

Measuring the Economic Capacity of the Indonesian Film Industry

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Article Info Article history: Received 22 Des 2020 Revised 28 Jan 2021 Accepted 27 Mar 2021	ABSTRAK Makalah ini berangkat dari permasalahan lama yang menghambat industri film Indonesia: tidak tersedianya data yang komprehensif. Masalah ini menjadi persoalan bagi seluruh pemangku kepentingan industri perfilman, yang tidak dapat bergantung pada indikator ekonomi makro dalam menjalankan usaha mereka. Dari sini, makalah ini mencoba menjawab pertanyaan-pertanyaan ‘bagaimana seharusnya kita menghitung dengan benar kontribusi film, atau industri film, terhadap Produk Domestik Bruto Indonesia?’ dan ‘bagaimana seharusnya kita mengukur dampak ekonomi dari industri film di luar Produk Domestik Bruto?’ Dari sana tulisan ini melakukan eksplorasi beberapa metode untuk mengukur dampak ekonomi film terhadap Produk Domestik Bruto, dan/atau menghitung potensi ekonomi film, sekaligus menyoroti efek berlapis (multiplier effect) industri ini di sektor lain. Dalam konteks peningkatan jumlah layar bioskop, ada kebutuhan untuk melihat apakah efek berlapis bioskop Indonesia saat ini berdampak signifikan, atau apakah akan berdampak signifikan dalam waktu dekat. Hal lain yang ingin dipahami adalah keadaan industri saat ini, dan kebijakan apa yang dapat mendukung kontribusinya lebih lanjut bagi perekonomian Indonesia. Kata kunci : <i>ekonomi film; industri film; industri kreatif; data box office; efek berlapis film</i> ABSTRACT This paper starts from an old problem that has hampered the Indonesian film industry: the lack of comprehensive data. This is a problem for all film stakeholders, who cannot depend on macroeconomic indicators in running their business. From here, this paper attempts to answer the questions 'how should we correctly calculate the contribution of films, or the film industry, to Indonesia's Gross Domestic Product?' and 'how should we measure the economic impact of the film industry outside of the Gross Domestic Product?'. From there this paper explores several methods to measure the impact of the film economy on Gross Domestic Product, and/or calculate the economic potential of film, as well as highlighting the multiplier effect of this industry in other sectors. In the context of an increasing number of cinema screens, there is a need to see whether the layered effect of Indonesian cinemas is currently having a significant impact, or whether it will have a significant impact in the near future. Another thing to understand is the current state of the industry, and what policies can further support its contribution to the Indonesian economy. Keywords: <i>Film economy; film industry; creative industry; box office data; film multiplier effect</i>
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INTRODUCTION

Since its inception, the Indonesian Creative Economy Agency (Badan Ekonomi Kreatif, BEKRAF) has used macro-economic indicators such as 'contribution to national gross domestic product (GDP)' as its main indicators in developing Indonesia's creative economy. Pursuant to BEKRAF calculations, the creative economy sector contributed a total of IDR 852 trillion (7.38%) to Indonesia's GDP in 2015 (SKEK, 2016: 4). Of this, film's contribution was miniscule, amounting to 0.16% of the total creative economy sector (*ibid.*, h. 5); dominant were the culinary (41.69%), fashion (18.15%), and craft subsectors (15.87%). Despite BEKRAF's claim that film is a "locomotive" that will carry other creative industries, its economic contributions surpass only those of the design and visual communication subsector.

In a 2017 report, meanwhile, BEKRAF noted that film's contributions had increased by 10.09%, attributing this to the mushrooming of cinemas as well as the deregulation of the industry (Saputri, 2018). With foreign investors having more opportunities in the film industry,¹ especially in the exhibition business, ticket sales increased significantly (*ibid.*) The late Boy Berawi, Deputy I of BEKRAF, claimed that film's economic contributions were the second fastest-growing of the creative industry, even as he admitted that its contributions (0.17%) remained far from significant.

The limited contribution of the film industry to Indonesia's GDP might be because it has yet to reach maturity and fully explore its potential (as manifested, for example, in some areas having no cinemas), or it might come from underrepresentation in the calculation/estimation process, or might be a combination of both. BEKRAF and Statistics Indonesia, which produced the above figures, have not disclosed their methods. Furthermore, owing to the lack of comprehensive data, such calculations are extremely difficult. Many calculate the total revenue of the film subsector mainly from ticket sales in mainstream cinemas, and thus fail to include alternative screenings, streaming platforms, or even film production activities that are unrelated to commercial cinemas (see Mediarta, 2018).

This paper explores several methods for measuring film's economic impact on GDP and beyond. It means to calculate the economic potential of film, as well as highlight this industry's multiplier effect in other sectors. This is done in the context of the growing number of cinema screens: Does the multiplier effect of Indonesian cinema have a significant impact today, and will it have a significant impact in the near future? What is the current state of the industry, and what policies could support its further contributions to Indonesia's economy—and beyond? At the same time, this paper also takes look into the infamous problem that has hampered Indonesia's film industry: the difficulty of collecting comprehensive data. This has been particularly problematic for industry stakeholders, who cannot rely on macro-economic indicators such as GDP, employment, or total exports/imports when running their ventures.

RESEARCH QUESTIONS

This paper seeks to answer two specific questions: How should we calculate the actual contribution of the film subsector, or the film industry, to Indonesia's GDP? How should we measure the economic impact of the film industry beyond the GDP?

DISCUSSION

¹ Media ownership (including in the film industry) has long been debated in Indonesia, as the sector is perceived as playing a strategic role in influencing public opinion and shaping an Indonesian identity. In the 1999 Press Law, direct foreign ownership in media companies was limited to 20%. However, this regulation often seemed to be ignored in the case of film; ultimately, the government removed the industry from the 'negative list' (i.e. the list of industries where foreign ownership must be lower than 50%).

Literature Review

In highlighting the methods for measuring the film industry's impact on GDP and beyond, this study relies primarily on reports produced by Oxford Economics on the contribution of the film and television film industries in Indonesia (Oxford Economics, 2010; produced for the Motion Pictures Association [MPA]) and for measuring the impact of the British film industry (Oxford Economics, 2012; produced for the British Film Institute [BFI]). In these reports, especially the latter, the economic impact of the film industry is measured not solely through GDP, but also through indicators such as the economic value of film's cultural impact, film's impact on national "branding" and "identity", and even film's cultural contributions that indirectly affect the nation.

Whilst this does not conform totally with BEKRAF's strategy for using GDP to highlight film's role in Indonesia, it does better suit Indonesia's case for several reasons. First, considering the industry's relatively miniscule contribution to Indonesia's GDP (as shown in the numbers above), exploration of film's role should come from another direction, one that can reach beyond the economic. Second, the lack of comprehensive data on the film industry could potentially hide film's real economic impact, especially when GDP is used as the main indicator. Moreover, the lack of comprehensive and reliable data on the Indonesian film industry has made it difficult for film stakeholders and industry practitioners to make sound analysis or optimise their film-related ventures.

This paper refers to the Oxford Economic reports, and applies its methods to the Indonesian case whenever relevant. The indicators used by these reports, thus, are thus adapted for Indonesia when available. This discussion also explores the possibility of using such data to produce a sound report on film's impact in both economic and non-economic terms. Along the way, the current state of the film industry and its potentials will be discussed to draw conclusions regarding the capacity of the film industry in Indonesia.

In measuring the economic effects of the British film industry on the United Kingdom, Oxford Economics refers to three primary channels (Oxford Economics, 2012:17-18). First are direct impacts, i.e. employment and activity in the film industry itself, covering all stages of the production process (preproduction, production, and postproduction) as well as distribution and exhibition.

Second are the indirect impacts of the film industry, defined as:

"...employment and activity supported down the film industry's supply chain, as a result of purchasing goods and services from the industry's suppliers. This includes, for example, jobs supported by the manufacture of production equipment sold to production companies; the manufacture of goods sold at cinemas; the spending of film crews in hotels, restaurants etc.; business expenditure on TV, radio and other advertising; and a wide variety of activity in the business services sector (legal, accountancy, IT etc.)."

Third are induced impacts, defined as:

"...employment and activity supported by those directly or indirectly employed in the core UK film industry spending their wage income on goods and services in the wider UK economy. This helps to support jobs in the industries that supply these purchases, and includes jobs in retail outlets, companies producing consumer goods and in a range of service industries. But there are also a number of additional economic catalytic impacts ('spill-overs')"

The Oxford Economics study of the British film industry identifies several such "spill-overs" (ibid: 18):

- Skills and labour supply: the film industry improves skill levels in the United Kingdom economy, which will economically benefit the country;
- Tourism: enhancement of the tourist industry (see the chapter on tourism in this volume)
- Culture: "a distinct film culture has the characteristics of a public good in the sense that all of the cultural/educational economic externalities (i.e. spill-overs or benefits) are unlikely to be provided by an unaided market" (ibid)

- Merchandising: sale of film-related merchandise such as DVDs, VoD (or currently in the form of over-the-top service or OTT), books, toys, clothing (see the chapter on film and fashion in this volume), etc.

- Promotion and trade: "branding" and awareness of a country, mostly to attract foreign investment and trade.

Interestingly, the 2010 Oxford Economics report on Indonesia uses data from the Ministry of Trade (which was responsible for the creative economy sector when the survey was conducted), and from PT Dataindo Inti Swakarsa, a private company specialised in business information (Oxford Economics, 2010: 6). As such, the datasets produced by this company—and used to produce the Oxford Economics estimates—are not available to the public, and it is therefore difficult to understand how the datasets were produced, especially given practitioners and other stakeholders' difficulty obtaining raw data regarding the film industry, as will be explained later in this paper. Looking at the report, its numbers were produced based on estimates (Oxford Economics, 2012: xx) rather than concrete and verifiable data.

Policy Review

In Indonesia, film falls under the auspices of three different bodies. The first is the Ministry of Tourism and Creative Economy (Kemenparekraf) and previously the aforementioned Indonesian Creative Economy Agency (BEKRAF). BEKRAF was started as a non-departmental body established to coordinate and synchronise creative economic policy to produce an efficient and healthy ecosystem and increase the creative economy's contribution to GDP (BEKRAF website). In the agency's structure, film is considered one of sixteen subsectors. However, its position is considered strategic, as it is believed to have the capacity to produce a "multiplier effect". Film is regarded as a "locomotive", something that can "pull" other parts of the creative industry. In 2019, BEKRAF was formally dissolved after the re-election of incumbent president Joko Widodo (popularly known as Jokowi). As its functions were overtaken by the Ministry of Tourism, since rebranded the Ministry of Tourism and Creative Economy (Kumparan.com, 2019), members' authority will likely be truncated in the future; they no longer report directly to the president, as during Jokowi's first term, but to a government minister.

Second is the Ministry of Education and Culture with its Centre for Film Development (*Pusat Pengembangan Perfilman*, PUSBANG Film, July 2015-2019), and continued by the Directorate of Film, Music and New Media (January 2020 - now). These bodies focus on the educational and cultural role of film. Whilst BEKRAF worked with "creators" to increase the creative economy's contribution to Indonesia's GDP, PUSBANG Film focuses on working with "stakeholders" in reaching the constitutional objective of educating the nation (Renstra Pusbang Film, 2016).

Third is the Indonesian Film Board (*Badan Perfilman Indonesia*, BPI), a quasi-governmental organisation whose establishment was mandated by the Film Law of 2009. BPI is intended to be responsible for all film related activities, from appreciation to economic performance. However, due to its lack of funding and its character as a non-portfolio agency, BPI now serves primarily as an intermediary between the aforementioned agencies and practitioners, stakeholders, and the general public. One of BPI's responsibilities is developing the capacity of "film communities" (*komunitas film*), not-for-profit community groups that are active in film culture. Although film communities are recognised in the 2009 Film Law as separate from the commercial film industry, their economic potential (direct and indirect) have never been studied properly.

Film: the Multiplier Effect

In Indonesia, the view that film has a multiplier effect is not solely limited to the "core film industry". All films, regardless of country of origin, are believed to have the capacity to amplify other aspects of the economy. Minister of Trade Darmin Nasution has stated, for instance, that good films are able to attract audience, who subsequently spend money on retail products (Adri, 2019). In other words, good films (such as *The Avengers*, per Nasution) attract potential consumers, and thus indirectly improve the retail sector and the economy in general.

Nasution's comment is heavily informed by the fact that, in Indonesia, cinemas are located mostly in shopping malls rather than stand-alone buildings (as it was in the 1980s). It is taken for granted that including cinemas in shopping malls stimulates economic activities amongst middle-class consumers. Although such a view may have merits, it also limits the possibility of maintaining, endorsing, and supporting non-middle-class screening venues. The geographical and demographical expansion of

cinemas must be considered, especially considering the inequalities in Indonesian film exhibition (see Ramadani, 2018 for further explanation).

Reflecting this view that film has a multiplier effect, BEKRAF stated in various documents and on numerous occasions that film should be the "locomotive" of the creative industry (bisnis.com, 2015, see also Kompas, 2015). Rather than focusing merely on strengthening the core film business (i.e. production, distribution, and exhibition), this strategy stresses on film's capacity to instigate a multiplier effect within the creative industry and beyond. As an example, BEKRAF Director Triawan Munaf cited the film *Laskar Pelangi* (*Rainbow Troops*, 2008) and its impact on tourism; within a year after the film's release, the tourism sector in the area had grown by 1,800 per cent (BEKRAF, 2017: 6). Such an approach is attractive, as it can increase film's impact on the GDP, especially its "indirect" and "induced" impacts that can be considered part of the creative economy. Such an approach has also been employed in the film industry (and creative sector) in the United Kingdom, which has highlighted the film industry's significance in the national economy. According to this approach, even if film-related sales are limited, film's impact will be enhanced by calculating economic revenue (and taxes) from other sectors that indirectly benefit from it. Even broader "induced" sectors could also be calculated; in the illustration given by BEKRAF above, for instance, this included tourism in Belitung.

Expansion of the film industry

All three agencies responsible for film in Indonesia have agreed on the importance of developing Indonesia's film industry. However, they have taken relatively different approaches in looking at the issues, and seek to expand the industry to achieve their own particular objectives. This section explores the expansion of the film industry, using various points of view to measure its economic impact in Indonesia. Two key policies are 1) the removal of film from the "negative list" through Presidential Decree in 2016, and 2) the development of Regional Film Commissions (*Komisi Film Daerah*, KFD) to improve the film industry outside Jakarta and other major cities.

BEKRAF sought to expand the Indonesian film industry by having it removed from the "negative list" (a list of sectors where foreign investment is wholly or partially prohibited). This was realised in 2016, and has been cited as major driver of the recent spike in the number of cinema screens in Indonesia. This growth is described by Yustriani and Rahman (2019, p. 10) as follows:

"In 2012, there were only 145 movie theatres, with a total of 609 screens, in Indonesia. By December 2018, this number has increased sharply to 343 movie theatres and 1,756 screens. This means that, in the last six years, the number of movie screens has increased by 136.5%, and the number of screens has increased by 188.34%."

This expansion remains ongoing, and some prominent industry players expected to see the number of screens reach beyond 2,000 soon. Catherine Keng, the Corporate Secretary of XXI Group, estimated that Indonesia would have 2,400 screens by the end of 2019 (kontan.com, 2018).

Also key to the expansion of Indonesia's film industry has been the policy to promote film production in areas outside Jakarta, the national capital. This policy is understandable in the context of Indonesia's film industry; more than 69% of screens are located in Jakarta. More broadly, more than 80% of cinema screens are located in cities (*kota*). Only 20% are located in regencies (*kabupaten*) (Yustriani and Rahman, 2019, pp. 10–11). Although this represents a slight improvement over 2018, when 87% of screens were in cities and 13% were in regencies (*ibid.*), massive gaps remain evident.

Recognising this situation, BEKRAF and BPI encouraged local governments to establish their own film commissions that could transform films into catalysts for the local economy (*ibid.*; see the chapter on film and local business). This was rooted primarily in the belief that film has a "multiplier effect" (BEKRAF, 2016: 14), especially in the tourism sector (*ibid.*: 14–15). It was also in-line with BEKRAF's strategy of highlighting the economic impact of the creative sector (including film), including its indirect and induced impacts.

BEKRAF urged Indonesia to welcome foreign productions, which would have direct economic impacts (including through employment and consumption) and have a multiplier effect (especially in promoting certain areas as tourist destinations). This was clearly underlined in BEKRAF's guidebook for establishing local film commissions (KFD) (BEKRAF, 2017), titled *Shooting Lancar Daerah Tenar* (*No-Hassle Shooting, Fame to the Area*), which urged local governments to use KFD to 1) identify

scenic potentials, 2) create databases for service providers, and 3) implement one-stop licensing for film production (BEKRAF, 2017). This policy reflected government policies oriented towards increasing foreign investment in Indonesia and amplifying state revenue.

The above-mentioned mushrooming of movie theatres and screens is considered responsible for increased number of ticket sales. Estimates from the Ministry of Education suggest that movie theatre attendance increased from 16 million in 2015 to 36 million in 2016, 42 million in 2017, and 48 million in 2018 (CNN Indonesia, 2019); Yustriani and Rahman (2019: 6) give an even higher estimate, 51.2 million ticket sales in 2018. Some industry players, such as film producer Sheila Timothy, have viewed the situation optimistically, estimating that Indonesian films had reached a market share of 30% by 2018 (BBC Indonesia, 2019). This optimism seems justified; several domestic productions have outperformed foreign films in the Indonesian box office. In 2016, *Ada Apa dengan Cinta? 2* (*What's Up with Love? 2*) sold more tickets than *Captain America: Civil War*, which was released at the same month (BBC Indonesia, 2019). This highlights the growth of the Indonesian film industry.

However, the encouragement of local governments to establish local film commission left out one issue that has long hampered the Indonesian film industry: inequality in the exhibition sector. Even today, more than 75% of cinema screens are located in Java's major cities (Ramadani, 2018)—even though the island holds only 56% of the national population (City Population, no date). Even though the expansion of cinema screens to smaller cities remains an important means of redistributing resources and improving the potential of local film culture, policy has left this expansion to market mechanisms and entrusted it to the private sector. Consequently, without incentives or encouragement to expand to other—even smaller—regions, screen distribution in Indonesia is still concentrated in Java.

The exhibition sector in Indonesia has also been dominated by "A-class" cinema halls and screens that use the latest state-of-the-art technology, following a model that has remained dominant since the 21 Cineplex Group began monopolising distribution and exhibition channels (Sasono et al., 2012). Although this does provide audiences with higher technical (image and audio) quality, it also limits the possibility of films reaching lower-class audiences in smaller cities. This gap remains almost untouched by government policy. One initiative, implemented by the Provincial Government of Jakarta to reach lower-class audiences, was subsequently taken over by a private entity. Under this programme, a lower-class cinema hall had been developed, with tickets priced between IDR 15,000 and 20,000—below the average ticket price (Khoiri, 2019).

Another related issue is support for non-commercial film activities, which falls primarily under the purview of the Ministry of Education and Culture. Non-commercial film activities, as well as their actors, are acknowledged by the 2009 Film Law, which holds that the not-for-profit sector is meant to support the development of community-based film activities (production, distribution, exhibition, and development of film culture). Such communities have provided an important audience base, and a major source of talent, for the Indonesian film industry since at least the early 2000s. These communities have also had an enormous role as training grounds for new and emerging filmmakers throughout Indonesia (bpi.com, 2018); for example, several filmmakers from Yogyakarta have had their works screened at reputable international film festivals, fuelled by their involvement in film communities. Given the lack of cinema halls in smaller cities, especially in the early 2000s, such communities have played a particularly important role in developing Indonesian cinema culture and its aesthetics. Maintaining them, thus, is necessary to create a diverse cinema culture in multicultural Indonesia.

Such issues were not, however, touched upon by BEKRAF's policies, which focused mostly on expanding commercial filmmaking at the regional level, with the promise of stimulating further economic growth. The establishment of local film communities, as promoted by BEKRAF, is intended to accelerate economic growth. In BEKRAF's words:

"KFD have significant potential for increasing regional income, as well as accelerating economic growth through local filmmaking. Therefore, KFD are designed as profit-oriented activities to increase regional income, something that has not been optimally absorbed" (BEKRAF, 2017: 15).

This focus on the commercial aspects of film communities could exacerbate the film exhibition gaps in Indonesia's larger and smaller cities.

Findings

Several issues have been identified that should be addressed before targeting the core issues related to the Indonesian film industry and its current economic capacity. The lack of comprehensive data will be discussed, as it has been a hindrance in obtaining a better understanding of Indonesia's film industry. To best illustrate the difficulty getting reliable and comprehensive data, discussion will focus on using an integrated box office counting system as a basis for data collection and making said system available to the public. After discussing these issues, focus will be given to the current state of the Indonesian film industry and its economic capacity since the publication of the Oxford Economics report in 2012. Several findings will be highlighted: the slow growth of the secondary film market; the link between film and other creative industry sectors; the broader impact of film (on tourism, productivity, and human resources); and the cultural impact of film.

Lack of Comprehensive Data

Regarding film's estimated contribution to Indonesia's GDP, it is apparent that BEKRAF and Statistics Indonesia (BPS) have not concerned themselves with making data available to the public. Indeed, BEKRAF, a relatively newly-established agency, was expected to prove its ability to stimulate growth within the creative economy sector (see *Pelakubisnis.com*, 2018). The significance of data—as well as its public availability—has been acknowledged by the government, the business sector, and film stakeholders in general, and indeed are recognized in the 2009 Film Law. The lack of data, especially on audiences and ticket sales, has been recognised by industry practitioners as a major issue; many business actors are not willing to provide government agencies or members of the public with access to data regarding actual ticket sales.

The 2009 Film Law instructs producers to notify the Ministry when they will begin shooting a film, and the Ministry subsequently publishes data based on said notifications (Film Law: Article 17). However, many producers fail to comply, and as such PUSBANG Film—the government agency responsible for this matter—cannot produce the data necessary for publication. This explains why the agency has had to proactively access producers' websites and social media pages to obtain the necessary data for its 2017 report. As it notes:

"The existence of an integrated Indonesian film database that is managed officially by the government is not yet available, even though several government institutions have started to conduct film data" (PUSBANG Film Report, 2017: 4).

Several state institutions, public initiatives, and private entities have collected data about Indonesian cinema. As stated in the same report:

"For example, Statistics Indonesia (BPS), through the Information and Communication Company Survey of 2014, recorded cinemas in Indonesia; the Censorship Agency (LSF), meanwhile, recorded films that had escaped censorship. Non-governmental institutions have also collected data on Indonesian films; for example, *filmindonesia.or.id* records films, cinemas, and film audiences in Indonesia. However, the breadth of data distribution, as well as the variety of terminologies and data collection strategies used, often makes it difficult for stakeholders to utilise these data" (*ibid*).

For its research on the current state of the Indonesian film industry, PUSBANG Film collected data about feature-length films produced in Indonesia through several channels (2017: 6–7): notifications from producers (as required by law), censorship agencies, producers' websites, and social media pages. This highlights the lack of a centralised data system for the Indonesian film industry that can be readily accessed by the public.

Elsewhere in the 2009 Film Law, exhibitors are required to collect data regarding film viewership, and the government is obliged to regularly publish these numbers (Film Law: Article 33). However, as will be explained below, exhibitors do not comply with the law, and thus no such data are available for government publication.

The importance of data and data integration is also recognised by the 2017 Cultural Advancement Law, which requires the formation of integrated data centres that cover all cultural activities—including film (Cultural Advancement Law: Article 15). Such data centres would collect up-to-date data from local and national agencies, then make said data available to the public. The law mentions that such data

centres should be hierarchical, being located at the city/regency level, provincial level, and national level. Upon implementation, such a model would enable the creation of an integrated database regarding ticket sales (per title) based on taxation (using entertainment tax or development tax, both of which fall under local governments' purview).

Box office earnings

Box office earnings have long been subject to debate in the Indonesian film industry, one between the public's need for reliable and verifiable and industry's need to protect trade secrets. Thus far, the most comprehensive data on box office earnings is provided by filmindonesia.or.id, a private initiative established by the senior journalist JB Kristanto and later supported by the Konfiden Foundation, a community-based film and media activism organisation. Rather than the public initiative designated by the film law, this not-for-profit initiative is private, with minimal government support. To date, filmindonesia.or.id has only been able to compile data on tickets sold for Indonesian films released in commercial cinema. Data are collected from the voluntary reports of cinema chains, i.e. XXI Group and Blitzmegaplex (now CGV), as well as from the Film Producers' Association (PPI), from individual producers, and from other sources (see filmindonesia.or.id). To determine gross revenue, filmindonesia.or.id provides estimates based on average ticket prices. This method is far from perfect, as no verification methods are available (Interview, Alex Sihar, December 2019).

To address this issue, an integrated box office system (IBOS) that provides real-time data on ticket sales has been proposed. Using such a system, the direct economic impacts of film (in both its basic and quotidian sense) could be calculated (interview, Alex Sihar, 2019). Such a system would also contribute significantly to planning and decision-making in the film industry, as well as to the development of a healthy industry in general (See Imanjaya and Ghasela, 2016). However, the proposal has been controversial and faced heavy resistance from the industry. Chand Parvez, a producer at Starvision (a major production house) and the leader of BPI, was quoted as saying that IBOS would cause more harm than good, and that available data was sufficient even without such a system (see Media Indonesia, 2017). Resistance was also strong in BEKRAF, which issued a statement that IBOS should not be implemented as it might harm the film industry (ibid). Such controversy and resistance show the major obstacles plaguing the collection and publication of data, even when using it to measure film's economic impact (especially at the micro level).

Film distribution

Film's main economic impact lies in its distribution, especially given that films reach audiences in different settings using different platforms. The increased number of screens in Indonesia has found that audiences have increased significantly, from around 17 million in 2012–2016 to 40–50 million in 2018–2019. As a result, many titles have broken the psychological barrier of one million tickets sold, and several have sold more than six million tickets; presently, *Warkop DKI Reborn* (2016) holds the record for most tickets sold (6,858,616 tickets sold), followed by *Dilan 1990* (2018) (6,315,664 tickets sold). For comparison, the top grossing foreign film in Indonesia during this period was *Avengers: End Game* (2019), which earned USD 34,774,278 (Box Office Mojo, 2019). Assuming an average price of IDR 40,000 per ticket (filmindonesia.or.id), and using an exchange rate of IDR 15,187 per USD 1, it may be estimated that *Avengers: End Game* sold 13.2 million tickets in Indonesia. This shows that, even though domestic films have increased their market share in Indonesia by 30% in recent years (BBC Indonesia, 2019), foreign films—especially ones made in Hollywood—continue to dominate.

At the same time, even as market shares have increased, Indonesian films have shorter life cycles due to the lack of movie theatres dedicated to lower-class audiences; for comparison, in the 1980s, due to the stratified structure of cinemas, a single film could remain in theatrical distribution for more than a year (Sasono et al., 2012). As mentioned above, the exhibition business today is dominated by A-class cinemas that target upper- and middle-class audiences. Films of diverse quality must compete in similar settings, without any second cinema window. During the 1980s, such a window had been provided by the second- and third-rate movie theatres located in suburban and rural areas, which provided a means of extending films' circulation even after first-class audiences became disinterested. In such second- and third-rate movie theatres, films could reach new audiences and increase their revenues, and thus potentially making their life-cycle for years. Today, however, new films have only a single theatrical platform: one of the major chains (the aforementioned XXI Group, CGV, or Cinemaxx). Films open on Thursdays, and continue screening into the following week(s) if they perform well. Once a film is no

longer performing satisfactorily, with low weekend viewership, its theatrical screening will end immediately. As a result, filmmakers have sought to Indonesian film fans to watch domestic productions on Thursday (*#kamiskebioskop*, or Thursday to the cinema), thereby giving cinema chains a reason to continue screening these films (Puspa, 2017).

Some films, especially smaller "independent" productions, have sought to reach new audiences through road shows in non-theatrical settings, in small independent movie houses such as Kineforum (capacity: 45 seats) and Kinosaurus (capacity: 30 seats), and on campuses. One film producer, Ifa Isfanyah, has promoted such alternative models (Yustriani and Rahman, 2019); however, for larger productions, these models are not reliable, as they yield minimal returns.

Free-to-air television stations were once a lucrative channel for feature-length films, enabling them to reach fresh audiences. Results varied. In the early 2000s, a recent film could earn between IDR 400 million and IDR 1 billion for a one-year screening contract (as seen in the example of *Jelangkung*). In contrast, the *Warkop* comedies produced in the 1980s have been televised frequently, based on a one-off payment, without new royalties being paid (Khoiri, 2016).² However, in recent years, films have not been able to receive similar amounts.

Furthermore, the main channels for post-theatrical screening are no longer free-to-air television stations, but rather over-the-top (OTT) services that deliver films and television shows directly to users directly through their digital devices. In 2018, OTT services in Indonesia had a market value of USD 213 million; it was projected to reach USD 1,502 million by 2026. Key players include Catchplay, HOOQ, iFlix, Mola TV, PT Media Nusantara Citra Tbk. (MNC Media), Netflix Indonesia, PT Telekomunikasi Selular (Telkomsel) PT Telekomunikasi Indonesia (Telkom Indonesia), Vidio.com, and Viu (Rake and Baul, n.d.). Less prominent is Flik, a channel dedicated to older Indonesian films that has been perceived as enabling Indonesian films to reach audiences long after their first theatrical release (Harahap, 2016).

These OTT services, especially the global brand Netflix, have been subjected to a fierce tug-of-war within the archipelago. These services are considered to be in direct competition with a state-owned telecommunication company, Telkomsel, which owns its own movie streaming service and acts as an internet service provider. Telkomsel, with 167 million subscribers in 2019 (CNBC, 2019), has long blocked Netflix from its services. Another state-owned telecommunication company, Telkom, has also been inimical to Netflix, calling the company arrogant and unwilling to understand Indonesian regulations (Detik, 2018). Such attitudes have been supported by the Ministry of Telecommunication and Information, which has condemned Netflix and requested that the company produce more Indonesian content (The Jakarta Post, 2020). Conversely, the Ministry of Education has sought to collaborate with Netflix to develop the talents of Indonesian filmmakers. The company has also acquired and screened original Indonesian content, including Timo Tjahjanto's *The Night Comes for Us* (2018).

Also problematic is the fact that foreign-owned OTT companies, such as Netflix, have not paid taxes in Indonesia since 2016, lacking any Indonesian legal entity (kontan.com, 2020). Many companies follow market mechanisms, rather than be heavily regulated in ways that favour local companies. As such, Netflix and other foreign-owned OTT companies (such as iFlix) will remain the subject of extensive debate Indonesia. The is one of the most important items in the media convergence bill that is being considered by Indonesian parliament.

Another distribution channel, albeit no longer prominent, is DVD sales. Despite being less lucrative than TV and OTT, DVD sales once dominated the market and were perceived by filmmakers as a source of additional, unexpected income. DVD rights for a successful film could be sold for up to IDR 150 million. However, piracy has killed the industry. In 2014, President of the Indonesian Lawyers Congress (KAI) Indra Sahnun Lubis described DVD piracy as costing the country IDR 5 billion per annum (Tribun News, 2014).

Link to other creative sectors

As mentioned above, film is viewed as promoting growth among other creative industry sectors or subsectors (Beritasatu.com, 2015), and thus having a multiplier effect (Warta Ekonomi, 2019). As an example of the link between film and tourism, the case of Laskar Pelangi and its effect on domestic tourism in Belitung has been widely cited; it is discussed further in one of the chapters of this volume.

² This shows that, previously, Indonesian film producers were unfamiliar with the intellectual property rights-based business model.

Other sectors that are well-known to be associated with film are music and fashion, both of which are detailed in specific chapters in this volume.

Even though films with culinary themes have only recently drawn filmmakers' attention, film is also regarded as able to promote Indonesian cuisine abroad. Examples of films dealing with culinary subject include *Tabula Rasa* (Adriyanto Dewo, 2014), *Filosofi Kopi* (Angga D. Sasongko, 2015) and *Aruna and Her Palate* (Edwin, 2018). The first of these, *Tabula Rasa*, received a sponsorship deal with a Minang restaurant before production, and follows the trials and tribulations of such a restaurant (Eka, 2014). This film was invited to the Sofia International Film Festival in Bulgaria in 2018, four years after its release, both due to its aesthetic value and its promotion of Indonesian cuisine and tourism. Viewers were offered samples of *rendang* (harnas.com, 2018), a main staple of a Minang restaurants. *Filosofi Kopi*, meanwhile, was invited to London's South Social Film Festival, which is well known for its link to international culinary culture (southsocialfilmfestival.com). The film was screened along with examples of foods considered iconic of Indonesia: Sumatran coffee, an Indonesian-style buffet, sesame noodles, and cucumber salad (South Social Film Festival, 2015). *Aruna and Her Palate*, finally, was screened in a special section on cuisine at the 2018 Berlinale Film Festival. The Indonesian delegation, supported by BEKRAF, presented the film so "audience members will be given the opportunity to experience an Indonesian culinary adventure beyond the screen, as they will be served a five-course Indonesian meal inspired by the movie" (The Jakarta Post, 2019). It is difficult to understand the impact of these films, as there are no reports—quantitative, qualitative, or even anecdotal—regarding the extent to which they have improved recognition of Indonesian cuisine among festival audiences or the general public, let alone these films' impact on the sale of Indonesian foodstuffs outside the country. Nevertheless, these examples illustrate film's potential to promote certain foods and culinary lifestyles. Also highlighting the link between film and other creative economy sectors is the copyright-based business model, which has only been recently developed. Some filmmakers have developed films beyond their narrative elements, turning them into brands or "content". Perhaps the most telling example of this model is *Filosofi Kopi*, which was transformed into a brand by its director-producer, Angga Sasongko, who added narrative elements to a collection of essays written by Dewi "Dee" Lestari. Sasongko also established a café with the same name with the film, and it is not excessive to view the film as a glorified advertisement for this café, which has subsequently become one of the hottest spots for coffee lovers in Jakarta. *Filosofi Kopi* could not be considered as a box office success; it sold only 231,339 tickets (Hens, 2017), far below the psychological threshold of one million ticket sales. Nevertheless, it was developed into a brand, with the intent of creating a "cinematic universe" akin to *Star Wars*, and a sequel—*Filosofi Kopi 2*—was produced. Although further sequels have yet to be realised as of writing, *Filosofi Kopi* has nevertheless been developed into other formats—web series, radio dramas—and merchandise—clothing and souvenirs (Rosalia, 2017).

Such a model is not entirely new in Indonesia, as many producers have expanded films' characters and narrative element into other areas. However, companies' awareness of their intellectual property rights and incorporation of said rights into a business strategy has not been the dominant model in Indonesia (Adzkie, 2018). A survey conducted by BEKRAF and BPS has found that, of 8.2 million companies in the creative economy sector, only around 902,000 (11%) have intellectual property rights (Situmorang, 2019). The failure of the original Warkop films to receive royalties for decades of television screenings further highlights earlier film business players' limited awareness of their intellectual property rights and the business implications of these rights.

Broader impact of film: Tourism and recognition

More broadly, film is considered to promote a country to external parties, be it to attract tourists (discussed in a chapter in this report) or to increase recognition. Films affect tourism in numerous ways, most directly by promoting particular sites to holiday makers through their images and scenes. Examples include not only *Laskar Pelangi*, already mentioned above as having stimulated tourism in Belitung, but also *Pendekar Tongkat Emas* (*Golden Cane Warrior*, Ifa Isfansyah, 2014), which was sponsored by a travel agent to promote tourism destinations in Sumba (Subiyanto, 2014).

Rather than promote specific tourist destinations, films can also highlight a country or region in general. Moreover, by depicting scenery and cultural practices, films can also generate broader interest in countries and their offerings (Oxford Economics, 2012: 66). In the case of Indonesian cinema, the impact is most strongly felt amongst domestic holiday makers; foreign tourists are little affected, as Indonesian films (i.e. films made by Indonesian companies in Indonesia) have yet to attract global

attention; likewise, their effect on audiences in film festivals³ or Indonesian diaspora film screenings⁴ has yet to be quantified. Tourist destinations such as Bali do not really need to be promoted by Indonesian films abroad, as they are already famous—arguably more so than Indonesia—among holiday makers. Although Hollywood films such as *Eat Pray Love* (Elizabeth Gilbert, 2010), starring Hollywood royalty Julia Roberts, might promote Bali, this film is not an Indonesian film, and thus could not be considered part of the core Indonesian film industry.

Another possibility is for films to turn their creative force into "brands", as done by the United Kingdom with the opening ceremony of the 2012 Olympic Games, which was directed by filmmaker Danny Boyle. This demonstrates that the creative forces behind film can play an important role in showcasing a country (Oxford Economics, 2012: 44). In an Indonesian context, branding has yet to reach that level, as Indonesian filmmakers have not reached a level that reaches beyond their own industry. However, the potential to produce a creative force that can be transferred into other industries and areas is tangible, and could be considered one direction for policy development.

At the same time, films have the power to raise awareness of certain consumer goods and products, and this might increase the popularity and sales of famous/well-known products from a country. A clear example comes from the United Kingdom, where the James Bond films have promoted the high-end automobile industry by using Aston Martin, a domestic automotive manufacturer, as a state-of-the-art vehicle capable of tackling the world's worst villains. In Indonesia, such product placement has yet to have such international impact, especially given differences in the economic model. There are no famous Indonesian brands abroad, and no Indonesian films have received international attention. Without potential foreign buyers, product placement works only affects local/domestic audiences. However in the long run, such a strategy may potentially promote certain products that are already associated with Indonesia, such as coffee and coffee products.

Cultural impact

Outside its economic value, film lays the foundation for the formation of identity in general. In the United Kingdom, a report by HM Treasury (quoted in Oxford Economics, 2012: 75) asserted the importance of film's double role in shaping British identity. At home, films can explore the nation's diversity; abroad, films are part of the dissemination of the British culture. HM Treasury states:

"Cinematic film provides a universal and readily accessible medium for the expression and representation of British culture and national identity. Films can help reflect, explore and challenge our diverse history, cultural beliefs and shared values. In doing so, the best British films not only help us to reach a better shared understanding of Britain and its place in the world, but are also instrumental in spreading awareness and appreciation of British culture around the world. As such, British films are an important part of our cultural heritage and a significant channel for the continuing expression and dissemination of British culture." (HM Treasury in Oxford Economics, 2012: 75)

The main challenge for Indonesian film is quite different: to establish Indonesian films as the main staples for Indonesian filmgoers. The slogan *menjadi tuan rumah di negeri sendiri* (being the lord of one's own house) has been used frequently by filmmakers since the 1980s, especially as Hollywood films have been prioritised by major cinema chains. One of the main questions asked by Indonesian filmmakers is: are Indonesian audiences willing to pay the same amount to watch Indonesian films as they are to watch Hollywood films?

Recently, as mentioned above in the section about film distribution, some Indonesian film have outperformed Hollywood films released at the same time. This may not be the first time; there are many anecdotes about the success of Usmar Ismail's *Tiga Dara* or the *Jaka Sembung* series, but records of audiences, distribution venues, promotion strategies, etc. are not readily available for analysis.

³ These include both 'prestigious' and 'regular' international film festivals held in cities around the world, including the Cannes Film Festival, Berlinale, Venice Film Festival, IFFR Rotterdam, Sundance, etc.

⁴ Defined as screenings of Indonesian films by the Indonesian diaspora to promote Indonesian cinema and culture. In some major cities, such activities are considered part of cultural diplomacy, and thus supported by the Indonesian mission in the host country.

The issue of Indonesian films' box office performance when in direct competition with Hollywood films requires a separate, thorough investigation. This would be a timely subject, especially since the latest survey—conducted by Saiful Muzani Research Centre (SMRC) and released in 2020—found that Indonesian films draw larger domestic audiences than foreign films (Gandhawangi, 2020). A more detailed investigation of these survey results should be done, identifying individual films (including their genre, when and where they were released, how long they were screened, and what marketing tools were used) to develop better film production and release strategies.

In the HM Treasury statement quoted above, it is mentioned that "Films can help reflect, explore and challenge our diverse history, cultural beliefs and shared values". This is particularly relevant in Indonesia, a nation that began major political reform in 1998 and continues to struggle with diversity, varied cultural beliefs, and shared values. At the political level, the nation is still struggling with ideas related to nation-building, the social and political stigmatisation of minorities, and other fundamental basic rights. Exploring those challenges is far beyond the scope of this report and should be done, again, in a separate investigation. At this stage, such a study would be best served by cataloguing scholarly research on the wider social and cultural impacts of Indonesian films. Such a catalogue might be very useful for creating a list of films that can be used to stimulate discussion or to educate audiences about delicate subjects.

CONCLUSION

Quantifying the Indonesian film industry, to date, has only been possible at the macro-level using predictions and estimates, rather than data generated from actual sales and distribution and exhibition maps. Such macro-level measurements happen to fit into the development strategies advocated by the Indonesian Creative Agency (BEKRAF), once the dominant governmental organisation in the creative industry. Although BEKRAF has since been incorporated into the Ministry of Tourism and Creative Economy, its approach might still be considered dominant, as the current administration (under President Joko Widodo) is keen to boost foreign investment in Indonesia, and will likely continue employing a creative economic approach to advance the film industry.

Such an approach might still be a useful means of obtaining macro indicators. At the same time, it could conceal alternative development strategies, especially in the following areas: 1) improving the involvement of film communities in film culture, which could potentially affect films' viewership, production, distribution, and exhibition; 2) measuring the non-economic (i.e. social and cultural) impacts of film, which enables it to play a bigger and more significant role in building shared beliefs and common values; 3) identifying micro-indicators and measurements that could provide a more reliable and accountable basis for quantifying the film, as well as for increasing opportunities for public participation in the process.

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