Article

In Search of Film Policy and Film Exhibition Model Based on Mission Economy: the Case of the Baltic Film Industries

Audrius Dabrovolskas[1,2*]
[1] Department of Commerce, Faculty of Business Administration, Turiba University,
Graudu iela 68, Zemgales priekšpilsēta, Riga, LV-1058, Latvia
[2]Department of Communication and International Relations, Vilnius Business College,
Kalvarijų g. 129-401, LT-08221 Vilnius, Lithuania
[*] Corresponding author, email: *Audrius.Dabrovolskas@kolegija.lt*

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Abstract. In Europe film industries are regulated through film policies at national and supra-national levels. The biggest attention is paid to film production and distribution, because they are considered as the most crucial sectors regarding financial investment. Film exhibition on the other hand is more about whole commercial life of a film and since theatrical admissions in European Union increased by 5.3 % (in 2019) before covid-19 pandemic it demonstrates that theatrical release is still among one of the most important release windows. Yet Lithuanian, Latvian, and Estonian film exhibition trends and their role for developing film policy were not examined.

The qualitative and quantitative research methods applied: descriptive statistics and its analysis of secondary sources such as cinema attendance, the number of multiplexes and digital screens, premieres of national films and box-office and the analysis of film policy (regulatory) documents in Lithuania, Latvia, and Estonia.

Economically film exhibition sector during covid-19 pandemic was heavily influenced and challenged by enormous decline in cinema attendance and the competition and rising role of audiovisual video-on-demand platforms. The article provides insights and findings based on the analysis of current role of film exhibition for the development of film policy and its possible model in the Baltic film industries.

JEL: H1; M1; Z1.

Keywords: Film policy; film exhibition markets; mission economy; Baltic film industries; business administration.

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Introduction

Films are available to the public through a range of exhibition windows: theatrical release (in cinema theatres), DVD or Blu-ray format, video-on-demand (VOD) platforms, pay television and fee-to-air television, non-theatrical release, but still theatrical exhibition remains of crucial importance for providing a shop window for the whole commercial life of a film [1]. One of the main reasons why theatrical release is such significant on the whole performance of the movie is the buzz created by the studios prior to and during the theatrical release dates, generated through high advertising spending, and the attention given by the media to box-office performance and figures [2]. Such improvements as availability of multiple screens, more comfortable environment, improved sound, and picture presentations have led to a sustainable attendance level not only in the United States [2], but even in smaller European countries.

Although cinema attendance is growing, market concentration exists in the European film distribution market. A. Pardo and A. Sanchez-Tabernero have pointed out that linguistic barriers have created isolated markets of medium or small size, and national companies have been unable to compete with their bigger American counterparts and in 2012 U.S. films accounted for an average of 63.4% of the European market [3]. According to European Audiovisual Observatory information, this trend did not change in 2019 as well since the estimated market share for US films increased from 62.6% to 68.2%, while the market share for European films in the European Union decreased from 29.3% to 26.2% [4]. The increase in cinema attendance can be attributed to the development of multiplexes, but this not always can guarantee the opportunity to see national films. For instance, M. Pendakur highlighted the problem that national film production in Canada was not always shown in cinemas [5] as similarly to the early situation in the Baltic States during 1990s and early 2000s.

The Baltic film industries and their exhibition markets already have more than 30-year development history. In the 1990s the number of cinema theatres drastically decreased but starting with early 2000s and later foreign capital companies invested into development of multiplexes and the cinema attendance started to grow as financing for national film production. The article's scientific problem is related with the potential of film exhibition in the Baltic film industries and the impact of film policy for business administration, which needs to be critically addressed and mission economy approach is offered since it emphasizes the directions of change and the role of public sector [6].

So far only a very small number of research indirectly related with film exhibition in Lithuania, Latvia and Estonia were published in 2009 and 2013. For instance, the impact of European support programmes on the audiovisual industry in Lithuania [7] focused on Lithuanian audiovisual industry: cinema theatre attendance, audiovisual production import and export during 2002-2008, also the influence of European support programmes for Lithuanian audiovisual industry. Valuable contribution to the analysis of film exhibition in Lithuania was published in a report [8]. In the report it is possible to find information about Lithuanian regions and their technological capabilities to screen films, certain measures to attract audience in the regions to see films, therefore, the analysis of technological, infrastructural aspects in selected Lithuanian regions could be used to explore potential business opportunities and integration. Another report [9] mostly focused on new business models in the audiovisual sectors in Lithuania, Latvia and Estonia, while film exhibition was mentioned briefly without analysing existing film policy and trends that influence it. T. Mitkus and V. Nedzinskaitė-Mitkė were recognizing the improved situation of Lithuanian films, which started

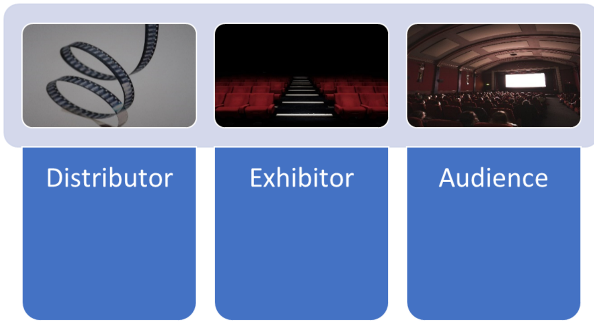

Fig. 1. Industry structure (supply chain). Adapted according to Ref. [2].

to pay back the investment and attracted local audiences [10], but film policy was mostly mentioned in the context of tax incentives for film production.

The purpose of the research is to identify the trends of film exhibition in the Baltic film industries by setting the tasks:

1) compare the growth of cinema attendance, the number of multiplexes and digital screens;
2) analyse the role of film exhibition sector for the film policy;
3) draw the recommendations for the development of film policy based on mission economy.

The qualitative and quantitative research methods applied: descriptive statistics and its analysis of secondary sources such as cinema attendance, the number of multiplexes and digital screens, premieres of national films and box-office, the analysis of film policy (regulatory) documents in Lithuania, Latvia and Estonia, information gathered from semi-structured interviews with an experts from film exhibition were used only to supplement the research.

The results proved that film exhibition sector in the Baltic film industries was constantly growing as in other EU countries before covid-19 pandemic, but regarding film policy and mission economy-oriented approach the involvement of business and public institutions is not sufficient.

1. The context of film exhibition in the Baltic film industries

U.S. and European film exhibition structure is similar in a way that both have theatre chains (circuits) and independent exhibitors. What is different - exhibition practices that vary across European territories depending on: the role of public intervention, both in terms of urban planning and cultural policy, the geographical distribution of exhibitors, contrasts between urban centres and low-populated areas and degrees of integration or competition between operators [1]. Fig. 1 represents the industry structure (the supply chain).

Film exhibition in the Baltic film industries started to change when *Forum Cinemas*, which belonged to Finnish cinema theatre *Finnkino*, started to operate in 2001-2005. Before *Forum Cinemas* operation in the Baltic States, the number of cinema theatres in Lithuania, Latvia, and Estonia (including other places where cinema was exhibited) were gradually decreasing. For instance, in 1990 Estonia there were 641 film exhibition venues, in Latvia – 1103, in Lithuania – 981, while in 1996 there were only 197 in Estonia, 137 in Latvia and 106 in Lithuania left [11, 1].

The attendance of cinema theatres started to rise during 1997-2000 [1]. During that period certain disproportions of national film and Hollywood film production were visible. In Lithuania only one national film was exhibited, while 215 Hollywood films were shown in cinema theatres during 1998-2000 [12]. At the same period in Latvia there were 13 national films and 614 Hollywood films exhibited [13] and in Estonia there were 5 national films and 424 Hollywood films exhibited [14].

Non-commercial or art-house cinema theatres in the Baltic States such as *Skalvija*, *Pasaka*, *Romuva*, *Soprus*, *Splendid Palace* and others show European films and partially offset the influence of Hollywood film production. Since art-house cinemas are focused on the education of spectators, ensuring public interests regarding cultural diversity, it is difficult for them to survive only on the sale of movie tickets. Therefore, certain strategies were implemented to attract audience, for instance, film directors and actors are invited to discuss the film that is being exhibited, retrospectives are shown, various thematic film screenings are organized [15]. Moreover, art-house cinemas are often selected by film festivals that need various cinema spaces.

In 1992, the Europa Cinemas network of cinemas was founded, which unites. This initiative was supported by film support programme *Media* and film support fund *Eurimages*. Art-house cinemas of the Baltic countries that have also joined this network: in Vilnius – *Skalvijos kino centras*, *Pasaka*; in Kaunas – film centre *Romuva*; in Panevėžys – film centre *Garsas*; in Riga – *Kino Bize*, *Ksuns* and *Splendid Palace*; Tartu – *Elektriteater*; Voru – *Kino Kannel* and Tallinn – *Kino Artis* and *Kino Soprus*. Another important factor that influenced the development of multiplexes and art-house cinemas was the digitization of screens, which started in 2009 [16].

Analysing the regulation of film exhibition in the Baltic film industries it is paramount to emphasize that only Lithuania (in 2002) and Latvia (in 2010) have adopted film laws. The regulation is relevant regarding the outcomes it brings to the film industry and how it affects business administration and management. For instance, in Fig. 2 it is possible to notice that the value chain for films consists of production, distribution and exhibition processes. During exhibition audience can consume the product and in the case of the Baltic film industries – taxes applied on the cinema ticket sales later are used to support national film production.

Since the value chain for motion pictures shown in Fig. 2 represents different types of entities and individuals participating in each stage – independent film production companies, producers, film distribution companies, bigger exhibition chains and art-house cinemas, it lacks the public sector input and especially from film policy perspective.

2. Methodology of the research

Mixed-method approach was selected for the research since it allows to capitalize on the strengths of each while offsetting their respective weaknesses and is useful when it comes to data evaluation and triangulation, which could be useful when different aspects of a

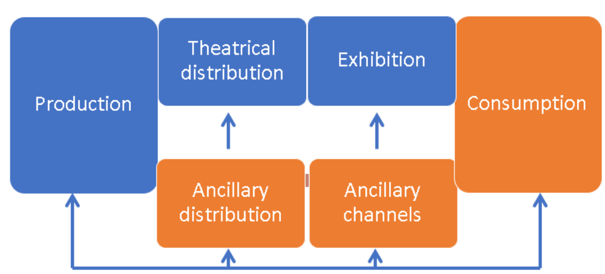

Fig. 2. The value chain for motion pictures. Adapted according to Ref. [17].

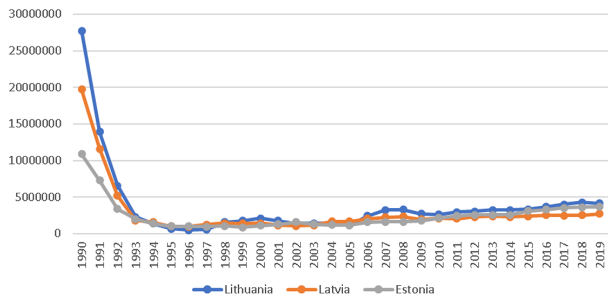

Fig. 3. Cinema admissions in the Baltic film industries from 1990 untill 2019. Constructed according to data of Refs. [20-25].

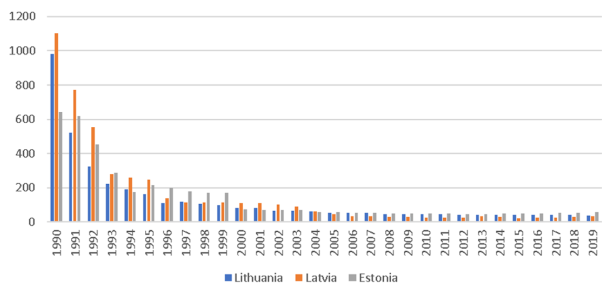

Fig. 4. Cinema theatre and exhibition places number in the Baltic film industries from 1990 till 2019. Constructed according to data of Refs. [21-27].

phenomenon are studied, and where the relationship between macro and micro levels are explored [18]. At first, descriptive statistics was used as the main method to calculate and describe various statistical factors of cinema attendance, the number of cinema theatres and other screening venues, number of multiplexes and digital screens, the number of national films in TOP-10, cinema premieres and box-office in Lithuanian, Latvian and Estonian film exhibition market. To supplement the statistical information and research, information from previously conducted semi-structured interviews with an experts from film exhibition (Vida Ramaškienė (former director of cinema theatre *Lietuva* and director of the film festival *Kino pavasaris*), Dainius Beržinis (*Forum Cinemas* representative) and Sarmite Pika (former film distributor in *Baltic Cinema* and exhibitor *Kino-52*) were used. Finally, content analysis of documents [19] was applied to interpret the statistical data.

3. Results

In the beginning of 1990s cinema attendance was decreasing drastically. In Lithuania cinema attendance in 1990 exceeded 27 million, in Latvia – 19 million, in Estonia – 10 million. After 1990 the lowest number of cinema attendance in the Baltic States was during 1996: that year in Estonia only around one million spectators, in Latvia – 960 000 thousand, in Lithuania – 470 000 thousand (Fig. 3).

Such attendance trends were related with unstable national film production (the number of domestic films produced decreased after 1990 and the number of imported foreign film production was unstable) and the decreasing number of cinema theatres and screening venues.

Fig. 4. represents the cinema theatre and exhibition places number in the Baltic film industries. The number of cinema theatres and screening venues decreased in Lithuania, Latvia, and Estonia. For instance, Lithuania in 1990 had 1089 cinema theatres and other film screening venues, while in 2016 there were 39. Latvia had the biggest decrease of the number of cinema theatres and screening venues – 1103 in 1990 and in 2016 – 25. Similarly in Estonia in 1991 there were 617 cinema theatres and screening venues and in 2016 – 50.

In general, similar situation was in all Central and Eastern Europe throughout the 1990s. Most of the reasons to such situation in the Baltic States and their film exhibition markets were related with cinema theatre privatisation and the collapse of film distribution system since "cinema theatres were especially watched and needed, because they were in the best parts of the city, in the old towns, and the premises were large. Also cinema theatres were economically unprofitable" [28]. According to Sarmite Pika, video tapes and their illegal distribution was harmful in the early 1990s for film exhibition [29].

Cinema attendance in Lithuania and Latvia started to grow during 1997 – 2000, while in Estonia during 2000 – 2002 m. Constant stability in the growth of cinema attendance is visible from 2002 in Latvia and 2005 in Lithuania and Estonia. One of the main reasons that affected the growth of cinema attendance – the development of multiplexes and digital screens.

Fig. 5. represents the number of multiplexes in the Baltic film industries.

For instance, in Estonia *Coca-Cola Plaza* cinema theatre, which has 11 screening halls started to operate in 2001. Cinema theatre *Vingis* [30] was renovated in 2003 and at that moment it had 9 screening halls, while in Riga 14 screening halls had *Citadele Plaza*, which started to operate in 2004.

The opening of multiplexes in the Baltic States matched the changes in digital technologies, which began to change film production, distribution, and exhibition. According to Dainius Beržinis, since 2003 projectors have changed and have become digital, quality of chairs, air conditioners, digital sound system appeared [31]. This led to a change in quality that attracted more and more spectators. Fig. 6 represents the number of digital screens in the Baltic film industries.

On the other hand, although cinema attendance in Lithuania, Latvian and Estonia has increased since the development of multiplexes and digital screens, the number of national films exhibited in multiplexes has increased slightly since 2002.

Fig. 7 represents the domestic or national films in TOP-10 most yearly watched films in the Baltic film exhibition.

From 2002 till 2019 the biggest number of national films that reached as TOP-10 most watched films per year was in Lithuania - 29. Film distribution and exhibition companies decide, which films could be distributed and exhibited, therefore, film premieres should be emphasized.

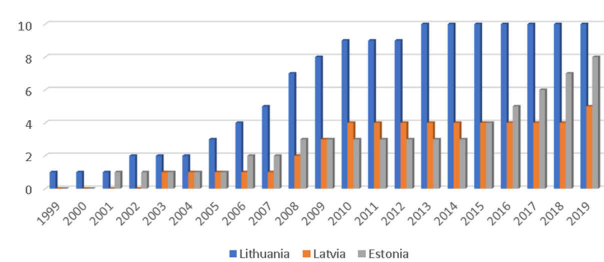

Fig. 5. The number of multiplexes in the Baltic film industries from 1999 till 2019. Constructed according to data of Refs. [20-24,27].

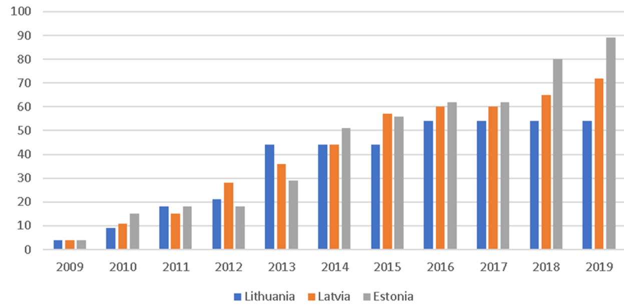

Fig. 6. Number of digital screens in the Baltic film industries from 2009 till 2019. Constructed according to data of Refs. [22-24,27].

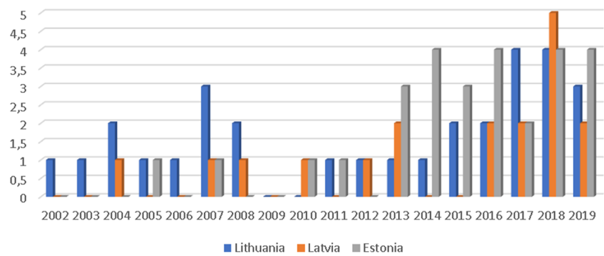

Fig. 7. Domestic or national films in TOP-10 most yearly watched films in the Baltic film exhibition. Constructed according to data of Refs. [16,20-24,26-27,32-40].

The number of film premieres in Lithuania, Latvia and Estonia was unstable with different growths and decline periods (Fig. 8) with an exception during 2017-2019 period (Fig. 9). Some Lithuanian national film production was not exhibited in multiplexes, because of an opinion that nobody will be interested to see them or there will be insufficient amount of tickets sold [31].

During that period in early 2000s Lithuanian films in cinema theatre *Vingis* were replaced by Hollywood film production, as *Forum Cinemas* focused on creating added value by redeeming invested funds. In 2005 Forum Cinemas initiated AXX Lithuanian short film festival in order to "foster local film production" [31]. This can be seen as the influence of film exhibitors in shaping national film production. To put it differently, the companies with the largest share of film distribution market in the Baltic film industries pay attention to such domestic films that can be commercially successful. From one perspective, the position of national films in film distribution and exhibition markets depends on the number of national films produced, on the other hand, film distribution and exhibition companies have an impact in selecting which films to show.

In Fig. 10 it is possible to notice that Gross Box Office in Lithuania, Latvia, and Estonia was constantly growing from 1995 till 2019. How the revenue is used later, for instance, for national film production support in Lithuania, Latvia and Estonia is described in regulatory documents.

According to Film Law in Lithuania, national film financing consists of state budget allocations considering programmes prepared by Lithuanian Film Centre and 60 % of value-added tax from actual income collected from film distribution and exhibition [41]. The Latvian Cinema Law, which was adopted in 2010, does not contain any information about the use of value added tax for the sale of cinema tickets [42]. However, a separated document on film financing from the state budget has been approved, which indicates that funding for film projects consists of the Ministry of Culture's subprogramme" Film Industry" depending on the current year's budget and funds for film art culture programmes allocated by the Culture Capital Foundation of Latvia [43]. National film production in Estonia is financed from the budget of the Ministry of Culture [44]. Funding for film production in Latvia, Lithuania and Estonia is allocated directly from state budgets through the Ministries of Culture.

Experts from film exhibition in Lithuania are allowed to participate in the Film Council, hich have the performing functions of an expert and consultant in solving issues of film policy formulation and implementation [45], which could be considered as macro level.

If we investigate micro level where the decisions are made, for instance, which national films should receive financial support - the situation is different. According to Lithuanian Film Centre regulations, only members from film production companies, film art creators or film critics can be members of expert commission (film project evaluation). The Latvian Film Council – a public advisory

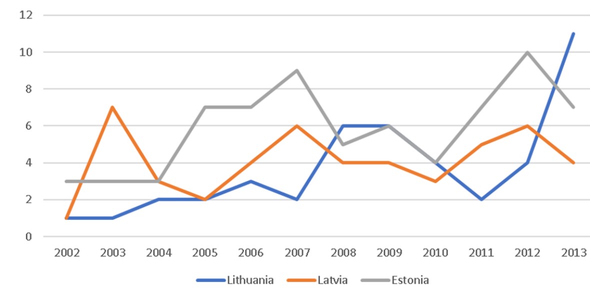

Fig. 8. Premieres of feature national films in the Baltic film industries from 2002 till 2013. Constructed according to data of Refs. [20-22,26-27,35].

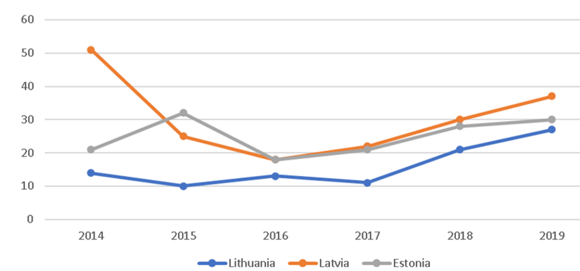

Fig. 9. Premieres of different domestic genre films in the Baltic film industries from 2014 till 2019. Constructed according to data of Refs. [20-24,26,35].

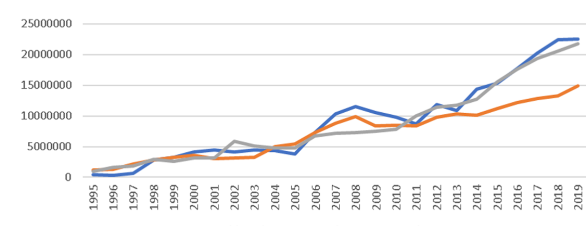

Fig. 10. The growth of Gross Box Office in film exhibition in the Baltic film industries from 1995 till 2019. Constructed according to data of Refs. [20-24,26-27,32].

institution for the Minister for Culture of the Republic of Latvia, – has been established to ensure implementation of the principles of democracy within the administrative field of the film industry and to promote the development of the national film art. Specialists who have the knowledge or working skills in the film industry and who do not represent the interests of the project submitters <…> at least one member of the commission shall be a representative of the National Film Centre [46]. In Estonia, applications that are deemed compliant shall be evaluated by an evaluation committee formed by the granting authority [44].

As it is possible to notice, there is no clear inclusion of experts from film exhibition to participate while evaluating film projects before their development and allocation of financial support. Therefore, this means that on a smaller scale and especially in micro-level the experts from film exhibition are not included in decision making, which later affects distribution and exhibition of national film production. One of the ways to continue developing film exhibition in the Baltic film industries, which proved to have economic capacity to grow, is to apply mission-economy orientation. Policy missions are related with direction and concrete problems to be solved. One of the mission-oriented policy pillars relies on setting a purpose for public investment [47] and this type of investment could help co-create and co-shape the market, affect the way film exhibition business is administered.

Market creating and shaping is more about new ways of doing business while not forgetting the influence of public policy. If our understanding of the role of public sector is limited to one that simply "administers", "fixes", "regulates", and at best "facilitates" and "de-risks" the private sector, it prevents us from thinking creatively about how to allow public sector vision, risk-taking, and investment to lead and structure the necessary transformational changes [6]. State should be considered as a lead investor and risk-taker, market creator, and policy as market creating and shaping process where distribution of risks and rewards between the state and the private sector is a key issue [48].

Another potential that is still not used is closer institutional cooperation between national film centres in the Baltic States. In 2018 Ministries of Culture of the Republics of Lithuania, Latvia and Estonia signed the *Programme of Cultural Cooperation for the years of 2019-2022* [49]. In the article number 7 it was indicated that "The Parties shall foster co-operation in the field of cinema and audiovisual production and facilitate joint promotion of the Baltic film and audiovisual production within the Baltic States and abroad. For this purpose the Parties shall consider the possibility of establishing a co-production fund for films and TV-productions between Estonia, Latvia and Lithuania". Joint promotion of the Baltic films was announced, but there are still no measures to implement this process.

Conclusions

Thus, although in general the number of cinema theatres and other screening venues in Lithuania, Latvia and Estonia were decreasing until 2012, cinema attendance was still growing and in 2019 was at least twice higher than in 2001. The integration and development of multiplexes and digital screens contributed to the increased attendance; therefore, this growth implies that film exhibition in the Baltic film industries still has the potential for development and the impact for the film policy should be emphasized.

Current film policy model in the Baltic film industries shows insufficient cooperation between institutions (public sector) that implement and develop film policy in the Baltic film industries and experts from film exhibition (private and public) are not included in micro-level decision making. To seek for mission-oriented policies, foster institutional transformations, regional cooperation, market co-shaping and co-creating together with private sector it is recommended to start closer institutional cooperation between national film centres in Lithuania, Latvia, and Estonia, to include experts from film exhibition to participate in wider scale (not only macro-level) of decision making.

The Baltic States could be in a lead position in market co-creation not only regarding financial investment, but possible partnerships with businesses and thus would affect business administration processes and their possible outputs to continue developing the Baltic film industries.

Abbreviations

DVD	-	Digital Video Disc, type of optical discs used for data storage and as a platform for multimedia.
VOD	-	video-on-demand platform

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