European policies for cinema: why valuing exhibition and non-commercial exhibitors? Contributions from the Portuguese and Italian cases

Helena Santos (hsantos@fep.up.pt)*

Faculty of Economics, University of Porto

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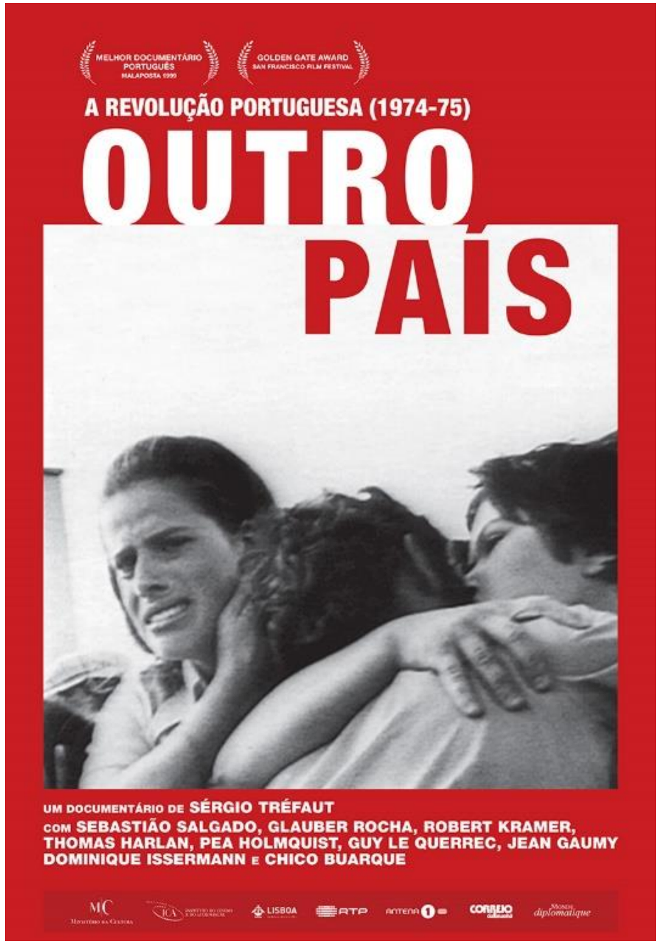
* With Marta Miranda



Summary

- Main perspective (1) of the research and methodology
- European policies for cinema:
  - Notes about the EU and selected countries (incl. Italy)
- Perspective (2-3):The case for non-commercial exhibition
  - Portugal
  - Some results
- Final remarks (for discussion?)

Perspective (1)

Cinema:
In-between culture- and market-driven interests

EU public policies for cinema and audiovisual:
Countering US dominance

The last decades of the 20th century showed particular concerns regarding cinema policies, in line with the "***creative industries turn***" in European countries' cultural policies (Menger, 2013) and the digital transition (**streaming**).
Culture seen as a **form of capital** (Throsby, 2011).

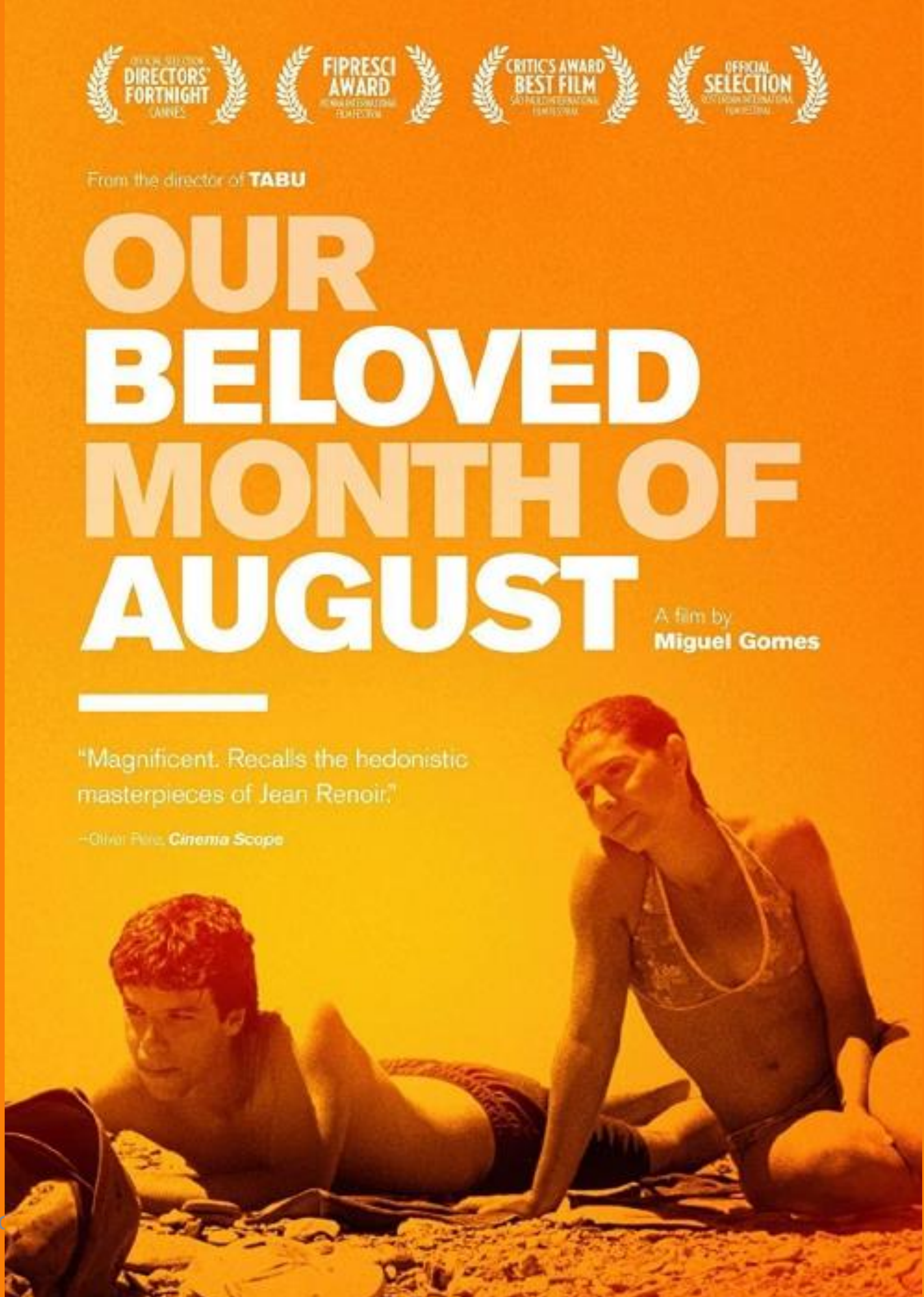
Methodology

Documentary analysis – main sources

- Legislation and contests' rules (Portuguese Institute of Cinema and Audiovisual – ICA; indirect consultation of some documents of selected countries' cinema institutions)
- Official reports (European Audiovisual Observatory, ICA, Europa Cinemas, Focus, and others)
- Official databases (ICA – non-commercial exhibition) – Statistical analysis
- Film-societies' documents

[Direct observation]

See: [Project - NON-COMMERCIAL FILM EXHIBITION IN PORTUGAL (weebly.com)]



EU policies for cinema – some notes

1. **<u>All countries</u> support the cinema sector, and direct public support is predominant in Europe**

- **The most common forms of supporting the national film and television industry in Europe**, is through direct (obligation to invest directly in programmes) and indirect investments in production (obligation to contribute to the national film fund) by broadcasters. There are also mandatory obligations defined by law or concessions and for providers of on-demand services, but the percentages imposed by each country are still quite dissimilar.
- **Public funding has a heavy cultural component and therefore several cultural requirements must be respected**. Each country is responsible for defining cultural criteria following national parameters, to ensure that the projects will contribute to the promotion of art and film culture
- **Production gets the lion share of public support**, which leads to concerns regarding the performance of subsidised films: artistic and experimental films find difficulties in attracting people (consumers), and theatrical exhibition remains residual in national policies for cinema.
- **Some countries that do not have a cinema *industry*** (such as Portugal) perform well in film festivals.
- **Internationalisation of national films** is becoming a target in many countries (e.g. Italy and the research project International circulation of Italian cinema: International Circulation of Italian Cinema – Mapping the forms of distribution and circulation of Italian cinema abroad).

2. When referring to **cultural policies**, the usual subjects are arts and (conventional) heritage – **cinema has autonomous policies, with a substantial economic-driven dimension**, due to:

- **Countering the US industry**, which has developed historical advantages regarding the EU, and targets international trade (quite efficiently)
- **Acknowledging the cultural effect** of cinema as entertainment and business
- Aiming at getting scale and scope for a **European cinema market**, historically very fragmented, and heterogeneous. Circulation of European films within the EU has been a target
- Dealing with the **digital transition**, with permanent and expensive technological changes in production, distribution and consumption (streaming), as well as new cinematic contents ("beyond cinema")
- Some **important references regarding pan-European policies**: Media program (launched in 1990; part of Creative Europe since 2013); Europa Cinemas (1992; theatrical exhibition); Eurimages (European Cinema Support Fund, the Council of Europe fund, established in 1989); and… the establishment of the European Audiovisual Observatory (1992).

3. **Systematic research** regarding exhibition (and distribution) is scarce and rather casuistic*:

- Cultural and artistic studies tend to focus on films, directors, niches of "alternative" consumption and reception (usually case studies)
- Economic research tends to focus on the performance of films (box-offices), very often inferring that that public support is inefficient, as subsidised films do not attract as many audiences as commercial films/blockbusters
- Sociology studies of tastes and cultural demands rarely address cinema.

* A suggestion: Salson & Arnal (2016).

Typology of support in Europe: a recent synthesis (Poort & van Til (2020): 602)

Table 1. Typology of support policies.

General characteristics of support schemes	
Administrative level:	Supranational/national/subnational
Types of projects:	Feature film (fiction, animation and documentary)/TV series/TV single work/short films/ multimedia productions/video games/web projects
Types of activities:	Scriptwriting/development/production/distribution/promotion/exhibition
Selection method:	Selective/automatic
Eligibility criteria:	Cultural test/spending obligations/market interest/confirmed financing
Direct public support	
Financing of funding bodies:	Public sources/contributions from broadcasters, cinemas and VOD services/national lotteries/ repayments and copyright exploitation/self-generated income
Type of financial aid:	Grant/loan
Indirect public support	
Incentive schemes:	Cash rebates/tax credits
Unlocking private capital:	Tax shelters/guarantee facilities
Investment obligations	
Applicability:	Public broadcasters/private broadcasters/exhibitors/audiovisual services distributors or video publishers/VOD services
Type of obligation:	Direct (Pre-acquiring of licensing rights, acting as co-producer)/ Indirect (Taxes or levies payable to funding body)
Market oriented sources of financing	
Presale of distribution rights/In-house financing/Third-party financing/Varia	

Theatrical fiction films released in 2018

Categories and importance of film financing sources in Europe (2018)

Rank	Financing source	Amount in MEUR	% share
1	Direct public funding	473.8	26%
2	Broadcaster investments	379.1	21%
3	Producer investments (excl. broadcasters)	300.7	17%
4	Pre-sales (excl. broadcasters)	270.1	15%
5	Production incentives	269.9	15%
6	Private equity cash investments	38.0	2%
7	Debt financing	16.4	1%
8	In-kind investments	7.6	0%
9	Other financing sources	40.0	2%
	Total sample	**1 795.6**	**100%**

(Source: European Audiovisual Observatory)

Europa Cinemas (launched in 1992)

	Europa Cinemas (March 2022)	Population (M, 2020)*	Admissions per capita (2019)**
United Kingdom	27	67.22	2.6
France	156	67.39	3.2
Spain	61	47.35	2.2
Italy	200	59.55	1.7
Portugal	11	10.31	1.5
Nordic countries			
Denmark	*16*	*5.83*	*2.3*
Finland	*8*	*5.53*	*1.5*
Iceland	*1*	*0.37*	*3.5*
Norway	*6*	*5.38*	*2.1*
Sweden	*47*	*10.35*	*1.6*

* Word Bank; **Focus 2020

According to the EAO:

- **69% of European films were released between 1996 and 2019, against 16% of US films, the latter having accounted for 66% of admissions (European films: 31%)** (European films refer to films from the 27 EU countries plus UK and Other European countries)**.**
- **In 2018, Europa Cinemas Network covered 58,2% of the total European screenings, 34,5% of the total European non-national screenings, 29,9% of the total European non-national admissions, and 55,3% of the total European admissions**

Rank	Country		Mean budget 2018 (in MEUR)	Median budget 2018 (in MEUR)	Number of sample films 2018
Countries with a median budget > EUR 3 million					
1	DE*	Germany	5.78	**4.24**	42
2	LU*	Luxembourg	3.92	**3.92**	2
3	FR	France	4.90	**3.49**	161
Countries with a median budget between EUR 1 million to 3 million					
4	GB*	UK	4.37	**2.82**	16
5	SE	Sweden	2.65	**2.56**	18
6	AT	Austria	2.48	**2.36**	13
7	CH	Switzerland	2.07	**2.35**	19
8	DK	Denmark	2.70	**2.12**	24
9	BE	Belgium	2.52	**1.84**	20
10	NO	Norway	2.30	**1.78**	17
11	IS	Iceland	1.73	**1.71**	6
12	NL	Netherlands	2.11	**1.69**	24
13	IT	Italy	2.18	**1.44**	106
14	FI	Finland	1.50	**1.39**	20
15	LT*	Lithuania*	2.11	**1.22**	3
16	IE	Ireland	1.90	**1.17**	10
17	LV	Latvia	1.20	**1.12**	6
18	CZ	Czech Republic	1.20	**1.05**	22
19	RO*	Romania	1.05	**1.05**	9
Countries with a median budget between EUR 500' and EUR 1 million					
20	EE	Estonia	0.82	**0.82**	7
21	PT	Portugal	0.77	**0.76**	12
22	HR	Croatia	0.70	**0.66**	4
23	BG	Bulgaria	0.60	**0.56**	7
TOTAL SAMPLE			**3.16**	**1.93**	**568**

** Due to either low coverage rates or a very low number of sample films, the average values should be considered 'technical' values which describe the data sample rather than as representative values for the respective countries.*

Source: European Audiovisual Observatory Kanzler (2020): 34.

Big differences regarding the size of the market, the number of films, the budget, the availability of data, etc.. (e.g., no data for Spain)

Four countries combine high levels of production with reputed films, i.e., awarded and with wide international circulation (both in a commercial and alternative basis): United Kingdom (1), France (2), Spain (3) and Italy (4). The **Nordic countries** configure an interesting illustration of a territorial and cultural agenda with positive impact on cinema exhibition (municipal scale).

1. United Kingdom (Anglo-saxon model) – the strongest combination of public money and a market-driven, international, industry

At national level, the **main form of public funding are tax reliefs for the screen industries** that are part of the **UK Government's Creative Sector tax relief**.

The **British Film Institute** is the main institution for film and television, and it is responsible for awarding the second most important form of public funding, which is awarded selectively. It also actively protects the **national film and television archive** and supports the next generation of filmmakers.

Funding for film development, production, distribution, and exhibition is provided by the **British Film Fund**, that also encourages educational activities. The fund prioritizes support for films with a **strong cultural impact, new talents and perspectives, and plans to grow audiences while also increasing access to independent British and international films, especially for audiences outside London** - the UK has a history of **municipal cinemas**.

Films considered as **national works**, can receive national funding or tax benefits.

2. France (paradigmatic of Central European Model)
The most state-protected, multi-levelled policy, with a strong international co-production system
(the "French bias" in European comparisons)

France is the country with more international participations in film production (**international co-productions**), and the one with the highest support, under a complex scheme.

Support for distribution and exhibition is granted for both **national and specialized films** (meaning non-mainstream Hollywood movies)

A **centralised** support scheme, but a very **complex system of regional funding system (40 subregional funds in 2014)**.

One central national agency, ***Centre National du Cinéma et de l'Image Animée*** (CNC), responsible for providing public support, both automatic and selective, to production, distribution, exhibition, script-writing or exportation.

The amounts are obtained through **taxes on cinema tickets, broadcasters and video-on-demand platforms**.

A solid **arthouse exhibition network**.

An initiative close to decentralisation, is the **selective support attributed to exhibitors for the modernisation and construction of cinemas in isolated regions**, especially rural areas.

3. Spain – Regional (relative) autonomy and incentives for private investments

Quotas are applied to the audiovisual sector in order to finance the film industry.

The central national agency is the **Institute of Cinematography and Audiovisual Arts** (*Instituto de la Cinematografia y de las Artes Audiovisuales*, ICAA).

Main mission: protect cinema heritage and promote cultural diversity while ensuring a smooth transition to digital, which is evident as there is **a special concern with exhibiting and distributing national films**. That also includes the reduction of rates associated to loans granted for production and exhibition.

Investments in film projects at **private level** are also encouraged through fiscal benefits.

Support is granted both for exhibition and distribution of **national films**.

At **regional level**, there are several agencies operating across the country with **relative autonomy** regarding the film and audiovisual sector policies.

No data available in some EAO reports.

Spain is a member of Ibermedia (created in 1996: Italy, Portugal, Spain and 18 Latin American countries.)

4. Italy – contradictions between "artistic" and "national" interests; regionalisation and private participation

Contemporary film policies inspired by the French model (**2016 Italian Cinema Law**):

- aiming at broadening and diversifying the cultural offer, generating positive externalities and t protecting national identities and cultural heritage; there was an effort to **distinguish films of "national cultural interest" from films that were "national productions"**;
- funding comes mostly from **taxations imposed to the audiovisual industry**; additionally, **subsidies are attributed and dependent on box-office revenues**.

There seems to be a **contradiction when it comes to the national and artistic interests**, due to a tendency to encourage productivity and profit, therefore bypassing cultural contents (prevalence of commercial and entertainment logic) (e.g.: in 2009 the “digital cinema tax credit” that had been introduced raised concerns regarding the fact that it was only aimed at large multiplexes that would not need such support).

The main entity responsible for the cinema and audiovisual sector is the **Ministry of Culture (General Directorate Cinema and Audiovisual)**, which implements the "**Fund for the development of Film and Audiovisual investments**", that comprises tax credit schemes and automatic, promotion and selective subsidies to cover production, distribution and exhibition activities.

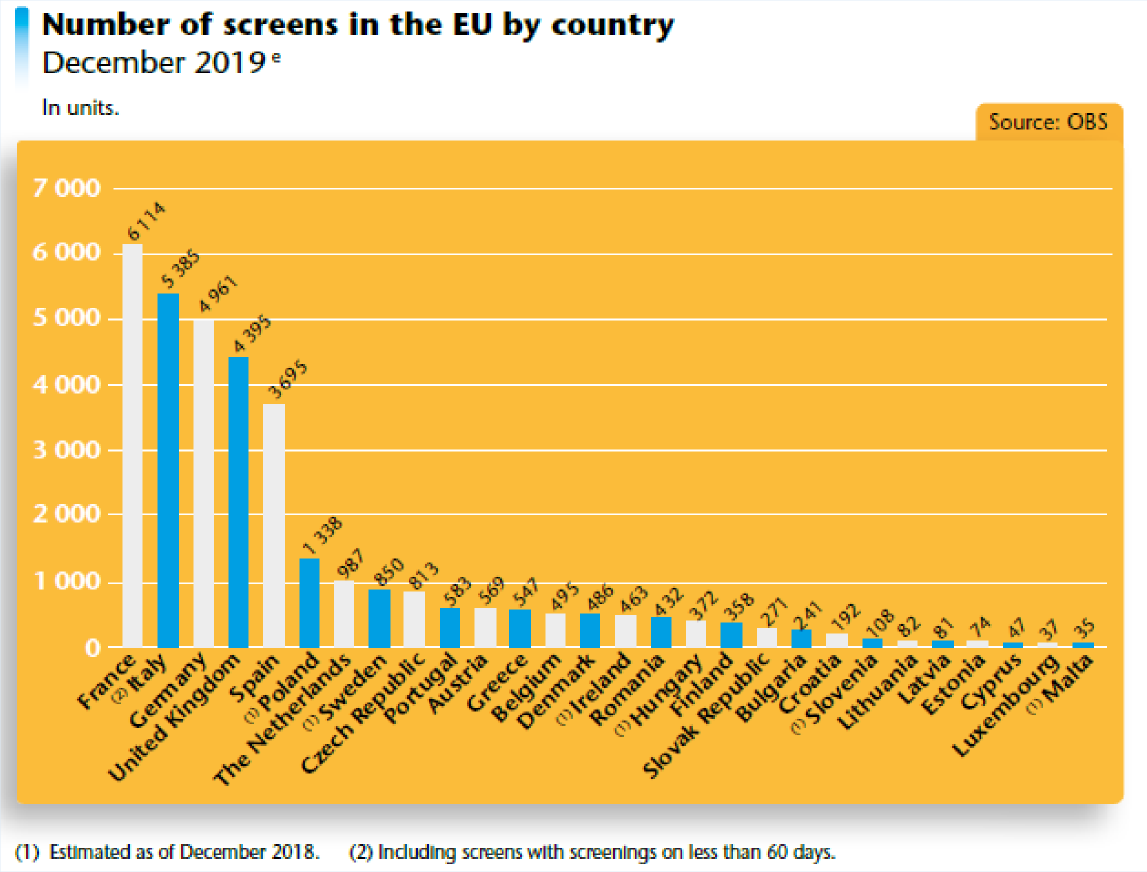
A sort of **decentralisation** by establishing **regional film commissions and film funds**, delegating the management of cultural facilities while also stimulating the combination of private and public interventions.

Source: Teti, Collins, & Sedgwick (2018): 245.

Law and regulation developments concerning public subsidies to film production in Italy

Law no. 1213, 4 November 1965	Italian State confirmed its support and commitment to the film industry—one that can be dated back to 1927
Decree no.26, 14 January 1994, amended in 2004/5	A distinction between films of ‘national cultural interest’ and ‘nationally produced’ films is established, each governed by separate administrative procedures
Law no. 153, 1 March 1994, Article 8	The categories of ‘first works’ and ‘second works’ related to films of ‘national cultural interest’ are introduced
Law no. 137, 1, 6 July 2002	New procedures to improve subsidy allocation, and control
D. Lgs. No. 28, 22 January 2004	Establishes a new set of guidelines for the regulation of the public subsidy to film industry
Ministerial Decree, 27 September 2004	Stricter prescriptions on subsidies to film production are introduced
Ministerial Decree, 13, August, 2015	Criteria published defining ‘cultural interest’, including technical criteria necessary for films to be considered eligible for public funding
2016	(New) Italian Cinema Law

- Italy has one of the highest **number of screens** in Europe.
- In 2019 was the country which **produced more feature films** (312, of which 268 100% national), followed by France (240) and Germany (237)
- Remains a European reference, still being one the most awarded countries in film festivals.
- In 2019 showed the highest annual growth in admissions (14%), followed by Germany (13%) and the Czech Republic (12%) (Cyprus got 12% , but it is a different market size; France: 6%)



Perspective (2): Exhibition (and theatrical release) matters

- **Commercial exhibition**
- **Alternative exhibition:**
  - **Semi-commercial exhibition (e.g. Europa Cinemas)**
  - ***Non-commercial exhibition***

Intrinsic cultural goals, thus calling upon the **convergence between economics and cultural-educational policies**:

Prioritising **cultural democratisation** (in the sense of wide cultural accessibility) combined with **cultural democracy**, i.e. sociocultural empowerment as the basis for free (critical) individual choices.

(As referred to:) Many films produced with public support do not get theatrical release; and when they do, as <u>they face several barriers to attract "less competent" audiences and non-urban territorial centres</u>.

Perspective (3)

Alternative exhibition recently became a target of public policies

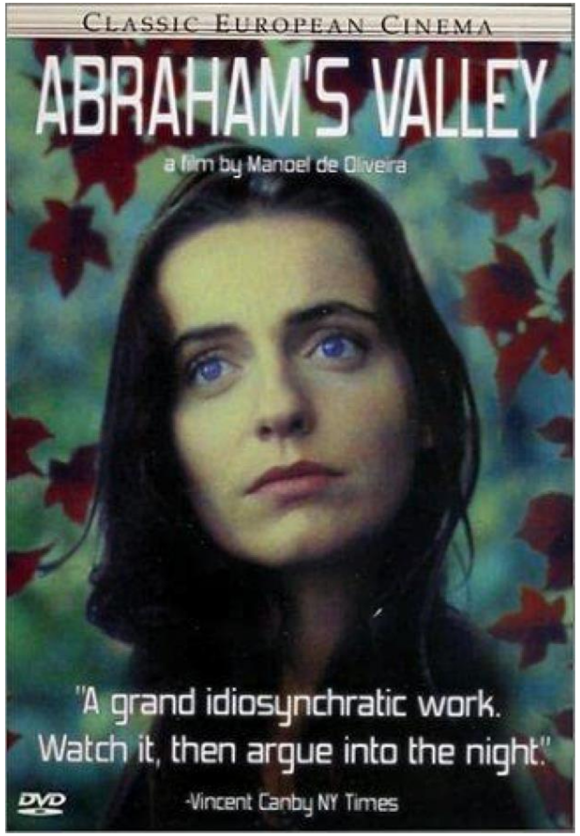
Driven by technological changes:

Digitisation of screens

Due more to economic performance than cultural value

New potentialities for cultural accessibilities and empowerment regarding choice (via cinema)

Permits the **diversification** of film supply, but **also of other arts** (as long as they have been filmed)



What is the non-commercial exhibition segment?

"Traditional film societies screening films to members with a common interest in film appreciation, to pop-up screening events in non-traditional venues and village hall screening programmes offered by local groups for social and recreational purposes."

(Jim Barratt & Sarah Jones, 2014: 8)

Mainly **film societies**, but also **cultural associations (some informal)** using **cinema** for **educational** and **social purposes**

→

Important role at **local levels**

- "Supply" of **diverse activities ("multi-product"; many are community-driven)**

- Acknowledgment of **cinema as art**

→

Filling **lacunas** the commercial and semi-commercial sector are **unable to**

Support for non-commercial exhibition in Italy

- **Under selective granting to promotion: support for "**film culture dissemination activities carried out by **film culture circles**, **national associations of film culture** and **community theatres** in the field of cinema" (Direzione Nacionale Cinema e Audivisivo):
  - **Budget 2022**: € 1,000,000 (up to 80% of each project) divided as follows:
    - 10% (€ 100,000) to **film culture circles [film societies]**;
    - 80% (€ 800,000) to **national associations of film culture**, of which:
      - 20% (€ 160,000) is assigned to **initiatives carried out jointly between two or more associations**;
      - 30% (€ 240,000) is assigned to **each of the associations in relation to the number of clubs that are members and active at the date of submission of the application for assistance and their distribution throughout the country**;
      - 50% (€ 400,000) is assigned on the basis of **the activities planned by each association, adopting criteria of proportionality and taking into account the amount assigned based on the previous automatisms**;
      - 10% (€ 100,000) to the **community halls**.

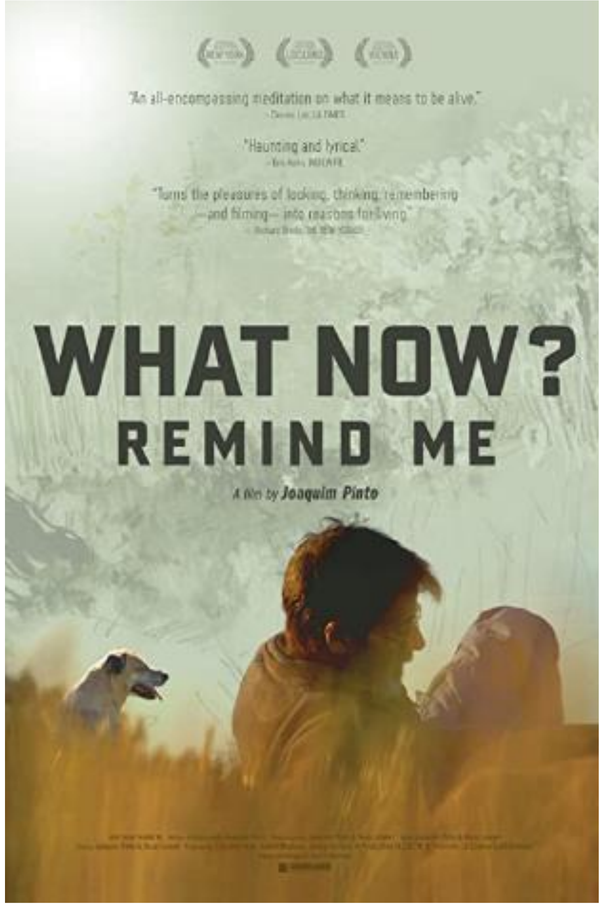
[See: Tutti i Numeri del Cinema e dell'Audiovisivo – Anno 2020 - Direzione generale Cinema e audiovisivo (cultura.gov.it)]

- **Different types of Associations/ Film societies**

1. Association for Audiovisual Film Initiatives (Associazione per iniziative cinematografiche audiovisive - AICA)
2. National Association of Italian Film Clubs (Associazione nazionale circoli cinematografici italiani - ANCCI)
3. Socio-cultural Youth Clubs (Cinecircoli giovanili socioculturali - CGS)
4. Italian Cineforum (Cineforum italiano - CINIT)
5. Cinematografic Studies Centre (Centro studi cinematografici (CSC)
6. Italian Federation of Film Societies (Federazione Italiana dei Cineclub, FEDIC)
7. Italian Cineforum Federation (Federazione italiana dei cineforum - FIC)
8. Italian Federation of Cinema clubs (Federazione italiana dei circoli del cinema - FICC)
9. Union of Cinematogaphic Clubs (Unione circoli cinematografici ARCI - UCCA)
10. Italian Union of Cinema Clubs (Unione italiana circoli del cinema - UICC)
11. **…**

Portugal

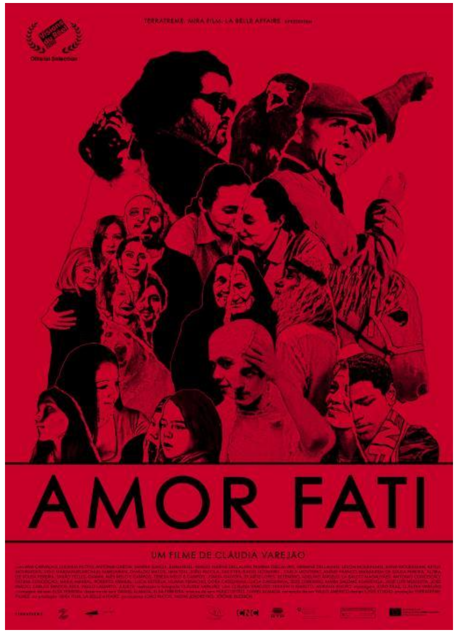
- Small Southern European country (~10M inhabitants) with high socio-territorial asymmetries
- Peripheral European country
- Long-lasted dictatorship (1926-1974)
- Joined the EU in 1986
- Recent, not stabilised, cultural policies (Ministry of Culture in 1995; intermittent) – combining the French and the Anglo-Saxon models
- **Portuguese cinematography internationally recognized and awarded (authorial), little national visibility/recognition**



<u>1/3 of the population has no access to film exhibition</u>

Portuguese Institute of Cinema and Audiovisual (ICA)

- (Stable organism since 2007)
- Responsible for the development of cinematographic and audiovisual activities
- Indirect administration by the state, with administrative and financial autonomy



- **Support programme for film exhibition in alternative circuits (targeted to non-profit entities)**
  - Exhibitors' requirements for eligibility:
    - Informatized ticketing system (implemented in 2004)
    - Exhibit minority filmographies (national and international, whose distribution in Portugal is inferior to 5% of the market share)
    - Program a minimum of 30 different sessions per year
    - Quota of national films
    - Provide a detailed exhibition programme
  - Maximum €10 000 per project and per year
  - Up to 80% of the project

High centralisation of public support for cinema

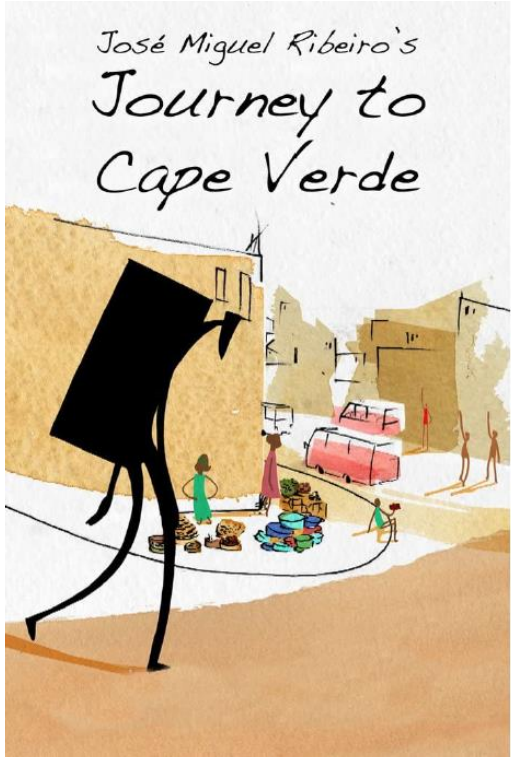
Evolution of public support to the cinema and audiovisual sector between 2007 and 2019: all programmes, distribution and exhibition (K€, non-deflated)

	2007	2008	2009	2010	2011	2012*	2013	2014	2015	2016	2017	2018	2019
All programmes	**10190**	**10190**	**10190**	**10190**	**10140**		**10190**	**17654**	**17763**	**18419**	**18540**	**18940**	**20550**
Distribution (all sub-programmes)	700	700	700	700	700		620	650	650	715	850	975	975
Exhibition (all sub-programmes, exc. Festivals)	300	300	300	300	250		250	350	150	420	445	350	570
Festivals**	750	750	750	750	750		500	2400			2400		
Non-commercial exhibition (alternative circuits)***	100	100	100	100	100		100	200		220	220		220

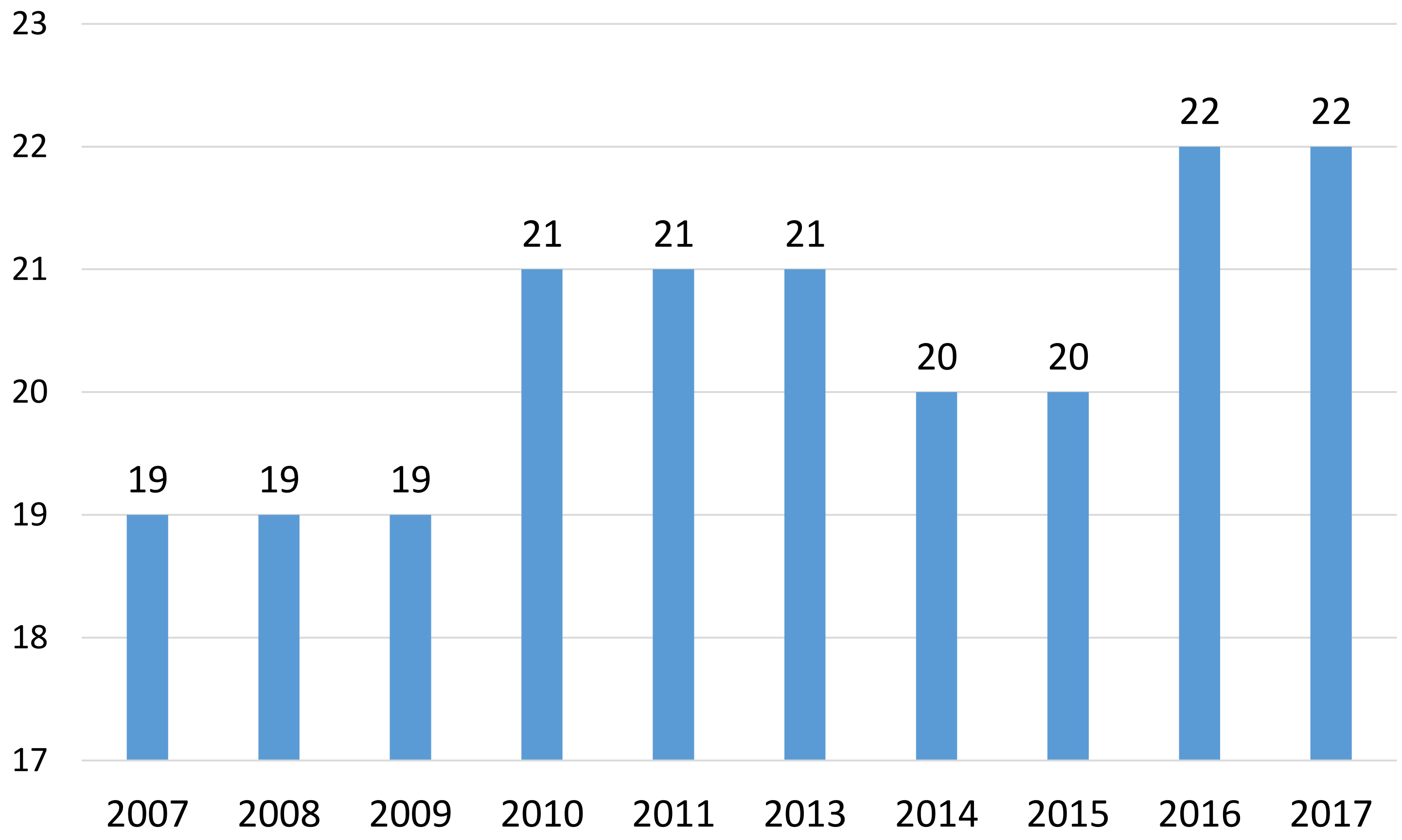
Source: ICA

* "Zero year"
** 2007-2011: annual and biennial contests/awarding; 2013: support for one year; from 2014 onwards: triennial contests/awarding
*** 2007-2013: annual and biennial contests/awarding; from 2014 onwards: biennial contests/awarding. **In 2021, the amount doubled (440 for 2 years).**

Exhibition (semi-commercial + festivals + alternative exhibition) gets 6,1% of the whole amount awarded (2020). Non-commercial exhibition gets 0.5%,



Number of financed entities (2007-2017)



Non-commercial exhibition database

- Started in 2004 (informatized ticket system implemented in 2013)
- More than 60 variables
- Agents involved
- Place of exhibition
- Resources used and funding amounts
- Films exhibited
- Target demographic
- A 'dynamic' database

ICA's NCE database ≠ Financial database

47
Exhibitors (NCE database)

34
Exhibitors with ICA support (financial database)

14742
Film sessions

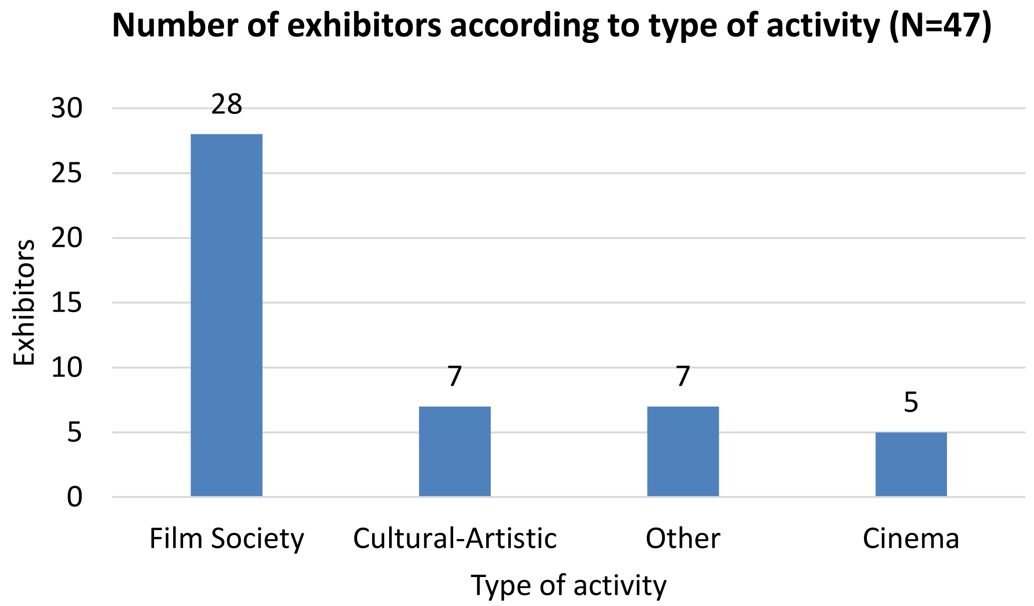
3753
Movie Titles

399
Multiple or thematic sessions

- Film sessions + exhibitors registers incomplete
- Digital ticketing system by all entities

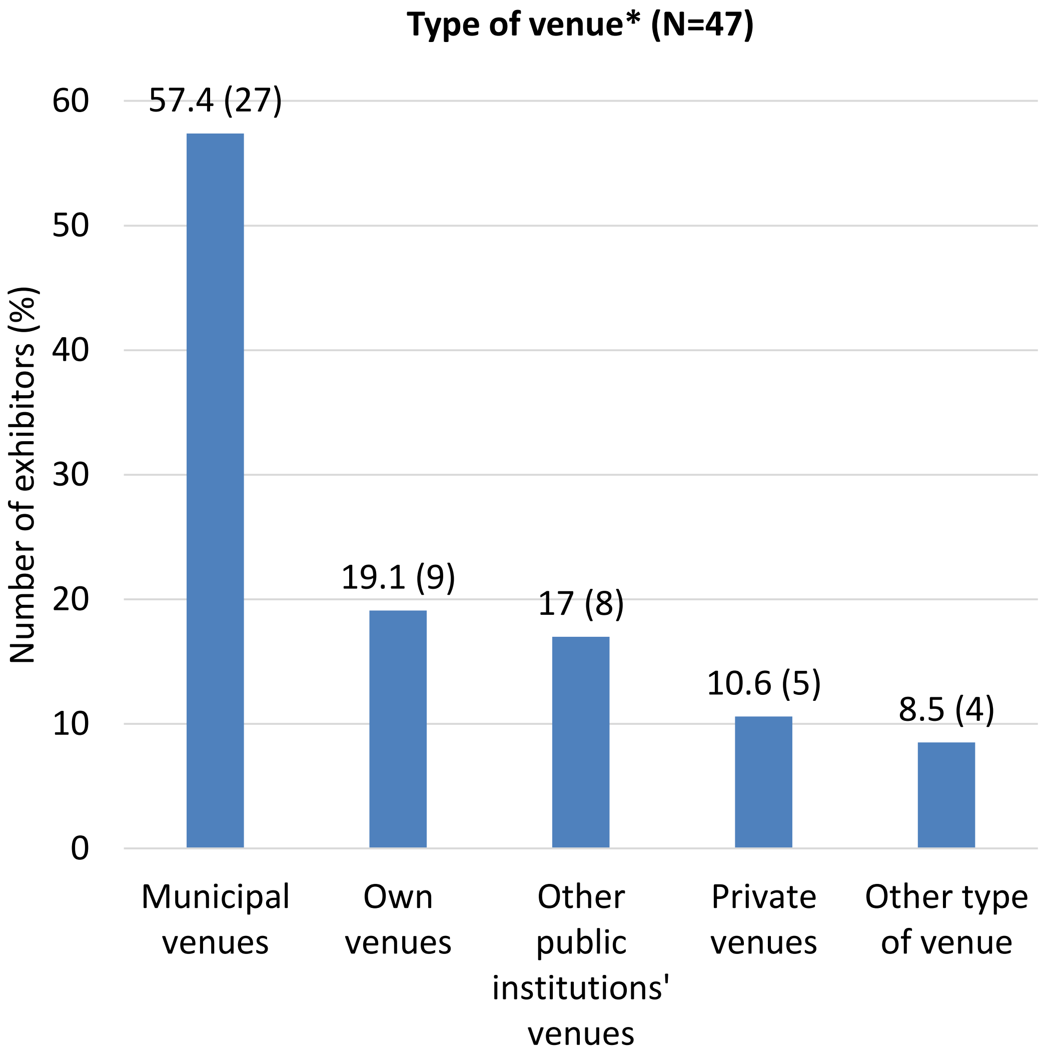
Why?

- **Film exhibition is often an intermediary activity for these exhibitors**
- **Informality, volunteer work and small size**

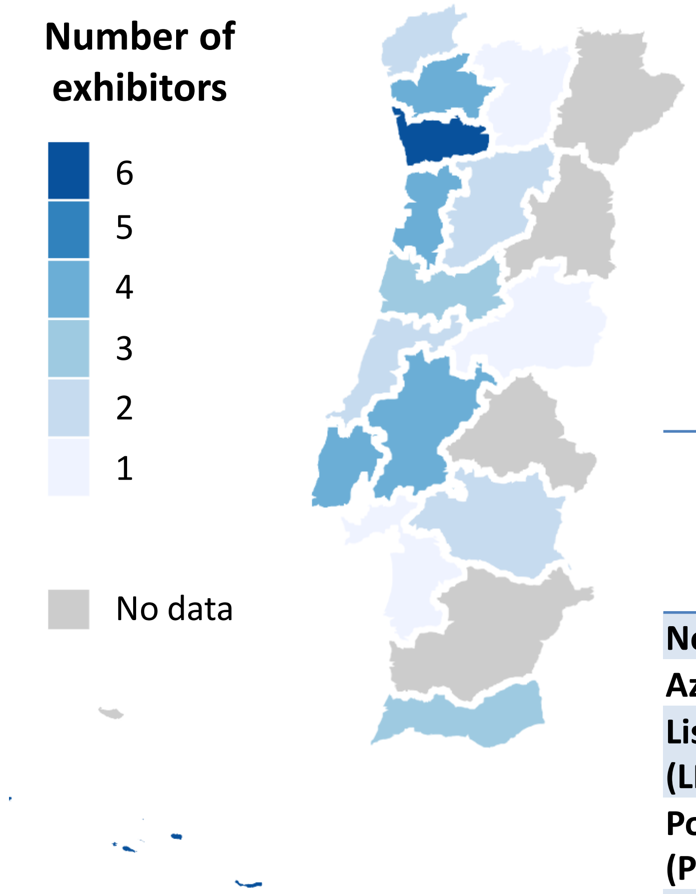


Film Society = Film exhibition
Cinema = Other cinema-related activities besides film exhibition
Cultural-Artistic = Multidisciplinary role, other cultural events
Other = Local development, social initiatives, municipal activities, sports

- **High vulnerability**
- **High dependency on other institutions, local governments (municipalities) in the first place, BUT film exhibition is not a priority in cultural municipal agendas**



*total > 100% as the exhibitors tend to use more than one place of exhibition

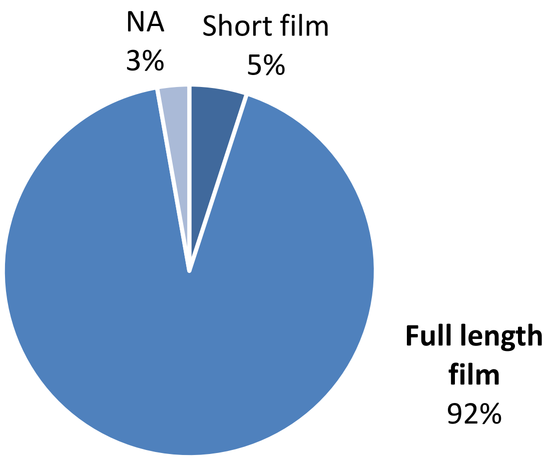


- **308 municipalities**
- **High territorial asymmetry**
- **Concentration in littoral + urban areas (cities)**

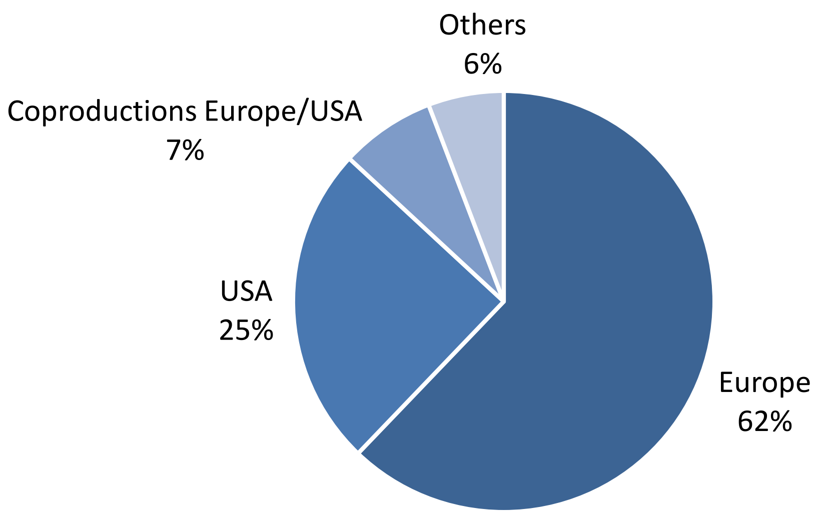
Region	Nº of exhibitors	Exhibitors (%)	Nº of sessions	Sessions (%)	Nº of spectators	Spectators (%)	Average number of spectators per session
North (excl. PMA)	9	19	2048	13,9	168991	24,7	**83**
Azores	6	13	562	3,8	38318	5,6	**68**
Lisbon Metropolitan Area (LMA)	5	11	1104	7,5	66436	9,7	**60**
Porto Metropolitan Area (PMA)	8	17	2363	16	128242	18,7	**54**
Alentejo	2	4	1217	8,3	58716	8,6	**48**
Algarve	3	6	1771	12	67801	9,9	**38**
Center	14	30	5677	38,5	156293	22,8	**28**
Total	**47**	**100**	**14742**	**100**	**684797**	**100**	**46**

Films exhibited

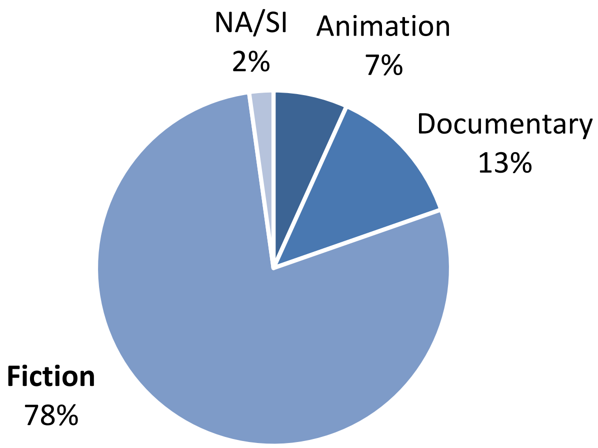
Length
(% per total number of sessions, N=14742)



Origin of the films - Regions (ICA)
(% per total number of movies, N=3753)

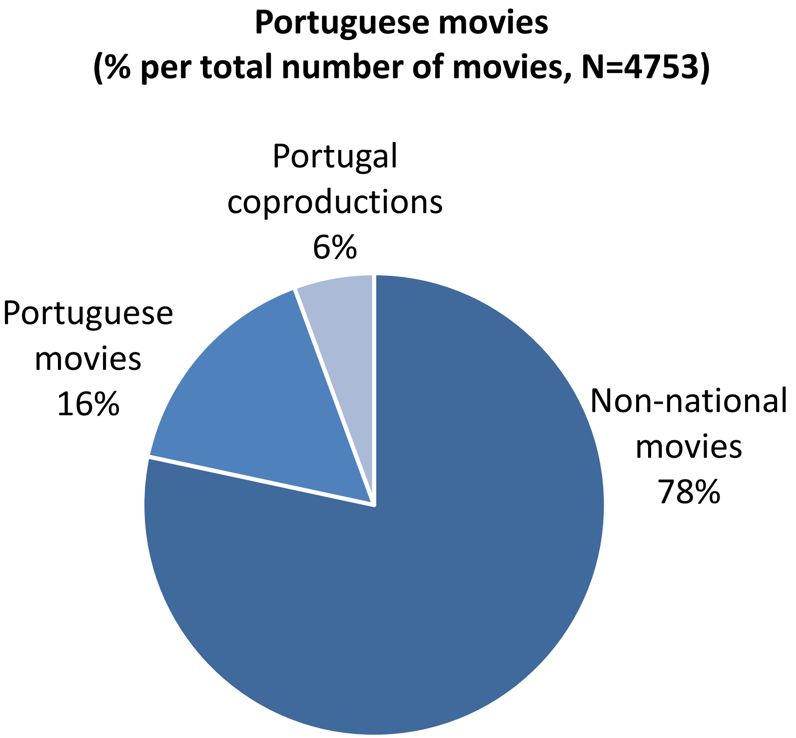


Type of film
(% per total number of sessions, N=14742)

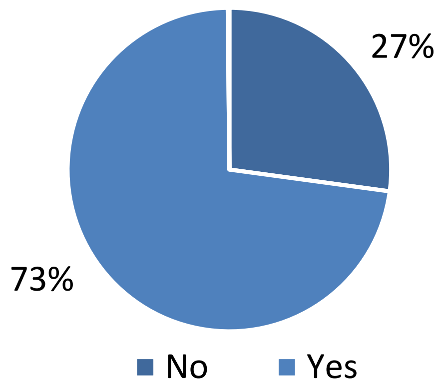


- **Outside the commercial segment short films are programmed exceptionally, so a higher percentage was expected. (Shorts include most of animation as authorial films)**
- **European films are dominant**

- **Portuguese Films – 22%**
- **Residual presence (even though many are often awarded at international film festivals)**
- **Co-productions are mostly established with European countries and Portuguese speaking countries**
- **Portugal established several co-productions as main producing country but never as co-producer**



Commercial *premiere* in Portugal
(% total number of films, N=3753)



Number of films that premiered in Portugal (aggregated by year)

Year (aggregated)	N	%
1981-2000	238	6,3
Until 1980 (1914-1980)	262	7,0
2001-2007	441	11,8
2008-2012	**868**	**23,1**
After 2012	**920**	**24,5**
NA (e.g. thematic session; did not premiere in Portugal)	1024	27,3
Total	***3753***	***100,0***

47,6%

There seems to be an attempt to exhibit contemporary films, most likely to attract a wider audience (young people in some cities):

- **NCE is often seen as distant from the commercial one, but these results show the exact opposite**
- **Almost 50% of the titles premiered after 2007 (66% when removing NA)**

Time counts… and free entrance (apparently) too

Only 9 exhibitors with regular activity between 2007 and 2017, of which:

- **7 film societies**
- **1 cultural association dedicated to cinema activities (including 1 film festival)**
- **1 association dedicated to local development**

6 exhibitors did not charge ticket fees, of which:

- **4 film societies**
- **1 cultural association dedicated to cinema activities (including 1 film festival)**
- **1 cultural-artistic association**

Seniority of the entities (year of foundation)

Period	N	%
2005-2017	**12**	**26**
1995-2004	10	21
1975-1994	8	17
1950-1974	10	21
Until the end of WWII	4	9
NA	3	6
Total	***47***	***100***

Preliminary econometric estimation trying to identify the main determinants of spectators (number of)

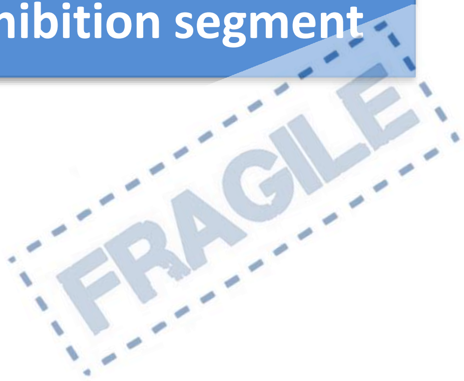
Variables	
Spectators	total number of spectators per exhibitor and year of exhibition
$Ticket\_price_{it}$	ratio between total revenue and number of spectators, in euros, obtained by exhibitor i during year t
$Anim_{it}$	percentage of animation films exhibited by exhibitor i during year t
$Docum_{it}$	percentage of documentary films exhibited by exhibitor i during year t
$Fict_{it}$	percentage of fiction films exhibited by exhibitor i during year t
$Short_{it}$	percentage of short films exhibited by exhibitor i during year t
$Full_{it}$	percentage of full-length films exhibited by exhibitor i during year t
$Portug_{it}$	percentage of Portuguese movies exhibited by exhibitor i during year t
$Funding_{it}$	assumes the value "1" if exhibitor i received public funding during year t, and "0" otherwise

Main results:

- **Characteristics of the films and of the exhibitors** influence demand for cinema in NCE circuits
- Variables concerning **ticket price and Portuguese films** were found to be statistically significant: **spectators are price sensitive and Portuguese films seem to deter audiences**
- Variable **funding** was found to be statistically significant with a **positive impact on the number of spectators**.

Final remarks

Non-commercial exhibition segment



Promotes cultural diversity and contributes to cultural democracy and democratisation

- Despite urban concentration, delivers cinema to isolated areas
- Sometimes NCExhibitors are the only local cultural supply
- Important weight of European films (and universal minor filmographies)
- Portuguese films get (some) visibility

- **Core impact of public funding, although insufficient**
- **Urgency of integration with other policies in Portugal (e.g. need of local involvement)**
- **Need for EU comparisons**

Images, by order of appearance (**credits**: IMDB and ICA):

Slide 2: *Another Country*, 2000, Serge Tréfaut, PT: 70' (doc).

Slide 3: *Tragic History with Happy End*, 2005, Regina Pessoa, PT/FR/CAN: 7' (ani).

Slide 4: *Our Beloved Month of August*, 2008, Miguel Gomes, PT/FR: 147’.

Slide 5: Cartoon Forum 2021, Toulouse: *Pete & Bern's*, Pedro Rodrigues & Bernardo Pacheco, PT (TV series).

Snow White, 2000, João César Monteiro, PT: 75'.

Slide 6: *Lusitanian Fado*, 1994, Abi Feijó: 6' (ani).

Slide 7: *The Garbageman*, 2022, Laura Gonçalves, PT:.

Slide 17: *Rafa*, 2012, João Salaviza, PT/FR: 2012, PT: 25’ (doc).

Slide 19: *Abraham's Valley*, 1993, Manoel de Oliveira, PT/FR/CH: 187'.

Slide 20: *What Now? Remind Me*, 2012, Joaquim Pinto, PT/ES: 164' (doc).

Batrachian's Ballad, 2016, Leonor Teles, PT: 11' (doc).

Slide 21: *Amor Fati*, 2020, Cláudia Varejão, PT/CH/FR: 101' (doc).

Slide 23: *Journey to Cape Vert*, 2010, José Miguel Ribeiro, PT: 17' (ani).

Slide 28: *Vitalina Varela*, Pedro Costa (2019), PT: 127'.

Slide 32: *The Metamorphosis of Birds*, 2020, Catarina Vasconcelos, PT: 101' (doc).

Slide 33: *Arabian Nights*, vol. 1-3, Miguel Gomes, 2015, PT, DE, FR & CH.

Slide 34: *Blood of My Blood*, 2011, João Canijo, PT: 140'.

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