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A Brief Analysis of Today's Turkish Cinema Industry

Dr. Okan Ormanlı
Assistant Professor,
Istanbul Kültür University
Faculty of Arts and Design,
Department of Communication Design
Turkey

Athens Institute for Education and Research
8 Valaoritou Street, Kolonaki, 10671 Athens, Greece
Tel: + 30 210 3634210 Fax: + 30 210 3634209
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Athens Institute for Education and Research

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Abstract

In the last decade the Turkish cinema has had an impressive progress in many areas. This progress has a complex background. First of all, after the collapse of *Yeşilçam*, (old Turkish cinema) the 90's became a transition period for the Turkish cinema. And the production system based on the powerful producers ended due to several reasons. One of these reasons was the decrease of moviegoers and production numbers. Many people preferred to watch TV or rent home videos. Furthermore in 1987, Hollywood's biggest studios entered the film business of Turkey. A huge number of blockbuster movies with high budgets covered the cinema theatres all over. At the same time the commercial and television sector raised in popularity in Turkey. Turkish cinema which was usually criticized by its technical insufficiency, overcome this problem and reached standard quality. In the 90's a new generation was raised that studied cinema and followed film festivals. Young directors from this generation created their own film languages. At the end of 90's, Turkish moviegoers were on the rise again and started to watch Turkish movies. Additionally some independent movies won prestigious and important awards in international festivals. Also some popular and commercial Turkish movies counteracted the Hollywood films.
In this study, the main goal is to reveal the main factors of the success of Turkish cinema in the last decade. To do this, several variables and dynamics which have important roles and impacts will be carefully examined.

Key words: Turkish cinema, industry, popular cinema, independent cinema

Contact Information of Corresponding author:

1. Introduction

The art of cinema has a history of more than 100 years. Since, it has rapidly grown to become one of the most powerful and important artistic mean. The film industry deals with millions of spectators worldwide as well as unimaginable sums of money. It is a well known fact that the major players in the field are the United States, and some European countries, such as France, Germany, the UK, Italy and Spain. When we look to at history of cinema, we notice the struggle between Hollywood and other countries, mainly European ones. Turkish cinema, which is referred to historically as *Yeşilcam* (named after a street in Beyoglu, İstanbul) has had similar experiences with world cinema in the early years but never became a powerful industry because of different and complex reasons.

The golden age of Turkish cinema was from the 1960s to the 1980s; after that, film production dropped steadily, from 300 films a year to about 80 – 90. One of the reasons for this sudden decline – and probably the most important one – was the lack of a powerful, stabilized industry that brings together professionals through syndicates. Some of the other reasons for this decline were a string of financial crises, and the effects of the coming of television. In the 1990s, Turkish cinema went through a transition period, and what emerged from it is now known as the New Turkish Cinema. The New Turkish Cinema was a some kind Renaissance in the industry, where audience numbers once again reached a high and the films produced began to receive international attention and recognition. Today's Turkish cinema has the most domestic viewers' percentage across Europe. This study will evaluate and discuss the reasons for this.

2. A General Outlook on World Cinema

When the subject "world cinema" is undertaken, more than 200 countries need consideration; because of the limitations and content of this study, only the United States and pioneering European countries will be taken into consideration. In 2004, nearly 4100 movies were produced, 7.6 billion tickets sold and the total income was of 24 billion dollars. The USA is the leader with 8.7 billion dollar income and Western Europe comes in thirds with 6.7 million dollars. While the USA has more than 36000 theatres, France has 5300 and Germany has 4870 theatres. Ticket prices are between 6-10 dollars in the world (Bordwell, Thompson, 2008). Indian cinema which is also called Bollywood, and other Asian countries (such as China, South Korea...) and also Latin America (Brazil, Argentina...) are other important players of the World cinema.

According to another survey, the cinema industry is separated into 4 zones: North America, EMEA (Europe, Middle East, and Africa), Asia Pacific and Latin America. Turkey is in the EMEA zone. North America has a market share of 40% in 2011 and it's expected to rise to 45% in 2013. The EMEA zone share in the market was 27% in 2011 and is expected to be 30% in 2013. On the global scale, the cinema industry reached number 83.9 billion dollars in 2008, and is expected to rise to 102.2 billion in 2013 (Çelik, 2011).

France, Germany, UK and Italy are four important countries when it comes to their national cinemas influencing the world stage. They have also been the leading countries in terms of film production numbers and moviegoers for many years. These countries have similar populations to Turkey but they generally have higher numbers in regards to audience and yearly productions to Turkey. For instance, France produced 72 movies in 1945, 99 in 1950, and 33 films in 1965. After the record of 190 films in 1977, the average number of the 80's and the 90's was 100.

France’s cinema audience figures was 402 million in 1945, 370 million in 1950. The average for the 1960’s was 200 million and 150 million from the 1970’s to 1990’s (Vincendau, 1995). France produced 171 films in 2000 (Jäckel, 2003) and in the new millenium, the figures were similar while the audience figure was 200 million in 2010. Germany (West Germany prior to the fall of the Wall) has similar figures with France. But Italy has more audiences compared to France and Germany; for instance 819 million in 1955, 550 million in 1969, but then a drop to 93 million in 1988. The average of the 1990’s and 2000’s is 100 million. The UK has also similar figures with France, Germany and Italy in terms of film production. But the UK has the most audience loss among these countries. While it has 1.5 billion audiences in 1945, it dropped to 581 million in 1959 and 214 million in 1969. The worst year was 1984 with 58.4 million. It increased to 114 million in 1993 (Vincendau, 1995). According to a survey about cinema in Europe, the UK has the most audiences after France (206 million audiences) with 169 million audiences in 2010 (European Cinema, 2011).

The struggle faced by Hollywood and other national cinemas especially with European countries is very familiar. Hollywood usually dominates the film market; however a study by the European Audiovisual Observatory of the top European films at the European box office revealed that from the European titles on offer, audiences preferred their own domestic productions. In 1999, 77.61 percent of box-office receipts for European films were earned in their domestic markets. Forty-two of the top European releases saw at least half of their ticket sales come from their domestic audiences; thirteen of these attained all of their sales from their home markets. (Jäckel, 2003). This means that there is a steady rise of national cinemas against Hollywood; this is indeed the case for Turkish cinema as well.

3. Turkish Cinema Today

In this section today’s Turkish cinema will be examined under two subsections; within contextual and quantitative frameworks.

3.1 Contextual Framework

Turkish cinema proceeded in a new direction after the 1990’s. With the collapse of *Yeşilçam* most of the film production companies closed down and the directors had to search for new sources of funding. The result of this process was an increased number of feature film productions, as more and more directors took over the production of films. With the financial support and contributions of Eurimages (a foundation which supports European Film Industry since 1990), a greater number of films garnered attention and received awards at international festivals. Furthermore, directors with backgrounds in advertisement and television began to make commercial films that had wide appeal. While annual film production began to decline (averaging about 20 a year), one could say that overall quality increased (Teksoy, 2008).

New Turkish cinema is different from *Yeşilçam* which is mainly based on a producers system and also introduces a separation between popular mainstream cinema and art, auteur or independent cinema. The Bandit (*Eşkıya*) is commonly acknowledged to be the film that gave birth to the new Turkish cinema, which is often taken as a "true" Turkish or domestic film. Post-Yeşilçam’s cinematic world reflected similar tendencies in its mix of popular cinematic languages through a sophisticated visual narration and the ongoing but limited Turkification of Western films, whereas contemporary auteur cinema has represented the vernacular internationally (Arslan, 2011a).

Turkish cinema entered upon a new phase since the second half of the 1990's. The opening of several film schools, global advancements in technology and communications, financial initiatives available to filmmakers, such as European funds or government loans and the relaxation of censorship regulations could be cited as contributing factors. The new generation of filmmakers, who grew up during the years of modernization, have acquired a new set of values and approaches to life and cinema. Recognized in the West as well as at home, these filmmakers search for a new language and are capable of expressing their artistic concerns and reflecting the realities of society. While doing this they are benefiting from the possibilities of a rich tradition and the advantages of modernity. Nuri Bilge Ceylan brought attention to this new movement with Distant (*Uzak*), which won the Grand Jury and the best male actor awards at the Cannes Film Festival in 2003, the first time a Turkish film won at Cannes since *Yol* shared the Palme d'Or with Missing by Costa Gavras in 1982 (Colin, 2008). This film received praise by critics worldwide, including respected cinema magazines such as Sight and Sound. While writing about Distant, a Sight and Sound's critic mentioned that Nuri Bilge Ceylan is very much his own man, and his *Uzak*, the final installment of his semiautobiographical trilogy, is a gem-like film (James, 2010).

In the 1990s and 2000s, there were two different forms of filmmaking; popular cinema with box office success and art house cinema which gained appraisal by critics and awarded in national and international festivals (Suner, 2010). When we look at the important awards of the last ten years: 2011; Once Upon a Time in Anatiolia (Nuri Bilge Ceylan) / Cannes, Grand Jury Award, 2010; Honey (Semih Kaplanoğlu)/ Berlin, Golden Bear, 2008; Three Monkeys (Nuri Bilge Ceylan) / Cannes, Best Director, *Uzak İhtimal* (Mahmut Fazıl Coşkun) / Rotterdam, Golden Tiger Prize, 2006; Climates (Nuri Bilge Ceylan)/ Cannes, FIPRESCI Prize, 2003; Distant (Nuri Bilge Ceylan) / Cannes, Grand Jury Prize and Best Actor (Muzaffer Özdemir, Mehmet Emin Toprak) (Arslan, 2011b).

Generally, the key for a commercial success is up to the advertisement campaign. But the Bandit, a hit at the box office, does not owe its success to any advertisement campaign. The secret of the film's success was the comments of the spectators. Director Yavuz Turgul used the techniques of modern Hollywood productions such as fast editing and mobile camera. After The Bandit, popular Turkish films had at least 1 million spectators. These films do not receive their funding from the industry itself; usually the funds from television shows and advertisements (Suner, 2010).

When we look at the assignment of duties in the Turkish cinema sector in terms of distribution and screening, there are three actors. The producer is responsible for the publicity and advertisement. The distributor deals with film copies, subtitles, dubbing and transportation of movies. The theatre owner is responsible for the technical equipment and other expenditures. Perhaps the main problem is the high taxes enforced upon the film industry, which reduces profits and prevents new investments (Tanrıöver, 2011).

3.2. Quantitative Framework

According to a law established in 1987, foreign distributors were able to open distribution offices in Turkey. In 1989 two major Hollywood companies WB and UIP entered the Turkish film market and they dominated almost all the market with a Turkish film company called Özen Film. WB and UIP would book most movie theatres with Hollywood productions in the country and Turkish films had difficulties finding screening time. In 2005 Özen Film became the leader in the market with a share of 34 percent with foreign and domestic movies; the situation today is the same (Tanrıöver, 2011).

Yavuz Turgul became a pioneer of box office hits during this period (starting in the 90's) as his *Eşkiya* (Bandit) drew in 2.5 million spectators. *Vizontele*, co-directed by Yılmaz Erdoğan and Ömer Faruk Sorak, surpassed this record with over 3 million tickets sold. This trend continued with 1.5 million spectators for Mustafa Altıoklar's *O Şimdi Asker* (He is in the Army Now). A few years later, *GORA* by Ömer Faruk Sorak and *Babam ve Oğlum* (My Father and My Son) by Çağan Irmak both reached ticket sales surpassing four million. While it was encouraging to see these films attracting even larger audiences than Hollywood productions, it was unfortunate that the films of award winning directors such as Nuri Bilge Ceylan and Zeki Demirkubuz drew in a very limited audience around the number of 40-50 thousand. This was in great part due to the fact that the media that had always supported popular commercial films remained silent in the face of non-commercial productions. The post 1990 period witnessed a sharp rise in the number of annual spectators with 23.9 million in 1999 and 28 million in 2001. This was partly due to the renovations of older movie theaters as well as the increase in the number of multiplex theaters. By 2004 the number of movie theaters in Turkey had reached 443 with a total of 1059 screens and 198,782 seats. Regrettably the number of spectators decreased after 2001, totaling only 23 million by 2003. It may be argued that this was partly due to the increase in ticket prices and partly to a sense of disenchantment with Hollywood productions. The box office was on the rise again in 2006 and reached a total 35 million spectators; 18 million of which were drawn in by Turkish productions (Teksoy, 2008). In these years the number of film production gradually increased from 40's to 60's.

As indicated by three surveys done for Fida Film (an important Turkish film production, distribution and advertisement company) in 1999, 2002, and in 2006, the majority of cinemagoers in Turkey were young, educated, and upper-class spectators. While 62 percent of film spectators were upper or upper-middle classes, the percentage of female spectators rose from 37 percent in 2002 to 49 percent in 2006. In 2002, 44.5 percent of all spectators were between the ages of 15 and 24 and 41.7 percent were between 25 and 39. In 2006, these numbers changed slightly to 40.1 and 47.8 percent, respectively. In response to a question about their film preferences, the 2006 survey participants indicated the importance of a strong cast (78.1 percent) and an attractive subject or genre (72 percent), whereas they indicated that the following would make them to go to film theaters more frequently: actors 62.7 percent; cheaper tickets 46.1 percent, directors they like, 32.7 percent and European and festival films 31.7 percent Apart from the expected stars and genre appeal, this survey indicates an awareness of auteurs in cinema in line with, as indicated above, the rise of global auteurs (Arslan, 2011a). According to another survey, box office hits in recent Turkish productions are comedies with popular actors (Tanrıöver, 2011).

In recent years Turkish cinema attracted attention of research centers on film business. According to another survey, 2010 proved a successful year for the Turkish cinema market where admissions grew by 11.3% to 41.1 million, the highest level in years. Looking outside of the EU, Turkey remained the leading European country in terms of national market share with Turkish films taking 53% of total admissions in 2010 (European Cinema, 2011).

When we look at cinema database of 2011, there are 1968 screens and 256 000 seats. 54 percent of movie theatres are in Izmir, Ankara, Istanbul and

Bursa. The new trend of this millennium is the digitalization of the cinema. While digital screenings were in two cities two halls in 2000, it increased to 32 cities an 135 cinema halls in 2011. In 2011, 42.2 million tickets were sold. The total income was 220 million dollars. Nearly half of the total tickets were for Turkish movies, 21.2 million and they gained 103.4 million dollars total income (Yavuz, 2011). The number of Turkish movies screened in a year reached 60-70. The box office number one in 2011 was a popular comedy *Eyyvah Eyvah 2* with popular actors such as Ata Demirer and Demet Akbağ. The film attracted the attention of 3.9 million people. The second one was *Aşk Tesadüfleri Sever* with 2.4 million spectators and the cinema version of the popular TV series, *Kurtlar Vadisi: Filistin* in third place with 2 million people (Turkish Cinema, 2011).

An important point to keep in mind when talking about the new Turkish cinema is that the films that draw large crowds are not necessarily appreciated by film critics. The films that the critics praise do not always draw large crowds. Turkish cinema audiences are generally young and they go to the cinema for entertainment purposes. However the improving technical quality and Hollywood formulaic movies give visibility it lacked outside the borders. As a result of this process several Turkish movies attracted attention of international audiences in the film festivals and on the television. In addition to foreign funds, the Ministry of Culture invests 12.5 million $ annually in loans for film production. Today, the average budget of a Turkish movie is 0.5-1 million $ (Colin, 2008).

Few Turkish movies from the total production scale have audiences between 0.5 – 4 million which means financial success in recent years. However, when this question (what is the criteria for commercial success or who is responsible for lossmaking movies) is asked to cinema professionals, they have different answers. One of them indicates that the main purpose of artwork is not making a profit. Contrary, making a profit is the main purpose of commercial businesses. Another point to keep in mind in terms of why Turkish films do not earn as much as they could is because of bad distribution techniques and the improper operation of movie theatres. In this system, many movies are screened in the wrong movie theatres consequently they cannot reach their target audience. Some films have so much screening time that they leave no room for others. The solution to this problem is the arthouse cinema system which has existed for many years in developed countries (Taşçıyan, 2010).

Table 1: *Annual audience and income figures of all movies in Turkey between 2005-2011(Source: Akıncı,2012)*

Year	Total Audience (million)	Total Income (million / $)	Film #1
2011	42.3	220	Eyyvah Eyvah 2
2010	41.5	216.5	Five Minarets in New York
2009	36.9	174	Recep İvedik 2
2008	38.4	169.5	Recep Ivedik
2007	31.1	136.9	The White Angel
2006	34.8	137.3	Valley of the Wolves: Iraq
2005	27.8	104	The Class of Chaos in the Army

When we look at the table above, we see that Turkish cinema has more than 15 million spectators in 6 years and the total income has doubled. Furthermore, we can also see Turkish movies are in primary positions.

Table 2: *Annual audience and income figures of Turkish movies between 2005-2011(Source: Akıncı, 2012)*

Year	Total Audience (million)	Total Income (million / $)	Film #1
2011	21.2	103.4	Eyyvah Eyvah 2
2010	22.2	107.6	Five Minarets in New York
2009	18.8	83.4	Recep Ivedik 2
2008	22.8	96.6	Recep Ivedik
2007	12.1	49.8	The White Angel
2006	18	67.3	Valley of the Wolves: Iraq
2005	11	41.1	The Class of Chaos in the Army

When we read the table we will see that Turkish film audience has reduplicated and the total income increased nearly by 150 percent and the majority of number one films are comedies with famous TV stars.

Results & Discussions

This study is an attempt to identify the position of Turkish cinema in the world cinema. While doing this the global databases of world cinema was used to compare and to bring forth Turkish cinema in terms of global scale. Because of the limitations of this study the contextual and quantitative framework of Turkish cinema discussed from 90's until today.

The golden age for Turkish cinema was the period between 60's and 80's. This cinema (*called Yeşilçam*) was generally based on the star system and powerful producers who were after gaining high profits with the mass of audiences. A large number of film companies and studios were established in this period, mainly located in Istanbul, but they gradually shut down, starting from the beginning of the 1980s. There were several reasons for this; the negative effect of TV, financial crises and Hollywood's blockbusters, which took hold of Turkish cinema screens. But the main reason was the lack of healthy institutionalization which included permanence, professionalism, specialization, assignment of tasks, a national cinema center and also a legal arrangement that provides protective rights.

The collapse of the old Turkish cinema gave freedom and provided opportunity to some young or middle aged directors who wanted to stay away from the commercial worries and were looking for a new kind cinema and language with their own artistic and aesthetic concerns. The last 15 years were also the years of up and downs, contrasts and variances. Production numbers of Turkish cinema rose from 10 to 70 and audience numbers from 3-4 million to 20-22 million in a short time. This is the result of the national and international funds and supports such as Eurimage, Turkish Ministry of Culture and several sponsorships.

In this process independent directors like Nuri Bilge Ceylan, Semih Kaplanoğlu, Zeki Demirkubuz, Derviş Zaim, Yeşim Ustaoğlu worked like auteurs, similar to the French new wave directors, and won several prizes or got nominations in A Class festivals such as Cannes, Berlin and Venice. Film critics in Turkey and in the world wrote articles full of praises. On the other side popular movies (especially comedies) with famous casts and crews reached audience numbers of 3-5 million and surpassed the Hollywood movies. In this favorable atmosphere, the number of films screened in Turkey reached a total of nearly 300.

In the last 6 years the number of moviegoers that watch Turkish films reduplicated. Turkish cinema which has a percentage of 25% of the annual films screened has an audience of above 50%. This means that Hollywood films are losing popularity while Turkish films have never been more popular. In this process another important thing is to secure the interest of the audience attention and try to get it further. In order to do this, the audience needs to be educated in media literacy and cinema literacy. In elementary and also in high schools, it is possible to give the children and to the adolescents the awareness and consciousness of cinema. Another thing that can be done is to find activities and events that would attract the attention of middle aged or old people who rarely or never go to the cinema.

As mentioned above the weak points of Turkish cinema are simply the lack of institutionalization and marketing. The last 5 or 6 years are maybe "the semi-golden age" of Turkish cinema. To transform it to "the golden age" or to a "strong and well-industrialized cinema" the three C's are very important: "communication", "coordination" and "cooperation" in the industry. Another important factor is professional marketing in Turkey and abroad and looking for new sources from the official and private foundations in Turkey and in the world.

In conclusion, it is not easy or possible to say that Turkish cinema is an international and well-industrialized cinema, despite many impressive and rapid records of production and audience numbers and important and prestigious international awards But the success of Turkish cinema in the European zone, in terms of domestic audience is an interesting subject and needs a comprehensive study which should include data on socio-economic status and sociological background.

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