

## Class Bias in Indonesian's Post-Reformation Film Revival

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### ABSTRACT

This paper describes how the Indonesian film industry has experienced a revival to counter Hollywood dominance since the beginning of the Reformation Era in the 2000s. However, conditions that hinder the growth of the Indonesian film industry are mainly due to the concentration of movie theatres and film screens in big cities. Indonesian films are predominantly consumed by groups from the upper socioeconomic levels and ignored by the middle and lower economic strata. This article seeks to portray whether the movement against Hollywood dominance would be effective if Indonesian films were only directed at this particular audience segment. To analyse the development of the Indonesian film industry in the post-reformation era (2000-current), the authors used a nationwide survey from Saiful Mujani Research and Consulting, conducted from August 31 to September 9, 2019, shortly before the COVID-19 Pandemic hit globally. To corroborate the survey's findings, the authors also distributed a closed questionnaire to 100 students at Undergraduate Program in Communication, Universitas Indonesia, and followed this with in-depth interviews with several students. The authors seek to study the revival of Indonesian films despite the decade-long dominance of Hollywood films and, recently, South Korean films. The research question proposed in this paper is: Can Indonesia break away from Hollywood's dominance? For this reason, this research focuses on the availability and modality of Indonesian market-targeted millennial and post-millennial film audiences to support the revival of the national film industry to compete with the dominance of Hollywood films.

**Keywords:** *Class bias, Indonesian films' revival, taste culture, movie theaters, Hollywood films.*

### INTRODUCTION

The Indonesian film industry has experienced a revival since the beginning of the Reformation Era in the 2000s to counter Hollywood dominance (van Heeren, 2014; Hanan, 2017, 2021; Barker, 2019; Armando, 2020; Gandhawangi, 2020a, 2020b). However, due to the concentration of movie theaters in big cities, Indonesian films are predominantly consumed by groups from the upper socioeconomic levels and ignored by the middle to lower economic strata. This article seeks to portray whether the movement against Hollywood dominance would be effective if Indonesian films were only directed to this particular audience segment. Before COVID-19 hit in 2019, the national film industry achieved the highest growth in national film history (Rahman et al., 2021). In 2019, 53 million national movie tickets were sold, with 129 films circulating – this was a considerable improvement from previous years. In 2014, 106 films were released, with new ticket sales reaching 16 million. In 2017, 112 films were circulating, with 42 million tickets sold. A new challenge after COVID-19 subsided was

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that about 49% of pre-pandemic moviegoers no longer went to see movies in theatres. From that percentage, about 8% probably did not go to theatres anymore (Lang & Rubin, 2022).

An indicator of the growth of the national film industry is also evident from another milestone achievement - for the first time in Indonesian film history, there are 15 national films whose ticket sales reached more than 1 million. In 2011, there was only a single national film with ticket sales of more than 1 million. In 2015, only three films were in that category. Surprisingly, the national film movement accelerated after that, so in 2019, there were 15 films with ticket sales of more than one million (CNN Indonesia, 2019, 2022; Armando, 2020; Shackleton, 2022).

This article seeks to study the resurgence of Indonesian film industry, especially after the decade-long dominance of Hollywood films in Indonesia and other parts of the world. For the record, data regarding ticket sales for Hollywood films in Indonesia has yet to be available (Sasono, 2022). Therefore, the impression of Hollywood's dominance within the Indonesian film landscape is obtained from observations of displayed films in several Indonesian cinemas, most of which were observed in big cities in Indonesia, such as Jakarta, Bandung, Surabaya, Denpasar and Medan.

The research question proposed in this paper is: Can Indonesia break away from Hollywood's dominance? For this reason, this research will focus on the availability and modality of Indonesian film audiences to support the revival of the national film industry to compete with the perceived dominance of Hollywood films.

#### RESEARCH BACKGROUND

Of all the varieties of mass media, the global film industry is most strongly characterized by the dominance of United States (US) products in almost all countries (Hill & Kawashima, 2016; Moody, 2017; McKenzie, 2023). There are very few countries (outside of communist or reclusive Islamic countries) that have been commonly noted as countries whose cinema screens are not dominated by Hollywood movies. The most prominent is India, which is now followed by China and South Korea (Li et al., 2022). Beyond that, cinema screens in their respective countries are practically dominated by Hollywood films (McKenzie, 2023).

So strong is the dominance of US films that many researchers conclude that "Movies Are American" (Kim & Brunn-Bevel, 2020; Chen, 2023). Similarly, Carlos Diegues, a figure in Brazil's New Cinema movement, stated in several interviews that every country in the world has two types of national feature films, namely films from one's own country and the American cinema (Mayorga, 2018). The growth of Hollywood film dominance has strengthened with the development of new media outlets in recent decades, especially pay television and video streaming services, with all its ups and downs dynamics (Herbert et al., 2019; Nugraheni, 2021; Andrews, 2022; Sihombing et al., 2022; Brookey et al., 2023).

Movies are considered important due to several factors. *First*, the economic value of film industry products is very high (Hennig-Thurau et al., 2021). Hollywood blockbusters can bring tremendous income to the US, which can be seen in the list of films in the world with the highest ticket income (Liu, 2021). The list of films that are included in the highest ranking are Hollywood films. The top five films to gross more than \$2 billion each were the 2009's *Avatar* (\$2.8 billion), the 2019's *Avengers: End Game* (\$2.7 billion), the 1997's *Titanic* (\$2.2 billion), the 2015's *Star Wars: The Force Awakens* (\$2 billion) and the 2018's *Avengers: The Infinity War* (\$2 billion) (BoxofficeMojo, 2021).

However, it is crucial to note that the revenue from tickets in the international market of these films is greater than the income from domestic US tickets. For example, domestic ticket revenue for *Avatar* (2009) was only 760 million USD, *Avengers: End Game* (2019) 858 million USD, *Titanic* (1997) 659 million USD, *Star Wars: The Force Awakens* (2015) 936 million USD, and *Avengers: The Infinity War* (2018) 678 million USD. This data shows that only 30% of the total income of these blockbuster films was obtained from the domestic market. In comparison, the other 70% comes from the international market, including the Indonesian market with 260 million inhabitants. In this case, concern for Hollywood's dominance refers primarily to the trade imbalance between countries (Chase, 2019; Hennig-Thurau, Ravid, & Sorenson, 2021).

The authors want to remind the readers of critical theories about media domination and cultural domination from the perspective of cultural imperialism, as introduced in 1971 by Johan Galtung, one of the earliest scholars to demonstrate the importance of 'cultural colonization' as an essential part of 'structural imperialism.' Galtung believed that the world consisted of centre and periphery countries. The centre countries will continue to exploit peripheral countries as they did in past political and military occupations. According to Galtung, for covert exploitation to survive, there must be "cooperation" between the centre at the Centre and the centre at the Periphery. In this respect, the mechanism of 'penetration' is a decisive factor (Milan, 2020).

The basic idea of penetration is that the Centre state penetrates "under the skin" of the Periphery state by building a bridgehead in the periphery state. As the centre of the Periphery, the so-called "bridgehead" serves a crucial role in the overall structure of imperialism. In the context of this bridgehead construction, international information flows will be decisive. Within this schematic construction, as Galtung would agree, "the process of capital accumulation and power relations and imbalances in the geopolitical landscape can themselves be seen as forms of structural violence insofar as periphery regions or persons are exploited in order to ensure the status quo for more dominant, powerful actors" (Peterson, 2014, p. 6).

In line with Galtung, Herbert Schiller (in Fuchs, 2020) also saw the importance of mass media as a necessary means of capital accumulation by Western industrialists. Mass media is essential to creating common values and assumptions, especially among the elites of these countries. Schiller saw that information and communication would become vital components of the expansion of the American empire. Through constant information into the elite ranks of a country, there will be what he calls a 'cultural takeover'.

Nevertheless, Schiller revised his previous argument of the so-called 'cultural takeover' in the context of the rise of neoliberal capitalism and the new imperialism. As early as 1991, Schiller foresaw how "transnational corporations globalise the capitalist model, profit making, capital accumulation, privatisation (of communications and other services), inequality, advertising, cultural sponsorship, public relations, and consumerism" (Fuchs, 2020). In other words, the 'cultural takeover' spills onto the landscape of everyday realities, confirming what Fuchs (2020) termed "the authoritarian economic organisation of information based on the class character of communication and knowledge production... (which) is in control of the means of communication" (Fuchs, 2020).

Hollywood's dominance can be seen both in its economic and ideological value. Therefore, many countries view this dominance as an undesirable condition. Resistance to Hollywood dominance is found in many countries and has been referred to as “counter-flow” in recent decades (Oh & Nishime, 2019). Several countries are now the source of films imported to countries previously controlled only by Hollywood, for example, Japan, Hong Kong, South Korea, Nigeria, Turkey, and Mexico. While India can be used as an example of a country whose cinema screen has never been dominated by Hollywood (Teo, 2010; Ganti, 2012), South Korea can be used as an example of a country that, through various government policies in recent decades, can escape Hollywood colonialism (Lee & Zhang, 2021).

South Korea is a country that realizes the advantages of the creative economy sector. The country's government has been committed to making South Korea a significant force in the global cultural industry in the last 30 years, when Hollywood still dominated the domestic film market (Jin et al., 2021; McKenzie, 2023). In 1994, Hollywood films still controlled 53% of cinema ticket sales in South Korea. Now, the conditions have reversed. The population of South Korea is only 51 million, but the number of national film tickets sold reached more than 114 million, more significant than foreign films, which were around 105 million.

Moreover, South Korean films are streaming worldwide, and some are competing at prestigious international film festivals (Yoon, 2023). *Parasite* (2019) received many awards at international festivals, including Best Picture at the 2020 Oscars (Yoon, 2023). *Parasite*'s win broke the myth that foreign-language films cannot break through by winning Best Picture at the Academy Awards (Epstein, 2020; Demont-Heinrich, 2022). Its total revenue from worldwide markets reached US\$160 million, with US\$31 million from the US market. Through Netflix, pay television, and cinema chain CGV, audiences in Indonesia can easily access and slowly become fans of South Korean films (Jin et al., 2021; Yoon, 2023, p. 46). What has happened with the rise of South Korean cinema for the last three decades shows that the continued dominance of Hollywood, as theorized by the school of media imperialism, can be broken. The question is, can Indonesia also do it?

## METHODOLOGY

This paper employs various literature about the development of the Indonesian film industry. However, due to the unavailability of data from a national survey that examines the opinions of Indonesian film audiences in more depth through open questions, the authors will refer to two surveys conducted on students at Universitas Indonesia (UI). UI was chosen because it is easy to find young people from various regions with middle- to upper-economic backgrounds. Observations have shown that the majority of viewers of Indonesian films are young people in big cities who can afford relatively expensive tickets (around US\$3) compared to the income of the general public (the regional minimum wage in Jakarta is US\$266,7 per month).

Additionally, movie theatres in Indonesian malls and shopping centres cater primarily to the upper middle class. UI is one of the most prominent universities in Indonesia, whose students come from the upper middle class and from big cities in Indonesia's economic centres. 2019 itself was the last year before the COVID-19 epidemic, which killed people's interest in watching films in movie theatres during 2020–2022. The authors acknowledge that surveys at UI cannot represent the opinions of all film audiences in Indonesia. However, UI data is used as a 'proximity' to the audience's behaviour.

For the primary data, the authors referred to a survey conducted by one of the leading research institutions in Indonesia, Saiful Mujani Research and Consulting (SMRC), from August 31 to September 9, 2019, shortly before the COVID-19 Pandemic hit globally. The authors also conducted a study by distributing a closed questionnaire to 100 students of Undergraduate Program in Communication UI, and did in-depth interviews with several students ( $n = 8$ ) in August 2021.

## RESULTS AND DISCUSSION

The flow of Hollywood films to Indonesia has been ongoing since the beginning of the Indonesian state in 1950s. In that period, films from the US and India have dominated Indonesian cinemas. However, this development stalled in the last years of Soekarno's government, which ended dramatically in 1967. In the early 1960s, Soekarno refused the entry of Hollywood films in line with his anti-American political stance. The national film industry then collapsed, partly due to intense pressure from leftist groups who demanded that films take a social realism approach, which was highly critical of the wheels of capitalism.

Soeharto's government changed that bleak picture. The New Order government revived film in Indonesia and opened the doors to an influx of foreign films: Hollywood, Hong Kong, India, and Europe. However, at that time, there was already an awareness of the importance of protecting the national film industry from unequal competition with imported films (Sasono et al., 2011; Barker, 2019; Hanan, 2021). The New Order government limited the number of foreign films to protect national films, and importers were also required to fund national films. In 1970-1990, film grew as a popular means of entertainment and became the people's entertainment. In 1970, only ten national films were produced in Indonesia, but by 1975, that number had increased to 38 films per year. By 1990, the number of national films had reached 110 per year.

It was precisely in that era that great directors were born, such as Teguh Karya, Sjuman Djaja, Arifin C. Noer, Wahyu Sihombing, Wim Umboh, Nya Abbas Akup, Chaerul Umam, just to name a few. Two of these directors, Sjuman Djaja (1933-1985) and Teguh Karya (1937-2001), received widespread attention and serious study from Southeast Asian film academics because they were both considered successful in packaging their films in such an artistic way that they gained the status of "auteur" while at the same time, showing resistance to Soeharto's highly repressive New Order censorship regime (Hanan & Soehadi, 2020).

In addition, the Indonesian film industry has a relatively high reputation in Asia, as shown by the frequent Indonesian films receiving awards at international film festivals (Sasono, 2011; Barker, 2019; Hanan, 2021). However, national films at that time were not oriented only to elite-class audiences. Watching movies in the cinema was an activity carried out by all economic class circles. The cinema building has various classes, from luxurious cinemas and locations near upscale settlements to simple movie theatres (*bioskop*) with wooden benches located in traditional markets.

Since the 1990s, the film industry has declined, which the following causal factors can explain. The first was the birth of five private television stations in 1990-1993, an important fact given that previously, in Indonesia, there was only one national television station, namely *Televisi Republik Indonesia (TVRI)*. TVRI's broadcast is dominated by news programs, government public relations, and propaganda. The broadcast hours are limited to the

afternoon from 4-11 pm. There is indeed entertainment content, but it is minimal. Once private television stations were born, Indonesians obtained alternative entertainment shows for free. Moreover, because the number has reached five television stations in just a few years, these stations fight for audiences and advertisements by presenting entertainment content from dusk to dawn.

The second development is the presence of videotape that allows audiences to rent films cheap and watch them together at home. The third development is the arrival of satellite dishes that allow viewers to watch television broadcasts from various countries (Armando, 2016). The unintended consequence of these three developments is the reduced appeal of watching movies in theatres. Previously, watching movies in the cinema was a family recreational activity due to limited entertainment media at home. When people can watch free entertainment programs on private television or movies at home using videotape and live broadcasts from foreign television stations that is much more attractive and entertaining than those presented on TVRI, the attraction to watch big-screen films was significantly reduced (Jurriëns, 2016; Kannas et al., 2023; Scott, 2023).

However, as if these three factors were not enough, another factor contributed to the decline of Indonesian cinema, namely the growth of cinema building monopoly under Group 21, a subsidiary of PT Sejahtera Raya Nusantara (Subentra Nusantara). The owner of Group 21 was Sudwikatmono, who is a cousin of President Soeharto. As a movie theatre owner and importer of US films, Group 21 could pressure other theatres to join their group. If they refuse, the theatre would not acquire the rights to screen US films imported by them.

Independent movie theatres will be offered two options: acquisition or management cooperation. 'Management cooperation' refers to a form of cooperation in which the owner of the movie theatres only receives rent every month. In contrast, the management of the movie theatres is fully controlled by Group 21. Through this process, other movie theatres were gradually controlled by Group 21 and they developed a modern cinema theatres format that provides comfort facilities that have never been found in other cinemas, ranging from high-tech sound systems, comfortable seats, air-conditioned rooms, and multiplex formats. Group 21 also determined which films are in circulation, in which regions, and for how long they are shown. Film studios and film producers rely heavily on Group 21. Due to attractiveness considerations, Group 21 generally prioritizes Hollywood and foreign films. National films deemed unfit to attract elite audiences targeted by Group 21 struggled to find alternative cinemas. Watching movies is no longer a people's entertainment activity. Group 21 is not interested in developing movie theatres for low-income people. They set high building standards, impacting expensive ticket prices.

As a result of a combination of these factors, national films are experiencing signs of bankruptcy. By 1992, only 22 films had been produced. In 1993, the annual Indonesian Film Festival was cancelled because there were not enough national films to be judged. Film workers and crew moved from producing films to producing soap operas for private television. In 1998, the New Order government collapsed. The post-1998 era is known as the Reformation Era, in which new governments successively carried out democratization. On one hand, this impacts the state's policy openness to foreign film flow. On the other, an atmosphere full of openness is conducive for the birth of young Indonesian filmmakers.

Indonesian films were revived in the Reformation era. The rise of Indonesian films began with *Petualangan Sherina* (2000), with 1.2 million tickets sold. This success was followed by subsequent hit films like *Jelangkung* (2001), with 1.2 million tickets sold, and *Ada Apa dengan Cinta* (2002), with 2.4 million tickets sold. If the number of films produced can be used to indicate growth, there has been a relatively constant increase in numbers since 1999. In 1999, only four national films were produced. The figure had risen to 85 in 2009 and 131 in 2019. The increase in tickets sold runs parallel with the increasing number of viewers. In 2009, only six films nationwide had ticket sales that surpass 1 million tickets. In 2019, there were 15 films nationwide whose ticket sales exceeded 1 million tickets.

However, beyond the topic of Indonesian film revival, a fundamental character of Indonesian cinema today distinguishes it from conditions in the New Order Era. Indonesian films are no longer mass-consumer products enjoyed by the wider public. Currently, Indonesian films are made for upper socioeconomic class audiences in big cities. Furthermore, this is associated with expanding *bioskop*.

Since the early 2000s, the Subentra Group's monopoly on cinemas has ceased to last, especially after the birth of the 2009 Film Law. There has been a significant change in terms of movie theatres' dominance. PT Subentra still controls two major cinema chains: Studio 21 and Empire XXI. As of 2016, Studio 21 has 98 cinemas, while Empire XXI has 40 cinemas in 31 cities. Each cinema has 4-6 screens/studios, so they have about 865 screens. However, Cineplex XXI is no longer a single-player. In 2006, the CGV Blitz cinema chain operated for the first time in Jakarta and then expanded to other big cities. Furthermore, in 2014, Cinemaxx was also born and expanded its studio to several cities in Indonesia. Cineplex XXI, CGV Blitz, and Cinemaxx are the largest cinema chains in Indonesia now, surpassing several new players, such as New Star Cineplex, Platinum Cineplex, and Movimax, in terms of the number of their total movie theatres.

The number of movie theatres and screens in Indonesia continues to increase. As of December 2018, 343 cinemas and 1,756 screens exist in Indonesia. It represents an increase of about 138% compared to 2012. Although no longer monopolized by one group, cinema screens are not evenly distributed in Indonesia. Around 70 percent of cinemas and screens are on Java Island (Rahman et al., 2021). Movie theatres are only built in big cities. Even in the past decade, cinema screens of the largest cinema chains have been concentrated in luxury shopping malls. The entrance ticket is also expensive compared to the average Indonesian people's income level.

The tendency to build cinemas in shopping centres is not a typical characteristic of the Indonesian film industry. In many countries, movie venues are built in a multi-screen style in malls. As a result, in Indonesia, watching national films in theatres has become increasingly elitist and only takes place in big cities. The lavishness of large cinemas in Indonesia, such as XXI and Blitz Megaplex, located in a newly established Mall of Indonesia (MOI) in September 2008, considerably exudes an air of luxuriousness to attract an upper-class audience and the urban middle-class youth (Barker, 2011, 2019; Heryanto, 2014). In this case, the potential market for national films is not 260 million Indonesians but only around 45 million Indonesians in these big cities. If this number is narrowed to people with economic levels A and B+, the potential viewers will be only 20-25 million. Those with the purchasing power of tickets at a price level that allows movie theatres to operate profitably are indeed economic

circles A and B+. They are people with low 'price sensitivity' in the sense of being affected by price increases. These A-class people can also afford to buy food and drinks sold at costly prices in cinemas, which are currently one of the primary incomes of movie theatres.

This condition of Indonesian cinema has implications for the sociographic character of filmmakers in Indonesia and the themes of the films they produce. In the New Order Era, many leading directors were artists raised in a theatrical tradition that commonly revealed the real-life and the problems of the lower class. In the Reformation Era, young directors from the upper middle economic class had formal filmmaking education backgrounds in film schools in Indonesia and in the US and Europe (Sasono et al., 2011; van Heeren, 2014; Khoo, 2020). The themes they raise tend to be elitist, as well as the idioms used and jokes included. They still present social issues on the big screen. Nevertheless, ordinary people's lives are projected onto the screen in a way that reflects the perspective of the elite. With this condition, there is a strong division. Indonesian films are produced to be marketed to the upper-middle-class audience segment. In contrast, most ordinary people watch lesser-quality entertainment programs, including soap opera series or pay TV on private television stations (Myutel, 2019; Suyanto et al., 2019).

#### SURVEY OF INDONESIAN FILM AUDIENCES

The authors used surveys conducted by Indonesia's leading research institution, Saiful Mujani Research and Consulting (SMRC), to understand more about Indonesian film audiences. SMRC conducted two surveys on Indonesian film audiences. SMRC's first survey is a nationwide survey conducted from August 31 to September 9, 2019, using 1,220 respondents in 44 cities across Indonesia. This survey provided a preliminary overview of the market-targeted millennial and post-millennial Indonesian film audiences.

The survey found that less than 10% of Indonesians watched movies in theatres over the past year. About 9.3% have seen Indonesian films, and 8.2% have watched foreign films. If data from the Central Bureau of Statistics shows that Indonesia's population reaches 270 million, the number of Indonesian viewers who watch in theatres is only 27 million. As a market for the film industry, the potential is quite significant. However, this clearly shows that the market for national films still needs to grow compared to the actual population.

The survey also showed that movie-watching behaviour correlated highly with age, education, and income. In comparison, 41.8% of movie-goers under the age of 21 said that they had watched at least one movie in the past year, compared to 7.5% of those aged 41-55, and only 2.8% of those over the age of 55 said they had seen at least one movie in the past year. The survey's finding shows how unequal the tendency to watch movies between generations in Indonesia is. The chances of those under 21 years old to watch movies in theatres reach three times that of the age group over 41 years.

The finding is similar when viewed from the socioeconomic status. The study showed that only 3.0% of those with the highest primary school education watched movies, while 31.1% of those with the highest college education watched movies, which means a ratio of 1:10. In terms of income, only 4.4% of those who earn below Rp 1.2 million/month claim to watch movies, while 26.3% of those who earn above Rp 4 million/month watch movies. This latest data confirms the spread of movie theatres and screens in Indonesia. The complex dynamics of cinema caused only the elite in Indonesia to have a culture of watching films in theatres.



The second survey is the SMRC survey (1,000 respondents) conducted in December 2019. SMRC focused on millennials and post-millennials (aged 15-38 years) who live in 16 main provinces with relatively high economic levels. Research findings show that 71% of respondents said they had seen a movie at least once in the past year. This data shows that most young people in big cities in Indonesia are potential markets for the film industry.

When analysis of more specific age groupings was conducted, the study again revealed that the age groups most likely to be expected to be moviegoers were those who were still in high school and college. The study showed that 84% of respondents aged 15-22 stated that they watched a movie at least once in the past year, while 70.1% of respondents aged 23-30 years and 54% of respondents aged 31-38 said that during the past year, they watched a movie. Based on the level of education, the data shows that 85.6% of college-educated respondents watched a movie once in theatres in the past year. In comparison, only 40.4% of respondents with elementary school education had similar movie-watching behaviour.

In terms of income, it was revealed that 83.4% of respondents earned more than Rp 4 million/month compared to 64.6% of respondents who earned a maximum of Rp 2 million/month who watched a movie at least once during the past year. The study also reveals interesting findings about the movie-watching behaviour of Indonesian films from millennials and post-millennials. It was revealed that the percentage of those who watch Indonesian films is more than those who watch foreign films. Data shows that 67% of respondents said they had seen Indonesian films in theatres in the past year, while only 55% said they had seen foreign films in the past year.

When the frequency dimensions of the movie-watching were included, the result did not change. There are 40% who stated watching more than three Indonesian films over the past year, while only 32% stated watching more than three foreign films. When the age group was lowered, it was also found that the tendency to watch national films was considerably strong at 15-22 compared to older age groups. About 81% aged 15-22 said they watched national films, while only 47.8% of those aged 31-38 watched national films. Even this youngest age group (15-22 years) tends to watch more national films than foreign films. The comparison is that 81% watched national films while only 58% watched foreign films. When the age group was lowered in the socio-economic category, it was also found that higher income groups (above Rp 4 million per month) watched more Indonesians than foreign films. The survey found that 78.6% of higher-income respondents watched national films, while only 70.6% watched foreign films.

In SMRC's research, there are also questions about the most preferred film genres. It was revealed that the three most preferred national film genres are comedy (73%), horror (68%), and romance (44.5%). At the same time, the three most preferred foreign film genres are action (67.2%), horror (64.8%), and comedy (52.3%). The data from the survey above shows that young Indonesians in big cities are more interested in watching national films than foreign films. For researchers, this tendency triggers curiosity, especially when the data show that this trend applies to younger ages and those with relatively higher incomes.

Researchers conducted a limited survey of movie-watching behavior in theaters among UI students to understand the phenomena further. Some characteristics of UI students need to be emphasized here. UI is one of the most prominent public universities in Indonesia. The competition to enter UI is fierce, so only those from the best high schools can enter UI.

Inevitably, most UI students come from high socio-economic levels and good-quality educational backgrounds. Researchers suspect differences regarding national and foreign film consumption in this upper-middle group compared to other young groups.

The respondents were 100 first- and second-year students (18-20 years old) at Undergraduate Program in Communication UI. Research shows they are people who like to watch movies in theaters. Before COVID-19, they watched movies an average of 1.9 times each month. They watch more foreign films than Indonesian films. They said they watched an average of 5.2 national and 10.3 foreign films annually. These students also admitted that they preferred Hollywood films to national films. About 92% said they really liked Hollywood movies. While only 65% said they liked/really liked Indonesian films, and 65% said they liked/really liked South Korean films.

When focused only on those who answered 'really liked,' it was found that 63% said they liked Hollywood, 33% liked South Korean, and only 23% liked Indonesian films very much. Nevertheless, they still have the passion to support Indonesian films. 54% of participants said they 'strongly agree' that Indonesians should watch Indonesian films more often (while when combined with those who answered 'agree,' the percentage increased to 95%). In addition, 55% said they 'strongly agree' that Indonesian films continue to improve over time (when combined with those who answered 'agree,' the percentage increased to 92%).

However, they are pessimistic about the ability of Indonesian films to compete with South Korean and Hollywood films. Only 26% said they 'strongly agreed' that Indonesian films could compete with South Korean films in the Indonesian market. Only 23% said they 'strongly agreed' that Indonesian films could compete with Hollywood films in the Indonesian market. Researchers also asked them to name the films they liked the most. The top five films that ranked highest were: *Habibie dan Ainun* (2012), *Laskar Pelangi* (2008), *Nanti Kita Cerita tentang Hari Ini* (2020), *Cek Toko Sebelah* (2016), and *Imperfect* (2019).

While Indonesian films were only undergoing a revival in the first ten years after the reform began, and filmmakers were still looking for formats that had the most captivating chance of attracting audiences, the genres that were developed at that time were horror, slapstick comedy, and sex (Myutel, 2017). At that time, there was an assumption that Indonesian cinema would only survive with contents in the culture category, which was referred to as lower-middle and low culture (Gans, cited in Berger, 2018). It seems that because most of the audience is slowly becoming segmented only among those whom Gans (cited in Berger, 2018) refers to as those with high or upper-middle culture tastes, films that present sex, rough comedy, and traditional horror are no longer welcome.

However, in its development, such singular assumption needed to be revised due to the decay of cultural hierarchies' fixed category resulting in cultural pluralism (Daenekindt & Roose, 2017), the emergent term of *Omnivorousness* in contemporary landscape of cultural taste (de Vries & Reeves, 2022) and the "socially constructed nature of the high culture category in the cultural hierarchy (which) changes over time" (Daenekindt, 2018).

This specific film audience's preference reflects a plurality in taste within the framework of advanced cultural industry where cultural tastes might play a role in overcoming or maintaining social inequalities and social boundaries between higher and lower status groups (Meuleman, 2021). It is beyond reasonable doubt that taste expression signifies class position (Paßmann & Schubert, 2021), especially when analysed within the distinction of a cultural elite and an economic elite framework, where each used cultural taste,

and the associated cultural hierarchies, to define themselves and to make themselves distinct from other social groups (Jarness, cited in O'Brien & Ianni, 2022). The five films the students mentioned earlier represent films that cannot be categorized as 'mere pop culture' that are easily digested, repetitive, sensational, trivial, and standardized. Although some are comedy films, they are designed and produced thoughtfully and present issues that are very relevant to society.

Another important finding is that these students are familiar with new media platforms. About 74% subscribed to pay TV and 96% subscribed to video streaming (OTT). This study also revealed that OTT is one media with a potential to build an audience for watching Indonesian films. While only 10% who subscribe to pay TV stated that they often watch Indonesian films through the platform, 34% who subscribe to OTT say they often watch Indonesian films through OTT (Suwanto et al., 2021). The findings align with what the media reports about video streaming services. Some video streamers in Indonesia, such as Disney+ Hotstar and Klik Film, stated that Indonesian films in their video library are watched more than imported films. Disney+ even admitted that Indonesian films such as *Memories of My Body* (2018) and *27 Steps of May* (2018) beat international blockbuster films such as *Aladdin* (2019), *The Lion King* (2019), and *The Avengers: Infinity War* (2018) in the ranking of the most watched films on their platform.

Researchers also asked the respondents some open-ended questions regarding their views on Indonesian films in general. The informants were not respondents in the survey, but they come from a similar socio-economic and age group as the respondents, between 19 and 25 years of age. From the answers obtained, young people have an impression of optimism about the future of Indonesian films. However, they cited several problems that they perceived as hindering the development of Indonesian films, including weakness of story and dialogue, limited government support, weak promotion, limited quality directors and actors, and threats from Hollywood and South Korea.

Among the series of obstacles that received the most attention were the weaknesses of story and dialogue (Jamaluddin et al., 2014), ranging from overly rigid dialogue, unrealistic stories, awkward story logic, predictable stories, shallow portrayal of characters, far-fetched stories, and others. Table 1 below presents excerpts of answers to open questions about Indonesian films from 8 respondents.

Table 1: Quotes of answers from 8 respondents' about Indonesian films

Respondents	The Highlight Quotes of Answers
R1 (19 years)	Why do I like South Korean movies? Because the story is easy to understand, it is relevant, and the characters are similar to Indonesians; they are dramatic but not exaggerated and beautiful. Indonesian writers should follow the Korean style.
R2 (19 years)	Indonesian films do not need to participate in making superhero films. We are already behind with the film technology of developed countries. In fact, it feels forced. It is better (for the film directors and producers) to correct the story. Just present everyday life, like <i>One Day We'll Talk About Today (Nanti Kita Cerita tentang Hari Ini, 2019)</i> . You do not need advanced technology - enough (to emphasize the) dialogue and story.
R3 (19 years)	My friends and I like movies that tell stories about our daily lives. For example, <i>Two Blue Stripes (Dua Garis Biru, 2019)</i> tells about teenage pregnancy, <i>Imperfect (2019)</i> is about fat women, and <i>Check the Store Next Door (Cek Toko Sebelah, 2016)</i> talks about the condition of Chinese people. It is all really related to our lives.

R4 (20 years)	I hope the Indonesian government will be more active in encouraging Indonesian films. I heard that the South Korean government is investing in big numbers to encourage the production of their national films. Why won't our government do it?
R5 (18 years)	One of the problems is that I do not have enough information about accessing quality Indonesian films. Indonesian filmmakers should pay more attention to film promotion through social media.
R6 (18 years)	I am happy with the increasing number of Indonesian films worth watching. However, I'm worried that film producers feel it's better to make a watchable film, even if it's rubbish, rather than a quality film.
R7 (19 years)	My friends and I usually watch lots of Indonesian films. For us, watching Korean films can be on streaming television (over-the-top). When we go to the cinema, we often watch Indonesian films.
R8 (19 years)	I want to support Indonesian films, but I'm often disappointed. Even if the director is famous, his/her film is often below standard. Nevertheless, yeah, okay, it's getting better.

The series of answers to open questions with the students show that they hope that Indonesian films can continue to grow, reflecting on the experience of South Korea. They are also optimistic about the improvement of the quality of Indonesian films. However, at the same time, they consider this development has yet to be accompanied by the commitment and support from the Indonesian government and Indonesian film producers to produce films that are not only oriented towards success in the market.

#### CONCLUSION

The findings in this paper show that the popularity of South Korean wave and the seemingly dominant Hollywood movies in Indonesia do not hinder the revival of Indonesian cinema. After experiencing signs of bankruptcy leading up to the Reformation Era, the Indonesian film industry is already showing signs of serious revival, and the driving factor of this revival mostly comes from millennial and post-millennial film audiences.

It does not mean that the dominance of Hollywood and the South Korean film stream will be easily broken. Hollywood especially has comparative and competitive advantages over the film industry in all countries, so it is exaggerated to imagine the dimming popularity of Hollywood films in Indonesia. Hollywood will continue to produce blockbuster films that, when circulated, will dominate cinema screens in Indonesia. However, that dominance will not last all year. Indonesian films have many opportunities to balance Hollywood's presence in the national film market.

The most important thing for the revival of Indonesian films is the presence of large audiences who will become ticket buyers in cinemas that continue to be built in Indonesia. Studies cited and conducted by researchers at UI show that young Indonesians are among those who have great potential to become the target of a national film market. SMRC's research shows that it is not true that young people in Indonesia prefer foreign films (Hollywood) over Indonesian films.

However, it must be noted that the Indonesian film industry market has yet to be developed. Currently, only 10% of Indonesians are moviegoers in theaters. One of the main obstacles to reach a wider audience is the availability of movie theaters and movie screens. The construction of cinema halls is concentrated in major cities on Java Island, film screenings are centered in luxury shopping centers and watching movies is an elitist activity.

As might be expected, the emergence of new movie-watching platforms will open alternative outlets for national films. Nevertheless, cinema ticket sales will still be the primary source of income. In this condition, the key to the revival of Indonesian films is the upper-middle-class audience in big cities. Gans' categorization of taste culture can be used to analyze what these audiences like. Gans calls *taste public* as a group of people who have shared aesthetic values. According to him, every cultural content carries built-in educational requirements already formed at homes and schools.

Gans describes that people with high socioeconomic status tend to be in audience groups with two taste cultures: high and upper-middle cultures. The high culture group is characterized by concern about who is the creator of cultural products (film directors) and what the critics' views are about these cultural products (O'Brien, D. & Ianni, 2022). This circle is relatively limited, and they like films that emphasize on content that communicates mood and feeling, communication, introspection, character development, and philosophical-psychological issues. The upper-middle group tends to dislike high culture products, does not like abstract products, but still likes substantive culture. They love so-called 'quality media' and prefer content related to their societal position and role.

These two circles are now potential markets for Indonesian films to resist the dominance of Hollywood and South Korean films. For this reason, filmmakers who do not just present products that are popular and easy to digest are needed. These high-culture and upper-middle culture circles are those who have expectations for more than just a light spectacle. They do not demand sophisticated technology but relatable films, especially with stories and dialogues that align with their aesthetic standards (Mohd Erman, 2021).

The concentration on upper-middle-class audiences in big cities can be seen as ignoring the market potential that can be developed (Sukmono et al., 2019; Wijaya et al., 2022; Muchransyah, 2023). The data shows that only 10% of Indonesians have watched a cinema film during the past year. Thus, more than 200 million citizens do not watch movies in theaters. This discrepancy is related to Indonesia's uneven distribution of movie theaters and screens.

Logically, adding movie theaters and screens in Indonesia will likely increase income for Hollywood films. However, various surveys that have been cited show that Indonesian audiences are highly interested in watching films with Indonesian directors, stars, and themes. Therefore, increasing movie theaters will likely support Indonesian films' further growth and revival in the following years.

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