kanzler, Focus 2019.

On the other hand, the market share of Turkish movies, which lagged behind foreign films, exceeded the market share of foreign films after 2008. There has been an increase in film production and the Turkish films' box office, which gained momentum by attracting the attention of all producers. Undoubtedly, an international evaluation and classification system by Law No. 5224 on the Evaluation and Classification and Support of Motion Picture Films in 2004, affected this acceleration.

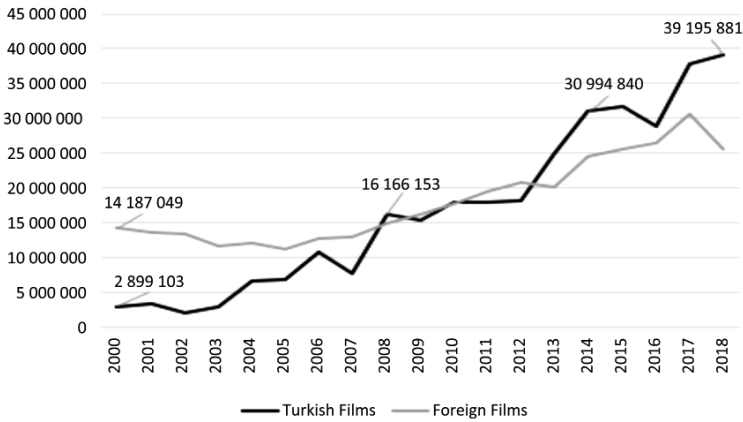


Chart 2.

The Audience of Turkish/Foreign Films

Source: Own elaboration on the basis: TÜİK – Turkish Statistical Institute (<https://data.tuik.gov.tr/>).

As shown in the table above, the number of viewers who preferred domestic films reached approximately 40 million in 2018. This figure corresponds to 63% of 70.5 million viewers who watched domestic and foreign movies in 2018. Turkey's domestic film share of 63.4% is well above the EU average of 29.4% compared to Europe. Although the average of EU films in 2018 was at the highest level in the last five years, US-origin films dominate the EU film industry (Kanzler 2019).

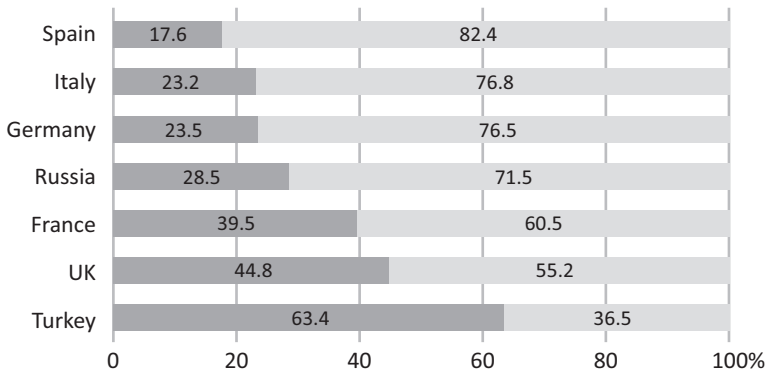


Chart 3.

The Ratio of Domestic/Foreign Films' Audiences

Source: Kanzler, Focus 2019.

However, these numbers show that the Turkish film industry still needs to mature. The total revenue from Turkish films in 2019 was 980,410,567 TL. The total income did not even reach the level of 0.2 billion USD. The table below shows that the total revenue in the USA and Canada is 11.9 billion USD, according to 2018 data. Turkey could not succeed to find a place among the first twenty countries according to 2018 box office revenues.

Table 2. Box Office Revenues (in Billion USD)

| | | | | | |
|----|-------------|-------|----|-----------------|-------|
| 1 | China | \$9,0 | 11 | Spain | \$0,7 |
| 2 | Japan | \$2,0 | 12 | Brazil | \$0,7 |
| 3 | UK | \$1,7 | 13 | Italy | \$0,7 |
| 4 | South Korea | \$1,6 | 14 | The Netherlands | \$0,4 |
| 5 | France | \$1,6 | 15 | Indonesia | \$0,4 |
| 6 | India | \$1,5 | 16 | Taiwan | \$0,3 |
| 7 | Germany | \$1,0 | 17 | Poland | \$0,3 |
| 8 | Australia | \$0,9 | 18 | UAE | \$0,3 |
| 9 | Mexico | \$0,9 | 19 | Malesia | \$0,3 |
| 10 | Russia | \$0,9 | 20 | Hong Kong | \$0,3 |

Source: MPAA 2018 Theme Report, p. 10.

THE AUDIENCE'S PROFILE

Many theorists have studied the audience's role in art and culture. The audience was initially thought to be passive. However, towards the end of the 20th century, it was revealed that the audience was not passive; on the contrary, they received the messages as they wished. According to Yaylagul, elitist thinkers such as Tocqueville (2016), LeBon (1997), Eliot, Nietzsche, and Arnold saw mass society as a threat to high culture, while Frankfurt school thinkers described the audience as "uncritical, contented consumers" (Yaylagul 2014, pp. 77–90). Benjamin, on the other hand, is more optimistic. He mentioned that the audience could perceive the works more quickly with the decline of the artwork's aura; thus, they engage with the cultural phenomenon (Kelner, p. xviii). Marcuse characterized the audience as individuals who simply serve the system to reproduce itself (Lukes, p. 228). Habermas' public sphere theory describes that the audience remains passive in general rather than actively participating in social problems and politics (Kellner). The "new audience research" undertaken by British cultural studies founded in the 1960s and their followers from a more liberal-pluralist view of the active audience associated with the "uses and gratifications" theory defines the audience as never passive or unequal. They receive media texts differently and take whatever they want from famous works (Webster, p. 190). As Kellner summarizes, while uses and gratification theory emphasizes consumer sovereignty, freedom of choice, and the individual creation of meaning; cultural studies, on the contrary, show how audiences negotiate a complex relationship with dominant institutions and forms of power (Kellner, p. 95).

Another critical approach in the cinema-audience relationship is consumption. As in all industries, the cultural industries must also consider and genuinely analyze the target audience's demands. Aside from the debates about whether art is for art's sake or society's, or whether cinema is art or not, cinema is a field that can only develop with its audience. Accordingly, while creating a project in the film industry, it is vital to analyze the audience correctly. Accurate analysis can only be possible based on specific fieldwork data. The first examples of market and small-scale audience preference studies began appearing in Hollywood in the 1920s. After World War II, the number of client-based research increased to ensure Hollywood's dominance in world markets (Kerrigan, p. 42).

In Turkey, according to the film industry sector report, there are not enough R&D studies in the film industry, neither on the films to be produced nor on the target audience. The most widely used researches in this field are the studies commissioned by private research companies by advertising, media planning, film production, or distribution companies (Şentürk, p. 124). Hence the outputs of these researches mainly consist of statistical information on concrete subjects, such as demographic, economic, and logistic data, then social and cultural ones.

Parallel to the population and the changing dynamics of the film industry, the cinema audience's profile has changed remarkably over time. In 1927, 75% of the population was living in rural areas. Hence the audience was modern elites living in big cities like İstanbul and İzmir.

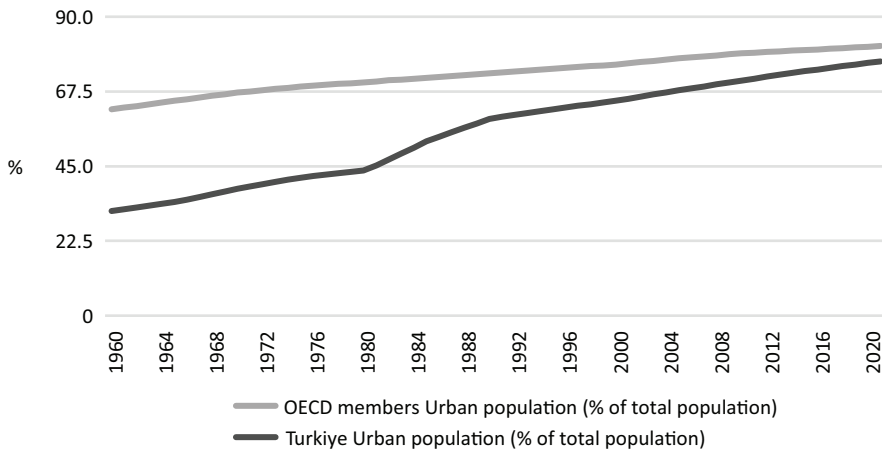


Chart 4.

Urban Population of OECD and Turkey from 1960 to 2020

Source: <https://data.worldbank.org/>

In the 1960s, although there was no dramatic increase in urban population, the primary audience became low- and middle-class families thanks to new screens opened even in small towns. Cinema was an essential means of socialization for this segment. Filmmakers produced films that families could go and watch together, most of which were similar to each other, with celebrities in the lead roles. After the 1960s, rapid migration to big cities changed Turkey's demographic and social structure and also the audience profile. Turkish film industry successfully used the contradictions arising from slums. *Taşra*, i.e. 'provincial' films, became the catalyst of the industry.

Especially as soon as television became widespread in the late 1970s and 1980s, the target audience of cinema shifted to young people, especially uneducated males. Action fighting movies – B movies, arabesque movies, and erotic comedies, which can appeal to this audience, made up most of the films produced (Vardan, p. 750). Regarding contemporary audience profiles in Turkey, 52% of the total audience is under 30 years. According to research conducted only in the Cinemaximum theatres, which belongs to the Mars Group, the biggest distributor in Turkey, the audience’s average age drops further; 77% is under 30 years old. The average age is 25.5. In the population distribution by gender, 57% of the Cinemaximum audience is male (Ipsos-Mars Media 2016).

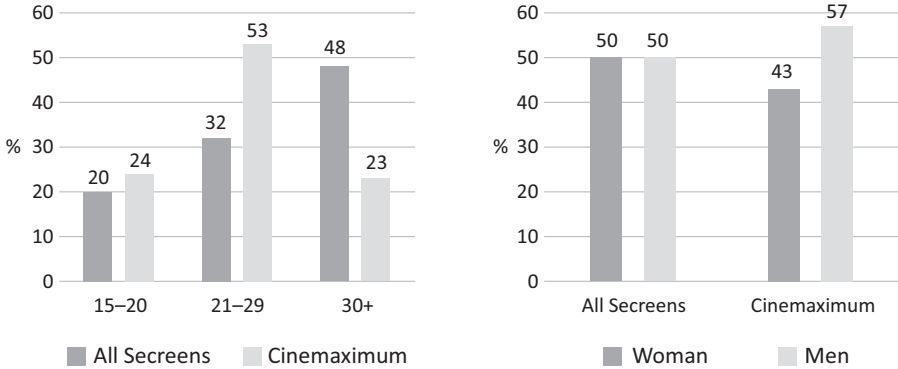


Chart 5.
Demographic Data of the Audience
Source: Ipsos-Mars Media 2016.

Kanzler reported in his study that despite the heyday of popular cinema, the audience no longer came to the cinema from the lower and middle classes but the upper and upper-middle classes. 62% of the tickets sold in theatres were sold to the AB socio-economic category, which makes up just 10% of the population. The audience from C2, D, and E socio-economic classes, which comprise 72% of Turkey’s population, only meet 15% of the total audience (Kanzler 2014, p. 113).

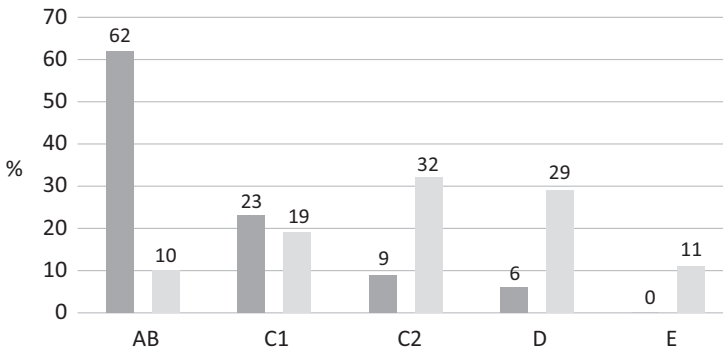


Chart 6.
The Audience vs. Population According to Socio-economic Classes
Source: Kanzler, 2014.

The screen preferences of the audience are also essential data showing which movies are preferred more. According to research below by the Istanbul Chamber of Commerce, 85% of the audience said they prefer to watch movies in shopping mall movie theatres.

Table 3. Movie Theatre Selection Criteria

| | frequency | percentage |
|---|--------------|---------------|
| I prefer movie theatres in shopping malls | 995 | 85.4% |
| I prefer other movie theatres | 170 | 14.6% |
| | 1,165 | 100.0% |

Source: Şentürk 2017, p. 131.

More than 80% of the total screens are located in shopping malls in the big cities. Today, there are over 400 shopping malls in Turkey, and almost all shopping malls have chain movie theatres.

Table 4. Movie Theatres According to Location

| Cities | Screens in malls | Other screens |
|--------------|------------------|---------------|
| İstanbul | 80.4% | 19.6% |
| Ankara | 85.4% | 14.6% |
| İzmir | 80.4% | 19.6% |
| Others | 63.5% | 36.6% |
| Total | 71.4% | 28.6% |

Source: Bilacı et al. 2016, p. 20.

The Cinemaximum movie theatres belonging to the Mars Group have 848 screens in 97 shopping malls in 36 provinces (cinemaximum.com.tr). In this context, the power of Mars Group, owning most of the shopping mall screens and being the biggest distributor, is evident in the industry. However, digital platforms, which became widespread with the pandemic, brought a new breath to the film industry worldwide and supported modern cinema representatives to make art. Thanks to digital platforms, many famous directors could realize their dreams without being anxious about the box office income and the duration. From this point of view, digital platforms could also be a barrier to monopolization.

THE AUDIENCE-BASED DECISIONS IN THE FILM INDUSTRY

Peter Drucker, the founder of modern management theory, placed consumer satisfaction at the center of the marketing concept in 1953. Kotler continued his work by developing a consumer-centered theory. For him, the first condition of a market-orientated strategy is customer satisfaction. Based on these theories, Lush and Vargo argued that value can only be created by the consumer in the act of consumption (Lush and Vargo, p. 281).

In this context, if films are produced to be watched, then focusing on the audience is essential. However, Kerrigan suggests that in cultural and creative industries, putting the customer at the center becomes contested. She added that while Fillis (2004), O'Reilly (2004) and Rentschler (1999, 2004) tried to redefine the marketing theory of the creative industries and the arts, the biggest problem they faced was the lack of transferability of marketing and public relations theories into art. (Kerrigan, p. 5). In such theories, it is hard to find a place for independent films which are produced with artistic concerns rather than audience appreciation or profit maximization. However, according to Kerrigan, it is not compulsory to disregard the marketing concept in order to examine film marketing. "If customer satisfaction is seen as the ultimate goal of market orientation, this can be seen as compatible with film marketing aims." Nevertheless, according to Kerrigan, consumer satisfaction can be achieved not only by asking consumers what they want to see but also by producing eligible artistic films and positioning them appropriately to appeal to the target market (Kerrigan, p. 5). This perspective brings the importance of dividing the market into the right segments to meet the expectations of different profiles.

As mentioned before the audience in Turkey consists mainly of young people, especially young men. According to the IPSOS research, the films most preferred by the cinema audience in Turkey were reported as action and comedy films, which is compatible with the audience profile. As shown below, 62% of the audience said they like action/adventure movies, and 60% like comedy films.

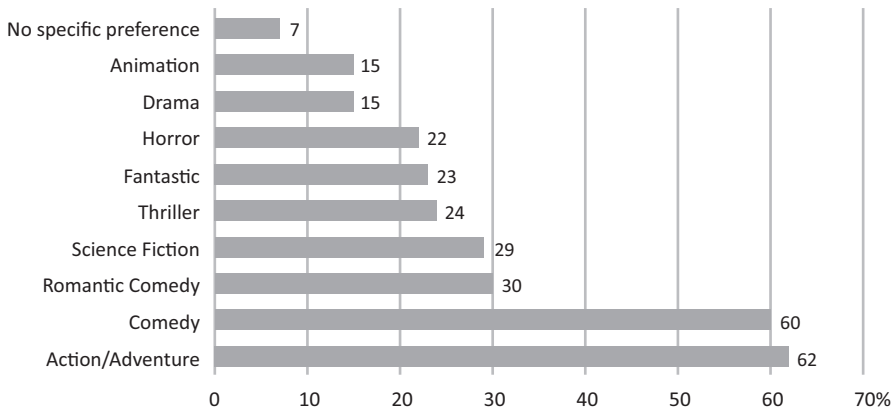


Chart 7.

Genre Preference of the Audience

Source: Ipsos-Mars Media, 2016.

According to Oskay, news and programs that offer "escape opportunities" in newspapers, radio, and TV programs attract an audience that feels distressed and helpless in the face of problems (Oskay, p. 85). The fact that the most preferred movies are comedies also supports this data. The movies provide an "escape space" to forget the anxiety of daily life for the audience regardless of their socio-economic status, education, age, etc., but mainly for desperate young generations complaining about political, economic, and social problems and high unemployment. Therefore, filmmakers aiming for higher box office income seize the opportunity to catch this target group

and prefer producing comedy and action films. In parallel, the table below, the top 100 most-watched movies by genre, shows that comedy films have the most significant percentage.

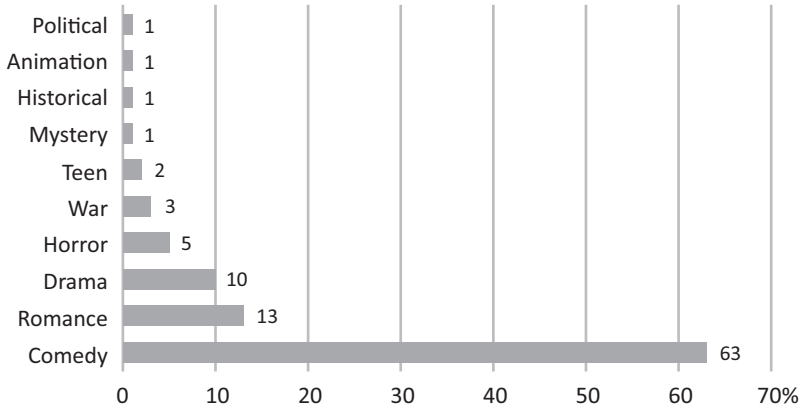


Chart 8.

Top 100 movies by genre

Source: Own elaboration on the basis: Boxofficeurkiye.com

According to the report “Public Financing for Film and Television Content” published by the European Visual Observatory in 2016, the average annual public support in 33 European countries between 2010 and 2014 was 2.53 billion Euros. In Turkey, the number is far below. Besides, unlike the advertising and television industry, the movie industry lacks constant and regular financial resources. Box office income, on the other hand, is not always predictable.

According to Lukk, 150 of 450 movies released yearly in movie theatres in the USA, are released as major studio films. Independent distributors release the others. Since about half of box-office gross is remitted to distributors, most movies do not earn their costs back from their domestic theatrical release. This risky business worries investors to direct their investments to relatively safer industries (Lukk, p. xii). Therefore, it is challenging for independent filmmakers to find a financial source for their projects. As a result, only a few companies can carry out the film production business. The decrease in the number of producers brings a monopoly in film production. It is also a big obstacle to the diversity of genres and subjects of movies because the top-ranking production companies focus on producing commercial blockbusters. The blockbusters are made according to the audience’s taste and expectations by big studios, but vice versa, the majority of the films produced, shape the audience as well.



Chart 9.

Film Rating System in Turkey

Another effect of the audience in the film industry appears because of the film rating system. The film rating system is used worldwide to rate a motion picture's suitability for specific audiences based on its content. In some countries such as Australia, Singapore, and Turkey, an official government body decides on ratings; in some countries such as the United States, industry committees decide. As young viewers have a significant share, movies limited by age have to appeal to fewer audiences. Age categorization not only determines which movies can be seen by young audiences but also their parents. When choosing a film in a movie theatre, the alternatives of the adults accompanied by children are also limited.

Limiting filmmakers to these kinds of marketing criteria brings the discussions of art vs society. According to Tozlu and Peltekoğlu, consumer-oriented marketing approaches are the basis of these discussions that suggest art should stay away from marketing (Tozlu and Peltekoğlu 2018). It is widely thought that shaping artworks in line with popular and financial demands may limit the artist's freedom, like the artists of the Italian Renaissance, who had to comply with the wishes of the sponsor families. However, cinema is an art that can survive, stabilize and develop only with its audience. Therefore, it is vital to analyze the audience correctly while creating a film project. That does not mean asking the audience what they want to watch and producing according to the majority's desires but instead segmenting the audience by accurately analyzing specific fieldwork data.

CONCLUSION

The Turkish film industry has gone through many periods, and the prevalent genre and content of films dramatically changed following Turkey's social, political, and economic conjuncture changes. The audience, on the other hand, has always been an integral part of the industry. Indeed, the industry has existed with the support of its audience, especially in the 60s and 70s. Having such a dedicated audience and the tradition of auteur directors are positive assets of Turkish cinema.

However, adopting a marketing strategy that prioritizes the audience and customer satisfaction could also be a handicap. Aiming to reach higher box office income regardless of artistic values could be a significant obstacle to sustainable growth and success. As already seen in the Turkish film industry, meeting the majority's expectations brings the uniformization of the movies and the monopolization of filmmakers and distribution companies. For the industry to thrive, the main objective should be to divide the cinema audience into the right segments, predict how these segments will react to different genres, and support diversity and multiculturalism.

On the other hand, marketing public relations may support filmmakers by introducing accurate audience analysis, finding financial resources, and motivating audiences to watch movies in theatres. Creating equal competition conditions for filmmakers could weaken monopolies. Thus, the film industry may overwhelm by its chronic economic problems, and independent filmmakers could be more powerful and free to create unique works of art.

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