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COMPARATIVE ANALYSIS OF THE IMPACT FACTORS INFLUENCING THE CINEMA AND THEATRE ATTENDANCE AND THEIR BUSINESS PERFORMANCE

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Abstract
The aim of this paper is to analyse the impact factors influencing the cinema and professional theatre attendance. The paper gives the analysis of the Croatian cinema and professional theatre industry, financial performance of the cinemas and national theatres operating in Osijek and Zadar and presents the relevance of the industry customized marketing methods. For the reason of determining the factors that influence the attendance and accordingly financial result, the primary research on student's consumption of analysed creative industries subsectors - cinema and theatre was conducted in Zadar and Osijek. The results of the primary research showed several factors relevant for the younger population attendance, which can accordingly influence the business performance and financial result. Here, the industries with different specifics were observed, the mainly private-owned and financed cinema industry and the mainly state-owned and financed theatre industry, which as well, significantly defines the business priorities, behaviour and performance.

Keywords
cinema and theatre attendance impact factors, industry customizedmarketing methods, business performance, financial results

1. Introduction

Unlike the privately owned and financed cinemas, in the Croatia the national theatres/1/ are state-owned and therefore mainly funded from public funds „Such a way of funding is often uncertain, given that there is a degree of uncertainty as to the amount of funds approved to be disbursed from the budget to finance theatre operation and programmes.“ /**2**/ As well, it allows the state-owned theatres not to continuously strive to gain the larger market share and attendance. There is even a question of their lacking the competitive spirit and the need of improvement and implementation of business management modern methods as well as modern marketing principles shaped by the need of specific target group. /**3**/ At the other hand, in the world there is the trend of introducing the new, innovative concepts with the aim of increasing the market competitiveness and attracting viewers. The newest examples is the combining the theatre and cinema repertoire, where today the live broadcasts of the world's biggest theatres such as United Kingdom National Theatre, Teatro alla Scala Milano, Royal Opera House London, Vienna State Opera, and concerts can be found in modern cinemas, and in that way attracting the theatre public. The theatres, in the same time, are becoming the places of the movie promotions and press conferences. In that way both sectors are trying to gain a larger market share and influence its financial performance. Nevertheless, to be successful and increase its attendance rate both industries have to perceive its visitors preferences, know their “buying” habits and in accordance shape and modernize its service and marketing methods. /**4**/ Following the trends of the world, and in Croatia the significance of cultural and creative industries market is growing, such as the film, video games, music, theatre plays and even street art performances, but at the same time the attendance is not rising by the same rate. This influences the financial and business performance of the cultural and creative industry actors. As the cinema and theatre financial results are highly dependable on the attendance rate, this paper gives the overview of the industry customized modern marketing methods as well as the results of the primary research of the impact factors that influence the attendance cinema screenings and theatre performances of the younger population. With the aim to analyse the preferences of the younger population, the primary research was conducted on the Zadar and Osijek Universities student population. As well, for the purpose of gaining insight of the cinema and the theatre industry and the main industry player's condition, the comparative analysis of cinema and professional industry theatre market and financial performance of main industry players in the city of Osijek and Zadar, is given.

The primary research tested the following hypotheses:

H1: There is no statistically significant difference between students from The Department of Cultural Studies and students from The Department of Information Sciences when it comes to the presence of certain sectors of creative industries in their lives.

H2: There is no statistically significant difference between the students of the Department of Cultural Studies and the Department of Information Sciences in the frequency of watching movies.

H3: There is no statistically significant difference in segments that could encourage students to go to the cinema.

H4: There is no statistically significant difference between the students of the Department of Cultural Studies and the students of the Department of Information Sciences at the frequency of visiting the theatre.

H5: There is no statistically significant difference between the students of the Department of Cultural Studies and the students of the Department of Information Sciences in the importance of impact factors for visiting the theatre.

2. About cultural and creative industries

„The creative and cultural industries are a term that includes a variety of different related industries." /**5**/ These industries are one of the most perspective and fastest growing. The employment of the industry is relevant and are also one of the few industries resistant to the economic crisis and in these recession times, recorded significant growth trends in both the European Union and in the Republic of Croatia. The economic potential of cultural and creative industries is at a high level as they occupy a relevant share of GDP in the Republic of Croatia, as well as in the European Union.

There are many different definitions of cultural and creative industries but neither one became commonly accepted. „The term 'cultural industries' was first extensively used in the UK, by the Greater London Council (GLC) in the 1980s, as a rhetorical or polemical device to emphasise two points. Firstly, that those cultural activities which fell outside the public funding system (the GLC sometimes equated these with mass (re)production) and operated commercially were important generators of wealth and employment. Secondly, a more directly cultural/political point – that of the whole range of cultural goods and objects which people consumed, the vast majority (TV, radio, film, music, books, adverts, concerts) had nothing at all to do with the public funding system." /**6**/

There are different definitions of the creative industries, but the most common one is the definition by UNESCO (2005): "those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation and exploitation of intellectual property". /**7**/

This paper includes the results of primary research about student's consumption of some chosen sectors of creative industries such as film industry and theatre. Theatre as a performing art is one of the sectors of creative industries as well. „The performing arts span four main activities: modern and classical dance, theatre, live music and circus arts. Providing an estimated 1,234,338 jobs in Europe, the performing arts sector is the largest employer among the continent's cultural and creative industries, providing more than one job in six." /**8**/ Performing arts include all forms of artistic expression in front of an audience. Film industry is one of the most popular and the most widespread sector of creative industries. A €17b market employing almost 650,000 people, the film industry is the ninth-largest in European Union.

„The term "creative industries" is applied to a much wider productive set, including goods and services produced by the cultural industries and those that depend on innovation, including many types of research and software development. The phrase began to enter policy-making, such as the national cultural policy of Australia in the early 1990s, followed by the transition made by the influential Department for Culture, Media and Sport of the United Kingdom from cultural to creative industries at the end of the decade." /**9**/ „New technologies are very important for the development of this sector, and digitization is one of the key processes that promote its growth and influence." /**10**/ „Most of the definition of cultural industries are based a combination of five main elements - creativity, intellectual property, symbolic meaning, useful and methods of production." /**11**/

Modern marketing methods in the theatre and cinema industry

One of the first marketing researchers about theatre market goes back to the 70s in the last century, more precisely in the 1974, and was conducted by the Ford Foundation to find out how does the price of theatre ticket impacts on theatre attendance and also which others factors (ie. theatre visitor earnings) impact on theatre attendance. Also, the following authors dealt with the same issues during the 80s and 90s: Whiters /**12**/, Levy-Garboua and Montmarguette /**13**/ and Gapinski /**14**/ – how does the substitution for leisure such as reading, movies, recreation affects attendance at the theatre show; Bonato /**15**/ – how does the level of education affects the arrival on the theatre show; Felton /**16**/ - how price affects theatre subscribers and nonsubscribers; Throsby /**17**/ - how does the quality of performance (quality of actors, production, set design, etc.) affects the arrival in theatre. Walmsley /**18**/ was in recent time dealing with the theatre attendance motivation.

The basic theatre marketing concepts are determined by the legal and ownership status, the type of theatre (national, regional, urban, musical, children's, etc.) and also the overall management. The type of theatre does not significantly affect creativity in marketing, but only causes certain frames and target groups, while the management principles are crucial for marketing creativity. On the other hand, marketing can and should have a positive impact on the theatre business success and help the management in building the principles of organization, production, total business and the general image of the theatre, but also to establish a program of sales and market launch, the concept of public relations and advertising campaigns, to create the repertoire policy, program hosting, tour and participation in festivals and define the direction of research and development in the theatre. /**19**/ According to Kerrigan et al. /**20**/ essence of marketing in theatres is in the business tactics. This implies a tactic to select successful marketing tools and ways to communicate with the environment. Marketing in theatres, of course, includes a sale process such as performance ticket or other services to theatre consumer (audience or viewers). /**21**/ Nevertheless, marketing in theatres is not based only on sales but also on successful communication with the audience, which can eventually help to attract more viewers (audience) and higher ticket and service sale. To achieve this aim, the marketing in theatre is using following resources: Promotion; Advertising; Public relationship (in broad sense); Relationship with the audience /**22**/ The basics of theatre marketing are *planning* and *research*. The study establishes the real needs of the particular environment in which the product is intended. Within this research, there is no universal approach and unique models, research is carried out on a case-by-case basis, from project to project, from place to place, taking into account only the general principles that apply to the placement of cultural products /**23**/.

With the help of planning, theatres can develop a good well specific market customized marketing mix. But, before the process of a creation of a marketing plan takes place, the answers to next questions should be given: "Do we need a marketing plan? What is our job? And what do we do in this moment? What do we want to achieve in the next 5 years? What are our products like? For whom do we produce? What does the value represent to our consumers? What do our consumers want to buy? What do we sell to our consumers? With which restrictions are faced when it comes to product sale? What and how much do we know about our market? How much do we know about our competition? Do we know what are our advantages in regard to our competition? Are we, and how much, different from our competition? Do we have any plans, when it comes to marketing? What are out marketing priorities? What do we want to send out about us? To whom do we want to send it

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out? On what are we going to use available funds for marketing? How are we going to reach out to consumers? Do we have any idea, what do we want from our advertising? On what are we going to direct our advertising?" /**24**/

For a successful marketing plan, the person who is leading the marketing in a theatre, has to have concrete answers to all previous questions. With the concrete answers, the awareness of marketing in theatre gets better and higher, and the person who leads marketing gets better guidance for marketing plan. Marketing in theatres in Croatia is relatively new concept because of the leftovers of socialist heritage. /**25**/ Despite this situation some theatres in Croatia have successfully started to impellent marketing in their business processes. Proof that the marketing plan and relationship with the visitors can be different and more successful is proving a private theatre in Croatia. In order to accommodate visitors of their theatre, they decided:

- Provide professional child care with no extra charge in the duration of the show;
- Play performances for people with special needs (audio performances with simultaneous translation into sign language);
- To share a free glass of champagne in show break;
- Offer special discounts in some shops on the day of the show;
- Cooperate with Croatian Railways to attract people from different parts of Croatia, etc. /**26**/

These marketing activities are an excellent example of how to please present visitors and also attract new ones. If the marketing in theatres is ignored, it can lead to devastating consequences. The proof of that, shows one of the marketing research in the theatre conducted by students of the Faculty of Economics in Osijek, in 2013. The aim of this research was to investigate the characteristics, opinions and attitudes of the young population in eastern Croatia on classical theatre. The study was conducted on 876 examines aged between 18 and 35 years. The results showed that only 1% of the young population regularly goes to National Theatre in Osijek, 5% twice in a month, 45% a few times a year, and 49% had never even visited the National Theatre. The study concluded if Croatian National Theatre in Osijek wants to attract more young population in the theatre, it must make a redesign of posters and leaflets, improve online marketing such as increased presence on social networks and local internet portals. /**27**/ This study has proven that the marketing in the culture cannot be ignored and must be regularly implemented to make theatre business successful in continuity and raised the awareness of the positive aspects of marketing because marketing can help easily to communicate with the audience (existing and potential). To attract more visitors and develop their business in a successful direction, the cultural institutions (theatres, galleries, museums etc.) have to combine creative marketing with changes in the environment and adapt their activities to the demands of the market. The simplest and the most effective way to accomplish this is to use creative marketing, with special emphasis on unconventional promotional activities like social media, ads on sugar packets, /**28**/, innovative theatre plays promotions (such as presentations of parts of play dialog in unexpected places, street communication of actors and the citizens, short video promotions etc.) The modern marketing presents the creative, innovative marketing models and is the best way of attract young audience to theatre plays and other cultural institutions events. Cinema is thus a complex cultural industry, and the challenge facing marketers when it comes to films is quite daunting. People may need to go to the cinema now and then to have a good time or to try to forget about their worries, but the average cinemagoer rarely needs to see a particular film. Therefore, marketers have to create a whole experience, the urge to see a product whose fleeting value–or lack of it–is only known after it has been watched. Consequently, the art of marketing, of creating advertisements able to entice people to buy precise items, was further developed. The cinema industry that grew in the 1910s and 1920s also resorted to marketing to sell its films to the largest possible audience /**29**/. When it comes 4P marketing mix and cinema attendance of young population, according to Mohammadian and Sezavar Habibi /**30**/ place is the most influential variable in attracting audiences and the priority of its indices were: the location of Cinema and the possibility of using public transport to access the cinema, product has the second place among the four variables in attracting the audience. All indices of this variable except "movie budget" were found to be influential in attracting audiences and their priorities were respectively: film genre, director, movie star, awards won and a nomination at the festivals and producer. In promotion, the priorities of indices were respectively: word of mouth (WOM based on the scientific research is such a successful tool in selling consumer product, due to its creditability and trustworthiness), movie reviews, television commercials, press ads, movie posters, radio advertisement and film website. As well the former research showed that the price is not an influential variable in attracting audience. On the other hand, the research of this paper showed the different attitude of the young population when it comes to the price. Obviously, it can be concluded that the cultural and geographical differences as well as age diversity can significantly effect on impact factors influencing the cinema and theatre attendance of the young population.

3. The cinema and professional theatre industry in Croatia

The Cinema industry in Croatia from 2011, presented in Table 1, shows the trend of stable growth of the number of cinemas, where in the five year period the number of screens grew by 5%, but with the change of quality of service where the number of seats in total in Croatia decreased for 8%. The reason for this is the appearance of the smaller cinema halls as well as exclusive and more expensive, VIP projections with the limited number of visitors per screening (Gold class), where the average number of seats decreased by significant 12%, from average 243 sets per screen to 213 seats per screen. Accordingly to the growth of the number of screens, the number of screenings grew by 35%, but the number of visitors per screening fell for 10%. The paradox is, that although the attendance and the number of visitors per inhabitant grew, as of high growth of competition in this industry, without the introduction of new services, the increase of ticket sales prices or the strong increase in attendance, the industry revenues will continue to reduce.

Table 1: The cinema industry in Croatia

Cinema industry in Croatia							
Year	Number of screens	Attendance, '000	Number of seats	Visitors per seats	Number of screenings	Visitors per screening	Visitors per inhabitant
2011	156	3,558	37,840	94	129,145	27.55	0.81
2012	162	4,064	36,355	112	164,787	24.66	0.95
2013	165	4,157	36,066	115	174,488	23.82	0.97
2014	159	4,080	33,310	122	165,914	24.59	0.96
2015	164	4,348	34,998	124	174,526	24.91	1.03

Source: Authors analysis according to the Croatian Bureau of Statistics (2017) /**31**/

The total number of screens of the Croatian industry is 164, where the Blitz-Cinestar d.o.o. owns 86 screens and 14.622, with the average number of the seats by the screen is lower than the average in Croatia with 170 seats per screen. Table 2 shows the development of the professional theatres industry in Croatia where number of professional theatres almost doubled in the past five years with the growth of number of seats by 46% but the attendance in total grew only by 4%. This led to the significant decrease in the average number of visitors by available seat and following, the decrease in the number of visitors per performance. Accordingly, although the attendance grew by 5% in the last 5 years that is significantly less than in the cinema industry, as of strong growth of competition without the introduction of new services, the increase of ticket sales prices or the strong increase in attendance, the industry revenues and profitability will continue to decrease.

Table 2: The professional theatres in Croatia

Professional theatres industry in Croatia							
Year	Number of professional theatres	Attendance, '000	Number of seats	Visitors per seats	Number of performances	Visitors per performance	Visitors per inhabitant
2011	53	1,261	11,241	112	5,608	224.86	0.29
2012	60	1,211	11,430	106	5,044	240.09	0.28
2013	83	1,255	12,558	100	5,739	218.68	0.29
2014	93	1,471	15,437	95	6,990	210.44	0.35
2015	98	1,309	16,419	80	6,571	199.21	0.31

Source: Authors analysis according to the Croatian Bureau of Statistics (2017) /**32**/

Comparing the two analysed industries the similar trends can be seen and the conclusions given. For the purpose of defining the important factors that are influencing the younger population attendance growth, the authors conducted the comparative analysis of the primary research on student's consumption of the services of the chosen creative industries

sectors - cinema and theatre conducted on locations of Zadar and Osijek universities. The results of the primary research showed several factors relevant for the younger population on the cinema and theatre attendance that accordingly influences the business performance and financial result. For that reason, before the result of the research, the financial analysis of the professional theatres and cinemas operating in Zadar and Osijek was performed and results given in the following tables.

4.1. The financial performance of the Zadar and Osijek national theatres

The table 3 shows the overview of the Croatian national theatre Osijek revenues structure in 2011 and 2015 and Croatian National Theatre Zadar in 2012 /**33**/ and 2015.

Table 3: Overview of the structure of the Croatian national theatres revenues

('000)

Description	**HNK Osijek**				**HNK Zadar**			
	2011		**2015**		**2012**		**2015**	
	Amount ('000)	Share in total rev.	Amount ('000)	Share in total rev.	Amount ('000)	Share in total rev.	Amount ('000)	Share in total rev.
Income from the state budget	26,495	92%	25,511	92%	3,930	73%	3,433	83%
Sales revenues and revenues from sponsorships and donations	2,175	8%	2,204	8%	979	18%	230	6%
Income from administrative fees and fees according to special regulations	0	0%	35	0%	0	0%	373	9%
Income from property	0	0%	0	0%	4	0%	0	0%
Grants and supports (other than state budget)	0	0%	0	0%	420	8%	112	3%
Income from sale of nonfinancial assets	49	0%	14	0%	1	0	0	0%
Other revenues	0	0%	0	0%	14	0	0	0%
Total revenues	**28,719**		**27,764**		**5,348**		**4,148**	

Total expenditures	**28,892**	**28,650**	**5,567**	**3,562**
Profit / loss of the financial year	**-173**	**-886**	**-219**	**586**

Source: Authors analysis according to the Report of activities and financial Report for the 2015 Croatian National Theatre Zadar /**34**/; Audit report of Croatian National Theatre Zadar the for year 2012 /**35**/ and according to the Report of activities and financial Report for the 2011 and 2015 Croatian National Theatre Osijek /**36**/, /**37**/

According to the analysis there was no significant change in the structure of the Theatre financing in analysed years. Both theatres were dominantly financed from owner's budget (weather state or municipality)

where there was almost no increase of theatre's own revenues (sales, rent or similar). "Such financing model in which culture is mostly financed from the state budget is characteristic for Europe, socialistic countries and countries whose historical legacy is the kingdom or monarchy that have learned to traditionally protectively behave towards culture." /**38**/ Although, the Zadar National theatre had the positive financial result, e.g. their spending did not exceed its revenues, this was not the result of the increase attendance of their performances but of the state funding increase.
Both theatres faced a significant fall of revenues, as the result of the reduced state funding – in the case of Osijek national theatre for 3.9 % and Zadar for significant 12.6 %. The reductions are the result of the state policy of reducing all budgetary costs as the response on Croatian economic crises and the state and municipalities budget deficit.

4.2. The financial performance of the Zadar and Osijek cinemas

After the insight of financing structure of the two national theatres, in this part, the financial performance of a major Croatian cinema chain, the privately owned cinema and comparative analysis with the industry as a whole is given. The only cinema in Zadar (with six screens and 980 seats) is run by the Blitz-Cinestar d.o.o., the company registered in Zagreb that is the owner of the major cinema network in Croatia, including the Osijek cinema (with 9 screens and 1,178 seats), therefore before the comparative analysis the work gives its short financial analysis in the last six year period, given in Table 5.
One more privately owned cinema, Kinematografi d.o.o. (with two screens) is operating in Osijek. The short business analysis of the Kinematografi d.o.o. is shown alongside with the other major players and the analysis of the industry itself presented by the firms registered in NACE 5914 - Motion picture projection activities and the Economy as a whole, by the table 5.

Table 4: The short comparative financial analysis of the business results in 2015 for the major players in Croatian cinema industry

Business analysis	Blitz-Cinestar d.o.o.	Blitz-Cinestar Adria d.o.o.	Kinematografi d.d., Osijek	Cineplexx HR d.o.o.	Industry of motion picture projection activities	Croatian economy
Business revenues ('000)	133,131	29,585	623	23,042	194,608	627,899,881
Change of business revenues	-0.18%	1.97%	-44.89%	23.08%	1.74%	2.54%
Net profit/loss ('000)	17,649	7,019	26	-5,468	18,873	16,226,341
Change in net profit/loss	-0.44%	42.82%	-82.20%	40,22%	58.35%	137.31%
EBITDA margin	18.74%	33,27%	-37.52%	-7.34%	11.16%	5.94%
Indebtedness factor	1.88	3,29	11,66	-	8,00	4,76
ROE	18.42%	23.58%	0.73%	-	1.35%	6.58%
Current Ratio	0.67	1.75	1.55	0.65	1.18	1.17
Share of own equity	0.72	0.58	0.62	-2.01	0.25	0.21
Operating cash flow ('000)	15,161	9,362	96	-956	26,269	36,150,809

Average payment period	50.35	29.70	209.79	85.42	57.40	30.59
Number of employees	133	35	5	32	237	893,455
Earnings before interest, taxes, depreciation, and amortization) (EBITDA) ('000)	24,955	9,843	-234	-1.691	34.217	59,115,582
Total assets ('000)	145,129	56,999	5,694	27,641	310.053	1,112,972,289

Source: authors' research

Comparative analysis presented by the table 4 showed that the Blitz group (Blitz-Cinestar d.o.o. and Blitz-Cinestar Adria d.o.o.) are the major market players where only the Blitz-

Cinestar d.o.o. makes 68.4% of the whole Croatian cinema market and almost half of the value of the industry in total. As well firm, in comparison to the industry as a whole has the high ROA and EBITDA margin as well as the other analysed financial ratios. By comparing the business revenues trend from 2011 to 2015, presented by the table 5 the significant fall can be seen, with the recovery in 2016. Although the firm increased its capacity and the quality of service by investing in modernization and opening new cinemas in the areas where it hasn't persisted till now (average CAPEX amounts 7.991 thousand HRK per year) it wasn't shown in its profit and loss account during the analysed period. Only in 2016, the firm showed the financial results that are comparable to the record year, 2011.

Table 5: The short profit and loss account of the Blitz-Cinestar d.o.o.

('000 HRK)

	2011	2012	2013	2014	2015	2016
Business revenues	148,677	137,610	140,438	133,375	133,149	150,030
Sales	140,209	133,763	135,231	128,113	128,205	144,617
Other business revenues	8,467	3,847	5,207	5,262	4,944	5,413
Costs of goods sold	94,339	104,082	100,950	104,449	108,176	115,066
Depreciation	8,299	7,561	8,374	8,728	7,184	6,786
Financial revenues	1,764	588	4,004	541	1,930	12,561
Financial expenses	694	4,347	7,108	3,012	2,070	674
Total revenues	150,441	138,198	144,442	133,916	135,079	162,591
Total costs	103,332	115,990	116,432	116,189	117,430	122,526
Gross profit	47,109	22,208	28,010	17,727	17,649	40,065
Taxes	1,402	0	0	0	0	1
Net profit	45,707	22,208	28,010	17,727	17,649	40,065
Tangible assets	112.100	117.340	118.922	121.946	118.107	113.423

Source: authors' research

4. The results of comparative analysis of student population from Osijek and Zadar

This chapter presents the results of a comparative analysis based on two groups of respondents, namely the students of the Department of Cultural Studies at Josip Juraj Strossmayer of Osijek and the students of the Department of Library and Information Sciences at the University of Zadar. Based on the obtained statistical data, correlations and comparisons were made using different statistical methods, with the aim of determining the similarities and differences between the answers to the selected questions. This comparative analysis and research were conducted during April and May in 2016 between student population in Osijek and Zadar.

5.1. The sample of student population by gender and by the age from Department of Cultural Studies and Department of Library and Information Science

Table 6: Distribution of respondents by gender

Category	Total	Percentage %
Female	131	86.18
Male	21	13.82

Source: author's research

The 152 respondents (N=152) were included, 86.18% were female, and 13.82% male. The respondents are between 18 and 49 years old but the most of the respondents are between 19 and 24 years old or expressed as a percentage 76.97%.

6. Research findings

6.1. Results of comparative analysis on the presence of certain sectors of creative industries in the lives of the student population

This subchapter starts with the question about the presence of certain sectors of creative industries in student's lives. There was used the Likert Scoreboard to evaluate the presence of certain sectors of creative industries in student life. The responses of students are presented in Table 8 that shows descriptive statistical analysis regarding the presence of specific sectors of the creative industries in student's lives. The descriptive statistical analysis includes the arithmetic mean, median, mode, variance, and standard deviation.

Below, Table 7 shows how often students from Osijek and Zadar visit or consume some sectors of the creative industries due to excessive leisure time.

This chapter follows a sample analysis of the students of the Department of Cultural Studies in Osijek and the Department of Library and Information Science for comparative analysis.
The table 6 shows the aggregate distribution of respondents by demographic characteristics (gender).

Table 7: The structure of the respondents by the place of the higher education institution and select the creative industry sector due to excess of leisure time

Excess of leisure time	Place of higher education institution			
	Osijek		Zadar	
	f	%	f	%
Going to the cinema	58	57.4%	43	42.6%
Visiting the theatre	53	61.6%	33	38.4%
Going to the library	28	65.1%	15	34.9%
Visiting gallery or museum	36	56.2%	28	43.8%
Watching TV	10	66.7%	5	33.3%
Using the interactive software/game on mobile or computer	5	22,7%	17	77,3%

Source: author's research

In their free time the students in Osijek are mainly watching TV (66,7%), visiting the library (65,1%) and visiting the theatres (61,6%) and students from Zadar are mainly playing video games (77,3%), visiting gallery or museum (43,8%) and going to the cinema (42,6%). As in the both groups of students the cinema and the theatre are placed in the third and fourth place of attendance, there is a significant space for improvement that can be achieved by using the industry customized marketing models.
Table 7 shows that students from Osijek are more likely to visit cinemas (57.4%) than students from Zadar (42.6%). As for the visits to the theatre,

students from Osijek also visit theatres (61.6%) more often than students from Zadar (38.4%).
Below are given hypotheses and their explanations through tables and parametric or non-parametric statistical tests.

H1: There is no statistically significant difference between students from The Department of Cultural Studies and students from The Department of Information Sciences when it comes to the presence of certain sectors of creative industries in their lives.

Table 8: The results of Mann-Whitney U-test for a group of questions related to the presence of some sectors of creative industries in the lives of the student population

Variables	Mann-Whitney U test Significance if p <,05000 Rank Sum 1	Rank Sum 2	U	Z value	p-value
Going to the cinema	6539.00	5089.00	2711.00	-0.44401	0.65704
Visiting libraries	7252.50	4375.50	2230.50	2.39822	**0.01648**
Watching TV	6981.50	4646.50	2501.50	1.23889	0.21539
Using different mobile applications	6526.00	5102.00	2698.00	-0.49792	0.61854
Playing a mobile games	6552.00	5076.00	2724.00	-0.40405	0.68618
Visiting theatres	7154.00	4474.00	2329.00	1.91718	0.05522
Visiting museums	7274.50	4353.50	2208.50	2.37397	**0.01760**

Source: author's research

From Table 8 it can be concluded that there is a statistically significant difference between student groups in two responses (out of a total of seven): "Visiting Libraries" (p = 0.01648) and "Visiting Museums" (p = 0.01760) what means that the students of the Department of Cultural Studies and the Department of Information Sciences visit libraries and museums differently and for that reason the H1 is rejected. All other sectors of creative industries such as going to the cinema, watching TV, using different mobile applications, playing a mobile games and visiting theatres students similarly consume that means that they are not statistically significantly differ in their consumption and for those sectors H1 doesn't reject.

6.2. The results of comparative analyses for film industry and theatre

In this chapter there are students' responses to selected sectors of the creative industry with special emphasis on the film industry and the theatre.

6.2.1. Film industry

When we are talking about film industry as a sector of creative industries, the following segments are analysed: the frequency of watching movies. the frequency of going to the cinema and also the parameters which would encourage students to go to the cinema.

H2: There is no statistically significant difference between the students of the Department of Cultural Studies and the Department of Information Sciences in the frequency of watching movies.

For H2 it has been used the non-parametric Mann-Whitney U-test because the variable is ordinal and the results are shown in Table 9.

Table 9: Results of Mann-Whitney U test about the frequency of watching movies

Variable	Mann-Whitney U Test Test is significant for p <.05000 Sum rang 1	Sum rang 2	U	Z value	p-value
Frequency of watching movies	6016.500	5611.500	2188.500	-2.53370	**0.011287**

Source: author's research

From the results presented in Table 9 it can be concluded that there is a statistically significant

difference between the independent groups (p = 0. 011287), because there is a difference between two groups of students in the frequency of watching movies, which means that H2 rejects.
In the next set of questions. students were expected to evaluate the importance of segments that attracted them for watching a movies. The responses were structured in the form of Likert's scale.

Table 10: Descriptive statistical analysis of students' responses on impact factors that attracted them for watching movies

Variables	**N**	**Arithmetic mean**	**Median**	**Mod**	**Variance**	**Std. Dev.**
Quality of the movie	152	4.493421	**5**	**5**	0.423797	0.650997
3D display of the movie	152	1.875000	1	1	1.209437	1.099744
Number of visitors in cinema	152	1.697368	1	1	1.020390	1.010144
Famous actors in movies	152	2.822368	3	3	1.458304	1.207603
Ticket price	152	3.894737	**4**	**4**	1.233879	1.110801

Source: author's research

From Table 10 it is concluded that for the both groups of students is very important quality of the movie (the most commonly rounded grade 5 for the quality of the movie) as well as the price of tickets (the most commonly rounded grade 4 for ticket price). For both groups of students are neither important well-known actors in movies (the most commonly rounded grade 3). At least important, for both groups of students is the possibility of 3D display of the movie in cinemas as well as the number of visitors in the cinemas (the most commonly rounded grade 1).

H3: There is no statistically significant difference in segments that could encourage students to go to the cinema.

Table 11: The results of Mann-Whitney U test to the impact factors that could encourage students for going to the cinema

Variables	**Mann-Whitney U Test** Significance for p <.05000				
	Rank Sum 1	Rank Sum 2	U	Z value	p-value
Interesting posters or flyers about the movie	6721.500	4906.500	2761.500	0.253928	0.799552
An interesting TV or radio announcement of the movie	6761.500	4866.500	2721.500	0.412126	0.680247
Recommendation of a friend about the movie	6762.500	4865.500	2720.500	0.428616	0.668203
Affordable ticket prices (discount on student card. index. group discount)	6567.500	5060.500	2739.500	-0.360072	0.718794
Movie hit so called blockbuster	6423.000	5205.000	2595.000	-0.890349	0.373279
An unconventional or creative way of promotion for a movie like flash mob	6521.000	4955.000	2780.000	-0.055828	0.955479

Source: author's research

The results of Mann-Whitney U test given in Table 11 show that for all variables worth p> 0.05. which means that there is no statistically significant difference in the responses of the students of the Department of Cultural Studies and the Department of Information Sciences by impact factors that would encourage them to go to the cinema at a significance level of 0.05 which means that H3 does not reject.

6.2.2. Theatre

The group of questions in this subchapter refers to theatres which are also included in the creative industries sector and are part of performing arts. This chapter begins with a group of questions related to the frequency of theatre visits and also impact factor which can attract student population for visiting theatres.

H4: There is no statistically significant difference between the students of the Department of Cultural Studies and the students of the Department of Information Sciences at the frequency of visiting the theatre.

Table 12: Results of the Hi-square test about the frequency of theatre visits by Departments

Variable		Are You visiting theatres?
Frequency of visiting theatres	Hi-square	9.388727
	df	4
	Sig.	.05208

Source: author's research

The results of the Hi-square test shown in Table 12 show that p> 0.05 (p = 0.05208) means that there is no statistically significant difference between the frequency response of theatre visits between the students of the Department of Cultural Studies and the Department of Information Sciences at the level of 0.05 which means that H4 does not reject.

Table 13: Descriptive statistical analysis of the importance of impact factors for visiting the theatre

Variable	All Groups						
	Valid N	Mean	Median	Mode	Variance	Std. Dev.	Standard Error
The quality of the theater program	152	4.368421	5	5	0.605089	0.777875	0.063094
Ticket price	152	4.296053	5	5	0.766077	0.875258	0.070993
Theater location	151	3.225166	3	3	1.548962	1.244573	0.101282
The popularity of the theater	151	2.801325	3	3	1.333598	1.154815	0.093978
Marketing	152	3.302632	3	3	1.219066	1.104113	0.089555
Famous actors	152	3.092105	3	3	1.660335	1.288540	0.104514

Source: author's research

From Table 13 it can be concluded that the most important segments for visiting the theatre for both groups of students are the quality of the theatre program and ticket price (the most commonly rounded grade 5 for the quality of the theatre program). Theatre location, the popularity of the theatre, marketing and famous actors are not so important for both groups of students (the most commonly rounded grade 3 for those segments).

H5: There is no statistically significant difference between the students of the Department of Cultural Studies and the students of the Department of Information Sciences in the importance of impact factors for visiting the theatre.

Table 14: The importance of impact factors for visiting the theatre

Variables	**Mann-Whitney U Test** Significance for p <.05000				
	Rank Sum 1	Rank Sum 2	U	Z value	p-value
The quality of the theatre program	6479.500	5148.500	2651.500	-0.72459	0.468705
Ticket price	6381.500	5246.500	2553.500	-1.11823	0.263471
Theatre location	6444.000	5032.000	2703.000	-0.35396	0.723370
The popularity of the theatre	6425.000	5051.000	2684.000	-0.42957	0.667510

Variables	Mann-Whitney U Test Significance for p <.05000				
	Rank Sum 1	Rank Sum 2	U	Z value	p-value
Marketing	6483.500	5144.500	2655.500	-0.66424	0.506536
Famous actors	6729.500	4898.500	2753.500	0.28034	0.779220

Source: author's research

Table 14 shows Mann Whitney U Test from which it can be concluded that there is no statistically significant difference because p-value for each segment is p>0.05 where H6 is accepted.

7. Conclusion

This paper analyses the main impact factors influencing the cinema and theatre attendance and their business performance. As the attendance rate is one of the key elements of the measuring the business success in analysed industries in the first part of the work, the issues of modern marketing methods customized to the specific industry, cinema or professional theatre were discussed where it was concluded that the marketing has to be customized to the industry itself and to the specific demographic characteristics of the target group.

Additionally, in the order to identify the key issues in the development of these specific industries in Croatia, the paper gives the analysis of the development of Croatian cinema and professional theatre industry from the period 2011 to 2015. Comparing the two analysed industries the similar trends were identified. Both industries recorded significant increase in capacities, in cinema industry and increase of quality of service as well, but the growth of attendance rate is not proportional and therefore without introduction of new services or higher quality, innovative services, increase of ticket sales prices or the stronger increase of attendance, the decrease in industries revenues and profitability can be expected.

To define the changes in on the micro level, the financial analysis of the National theatre Zadar, National theatre Osijek and the main players on the Osijek and Zadar area cinema industry comparative analysis of the financial position, was conducted. In the five year period the National Theatres haven’t achieved almost no improvement in the theatre own revenues (sales revenues and revenues from sponsorships and donations), in the case of Zadar National theatre even the significant decrease was identified. In the same time, the state budget funding was decreased, and therefore these theatres faced the serious financial difficulties.

At the cinema industry, the growth of the share of the Blitz-Cinestar d.o.o. was recorded. This company makes 68.4% of the whole Croatian cinema market and almost half of the value of the industry in total with the significant investments recorded in almost every business year. As well the Blitz-Cinestar d.o.o., in comparison to the industry as a whole have achieved the high ROA and EBITDA margin, as well as the other analysed financial ratios. The other market players, are lagging behind the leading player, whose business strategy is locating its screens in the main shopping centres and in that way leaning to relies on the additional offer of the entire shopping centre.

With the aim of defining the main impact factors influencing the cinema and theatre youth population attendance the research on student population from Department of Cultural Studies in Osijek and from Department of Library and Information Science in Zadar was conducted. The research analysis resulted with the following findings:

- In their free time the students in Osijek are mainly watching TV (66,7%), visiting the library (65,1%) and visiting the theatres (61,6%) and Zadar are mainly playing video games (77,3%), visiting gallery or museum (43,8%) and on the third place going to the cinema (42,6%). As in the both groups of students the cinema and the theatre are placed in the third and fourth place of attendance, there is a significant space for improvement that can be achieved by using the industry customized marketing models;
- Analysing the presence of sectors of cultural and creative industries in student’s life, there is statistically significant difference only in visiting library and visiting museums for both groups of students;

- There is statistically significant difference between both groups of students in the frequency of watching movies;
- The most important impact factors that attracted students for watching movies are quality of the film and ticket price;
- There is no statistically significant difference between both groups of students at the frequency of visiting the theatre;
- The most important impact factors that attracted students for visiting the theatre are the quality of the theatre program and the ticket price. The younger population strongly reacts on the quality of the program and on the entrance price, as in Croatia the students are still, in most cases, financially dependent on third parties.

In defining their marketing and business strategy the cinemas and theatres should conduct the market research and shape their business models and marketing strategies in accordance to these findings or their own previous market research results and the market niche that they are aiming for. The failure to follow the market demand can strongly influence their attendance rate and as a result on their business and financial performance.

Notes

/1/ The relevant publication of Croatian Bureau of Statistics observes the Children's theatres and the Amateurs' theatres as a different category than the professional theatres. Therefore for the purpose of this paper the industry of professional theatres has been analysed, without entering into further discussions of amateur's and children theatres.

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KOMPARATIVNA ANALIZA ČIMBENIKA KOJI UTJEČU NA POSJEĆENOST KINA I KAZALIŠTA TE NA NJIHOV POSLOVNI REZULTAT

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Sažetak

Cilj ovog rada je analizirati čimbenike koji utječu na posjećenost kina i profesionalnih kazališta. U radu se analizira hrvatska kreativna i kulturna industrija, financijska izvedba kinematografa i nacionalnih kazališta koja djeluju u Osijeku i Zadru, te također važnost marketinških metoda prilagođenih specifičnostima navedene industrije. Zbog utvrđivanja čimbenika koji utječu na pohađanje i na taj način financijski rezultat, u Zadru i Osijeku provedena su primarna istraživanja o potrošnji studenata u analiziranim podsektorima kreativnih i kulturnih industrija - kino i kazalište. Rezultati primarnog istraživanja pokazali su nekoliko čimbenika relevantnih za posjećenost kina i kazališta od strane mlađe populacije, što može utjecati na njihovu uspješnost poslovanja i financijski rezultat. Ovdje su promatrane industrije s različitim specifičnostima, uglavnom samofinanciranu i u privatnom vlasništvu kinematografsku industriju te kazališnu industriju u državnom vlasništvu što je također čimbenik koji značajno definira poslovne prioritete, ponašanje i poslovanje.

Ključne riječi

faktori utjecaja na posjećenost kinematografa i kazališta, marketinške metode prilagođene gospodarskom sektoru, uspješnost poslovanja, financijski rezultati