

HUNLYWOOD – comparison of EU cinematography focusing on Hungarian and Latvian film industry

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Abstract: Film-making is considered as an art and a whole industry at the same time. A national movie is a cultural relic which can represent a whole nation. Filmmaking is one of the most important art forms, also a tool for entertainment and a great way to educate. Since its inception, European Union has been supporting the film industry. Film industry is a social and economic value what can make national heritage and as a dynamically growing field it is quite important for a nation. The study is screening and mapping of some EU film market and getting acquainted with some factors what can influence the industry for a sustainable growth. The study also compares the Hungarian and Latvian film industry, as well as mapping their biggest challenges. For the film industry, the audience's perception is an indispensable aspect and going in to the cinema is a particularly preferred cultural activity. Therefore, study shows an international focus group research what can be helpful in mapping the challenges, and it is also a basis for creating a questionnaire research.

Keywords: EU film industry, challenges, audience's behaviour

1 Introduction

The aim of this research is among others, to identify tools what can positively affect the attitude of European audiences on domestic films. Furthermore, to collect data about the European film industry, and finally, to create a basis of a subsequent research with the help of results. The research is theory-based and mainly focused on data collection with studying the results of the reports provided by the European Parliament and the International Union of Cinema. In this paper I will introduce the film industry of some of the EU countries what have achieved success through the years. After, I will highlight those countries that have made substantive changes in the field of film industry to create a functioning film production. Processing of data and comparison of countries has already taken place in a previous research - could see in [22] - here I present the main results.

During the processing of secondary data, I would like to explore the tools that play a key role in film production and in the interest of audience in domestic films. I will present the main features of the film industry in Hungary and Latvia and compare the values of the two countries' cinema markets. I chose Latvia, because this country was one of my destinations in 2018. I took part in an international conference (IAW 2018 held on April 23-28), where I had an opportunity to meet the Latvian culture and have a closer look on Latvian film history. In my paper, after discussing the Hungarian and Latvian cinema markets, with help of two international focus groups, I try to find out cinema consumption habits, interest in national movies and look up for additional tools to influencing them. Finally, I summarize the results which will provide the basis for a subsequent questionnaire research.

2 Literature review

The creative and cultural industry in 2016 accounted for 5.3% of EU GDP and provided nearly 12 million jobs, of which nearly 641,000 jobs are produced by the film industry. The industry is a major part of the global economy all around the world. The specialty of film industry is to bridge the gap between art, culture, business and technology. In addition, they create jobs that cannot be outsourced, as they require specific cultural and historical skills related to the nation and the traditions. It is very important that they offer more jobs for young people and women than any other industry in EU and also the industry is resistant to the economic crisis. [5] The film industry has not an easy situation because the behavior of consumers (like creativity or innovation) are independent from the generations' classifications, because they are personal traits like optimism (i.e. born with) or typical general world relevant like urbanism (i.e. globalization problem) or age-relevant (i.e. change with age, education or maturity). However new special consumer layers appear, such as the LOHAS group, who behave differently from average consumer values [19]. The industry is risky, because the success of a film, especially in Europe, is extremely difficult to predict, and the production has to bring significant financial resources already during the preparations of filmmaking. That is why innovation in this industry is extremely important, which can not come without creative work. In most EU countries, therefore, national films are created with state fund. Since national film production does not get for enough resources from state fund alone - such as in America or the eastern region - one of the major challenges of European film production is the financial difficulties [6]. Moreover, the European film industry is struggling to keep pace with the technological innovation and the permanently changing cinematic habits of European audiences. However, there are many initiatives and programs within the European Union what can help for European film production, like the International Union of Cinema (UNIC) what is represented in 36 countries. The purpose of the association is to represent the economic, social and cultural values of cinemas in the member countries and around the world. Their

further mission is to promote the importance of national films in Europe, as well as to keep up-to-date information for the members, so the alliance has been measuring motion picture trends since 2010. Detailed reports have been available on UNIC's website since 2012. According to the UNIC reports, five European Union countries have outstanding film productions in England, France, Germany, Spain and Italy. In 2012, Spain was not the leader of European film production, as the box office was EUR 507 million, the admission accounted for 76.9 million viewers and the market share of domestic films was 14 percent. (International Union of Cinemas, 2014) In 2017, the box office in Spain was estimated at EUR 597 million, the admission was 99.7 million viewers, and the market share of domestic films increased by 3 percent, what is not a thundering change, but it got Spain to a leader position. In Spain after 2012 they set high VAT on movie theatres what set back the cinema admission. To boost the cinema market in Spain, UNIC held the Fiesta del Cine festival twice a year when movie ticket prices were reduced to only EUR 2.90 instead of the average EUR 6. This campaign boosted the audiences' interest and also enabled new viewers to join. France is trying to raise the next generation of cinema consumers with an effective education and training, as nearly 1.5 million students participate in cinematographic education every year. England organizes movie workshops and performances for young people, which brings participants closer to the movie industry by motivating them into cinema going. It is important to mention one of the most powerful film industry in Central Europe, what is Poland. The film industry in Poland is complex and diversified. National cinemas have more opportunities to apply for funding from several institutions, which result in managing with higher budget. The overall statistics about the polish cinema market are freely available, so market participants have access to day-to-day information while in Hungary these data are difficult to find or are incomplete. Because of this, filmmakers and distributors can easily follow the audience's needs in Poland, and thanks to their feedback, they can develop more effective strategies. The transparent and well-organized Polish film market is also reflected in the audience's interest. The enormous curiosity from the audience on national films has been moving their movies at the top of cinema lists in recent years. Due to their strong festivals, Poland can promote films widely not only for the public but also for the profession [8].

In Hungary, film production is provided by the Hungarian National Film Fund from 2011. Since its inception, they had to develop an operational strategy what could make the Hungarian film industry effectively competitive in EU. The primary task was to support the national movies through the acquisition of copyrights. However, the Film Fund was in debt, what cause the former organization mostly due to inadequate use of resources, overspending and huge loans. Therefore, Film Fund had to settle debts. The irresponsibility of the previous system has strongly influenced the attitude of Hungarian audiences to national films as well, which were fairly passive since the 80s. For that reason, the Film Fund is still working upon wining back Hungarian viewers [21]. The distribution of direct grants is now based on scenario-based tendering and above it is deciding the five-membered Film Committee. To improve the film production

in Hungary a 25 percent tax-preference is a great help what can be used by the sponsoring companies to account for their costs. Currently Hungarian film support is provided by three organizations: the Hungarian National Film Fund, which is responsible for supporting all-night films, the indirect State aid for Film Industry, which includes the reimbursement of 25 percent of the production costs, and finally the National Media and Info communications Authority, which assists short movies and televisions-radios [17] However, the Hungarian film support system is not as flexible as the Polish, because the directors can only apply to the Film Fund or the organization they oversee for money. Also, there is no close co-operation between the members of the distribution network as the film distributor usually joins this chain after the movie is created [12]. While for Americans, this institution is an integral part of the entire film production process. It is important because they can develop a coordinated and effective strategy together to reach the success of a film. However, the success of the films is turning upon several factors, such as admission, cinema box-office, movie payback based on revenue, and many other aspects. Although, the exact ratings and admission data of Hungarian films were not documented or only partially since the 80s. After the establishment of the Film Fund, the rules on movie promotion are often changed, and in the last two years (2016 and 2017) there are no aggregate, but quarterly, movie information on the National Media and Communications Authority which are not detailed. Each year (between 2012 and 2017) Film Fund subsidised average of 46 national films (including full-length, short films, documentaries and animations) and only 9 full-length Hungarian films on average, but in 2017 19 national feature films were shown in cinemas [18]. In 2016, the amount of state fund was more than 7.3 billion HUF (approximately EUR 23.6 million) and the average budget of a feature film is HUF 200 thousand / film (approximately EUR 644 thousand). Figure 1 illustrates that Hungarian films do not always return production support costs (each year those films were listed where data was available). However, the purpose of the Film Fund and the film support system is not to maximize income and profit, but to develop and preserve the culture of the Hungarian film industry [3].

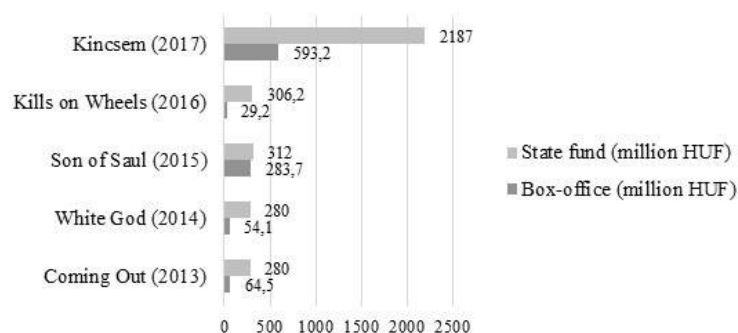


Figure 1 The amounts paid for films funded by the Film Fund and their box-office

In Latvia the funding is handled by the National Film Centre since 2013, what is also responsible for the national policy in the film industry and also in the cinema. International film-projects are handled by the Riga City Council's Riga Film Fund since 2010. Their main roles among others are to promote the competitiveness of Latvian film industry in the European Union, to strengthen the national heritage among the world and also to help for Latvian films to take part in several European support programmes. For the promotion of national films, the Latvian Film Council is supposed to assess and analyse the Latvian audio-visual sector and also to coordinate the film industry's strategy [15]. Before the 90's, Latvian film industry was under soviet occupation, but since its independence, filmmaking became a more powerful value in Latvia. Back at the soviet pressure there was one big benefit for the Latvian film industry, like the Riga Film Studios, what are still one of the biggest buildings in Northern Europe. It was an honour for the Latvian film industry, that in 2014 they hosted the 27th European Film Awards (EFA) what strengthened the corporation between Latvia and the international film partners. In 2017 over 9 million EUR were distributed for the film industry, what was the highest amount since its independence. In celebration of the Latvian centennial (100th birthday of the country), film industry received additional funding and got an opportunity to make more films (sixteen full-length films). In Latvia, Riga Film Fun offer 25% cash rebate of all production costs, like in Hungary, what is also a seductive offer for international co-productions [14]. There many initiatives in Latvia what were focused to strengthen the film industry, like the Latvian Filmmakers Union (main role is to unite the professional filmmakers nation-wide) or the Latvian Film Producers Association (the members of association offer locations and services for productions). [20] The total minimum budget for productions in Latvia is over 700 thousand EUR for animated and feature films, and for documentary films it's over 140 thousand EUR. Latvian state support almost tripled in the last three years (in 2014 the national film support was around 3,5 million EUR while in 2017 was more, than 9,7 million EUR including Latvian Republic 100 Years film support), but the average amount for film fund is 5 million EUR/year. The number of produced domestic films in Latvia increased as well, while in 2013 only 27 national films were produced, in 2017 this number thriven to 45 films including feature and short films, documentaries and animations (the number of documentaries grow from 18 to 29 films), but in 2017 only 6 full-length feature films were produced. In the local cinemas 28 national films (of 45 films) were screened in 2017 what reached over 194 thousand admissions and over 736 thousand EUR box-office at the Latvian cinemas. In Latvia several film festivals have been organizes through the years, like the ten-day long RIGA INTERNATIONAL FILM FESTIVAL, or the RIGA INTERNATIONAL FILM FESTIVAL 2ANNAS what is an independent film festival to introduce for the festival audience some innovative ways of communication in the film industry. In addition, Latvia contributes to support female labour and power within the film industry, like eight of sixteen full-length films for the centenary will be directed by women [16]. However, there are some challenges, what Latvian film industry has to cope with. As it is a tiny Baltic nation they cannot compete with the non-national movies, but this problem is also

appearing in Hungary. The unsatisfying funding cannot finance the co-production movies and the distribution is also fragmented. Furthermore, the cooperation between the TV and studios is delicate and there is lack of professional producers as well. However, shooting in Riga is beneficial because location costs are low and studios successively participating in several co-productions what are setting up their budget as well to make more national films and send it into international film festivals [2].

To compare the Latvian and Hungarian national film distribution and the interest of national cinema audience in domestic films through the years I used the cinema admission, box-office and national film share data (see Figure 2). I present it from 2013, because in Hungary could not be found any exact information about the domestic film distribution data before. In 2014 Latvian film *The lesson* was the most viewed domestic film according to the National Film Centre, but the number of admission and box-office was not mentioned exactly. I also present the TOP domestic films each year.

HUNGARY				
YEAR	Film title	Box-office (EUR)	Admission	National film share
2017	Kinseem	1 912 435	455 268	9%
2016	The Horsearcher	260 012	59 431	3.5%
2015	Son of Saul	914 814	268 714	4.2%
2014	Whatever Happened to Timi	443 404	104 904	3.7%

LATVIA				
YEAR	Film title	Box-office (EUR)	Admission	National film share
2017	Grandpa More Dangerous than Computer	281 030	76 068	7.84%
2016	Chronicles of Melanie	241 595	75 160	7%
2015	Brainstorm: In-between Shores	42 000	19 500	4.4%
2014	The lesson	under 172 000	under 38 000	7.58%

Figure 2 National film distribution

As it can be seen, the admission in Hungary grew between 2016 and 2017, what is due to the popularity of national films sponsored by the Film Fund. However, it is noteworthy that in Latvia, despite the difference between the population of the two countries (in Hungary 9 797 561 inhabitants while in Latvia only 1 950 116), the national film share is striking [11]. This can be the result of the strong national film festivals every year as well. After a brief review of the film industry, I switch to the focus group study where I tried to survey the audience's interest in national films in EU and get to know their opinion on an international sample.

3 Methodology

The method I used is qualitative research, especially two international focus groups. The participants of the first group were selected by simple random sampling. The fourteen members of the homogeneous group (six women and eight men) were students in age of 21 to 24, who visited the Obudai University under the ERASMUS program. As the majority of audience in the European film industry (25–30%) took by young people under the age of 25, the participants have been selected accordingly. Hungarian, Slovak, German, French, Portuguese, Spanish and Turkish students were equally appeared. Focus group research lasted 1.5 hours in a personal meeting and was organized in October 2017. The focus group guide asked about filming habits, cinema going frequency, their film selection, and opinions about their national films. The research included projective technique next to open ended questions (9 questions). The focus group was analysed by the transcript, where it was not necessary to use any text mining software due to the clear explanation of the text. In the course of analysing the transcript I used content analysis [23]. The gained information helped me to recognize the elements of audience's interest in their national-produced films and also provided a basis for my subsequent research. During the focus group, I tried to evaluate the attitudes of the participants by describing the affective (how they feel about national films), cognitive (what they know about national films) and conative (how often they go watch national films) components of attitude. The coding categories were formed on the basis of these. Research focuses on the European Union's audience and seeks to find factors that are commonly found in most countries [1]. In the order of the attitude variables, I moved backward during the research and I asked about the affective component of the attitude at the end of the focus group, so that the informal atmosphere between the participants could be evolved. As the study focuses on the Latvian film industry, I have also organized a second, mini group with three Latvian students (3 female students in age 20-21). The guide was followed by the structure and goals of the first one, but I asked them about the challenges of their national film industry more substantial. The research was conducted on an online platform in April 2018 and lasted for 50 minutes. Disadvantage that I could not analyse the non-verbal reactions of the participants, but the answers on the questions about affective variables of attitude still portrayed the emotional components. I will submit the results of two groups separately.

4 Results

At the first national group primarily, I assessed the cinema-going frequency (conative variable). The results showed that the participants are going to the

cinema on average four to five occasions a year, so they are occasional movie-goers (movie going frequency is defined by the MPAA reports) [13]. However, when I was interested about how many times they went to the cinema for a national movie a year, the average answer was never. I've been trying to find out what options they prefer - cinema or any other options - to evaluate what alternatives they use most. Most respondents choose the cinema either way, and only four respondents preferred the home cinema instead of cinema. Two respondents answered that it is depending on the type of the movie or their current mood. However, in case of national films, more participants have preferred online downloading or streaming, as more of them believed that domestic films are not so "spectacular" that is necessary to pay for it. Although ECORYS, a Dutch research firm on the basis of the European Parliament's 2014 report proved that the negative effects of piracy on cinema box-office cannot be detected. However, the report draws attention to the fact that this does not mean that illegal download has no effect on cinema box-office, just the statistical analysis does not prove in due reliability. Illegal downloading is most common in premier films, but for the whole industry it means only five percent decrease on cinema revenue [4]. However, I find it interesting, that for the focus group members in case of domestic films, this option is preferred. When I asked about their all-time favourite films (cognitive component of attitudes), only two Hungarian participants selected a national movie, and in all other cases they did not mention domestic films. When I asked the participants to mention their favourite national films, five respondents (one French, one Spanish, two German and one Hungarian participant) said they did not have any favourite. Other participants chose a comedy for their favourite national film, while in case of non-national films appeared mixed genres (fantasy, thriller or sci-fi). Most of the participants thought that national films cannot create a high-quality visual world, so they would not be able to succeed in other genres, while comedies and their taste of humour are mostly good. With help of projective techniques, I tried to get acquainted with the participants' knowledge not only in national, but also in EU production films. On the basis of pictured scenes from six different EU film participants had to name the movie titles. The movies from 2012 to 2017 were the TOP films across EU cinemas based on UNIC reports (see in Figure 3 from left to right, 1. row: The Great Beauty (Italian), F*ck You Teacher (German), 2. row: Melancholia (Danish), Les Misérables (British), 3. row: Lucy (French), Angry Birds (Finnish co-production)). The most commonly recognized works were the German F*ck You Teacher and the Finnish Angry Birds. The participants said they saw and also liked these movies as they were "*entertaining and funny*". French Lucy was recognized five times and most of the participants watched this movie because the well-known director Luc Besson. Further movies they did not recognize not even once. After, I was interested in their knowledge about the most watched national movies in their country of 2017. Only one Slovakian and one Hungarian participant replied and also knew the name of films what were on the top list.



Figure 3 The film scenes presented to the focus group

After that I was trying to find out why they fond of or have no palate for national films (affective components of attitude). Some of the participants thought that national films are "*special*" and do not get the usual Hollywood story what are "*anti-mainstream*" and they like it more when they're "*funny*" and not "*depressed*". The participants also mentioned that the visual arts of national films are "*artistic and beautiful*", but often they are too "*sombre*". However, visual world is often "*boring*" even though they did not use any special effect. Additionally, almost all participants are considered "*low budget*" as the biggest deficiency of national films. Because of this, the productions can only use limited opportunities, so they cannot attract enough interest. Nevertheless, they presumed that "*beautiful costumes*" and the "*uniqueness of nation's culture*" can assign speciality into domestic films. They also mentioned that these films are producing at nations' own language, so it is no need for subtitles as it making them more "*personal*".

In the second group with Latvian students I followed the same steps as in the previous one. Relative to the cinema-going frequency (conative element of attitude) the participants meet cinema at least once every month, so they are frequent cinema-goers [13]. When the question asked about the frequency of cinema-going in to a national movie, the number of occasion became only once a year or never, and just like in the first group, they prefer to stream or download national movies at home. One of them opt for the cinema, as the best movie watching option, and two of them thought it depends on their mood. When I asked about their all-time favourite movies none of them mentioned national movies, but

they also picked their favourite national movies as well all of them are dramas (*Rudolf's Gold*, *A Limousine the Colour of Midsummer's Eve* and *The Child of Man*) but also, they mentioned, that there are lots of humour in these films, what make them really good. When I showed them scenes from the six EU movies they named only two movies (*F*ck You Teacher*, *Angry Birds*) the same as in the first focus group. Furthermore, they did not really know about top listed national movies in 2017, but they noticed some well-known domestic films like *Swingers* or *Chronicles of Melanie*. After, I asked what they are thinking and how they are feeling about national movies (affective component of attitude). They thought that good national movies can make them feel "*patriotically*" and because national movies are made in their homeland it is representing the beauty of the country. They also mentioned, that domestic films are "*building a culture*" and "*making a cultural heritage for the next generations*". One of them considered national movies as a tool, "*what develop the audiences' thinking*" and also they bring domestic audience "*much closer to the roots*". However, they thought that national movies, because they are made in their native language are rarely translated and shown up in other countries. In addition, low budget is also a big challenge for domestic productions and therefore their possibilities are limited not only in their homeland, but also worldwide. One participants mentioned, that most of Latvian films are "*old-fashioned*", because they "*can't lean out of reality*". She thought that "*movies are based on other people experiences*" and "*the tendency is to show the way of life*". Other participant despite of this said: "*I really enjoy that film makers show our nature – lakes, forests, sea and lands. Old films have more humour, but at the same time they show real life of citizen*". They also noticed the 100th anniversary of Latvia what are they proud of, and because of this many new Latvian films would be released. Therefore, they suggest, that in Latvian film industry "*maybe we should start to think more about quality, not quantity of films*". After analysing the transcript in detail, I formulated the coding categories using components of attitude and results of focus groups. I enhanced those variables, what appeared in most answers. Categories are mentioned in the following table:

Table 1 Coding categories made by the attitude of domestic audiences'

ATTITUDE OF DOMESTIC AUDIENCES'			
Affective components		Cognitive components	Conative components
AUDIENCE LIKE IT MORE if the films are:	funny and have humour	AUDIENCE KNOW ABOUT FILMS	GO TO CINEMA OR DOWNLOAD AT HOME
	anti-mainstream		
	the visual is artistic and beautiful		
	show the uniqueness of nation's culture		
	making a cultural heritage for the next generations		
	patriotic		
AUDIENCE LIKE IT LESS if the films are:	depressed	AUDIENCE DOES NOT KNOW ABOUT FILMS	NOT GOING TO CINEMA OR DOWNLOAD AT HOME
	sombre		
	boring		
	low budget		
	old-fashioned		
	can't lean out of reality		

On the basis of results, I take it that every component is linking to each other. The main goal of assumption was to frame a further research (quantitative questionnaire). The questionnaires' purpose is to find effective factors what can influence national audiences to go to the cinema on a domestic movie. It will include the challenges of national film industry what affect the audience by virtue of secondary research, which was inter alia low financing and not flexible support system, bare film festivals, cooperation inside the distribution chain, get over linguistic barriers or transparency within the industry. Devised with the components of attitude (Table 1) the questionnaire will contain the mentioned factors to assess the audiences' need and behaviour.

Conclusions

After a detailed mapping of the EU film industry focusing on Hungarian and Latvian industry I gained factors what are the weaknesses and challenges of national productions in EU. Based on the focus group results I revealed the components of audiences' attitude on national movies. I tried to find common factors, what can describe the most EU film industry. Unconventionally cannot get reliable results by generalization, but the research's main purpose was not to be representative rather to widen the focus. Data about the Hungarian film industry and the behaviour of Hungarian audience towards national films are deficient or difficult to get at, but mapping other nations help to reveal factors which are unreachable otherwise. For instance, it turned out, that for audience humour is an important factor, and Latvian film festivals could be also good example for Hungary to captivate domestic audience. The assessments of Hungarian audiences' behaviour already happened – see [22] – but with help of recent research I can add more specific factors to get precise results. Aim of population in the questionnaire will be the Hungarian residents and the sample would be

chosen by simple random or snowball sampling. Demographic limitation wouldn't be necessary, because I want to categorize the participants based on their attitude not by their demographic variables. As a committed devotee of national movies, I would like to encourage audiences to watch domestic movies, because they are a part of our culture and also a tool what can prompt a nation for cooperation.

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