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Cinema film distribution and exhibition in Ireland

Damien O'Donnell

Introduction

This study of cinema film distribution and exhibition practices in Ireland examines key aspects of the industry: firstly, the basic mechanics of the industry and its operations; secondly, the various alignments between exhibitors and distributors and consequences of those alignments; thirdly, the impact of the arrival of British multiplex companies; fourthly, the costs of film censorship; and finally, the idea of an 'art-house' circuit in Ireland.

Because the industry in Ireland is notoriously secretive, detailed data is difficult to get. Available figures contradict each other although many members of the industry were helpful in providing information. Figures for revenue and attendances for individual films and cinemas were impossible to obtain, despite the author's belief that they are privately available to all the major distributors and exhibitors(1).

The Main Players in the Industry

The major exhibitor is the Ward Anderson group which controls over 100 cinemas, and owns the Savoy and both Screen cinemas in Dublin. Ward Anderson compete against the Adelphi and Carlton cinemas in the city centre, the latter being controlled by the Cannon/MGM group. Albert Kelly of the Classic Cinema in Harold's Cross, is also the Chairman of the Independent Cinemas Association of Ireland (ICAI), which represents nearly all the independent cinemas not controlled by Ward Anderson. Neil Connolly manages the Lighthouse Cinema, the only independent cinema in Dublin city centre. The Irish Film Institute (IFI) owns a 50 per cent share in the Lighthouse. The IFI is also involved in the Irish Film Centre which is due to open in late 1992 as a resource centre for film, with two cinemas of its own.

All the major American film distributors have local offices which handle distribution in Ireland as part of the UK. Four of these are major American players: United International Pictures, 20th Century Fox, Columbia Tri-Star, and Warner Bros. In addition, there are two Irish distributors: Abbey Films, the distribution arm of Ward Anderson, and Dublin Film Distributors, run by Arthur McGuinness, who prides himself on being the only independent Irish film distributor. Finally, there is United Cinemas International, which has recently built two multiplexes in Dublin. UCI (Ireland) Ltd. is under the control of UCI (UK), and ultimately owned by Paramount and Universal Pictures in the United States.

After a thirty year decline, the number of visits to the cinema in Ireland increased in 1985. Irish cinema attendances have been rising steadily ever since; in the early 1990s, the figures should surpass 9.5m. per annum which it passed in 1980 on the way down. Figures released by Rank Screen Advertising indicated that in the twelve months to March 1992, there were 8.1m. admissions to the cinema. With an average ticket price of £2.50, the attendances brought in a gross box office revenue of £20.25m. Sales of food-stuffs inside the cinema probably added another 30-40 per cent to the cinema revenue.

This growth is mainly attributed to the quality of film being made in recent years, aiming for a broader and older audience. The arrival of multiplex cinemas in Ireland has

1. People interviewed in connection with this study are listed at the end of this article.

All such research is conducted by competent market research companies for RTE and the results are fed into RTE's internal decision processes.

In recent years, there has been a growing debate about the role of music and the type of music appropriate to RTE's radio channels. A number of research projects have been undertaken in consultation with radio management to address this topic. The aim of radio management is to achieve the best possible fit between, say, the role which Radio 1 plays as the nation's premier news, information, entertainment and cultural radio channel and the expectations and satisfactions derived from the channel by its listeners. The role of music is an important element in the output mix.

Audience research in public broadcasting is a multi-faceted endeavour. The particular mission of the public broadcaster, however, inclines the researcher more towards a perspective of the audience as citizen rather than viewing the audience as a mere consumer. The evolution in European public broadcasting which is leading to a clearer role for public broadcasting in the life of the nation also has implications for audience researchers whose primary task is to respond to the needs of the programming and corporate management with contributions and answers to the many questions raised.

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also made an impact. Ireland now has the highest cinema-going population in Europe; the annual admissions per capita for 1991 were 2.3 compared to an average of 1.8 across western Europe and 4.2 in the USA (Rank Screen Advertising, 1991).

The Mechanics of Film Distribution in Ireland

Film distribution in Ireland is similar to that in most other countries. The distributor buys the rights to distribute a film from the film's producer. The distributor then 'offers' the film to various exhibitors in his/her region. The number of exhibitors who are offered the film first is dependent upon the number of prints or copies that the distributor has available. Each print can cost £1,000 to make. The distributor assesses the film's likely performance in the region; if it is felt that the film will attract a large audience then s/he is likely to pay for a substantial number of prints – perhaps as many as fifty. If, on the other hand, the audience for a film is likely to be small, only one or two copies will be purchased thus reducing costs. The more film prints, the greater the number of cinemas where a film can be screened immediately upon release. With few copies, cinemas have to wait in line.

Distributors prefer to give first preference to exhibitors who have large cinemas in high population areas. When the film has finished its run, it moves to cinema screens in less densely populated areas, continuing its round until the revenue potential is drained. The distributor is responsible for having the film censored and promoting the film wherever it can be exhibited.

The exhibitor pays the distributor the agreed percentage of the net box office revenue (revenue from ticket sales less VAT). The amounts to be paid are usually set on a scale, although the particular scale varies from cinema to cinema (see Table 1). The scale is structured so that as the box office returns rise, the distributor's share increases. Some provincial cinemas with small revenues operate at a fixed price.

Table 1
An Example of a Sliding Scale

	Net Box Office Revenue £	Distributor's Fee £
Up to	1822	25
	1980	30
	2226	35
	2595	40
	2910	45
	4000	50

Source: Albert Kelly, Independent Cinemas Association of Ireland .

Distributor/Exhibitor Alignments

The six main film distributors aforementioned supply cinema films to eighty-four cinemas operating in the Republic of Ireland, which between them have 186 screens. Of these, thirty-nine are owned or controlled by Ward Anderson. Formed in 1947 by Leo Ward and Kevin Anderson, the company began its operations as a film distributor, which it continues under the name Abbey Films. Over time, Ward Anderson, sometimes known as the Green Group, began investing in cinemas around Ireland, owning thirty by 1970. It was the only chain of its size in Ireland and had a dramatic impact on the business. The majority of new films finishing their run in a major Dublin cinema would usually transfer to a Ward Anderson cinema in other Irish towns or cities.

Independents not linked with Ward Anderson, however, cried foul. In 1973, independent Dublin suburban cinema owners claimed that they had difficulty acquiring

REPORTS

a film once it had finished its run in Dublin city centre. They argued that Ward Anderson cinemas were given preferential treatment by film distributors, 'under threat that the multi-cinema firms will not show the film in any of their houses' and forcing independents to close (*Evening Herald*, 20 January 1976).

In 1976, the Examiner of Restrictive Practices investigated the complaints made by the ICAI that provincial exhibitors were forced to settle for

low grade films and could not obtain the box office attractions until the benefits had been almost completely squeezed out by repeated showings all over the country (Restrictive Practices Commission, 1978:9).

The Examiner found that the claims made by the Independent Cinema Association were reasonable and true. In his report, the Examiner documented unfair and restrictive alignments between exhibitors and distributors: exhibitors would show all the product from some distributors but not others. The cinemas named were: the Adelphi and Carlton both owned by EMI (now by Cannon/MGM); the Savoy, Odeon and Metropole owned by Rank Cinemas; and the Ambassador owned by Ward Anderson. All films opening in Ireland would have their first run in one of these cinemas. Independents in the city centre and Dublin suburbs found it impossible to obtain copies of these films for a substantial period of time. (Traces of this situation still exist, although the time lag is much reduced.)

These alignments (see Table 2) were inherited from similar alignments in the UK, where Rank and EMI controlled large cinema chains. It suited the exhibitors because they were effectively given a film exclusively when its revenue potential was highest. As the film's revenue diminished, it was replaced by a new release. The arrangements also suited distributors because they were virtually guaranteed that their film would open in a prestige cinema no matter how bad the film or how stiff the competition from other products. After the film finished its 'first run' in city centre cinemas, it travelled around the country.

TABLE 2

Alignments Between First-Run City Centre Cinemas and Distributors, 1991

Adelphi/Carlton:	Paramount, Universal, M.G.M., Warner Bros.
Savoy:	United Artists, Columbia Tri-Star, 20th Century Fox, Walt Disney/Touchstone, Rank
Lighthouse:	deals with smaller English companies on its own behalf and rarely with the above film companies
UCI:	no alignments; will screen best product on offer from all distributors
Dublin Film Distributors:	no alignments; will usually take the screen with the best revenue potential for its films
Abbey Films:	although owned by Ward Anderson, is not necessarily aligned with Ward Anderson cinemas; will seek best screen available for its product
Warner Bros:	distribute Walt Disney/Touchstone product in Ireland/UK

Note: There are signs that the alignments are becoming more flexible. Recently films which would normally be shown at the Savoy are finding screens in the Adelphi or Carlton. This probably represents a glut of films from distributors aligned to Ward Anderson coinciding with a shortage of product from Adelphi or Carlton's usual distributors.

Ward Anderson cinemas appeared to receive particularly favourable treatment by the distributors. The Examiner's report found that certain high revenue films reached a

Ward Anderson cinema up to two years before an independent competitor in the same town. The Report alleged that Ward Anderson cinemas were given more favourable rates by the distributors. The report concluded:

...agreements between film renters (distributors) on the one hand, and the Adelphi, Carlton, Odeon (Irl.) Ltd. (Rank), and the Green Group (Ward Anderson) on the other, have conferred monopolies on these groups of exhibitors. Independent film exhibitors outside of these groups have been victims of unfair discrimination which has made it difficult and, in some cases, impossible for them to compete (Examiners Report, 1977:70).

In April 1978, the matter was subsequently referred to the Restrictive Practices Commission which overturned the Examiner's conclusions, finding no evidence of a 'binding monopoly agreement.'

While we are forced to reject the Examiner's contention that the system of distribution is inherently unfair and discriminatory, we consider that in some respects a more equitable and speedy system of distribution could be achieved (Restrictive Practices Commission, 1978:59).

Under the Restrictive Practices Act, 1972, the Restrictive Practices Commission approved 'voluntary measures for fairer distribution' which had been submitted by the distributors. The measures were intended to speed up the time it took a new release to reach suburban and other independent cinemas. With regard to the contention that Ward Anderson cinemas were given favourable rental rates the Commission claimed it

did not find the terms of rental unfairly discriminatory, however the systems themselves lacked transparency and could lend themselves to some abuse which would be difficult if not impossible to isolate (Restrictive Practices Commission, 1978:61-62).

Questions are raised about the effectiveness of these voluntary measures in the context of the closure of seventy-five cinemas in the decade following the report's publication. Many more cinemas suffered a decline. According to some industry sources, 'the reason why so many cinemas are run down is because we cannot get pictures at the time when there's money in them.' In 1962, there were 324 cinema screens in Ireland. At the time of the Examiner's report, 1976, this had fallen to 173 screens. In 1992, despite the opening of three new multiplexes in Dublin, increases in screens in Cork and Limerick, and plans well advanced for a multiplex in Galway, the number of screens is still only 186, spread amongst eighty-four cinemas.

In 1983, after almost thirty years decline in cinema attendance, Rank Cinema pulled out of Ireland, selling the prestigious Savoy cinema, in addition to the Metropole and Odeon. After tough negotiations, Ward Anderson bought the sites in what *Business and Finance*, (October 1983), described as a 'major shift in the balance of power among the city centre first run cinemas'. Following the purchase, Ward began a programme of closures of other cinemas he owned in the city, including the Regent, the Green, and the Ambassador (until its closure, the largest capacity single screen cinema in Dublin). Simultaneously, other independent city centre cinemas closed. By 1990, the only independent cinema in Dublin city centre was the Lighthouse, surviving because its unique programming of 'art-house' or small European films did not come from the major distributors or compete for the same audience as the larger cinemas.

Throughout the country, independents who have survived the competition for Hollywood movies are now finding life comparatively easier. The arrival of video and satellite movie channels in recent years has significantly reduced the shelf life of a film and distributors are more eager to ensure that their films get around the Irish circuit as quickly as possible. This has resulted in more prints of a film becoming available, and

REPORTS

more cinemas opening 'day and date' with the city centre cinemas. While the situation has improved, some believe that the 'system means some screens are denuded of product whilst others have a queue'.

Neither distributors nor the major exhibitors deny that films 'queue up to be shown' in particular Dublin cinemas. Distributors can claim that their first loyalty must be to the picture, to open in a high profile, prestige city centre cinema. If, as is sometimes the case, the particular cinema is full of high revenue films, then they are prepared to delay release of a film until a screen becomes available. At the same time, other cinemas could be waiting for a film to replace one that is slipping in box office revenue.

The arrival of the two United Cinema International (UCI) Multiplexes in the Dublin suburbs of Coolock and Tallaght was expected to end this practice. However, there is evidence that even with UCI's twenty-two new first run screens in Dublin and Ward Anderson's ten screen complex in Santry, distributors will still wait to showcase their films at the Adelphi, Carlton or Savoy. It is predicted that a proposed MGM ten-screen multiplex in the city centre will finally put an end to this practice.

The close alignment between distributor and exhibitor has met with opposing views. According to one distributor, the alignments 'give us broad support for a large number of films which may not be so successful, whereas other cinemas (suburban and provincial independents) try to get the best releases'. For example, during a nine month period, Columbia Tri-Star released thirty-four films in Ireland, all of which were screened by Ward Anderson while only fourteen played in suburban houses. In fact, a distributor's product might be screened even though it might lose money. By allowing city centre cinemas to 'show case' films ahead of the suburbs and the country, a film's shelf life might be extended. The arrangement works both ways; the attitude seems to be 'I'm not going to support your company if your company isn't prepared to support me'. When a film has completed its course in Dublin, it moves on to the rest of the country, where the exhibitor-distributor alignments do not exist. Films usually become available to the Ward Anderson circuit, which owns or controls most of the screens outside Dublin. Distributors feel their films have a better chance against dwindling provincial attendances by hooking up with an exhibitor who can guarantee as many as ninety screens outside of Dublin. Ward Anderson's relationship with the distributors and its dominant position exacerbate the difficulties of independent operators in provincial areas. This practice has been described as 'insane' and 'immoral'.

The answer to the independents' problems, particularly in the Dublin suburbs, would be to follow similar alignments to those of the city centre cinemas. The Classic, Harolds Cross, and the Stella, Rathmines, have alignments which mean they do not compete for the same films. If all the suburbs procured similar alignments, more films would be made available more quickly by their respective distributors. In an ideal world, there would be a film print for every cinema that wished to screen it. However, by their nature, cinema films have a limited availability. The costs would be too great for the distributor to give every cinema a print at the same time. Some cinemas must inevitably wait their turn; thus there must be a circuit. The potential revenue of the Ward Anderson group puts them at the head of the queue.

The alignment agreement has probably been the most decisive factor in the closure of all but one independent cinema in Dublin. In provincial areas, emigration has led to declining audiences. The arrival of the multiplexes might lead to a situation where everybody will be offered all films whether they are able to play them or not. It is, however, unlikely that sufficient prints will be available at the right time to aid the ailing provincial cinema.

It is possible that the distributors could put aside two prints of a new film which would travel alternating circuits of small independent cinemas, exclusive of the usual circuits. The ability of these small cinemas to get a print of 'a talked about film while it's still being talked about' would go far to keep them open. This proposal is still under

consideration, but its success depends on the distributors adopting a policy which lacks a sound financial motive. And, at the end of the day, business is business.

The multiplexes are coming! The multiplexes are coming!

In 1985, the first multiplex cinema opened in Milton Keynes in the UK. It has since been credited with the revitalization of the cinema exhibition market in Britain. Multiplexes are responsible for an 85 per cent increase in British audiences (*Screen Digest*, 1990). Their arrival marked the end of a thirty year decline in British cinema audiences, and they cannot be denied some of the credit.

The multiplex concept is to offer customers a luxurious well designed leisure facility with as many as sixteen screens. It aims to give audiences high standards of exhibition in terms of picture and sound, with the bonus of secure parking. Judging by their performances, the customers love it. By 1990, multi-plexes accounted for 26.5 per cent of the total cinema screens in Britain. Their arrival has had an impact on other exhibitors. United Cinemas International (UCI), one of the largest multiplex operators, has always said that it has never been their intention to close other cinemas. However, since the first multiplex opened its doors, 80 per cent of independent operators have closed. *Screen Digest* (October 1990) reported that 'the march of the multiplex appears unstoppable'.

In June 1987, the *Irish Press* claimed that AMC, a predecessor of UCI, was examining sites around Ireland with a view to opening multiplexes; Blanchardstown and Tallaght were mentioned. At the time, this idea was dismissed as premature. But there was a keen awareness that in a short time there would be competition from British cinema companies. In 1989, Ward Anderson announced a £12m. investment plan to convert cinemas in Cork and Limerick, and a site in Northern Ireland, into multi-screen cinema complexes. This was described as a 'response to the need for better quality cinemas in more intimate surroundings'. At a later date, Ward Anderson added plans for a seven screen cinema in Galway, and a ten screen multiplex at Omni Park, Santry, on Dublin's northside, which opened in March 1992.

UCI opted for two sites: Tallaght and Coolock. They opened a twelve screen multiplex in The Square, Tallaght's new shopping centre, in November 1990. The following August, a ten screen cinema opened on the Malahide Road, Coolock. Within ten months, UCI had become Dublin's largest cinema exhibitor.

The arrival of the multiplexes will probably be the most important factor shaping future cinema exhibition and distribution in Ireland. Tallaght and Coolock added twenty-two while Ward Anderson provided a further ten new first run screens to the city, where the previous total had been seventeen. It almost tripled the demand for prints of major new releases. The target audience for multiplex cinemas is the 250,000 people living within twenty-five minutes drive; Coolock UCI includes the city centre in its calculations. Between the two sites, UCI hopes to achieve admissions of just under two million per year. At this point, the company seems to be on course. Coolock broke the UCI record for attendances in the opening week with 23,000 admissions. Tallaght achieved its millionth customer in its forty-eighth weeks of operation, making it one of the two top sites in the company. Ironically, Tallaght's millionth customer was an independent cinema owner who had been forced to close a few years previously. With average admissions of 26,000 per week during April 1992, it was the busiest cinema within the UCI European network.

The sizes of the auditoria in the multiplexes are considerably smaller than those of the larger city centre houses. Tallaght's biggest capacity for a single screen is 360 compared to Savoy 1 with 760 or Adelphi 1 with 614. However, the projection systems in the cinemas gives them the capacity to interlock screens, allowing the same film to be shown in several auditoria only a few seconds behind each other. This gives the cinemas

REPORTS

an ability to cater for a large demand for a single film with the option of switching to other films if the attendances suddenly slacken.

How the UCI multiplexes will affect city centre cinemas is difficult to say. 1991 proved to be an excellent year for cinema attendances country-wide, up by 30 per cent (Rank Screen Advertising). In Dublin, the increase was 50 per cent. If the rise in city centre cinemas was equal to the country average, then one could attribute a 20 per cent increase in Dublin to the multiplexes. However, industry sources assert that the new multiplexes have captured at least 40 per cent of the Dublin audience. This would be equal to drawing customers away from the city centre and to finding substantial numbers of new or lapsed cinema-goers in the areas where they opened. Of the 112,900 cinema admissions for first run cinemas in Dublin on the week that UCI Coolock opened (2 August 1991), as many as 50,000 were from Tallaght and Coolock. Some of these must have come from city centre cinemas.

However one may dispute the figures, it is hard to deny that the multiplexes have been successful. They are likely to strengthen their grip on Dublin audiences in the future. UCI multiplexes could take about 10 per cent of the business away from the city centre. This would amount to between 100,000 – 200,000 admissions a year. So far city centre screens have escaped serious deterioration in business because of the excellent performances of their films.

Others believe that the multiplexes will cause the loss of city centre fringe screens. A proposed new MGM city centre multiplex may force the Adelphi and Carlton to consolidate onto one site to reduce overheads and staffing costs. Ward Anderson have already conducted a similar exercise in Cork and Limerick, renovating one of the cinemas in each city into a multi-screen site and closing down others. Its view is that the multiplexes, including its own development in Santry, will speed up film turnover. This will not hurt the Savoy because there is a backlog of films trying to find screens in Dublin.

Greater film turnover and the increased print numbers can only be good news for the independents, who should find films reaching their own audiences more quickly. This should resolve, to some degree, their dilemma of showing old films to empty houses. But the independents face a substantial loss of business to the multiplexes, possibly losing up to fifteen per cent of their audience. Audiences are being lured by the better quality services.

The UCI cinemas do have some critics – those who find their style and manner of operations akin to McDonalds and other fast food restaurants, and without the magic and appeal of 'The Movies'. Their arrival signals an increase in the proportion of foreign owned cinemas in Ireland, and raises questions about the repatriation of profits. The two UCI Dublin multiplexes are unlikely to be the last. The potential of a Cannon/MGM city centre multiplex coupled with UCI's success will undoubtedly prompt proposals for others. In addition, Ward Anderson may be considering another site on Dublin's south or west side. Property developers have designed new urban leisure and shopping centres with multiplex cinemas. There are even suggestions of a multiplex in the city centre.

The multiplex has not yet made an impact on small town cinemas in Wicklow or Kildare, although UCI Coolock's attraction for customers from Drogheda and environs is bound to continue. The effect will be to escalate the decline and disappearance of suburban cinemas, and the concentration of cinemas in locations attracting a less than intimate crowd of 250,000 people. Emigration and continuing population concentration in Dublin will probably ensure the demise of small provincial cinemas.

The Cost of Censorship

Since the passage of the Censorship of Film Act, 1923, any film screened in the Republic of Ireland must have a certificate of censorship. Between 1923 and 1977, over 3,000 films were banned, and another 8,000 had scenes cut. Over time, there has been a

relaxation in censorship. A return to the time when films were banned as 'Soviet poison', 'Pro-British propaganda' or because they contained 'lascivious dancing' is unlikely.

Sheamus Smith, the current censor, is reputed to dislike cutting films, preferring to give a higher age certificate. During the 1980s, the number of films banned or cut has decreased dramatically (see Table 3). Indeed, the decision not to ban Martin Scorsese's *The Last Temptation of Christ* probably caused the most controversy. This change is not due entirely to the liberal attitude of the censor, but to the content of contemporary film. Films are more family oriented, aimed at a broader audience. Dublin cinemas which regularly screened 'soft porn' in the 1970s have closed down. The 1991 banning of Ken Russell's *Whore* – a decision upheld by the Censorship Appeal Board – was the first since *Crimes of Passion*, another Russell film, in 1985.

TABLE 3
Number of Films Over 5000 Feet Banned and Cut, 1975 – 1990

	1965	1975	1985	1990
Presented for Censorship	275	315	172	153
Passed without cuts	170	131	153	151
Passed with cuts	63	154	18	2
Films Banned	42	30	1	0

Source: Film Censor, Annual Reports

While film censorship is now less problematic, its cost remains a burden for many small films seeking an Irish screening. The 1923 legislation specified that the censor's office should not be a burden on the state. Instead, costs would be met by charging the distributors. Charges per foot of film (90 feet = 1 minute) were raised from 2.3p to 3.5p and then 7p per foot in 1983 and 1988, respectively. At this rate, an average length film can cost about £700. A small film running at an art house cinema, such as Dublin's Lighthouse, would be struggling to recoup the censorship cost in addition to promotion and advertising. It is alleged that 'some worthwhile films have been excluded from the cinema by censorship and now others will be excluded by the cost of censorship'.

Few in the industry are happy with the situation, but they have failed to organize an effective lobby, primarily due to disagreement on a common strategy. The major distributors argue for an overall reduction in the cost of all film censorship. In contrast, the IFI and small independent Irish and UK distributors propose linking the cost of censorship to the number of prints being distributed in the country; the more prints, the higher the cost. The review of censorship charges is the most important reform required in the film distribution industry. The high cost acts as a tariff against small, mostly non-English language, non-European films while enabling major American films virtually unrestricted access. It is further claimed that censorship is a cultural, not a financial, argument. To reduce the overall charge would only serve to reduce the costs of the major distributors, and do little to aid smaller foreign and European films in finding a screen in Ireland.

The IFI proposes that censorship charges should be between one to two per cent of the gross revenue of the film. 'There has to be some relationship between the capacity of a film to earn and the amount that it pays in censorship costs'. This view is supported by other Irish exhibitors who agree with concessions or a nominal charge for cultural or subtitled films. Smith is said to be sympathetic, but changes rest with the Department of Justice, and ultimately with the Government. On occasion, the problem has been circumvented by employing the non-fee 'educational' certificate for films whose length may have made censorship prohibitive.

The fiercest opposition to the IFI proposal comes from the American owned major distributors, who reject any idea of films distributed by the majors subsidizing smaller films. They deny a cultural argument which places cinema in a unique position

straddling business and art, mass entertainment and cultural enlightenment. Such a categorization would necessitate the introduction of a two-tier censorship scheme, which would prove virtually impossible to implement.

The majors further argue that the Film Censor's costs could be reduced with a consequent reduction in censorship costs. They claim that a number of films being presented for censoring does not warrant the office remaining open five days a week – a view rejected by Smith. He points to additional responsibilities accruing to the Film Censor's office following the Video Recordings Act, 1989. With over 10,000 films available on video, extra staff are being recruited, dispelling hopes that costs could be reduced.

There are unlikely to be any changes in the short term. The Video Recordings Act will probably cause a reduction in the number of films available on video as some, for reason of cost or content, will not be submitted and thus removed from shelves. The Censor has rejected claims that a British certificate of censorship (BBFC) is sufficient for videos on release here.

American Domination of Cinema Films

'The pictures people want to see are basically American'

Hollywood dominates the world cinema industry. Its films are seen in every part of the world, and dubbed into dozens of languages. Following changes in eastern Europe, Hollywood film distributors are set to make as deep an impression on this new market as they have elsewhere. In Ireland, 95 per cent of films we see are American. In 1990, the censor passed 155 films of 2,000 feet and over; 116 (75 per cent) were from the US, thirty-five (22.5 per cent) were of Irish, British or European origin, and only four (2.5 per cent) came from the rest of the world. In the same year, only a small audience viewed the 480 films made in Europe.

This situation is not unique to Ireland. In the twelve EC member states, productions from other EC countries never account for more than 25 per cent of the theatrical releases; 80 per cent of all European feature films are not distributed beyond the borders of the country of production (Maggiore, 1990). In Germany, for example, SPIO, the film industry body, reported that for 1990 'US movies won a record market share of 83.8 per cent' compared to only 2.8 per cent and 2 per cent for the UK and France, respectively (*Screen International*, 4 October 1991:8). Even the forty-eight German-made productions only managed to capture under 10 per cent of their own market.

There is no reason to believe that the situation will improve during the 1990s. France, which is the most protective of its cinema industry, has found that the share of the French box office for US films has risen steadily, presently standing at 60 per cent. The increase in European cinema audiences signifies an increase in European audiences for American films. The American distributors, controlling all links in the chain from production to distribution, are the only players equipped to deliver a film to all European countries simultaneously, supported by heavily financed promotions and advertising. European distributors are only active on a national scale.

The European Community has quotas on the importation of television programmes but not for cinema. Could a quota system work? Imagine trying to force feed European foreign language films to an Irish audience addicted to a diet of Hollywood narrative cinema! One commentator remembers that not long ago an Irish audience would smash a cinema if confronted with subtitles. The dilemma represents a 'Catch 22' situation: 'The only films audiences are offered are American, therefore the only films they see are American, therefore the only films they want to see are American'.

There is a lack of distribution opportunities for European films because 'most cinemas want to play high revenue American product'. A related problem is that whereas Americans make films of international appeal, France makes films for the

French and Germany makes films for the Germans. Is the parochial nature of European cinema the reason it travels poorly? The experience of *Cyrano de Bergerac* suggests that this need not always be so; it appealed to audiences as much as a Hollywood blockbuster. Its hindrance was its language; if it had been dubbed instead of subtitled, it could easily have filled one of the major Dublin cinemas for weeks.

Professional dubbing is an expensive business. Subtitling, albeit accepted as 'high brow', is considerably cheaper. It is a widely held belief that dubbing would not work on an Irish audience, some of whom at least, have settled down with subtitles. Watching a film where the voices are out of synchronization can be very distracting. Yet few major American motion pictures released in Europe are subtitled; nearly all are dubbed and quite successfully, judging by audiences. If the rest of Europe readily accepts English language films dubbed into their own language, then the opposite might also be true. If the content is good, the dubious relationship between lips and voice can go unquestioned. Popular foreign-language films subtitled during their cinema release in Ireland are now available, dubbed or subtitled, on video.

The EC is sufficiently concerned about US dominance of European cinema to finance numerous initiatives. The European Film Distribution Organization (EFDO) provides a soft loan for distributors of European-produced film enabling them to find screens in other European countries. This project is likely to achieve only minor success; there is a view that the project has been a disaster for Ireland, but is a necessary element of our 'cultural defence'.

Very few European films are screened in Ireland and vice versa. Many such films would find large Irish audiences if producers and distributors had as much to spend on advertising, promotion and distribution as their American counterparts. A Hollywood film costing \$27m. to produce could have \$11.5m. spent on promotion. It is a rare European film that could match this. When companies spend this much money promoting their products, audiences are not going to a film but an 'event'. *Terminator 2* and *The Commitments* are recent examples.

American distributors will always have an advantage because of their large domestic audience. The average American attends the cinema 4.2 times per annum, compared with the EC average of 1.8 (Rank Screen Advertising; see Table 4). With such avid movie-goers, the American film producers have strong financial support. Europe, divided politically, culturally and linguistically, cannot yet hope for such a supportive domestic market from which to launch itself on the world.

TABLE 4

Comparison of Population, Cinema Screens and Box Office Revenue of 17 western European countries and the US, 1990

	Population	Cinema Screens	B.O. Revenue
W. Europe	357.5m	19,565	\$2,709.9m
US	247.5m	23,132	\$5,033.5m

Source: Screen Digest, October 1990.

Note: the vast majority of the US and European box office revenue finds its way back to Hollywood majors.

Proposals for state subsidies for films have only minor appeal in Ireland, although an interventionist approach could create its own momentum. The state could provide financial support for cinemas which devote themselves to screening films other than high revenue American product. The Lighthouse already receives indirect state subsidy through the involvement of the Irish Film Institute. Situated only minutes from the two largest exhibitors in Dublin, it aims to build an audience for 'art-house' and foreign language film, which are rarely screened. Despite its success, the audience is small and may be divided between the Lighthouse and the two screens opening at the Irish Film Centre in 1992. The latter could put the Lighthouse in a financially untenable position.

REPORTS

To overcome potential problems, the IFI is keen that regular discussions and co-operation should be established between the two venues to avoid direct competition for new films.

Proposals to establish an 'art-house' circuit outside Dublin were made at the 1991 AGM of the IFI. The circuit would consist of 35mm prints selected from films screened at the Irish Film Centre and the Lighthouse. Previous attempts have been unsuccessful, although the Federation of Irish Film Societies, which has about twenty-five active societies around the country, has developed a reasonably successful 16mm circuit. There is also hope that the new multiplex cinemas at the Capital in Cork and the Savoy in Limerick will provide a steady flow of such films. The main drawback is cost; established exhibitors outside Dublin speak of a 'commercial motivation'. If these films do not produce a profit, they will not last.

Great efforts as well as state support will be required if American domination of cinema screens in Ireland and the rest of Europe is to be tackled successfully. It may be that cinema audiences will insist on Hollywood films, but at least cinemas should be able to offer a European selection capable of competing with Hollywood. There is a tough battle ahead. Bows and arrows against lightning? Perhaps, but with the arrival of 1992 and a concerted effort to achieve greater awareness of European film in individual member states combined with a concrete plan for European-wide distribution of same, the chances of success are better than we may think.

What Happens Next ?

As this century draws to its close, the following possible developments are worth noting.

The multiplexes will undoubtedly build on their audiences. They could easily recapture the 15-20 per cent of the audience that is believed to have been lost to home video. They may even add to it. With increased emphasis on leisure, cinemas may avoid another thirty year decline. However, they face fierce competition from the new and growing leisure industries which have taken root in Ireland. A strategy to broaden the appeal of film to hold on to an ageing European audience is required.

The concentration of more screens into fewer core locations with expanding admissions and revenue will continue (see Table 5). Emigration will effectively denude provincial cinemas of audience, decreasing by ten per cent over the next five years. Dublin's share of the total Irish market, presently just over 50 per cent, could grow beyond 60 per cent. Suburban cinemas which fall within the catchment area of the multiplexes are particularly vulnerable. Different viewing patterns will ensure that suburban multiplexes and city centre cinemas survive, complementing rather than competing with each other. Multiplexes find evenings their busiest time, while city centre cinemas see afternoon and early evening showings growing in importance. Nevertheless, the close proximity of the Omniplex in Santry to UCI Coolock - two miles - may seriously curtail each other's business. It is possible that one or other could find itself in difficulty within five years.

Table 5
Cinema Admissions and Estimated Revenue, 1980-1989

	1980	1985	1987	1988	1989	1991
Total admissions	9.5m	4.5m	5.2m	6.0m	7.0m	8.1m
Admissions per head	2.79	1.27	—	1.69	1.97	2.31
Box Office Revenue	£17.6m	11.3m	13.0m	15.0m	17.5m	20.3m

Note: Film rights for Ireland are sold as part of the rights for the UK. Accurate figures for the Irish market are difficult to obtain. However, industry sources estimate the Irish market to be 8-10 per cent of the total UK market. The average admission price was £2.50 in 1989-91. Source: Rank Screen Advertising.

As mentioned previously, the Irish Film Centre will open in 1992 with two new screens appealing to the same audience as the Lighthouse. Originally, the latter was conceived as a temporary project while the IFC theatres were being built. Now it seems set to stay. If the Screen at College Green is to be one of the casualties, then there is every possibility that they will survive alongside each other.

Distributors should be happy with more screen in Dublin. It will enable them to have more prints of their films playing and ease the difficulty of finding screens for mediocre films. It is not clear how the alignment system in the city centre will operate in the future. A second multiplex company would probably halt existing arrangements and give rise to a bidding system similar to the US. An alternative could be a much watered down alignment system which would give exhibitors exclusivity of some but not all picture company products.

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Interviews

Neil Connolly, Lighthouse Cinema
 Catherine Costello, Chairperson, Federation of Irish Film Societies
 Chris Edwards, General Manager, United Cinemas International, Ireland, Ltd.
 Michael Hussey, General Manager, Adelphi Carlton Cinemas
 David Kavanagh, Director, Irish Film Institute
 Albert Kelly, Chairman, Independent Cinemas Association of Ireland
 Paddy Kelly, Branch Manager, United International Pictures
 Gerry Mulcahy, Branch Manager, Columbia Tri-Star Pictures
 Sheamus Smith, Irish Film Censor
 Paul Ward, Director, Dublin Cinema Group, Ward Anderson Group

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