
MULTIPLEXES IN HUNGARY

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1. INTRODUCTION, METHODOLOGICAL QUESTIONS

The study – comprising some experiences of a more extensive research – is an attempt to continue the investigations into the changes of the cinema network in Hungary. It focuses first of all on the questions:

- What is a multiplex in the Hungarian and the West-European professional terminology?
- How did the appearance of the multiplexes reshape the spatial pattern of cinemas in Hungary?

The basis for the survey was provided by the most authentic data banks: in the case of Europe by the MediaSalles (European Cinema Yearbooks, Newsletter “European Cinema Journal”); in the case of Hungary by the Ministry of Education and Culture and the National Film Office.

The basic methodology of the process data were the statistical analysis and the investigation of the spatial pattern of the cinema network.

2. RESULTS

From the middle of the 1980s the rhythmic shrinking of the Hungarian network of cinemas has become stable. The process was generated by the simultaneous effect of several factors. Out of them we cannot ignore the grudging effect of the television, the explosion-like expansion of the home video-watching(VHS), the change of paradigm that occurred in the state subsidizing of the motion-picture industry, the infiltration of the elements of the market economy into the Hungarian economy, and later the stabilization of the market relations, the pluralization of the motion-picture distribution, its turning into a simple interest of profit, the change of ownership of

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the cinemas, the breaking up of the network into its constituent parts (BORSOS Á. 2006). The process was strengthened by the multiplex developments realized mostly out of foreign capital which significantly re-structured the Hungarian network of cinemas.

But what is a multiplex?

The concept – *multiscreen, multiplex, megaplex* – is used in a rather direct way by the domestic, as well as by the foreign parlance (equally the standard language and the professional terminology). In the West-European practice – first of all based on the interpretation of the MEDIA Salles – a *multiplex* is a cinema having more than eight screens built definitely for such a purpose and which also disposes of other auxiliary services (free or reduced-rate parking, refreshments) and its characteristics among the others are the followings: steeply tired seating, a comfortable distance between the seats, space in the foyers, air-conditioning, quality of sound etc. ((BRUNELLA, E. 1999, 2005). The establishments with several screens shaped up from the previous cinemas with one hall are called – in order to differentiate – *multiscreen*. According to our domestic concepts a *multiplex* is a purpose-built designed movie theater with six, or more screens. The Hungarian language differentiates those units which dispose of 3-5 screens and which resemble to the multiplexes in their technical and mechanical standard, their external appearance and services with the usage of the concept *miniplex*.

The American-type cinemas with several halls, the multiplexes appeared in the second half of the 1990s in Hungary. The “American-type” indication has a stressed importance. The classical cinemas with two or more halls were not unknown either in Europe or in Hungary at the time of the appearance of the new-type motion-picture theaters of the shopping centers.

The first cinemas with several screens of our continent were established in France yet in the 1970s. Several smaller screens were established from the halls of the traditional movie theaters with hundreds of seats. The movie palaces born this way, situated in the center of the cities proved to be competitive in the changed motion-picture market with their richer offer, more economical operation and their level of comfort improved through the re-structuring. It is not astonishing at all that the first American-type multiplex was opened by the French only in 1993 (SZÁNTÓ, L. 2000).

The first domestic multiscreen center with several halls was established by Budapest Film Rt. in a method in compliance with the French model. The rebuilt, modernized “Corvin Movie Palace” was opened in the last third of 1996. However, in order to enrich the offer a second or a third smaller screen was established previously in several movie theaters which had originally one screen. According to the evidence of the statistics one movie theater with five screens (the “Művész” in Budapest), five with three screens (the “Phaedra” in Békéscsaba, the “Blue Box” in Budapest, the “Béke” in Miskolc, the “Belvárosi” in Szeged, the “Ady” Movie Center in Zalaegerszeg) and a further 26 with two screens were operated in 1995 in our country.

The multiplex, which belongs to the entertaining and other consumptional block of the shopping malls, which offers and creates a new kind of receptive behaviour broke into the European market in 1985 in London. The cinema with several rooms which was considered to be successful in the pursuit of the viewer spread in rapid pace in Europe. The first centers of the dispersion beside Great-Britain were Ireland, Germany and Belgium. However, the process, which is nothing else but the American motion-picture industry's striving after dominance in Europe reached – even if in a different extent – e every West-European country by the end of the century (Table 1).

Table 1. Multiplexes in West-Europe in 1998

Country	Total number of screens	Multiplex screens	
		number	rate (%)
United Kingdom	2 349	1 010	43
Belgium	475	201	42
Luxemburg	26	10	38
Ireland	228	70	31
Spain	2 584	526	20
Austria	424	76	18
France	4 659	741	16
Portugal	442	60	14
Germany	4 128	523	13
Sweden	1 156	148	13
Norway	395	38	10
Denmark	320	26	8
The Netherlands	444	25	6
Greece	340	19	6
Switzerland	503	18	4
Italy	2 401	54	2

Source: European Cinema Yearbook 1998 and the author's own calculation

In Hungary, the multiplexes appeared in the second half of the 1990s in the so-called *third generation regional shopping malls* (CSAPÓ, T. 2008). The line was opened in 1996 by the “Hollywood Mutliplex” (Duna Plaza) that was a cinema with nine screens at the start and with eleven later and by the “Cineplex Odeon” (Pólus Center) with its eight screens. In the following half-decade the network widened in the capital city in every year. The expansion reached the provincial towns in 1998, such complexes were declared open firstly in Debrecen, Győr and Sopron (Table 2).

Table 2 The spread of the multiplexes (miniplexes) in Hungary

Year	Settlement	Name of the movie	Screens	Seats
1996	Budapest	Corvin Filmpalota	6	1 497
	Budapest	Hollywood Multiplex Duna Plaza	9	1 817
	Budapest	Cineplex Odeon	6	1 346
1997	Budapest	Cinema City Csepel Plaza	7	1 366
1998	Budapest	Hollywood Multiplex Lurdy Ház	10	1 736
	Debrecen	Cinema City Debrecen Plaza	9	1 727
	Győr	Cinema City Győr Plaza	10	1 920
	Sopron	Cinema City Sopron Plaza	7	1 380
1999	Budapest	Ster Century Campona	11	2 401
	Budapest	Ster Century Westend	14	3 038
	Kecskemét	Hollywood Multiplex Kecskemét	5	839
	Pécs	Cinema City Pécs Plaza	10	1 988
	Székesfehérvár	Cinema City Székesfehérvár Plaza	10	1 885
2000	Budapest	Cinema City V.I.P. Újudvar	6	818
	Budapest	Hollywood Multiplex Óbuda	10	2 006
	Budapest	Mamut Budai Moziközpont I.	8	1 288
	Miskolc	Cinema City Miskolc Plaza	8	1 405
	Nagykanizsa	Hollywood Multiplex	4	626
	Nyíregyháza	Hollywood Multiplex	5	1 003
	Szeged	Cinema City Szeged Plaza	9	1 969
2001	Budapest	Mamut Budai Moziközpont II.	5	1 005
	Kaposvár	Hollywood Multiplex	4	634
	Miskolc	Hollywood Multiplex	7	1 307
	Szolnok	Cinema City Szolnok Plaza	4	733
2002	Budapest	Palace Cinema MOM Park	9	2 477
	Békéscsaba	Center Mozi	4	638
	Szombathely	Cinema City Savaria Plaza	4	721
	Zalaegerszeg	Cinema City Zala Plaza	4	725
2004	Veszprém	Cinema City Balaton Plaza	4	617
2007	Budapest	Sugár Mozi	4	796
	Tatabánya	Palace Tatabánya	4	619
2008	Budapest	Cinema City Aréna	23	3 888
	Eger	Agria Mozi	3	445

Source: Ministry of Education and Culture, National Film Office

The “new cathedrals of consumption” (SIKOS T. T. – HOFFMANN I-né 2004) had an elementary effect. Their attractive force was primarily based by the high level of mechanical and technical standard, the auxiliary services and the new-type attitudes of movie-watching. They did not introduce much new in the field of program policy since following the distributors' change of

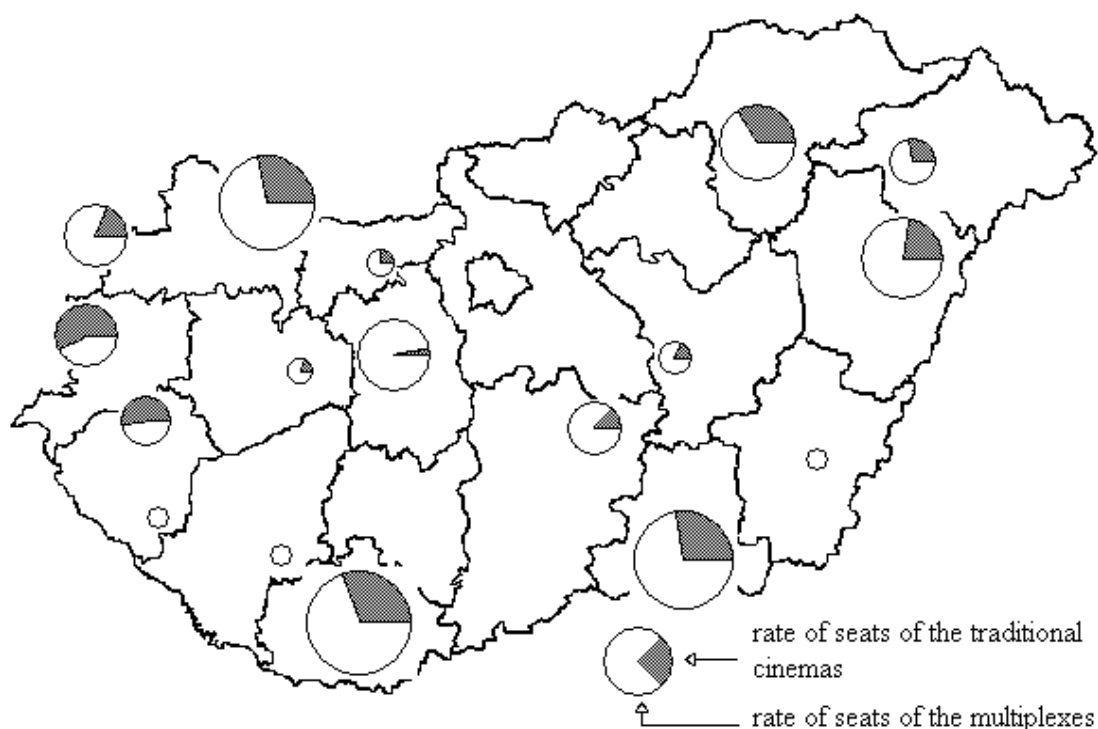
structure, which occurred at the end of the 1980s, the latest productions were almost at the same time introduced also in the cinemas of Hungary as the world premier. Substantial and good ones as well as the bad and insipid ones.

The appearance of the multiplexes generated a change of two directions in the concerned settlements. Generally, the seat-capacity of the cinemas significantly grew in the concerned settlements. Only Nyíregyháza was an exemption. This growth scattered between 13% (Budapest) and 209% (Székesfehérvár) in the year of the opening of the new cinema facility. The growth was extraordinarily high in Sopron (204%) in Szeged (151%) and in Nagykanizsa (120%). As a reaction to the grudging effect of the new offer a range of classical cinemas were closed. In some of the cities (Békéscsaba, Kaposvár, Nagykanizsa) there is not any alternative offer as opposed to the multiplexes at all (Figure 1).

The period of the powerful expansion of multiplexes in Hungary concluded at once by the middle of the first decade of the new millennium. In the year of 2005, out of the towns of county rank being at the top of the settlement-hierarchy only in Dunaújváros, Eger, Hódmezővásárhely, Salgótarján, Szekszárd, Tatabánya and Veszprém was not established any multi- or miniplex. The real-processes of the country were partly the same as the West-European trends and they partly differed from them, too.

- As well as in West-Europe, the period of the was over in Hungary, too. The proportion of the monoscreens was the lowest (38,01%) in Hungary within the Central-East-European region in the year of 2005. Within this region the network of Poland has not exceeded 50% yet. Out of the West-European countries only Switzerland (44,88%), Greece (44,69%), Italy (41,28%) and Norwegian (39,08%) disposed of a rate higher than our country's. In the other countries the penetration of the multiplexes was higher.

Figure 1 The seats and their rate in the towns having multiplex (miniplex), 2007



Source: The author's own drawing according to Ministry of Education and Culture' data

- The expansion of multiplexes and the decrease of the number of classical cinemas was accompanied by the concentration of the ownership of cinemas. In the middle of the first decade of the new millennium the predominant proportion of the cinema-capacity was concentrated in the hand of three companies (InterCom Rt., I. T. Cinema Rt. and limited only to the capital city it was the Budapest Film Rt.).
- While in West-Europe the number of spectators gradually increased also in the first five years of the new millennium, a gradual decrease occurred in Hungary. The yearly average admission by inhabitant in the year of 2005 in every West-European countries higher than the domestic rate of 1,2. Among the Central-East-European countries Slovenia and Hungary share the first position with this rate.
- In Hungary the initial magic of the opening of a new movie palace ceased within a relatively short period of time and if we observe the tendency, in every case the decrease of the number of visitors is typical until nowadays, too.

- With the exemption of Dania, Norwegian, Portugal and Sweden, the offer capacity and the number of seats has increased also nationwide with the spreading of the multiplexes (in spite of the incidental decrease of the number of monoscreens). In Hungary a proceed contrary to all these passed off which was not limited to the settlements with the new establishments.

In the middle of the decade of 2000 the signs of the over-development of the multiplex network have significantly appeared. While the movie theaters opened two-three years ago managed to more or less support the number of visitors allured to the cinema at the opening, the number of spectators of the first multiplexes decreased significantly by 40-50% as compared to their opening. Because of the fall-back of the ability to produce a profit and the increase of the operation costs Intercom Rt. and Budapest Film Rt., the two pioneers of the Hungarian multiplex establishments disposed of their establishments which embodied the break-through. This way came it to the selling of the “Mamut I-II. Mozicentrum” in 2005 and of the cinemas of Duna Plaza, Eurocenter Óbuda, Lurdy Ház, Pólus Center in the year of 2006. The smaller multiplex of Miskolc with seven screens was closed as well in 2006, the “Cinema City Új Udvar” in Budapest, the “Cinema City Csepel Plaza” in the year of 2008 and the Duna Plaza reduced its capacity with 4 screens (600 seats). The cinema in Miskolc was soon demolished, nowadays there is no sign of a previous multiplex's operation at the place of the shops operating there.

Several facts prove that the structural change of the Hungarian cinemas was not based on a conscious cultural conception or a conscious settlement-planning and organization (BORSOS 2007), but it was the secondary product of a capital investment serving the fulfillment of a consumption with a different direction; for example:

- There was no substantive branch or autonomous influence or conciliation concerning the developments. The over-development in Budapest, the building of the two multiplexes of Miskolc in the center of a region loaded by the economic recession and a deep poverty, the parallel development in Eger which could be valued as a wastage of state resources- all these refer to it.
- In spite of the obvious fullness and closing downs of the multiplexes' the Sugár Plaza with its four screens is opened in the capital city in the year of 2007 and the biggest cinema of Budapest, the Aréna Plaza with its 23 screens and 3888 seats is opened, too in the year of 2008. According to the plans the newest multiplex in an establishment that is being built at the place of the previous Skála of Buda can be started to operate in the near future.

- In Tatabánya, where the interest shown in cinemas is otherwise small a miniplex with four screens was opened in the year of 2007 which sealed the destiny of the “Turul” and “Bányász” cinemas operating with a short exploitation.
- In Eger, where the “Uránia Cinema” was renovated between 2003 and 2005 from own resources and from a state subsidy of the amount of nearly 40 million Hungarian Forints, a miniplex with three screens was opened in 2008.

As the consequence of the change of two directions (the closing up of traditional cinemas, the extension of multiplexes) the multiplexes concentrating in the 18 towns of the settlement-hierarchy gradually became the dominant elements of the Hungarian cinema network (Table 3).

Table 3 Characteristic data of the running cinemas in Hungary on the 31 of December 2004-2007

Year		Cinemas	Screens	Seats	Screenings	Admission	Gross box office (x 1000 HUF)
2007	Total	157	369	70 900	432 410	10 866 055	10 225 942,7
	Multiplex	28	204	39 956	325 163	8 939 483	9 148 014,5
	Rate	17,8%	55,3%	56,4%	75,2%	82,3%	89,5%
2006	Total	169	385	77 232	406 587	11 608 606	9 350 133,9
	Multiplex	28	208	40 990	298 353	9 377 498	8 342 958,6
	Rate	16,6%	54,0%	53,1%	73,4%	80,8%	89,2%
2005	Total	213	434	87 277	452 218	12 037 437	9 743 436,8
	Multiplex	30	214	41 809	336 508	9 430 655	8 459 936,7
	Rate	14,1%	49,3%	47,9%	74,4%	78,3%	86,8%
2004	Total	249	464	95 276	444 674	13 492 409	10 822 887,5
	Multiplex	29	210	41 230	339 314	10 741 558	9 460 764,9
	Rate	11,6%	45,2%	43,3%	76,3%	79,6%	87,4%

Source: The author's own calculation according to National Film Office's data

Their number in the year of 2007 is hardly more than the one-sixth of the network, they disposed of more than half of the operating screens and seats. Three-fourth of the screenings was organized there, 82,3% of the visitors booked a seat for these performances. They realized almost 90% of the box office receipts.

Not only the cinema-structure of the seat settlements was redrawn by the extension of multiplexes. They accelerated the degradation of the whole traditional cinema network as a subsidiary effect through the distribution of films and still nowadays they invariably influence the destiny of the yet remained movie theaters. That is to say that the determinant distributors, who otherwise have a capital interest abroad ensure an almost exclusive pole-position for the multiplexes in the interest of the soonest recovery of the invested capital and of the maximization of the

profit. The traditional movie theaters are degrading to the level of the second-run cinemas since they are able to get a copy the soonest within 2-4 weeks following the premier. By that time the production is generally over and a range of new productions is already at the center of interest. With such a dead weight the concerned cinemas can hardly expect a severe, competitive demand

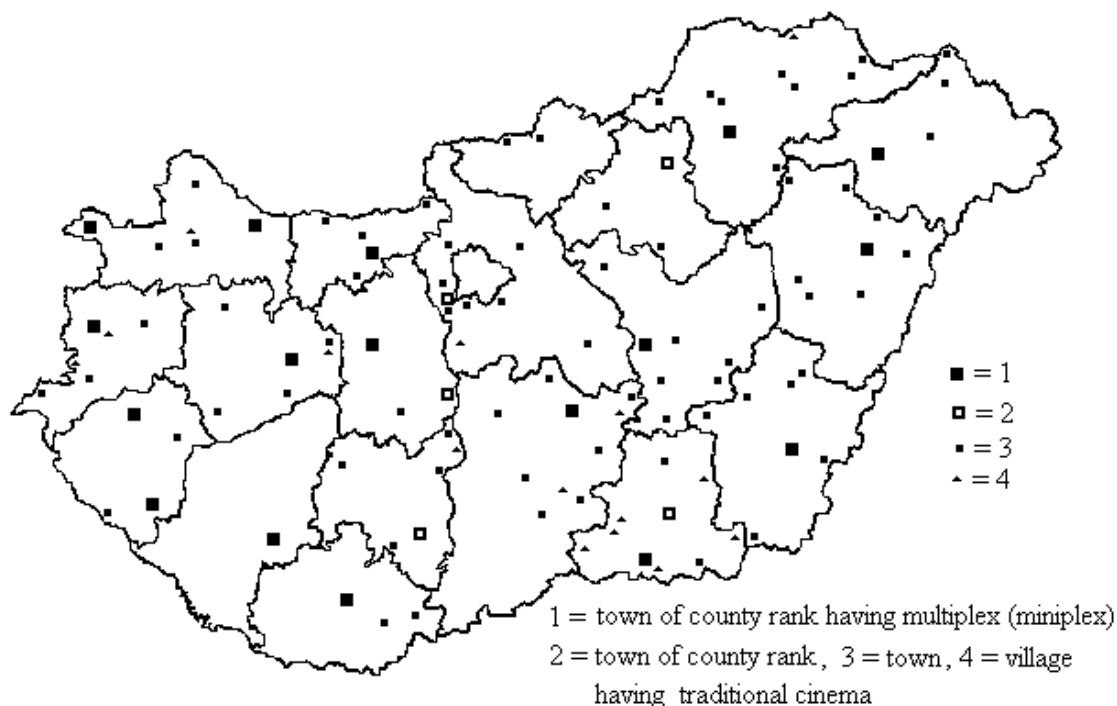
3. SUMMARY AND CONCLUSIONS

Naturally, there are both advantages and disadvantages of the expansion of multiplexes (miniplexes). Among their advantages we have to mention the high-level of mechanics, technology and comfort (Dolby Stereo sound, comfortable seats), the particular aesthetic appearance (fitted carpet, seats with plush cover), the organization of work which reminds of H. Ford and F. W. Taylor, the electronization of interactions (the issue of tickets with computers, on line or SMS order of tickets). Their disadvantage is the uniformization, the mechanization of interpersonal relationships, the emptiness of contact between viewer and the employee of the cinema, the new-type consumption behavior that is not primarily orientated on the aesthetic reception and the experience of catharsis, the plainer program structure and program offer which are based on the direct capital interest.

A significantly heavier disadvantage is the effect which influenced the formation of the cinema network and strengthened the process of deterioration. Not to mention that from the several milliards of profit realized by the distribution and cinema operation hardly was a small amount endorsed into the traditional cinema network.

According to the branch statistics of 2007 a cinema was operated only in Budapest and in the 32% of towns and 0,5% of villages of Hungary. The territorial dispersion of the network is uneven. This institution is already missed at coherent areas with a significant growth (Figure 2). The temporary position of the Hungarian cinema network has a lot of consequences in the education, culture services, state subsidizing of the motion-picture industry, too (BORSOS Á. 2006).

Figure 2 Spatial network of settlements having cinema, 31. December 2007.



Source: The author's own drawing according to National Film Office's data

The future of the Hungarian cinema network is unpredictable. However, the example of Miskolc clearly represents the threat of the uncontrolled globalization concealed in the guise of technical modernization. The shopping malls will in all probability survive the eventual closing up of the cinema at their territory. New shops will appear promptly at the place of the screens and nothing will remind of the fact that recently a cinema was being shown at the screen there.

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