THE CURRENT STATE OF LATVIAN CINEMA IN THE STREAMING ERA

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Abstract

The aim of this article is to analyse trends in the production and consumption of Latvian films and the impact of streaming platforms on the Latvian film industry, specifically regarding film financing and distribution within a broader context. Since the emergence of streaming platforms, significant adjustments have occurred in the ways films are financed, distributed, and consumed. This study seeks to map the new conditions affecting Latvian film production, distribution practices, and audience consumption.

Traditionally, film audiences have been assessed through statistical data on cinema attendance; however, there is an increasing need to analyse film audiences more comprehensively, tracking the entire lifecycle of the films – from cinema exhibition to linear television and streaming platforms. How has the introduction of both local and global streaming platforms altered the practices of Latvian cinema? Where is the audience for Latvian films concentrated – within cinemas, or do they prefer viewing on television or streaming services?

By analysing quantitative data on audiences for Latvian films across various platforms collected by the National Film Centre of Latvia, this article offers a broader and more nuanced examination of the lifecycle and audience of national films.

Keywords: *Latvian cinema, streaming platforms, video on demand, audience, series, fiction, cinema attendance*

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Introduction

Technological advancements, along with the rise of the internet and streaming platforms in the 21st century, have profoundly transformed the global film industry, reshaping both film production and distribution practices in Europe and Latvia. Online streaming platforms – such as OTT[1] services (e.g., SVOD, TVOD) – which provide on-demand access to films, have become a pivotal component of the global audiovisual landscape.

Companies operating various types of streaming platforms now integrate functions traditionally kept separate, serving as both film production entities and content distributors. For example, *Netflix*, the leading global media-services provider and production company that launched its streaming service in 2007, began creating its own original content in 2013, starting with the television series *House of Cards* [BBC 2018]. This allows companies managing diverse streaming platforms to distribute films directly to audiences, bypassing cinemas and conventional distribution companies. As a result, the classic film distribution cycle, once confined to theatrical releases and linear television, now encompasses streaming platforms as well. Both global and local streaming platforms have thus emerged as crucial channels for the dissemination of audiovisual content. Nevertheless, the impact of these platforms on national cinema, film distribution practices, and audience engagement remains underexplored and warrants further research.

Scholars suggest that the consumption of film remains under-researched within the main sociological approaches to cultural consumption, and there is a lack of distinction between the various media through which films are consumed, such as streaming platforms, television, and cinema [Hanchard et al. 2019]. However, pandemic has changed this a great deal and increased the interest among researchers [Budanceva & Svirina 2023].

Filmmakers across Europe must contend with the transformative impact of streaming platforms, often referred to as the *Netflix effect*. This term, introduced by McDonald and Smith-Rowsey in *The Netflix Effect: Technology and Entertainment in the 21st Century*, encapsulates not only the influence of *Netflix* as the leading global streaming service but also its role in reshaping film production, distribution, and consumption patterns worldwide. The authors argue that *Netflix* has disrupted

[1] OTT – Over-the-top media service (also known as over-the-top television, refers to a media service offered directly to viewers via the public Internet. SVOD (Subscription based video on demand). SVOD (video on demand) is a type of service where a user enters into a subscription agreement, which will grant the user access to the service type to watch until the user unsubscribes, which means watching with no limits. The best example of an SVOD service is *Netflix*. TVOD (Transactional based video on demand). Transactional (or Transaction) VOD (TVOD) payment amount is based on the content the user watches [Vodlix.com].

traditional distribution and exhibition models, realizing long-predicted scenarios where media content is accessible on-demand across multiple platforms [McDonald & Smith-Rowsey 2016: 2].

This phenomenon has gained even greater relevance following the COVID-19 pandemic, during which film distribution in cinemas was severely curtailed, and streaming platforms solidified their dominance. The pandemic has significantly strengthened the role of streaming platforms, expanding their influence not only in film distribution but also in production and consumption. As a result, many viewers in European countries now prefer to watch films at home via multiple streaming services rather than in theatres [European Audiovisual Observatory 2023/2024].

Recent data from the European Audiovisual Observatory highlights the continued growth of video-on-demand (VOD) services even beyond the peak pandemic years of 2020 and 2021. In 2022, the number of European households subscribing to OTT SVOD services increased by 22.6%, reaching 233 million, with a 23.8% rise in EU27 countries alone [European Audiovisual Observatory 2023/2024]. This trend underscores the enduring impact of the *Netflix effect* on viewing habits and the evolving landscape of audiovisual consumption in Europe. Cinema attendance figures in Europe did not return to pre-pandemic levels in the first post-pandemic years.

> *Despite the lifting of restrictions, in 2022 European cinemagoing continued to face many of the challenges seen during the pandemic, including audience reluctance to return to the cinema. Consequently, cinema attendance in the EU and the UK reached an estimated 656 million admissions in 2022, corresponding to 253 million tickets more than in 2021. While these results represent a 63% increase on the previous year, they remain significantly below pre-pandemic levels, accounting for only 67% of the average ticket sales recorded between 2017 and 2019.* [European Audiovisual Observatory 2023/2024]

European Audiovisual Observatory indicates a growing popularity of streaming services across Europe. For example, in Scandinavian countries, households typically maintain an average of two or more subscriptions to video-on-demand (SVOD) services. However, significant disparities exist between Western European nations and those in Central and Eastern Europe (CEE) regarding subscription penetration. Specifically, Western European countries boast an average of 111.9 SVOD subscriptions per 100 households, whereas CEE countries have a markedly lower average of only 45.7 subscriptions per 100 households. In Latvia, the penetration rate is somewhat higher than the CEE average, with 36 out of every 100 households utilising SVOD services [European Audiovisual Observatory 2023/2024].

According to the European Audiovisual Observatory, Europe hosts approximately 3315 video-on-demand (VOD) services and video-sharing platforms. Notably, on-demand services are predominantly centred around film and television fiction content; for instance, three-quarters of transactional video-on-demand (TVOD) services (73%) and nearly half of all subscription video-on-demand (SVOD) services (46%) in Europe offer film and television programming [Schneeberger 2023].

It can be concluded that Latvian audiences are likely to engage more actively with various streaming services compared to other Central and Eastern European (CEE) countries in accessing the content they offer. The objective of this article, however, is not to analyse the popularity or competitive dynamics of specific streaming services in Latvia, nor their influence within the market. Rather, the focus is on the presence of Latvian films, particularly those that have received public funding, across multiple Latvian streaming platforms. This study primarily examines the availability of Latvian films, particularly those receiving public funding, across multiple Latvian streaming platforms. Additionally, it explores how these platforms influence financing and production within the Latvian film industry. Despite their growing significance, the presence and audience engagement with Latvian films on these platforms and their broader impact on film financing and production remain underexplored.

Streaming platforms curate a mix of films originally produced for theatrical release and content created exclusively for streaming, financed directly by the platforms. In Latvia, films primarily intended for theatrical release are typically funded by the National Cinema Centre and, in rare cases, by the State Culture Capital Foundation, which supports the production of low-budget films. However, since 2020, there have been exceptions: six multi-episode films or high-quality series funded by European foundations and coordinated by the National Film Centre were specifically produced for distribution on streaming platforms and television. This topic will be examined in greater detail in the following sections.

The topics of film financing and distribution on streaming platforms represent a new and complex area of research, presenting significant challenges, particularly due to the scarcity of publicly available and open data. For instance, no information is available regarding the contribution of local commercial streaming platforms to the production and support of audiovisual content, nor is there data on the popularity of specific films on streaming platforms.

This study will utilise quantitative data collected by the National Film Centre to explore shifts in both film production practices, distribution and consumption patterns. It will expand beyond the traditional cinema setting to examine the broader life cycle of films, including their distribution and consumption across various platforms. Nevertheless, the quantitative data collected by the National Film Centre in 2024 – detailing Latvian film audiences on streaming platforms and linear TV – provides valuable insights into emerging consumption trends. However, its use is subject to certain restrictions, as it can only be publicly shared in aggregated form.

To gain a deeper understanding of how video-on-demand services – streaming platforms manage Latvian films, closed interviews were conducted with representatives from two prominent services, *Tet* and *LMT*, both of which are registered in the National Electronic Mass Media Council's Register of On-Demand Audiovisual Services [NEPLP; Rietuma 2025; Rietuma 2025]. These interviews offered valuable insights into the platforms' approaches to financing and distributing Latvian films. However, it is important to note that the data collected reflect broader trends rather than providing a comprehensive analysis of this complex issue. The study does not include data from the *Go3* platform, which is part of the *All Media Group* alongside the TV channel *TV3* and *TV3Play*, as *Go3* is not registered in Latvia as a video-on-demand service and operates from Estonia. Cross-border video-on-demand services fall outside the scope of this study. This study also does not examine the financial contribution of Latvian TV, the public media, to the film industry due to the lack of publicly available data.

The presence of Latvian films on streaming platforms

The introduction of various streaming services into our daily lives has profoundly impacted the film industry. In Latvia, as in many other countries, this influence is evident in the financing, distribution, and exhibition of films.

In examining Latvian cinema within the streaming era, it is essential to focus on the distribution of Latvian films through local streaming platforms. This focus is warranted by the limited or non-existent engagement of global streaming services, such as *Netflix*, with the local film industries of the Baltic states, including Latvia. Several factors contribute to this gap, one of which is the relatively small market size.

Where do Latvian cinema and film production stand within the global streaming landscape? With rare exceptions, it remains largely isolated in the domestic market, as global streaming platforms seldom include films from Latvia – or the Baltic states – in their catalogues. Although companies like *HBO* have acquired numerous Latvian films, primarily fiction, platforms such as *Netflix* have yet to feature any Latvian films as of early 2025[2]. In January 2025, the Latvian company *Tet* announced a collaboration with *Netflix* to introduce new subscription options – program packages that offer a mix of content, including *Tet's* original productions, popular TV channels, HBO programming, and *Netflix's* extensive library of films and series [Kotian, 2025]. Some days later, another Latvian telecommunication company, *LMT*, announced a similar move [LMT 2005].

[2] Although some films have been purchased for the *Netflix* catalogue, they are not available on *Netflix* in Latvia. For example, *Netflix* has acquired the rights to *Jelgava 94* (2019) [Rieksta 2019].

However, it is important to note that this service bundle is designed to provide a more affordable alternative for subscribers compared to purchasing each service individually. Yet, it does not include Latvian films in the *Netflix* catalogue. Furthermore, global streaming services do not currently commission productions within Latvia.

Both leading telecommunications companies in Latvia, *Tet* and *LMT*, also function as streaming platforms. *Tet* created their OTT service *Shortcut* in 2016 and rebranded it as *Tet* TV+ in 2021. *LMT* established the TV and VOD streaming platform *LMT Viedtelevīzija* in 2017. *Go3*, the leading OTT service in the Baltics by *TV3* group, was launched in 2019 [TV3 2024]. A diverse collection of Latvian films is available on the non-commercial platform filmas.lv, maintained by the National Film Centre of Latvia [Filmas.lv]. However, it primarily features classic and restored Latvian films, which are accessible free of charge and do not include commercially active titles. Local streaming platforms offer a diverse selection of Latvian films. As of 31 December 2024, *LMT's* catalogue contains 225 Latvian films, including eight series (fiction). *Tet* SVOD's catalogue features 300 Latvian films, including co-productions, where a Latvian production company is among the minority co-producers, such as co-production with Lithuania *Invisible* [*Nematoma* 2019]. Currently, *Tet TV+* offers the most extensive selection of Latvian cinema, featuring both beloved classics and contemporary productions. Its catalogue encompasses masterpieces by renowned Latvian directors such as Aloizs Brenčs, Varis Brasla, Leonīds Leimanis, Rolands Kalniņš, Roze Stiebra, Jānis Streičs, Juris Podnieks, and Ivars Seleckis, created during the second half of the 20th century before Latvia regained independence in 1991. It also features films produced in independent Latvia, including the recent success of Latvian cinema – the animated film *Flow* (*Straume*, 2024) [Rietuma 2025].

Nearly all recent Latvian films that have received production support from the National Film Centre of Latvia – the primary financing body for films produced by independent producers – eventually become available on major commercial streaming platforms such as *Tet*, *LMT*, and *Go3*, following a period of theatrical distribution, whether brief or extended.

For instance, in 2023, a total of 14 Latvian fiction feature films were released in cinemas. Of these, eight were funded by grants from the National Film Centre, three received support from the State Culture Capital Foundation, and three were financed through other sources, including *Go3*, *Tet*, and Latvian Public Television (*LTV*). After their theatrical release, all 14 films were made available on streaming platforms, with 10 accessible on *Tet*, three on *LMT Viedtelevīzija,* and one on *Go3* [NKC 2024; TET; LMT]. The 2023 data indicates that 100% of the films produced in Latvia during the year were released on VOD platforms.

As of February 2025, the European Audiovisual Observatory published the study *How are Theatrical Films Distributed on TV and VOD in the EU?*, which explores the broader context of the film distribution lifecycle across several EU countries. However, Latvia is not included in this study. A key finding of this study is that theatrical films – those released in cinemas – are primarily distributed via VOD or benefit from dual TV/VOD distribution within the same year as their theatrical release [European Audiovisual Observatory 2025]. Furthermore, during the first year of a film's theatrical release, 80% of titles are exclusively available on VOD services, making VOD the primary distribution window for films released in cinemas [European Audiovisual Observatory 2025].

Representatives from both *LMT* and *Tet* assert that Latvian content is popular, particularly newer films. However, they note that it is uncommon for a film to sustain long-term, relentless customer interest. A notable exception is Latvian classical films produced by the Riga Film Studio (*Rīgas kinostudija*) during the Soviet occupation, which continue to attract viewers year after year.

For example, *LMT's* representative highlights *Limuzīns Jāņu nakts krāsā / A Limousine the Colour of Midsummer's Eve* (1981) as a prime example, consistently ranking as the most-watched Midsummer film for many years [Rietuma 2025]. Similarly, a *Tet* representative confirms that films produced by independent Latvian producers are among the most viewed on the *Tet TV+ SVOD* service, contributing to the platform's ability to attract new viewers [Rietuma 2025].

Impact of streaming platforms on production

Leading streaming platforms such as *Tet*, *LMT* and *Go3* not only acquire the rights to Latvian films for their catalogues but have also increasingly taken on roles as co-funders or even primary funders of films and TV series. This collaboration with independent film producers has become crucial for many, as it often represents a necessary means to secure financing for their projects.

The funding landscape for the Latvian film industry is shaped by both EU and national legislation, which regulate the extent of financial support film producers can obtain from public funds. In Latvia, the primary source of such funding is the National Film Centre, which oversees the allocation of public resources. According to Cabinet Regulation No. 975, public funding is capped at 60% to 80% of a film's total budget. As a result, financial contributions from private entities, particularly streaming platforms, have become increasingly vital for bridging the funding gap in film production [Ministru kabinets 2010].

Despite the growing importance of streaming platforms in the Latvian film industry, research on their financial contributions remains limited due to a significant lack of publicly available data. Independent producers, operating as private business entities, treat the budgets and costs associated with their films and series as commercial secrets, making detailed financial information inaccessible. The only publicly available data pertains to state aid allocated to specific film projects, which is distributed through competitive programs managed by the National Film Centre [NKC]. Public data on funding for film projects is also available from the State Culture Capital Foundation, another source of public support. However, this fund is limited to low-budget films (with budgets up to € 120 000), short films, and small-scale film industry projects [VKKF].

Similarly, local streaming platforms do not disclose details regarding their investments or the extent of their financial contributions to Latvian films and television series. Although these platforms often support projects already receiving state aid, they refrain from publishing information on their funding allocations. As a result, it is impossible to conduct a comprehensive analysis of their role in financing original productions or co-financing state-funded projects. The absence of such data, which is treated as a commercial secret, significantly limits the ability to evaluate the full impact of streaming platforms on the Latvian film industry.

Platforms employ various approaches to working with independent producers, including co-financing, pre-sales, licensing, and licensing with marketing support. However, Anna Rozenvalde, the Head of TV Content Acquisitions of *LMT Viedtelevīzija,* emphasizes that it is crucial for a film or series to align with the company's values. This alignment serves as a key criterion when selecting projects for financial support or acquisition. In the case of co-financing, the compatibility of projects with *LMT* brand values – patriotism, events and personalities important to Latvia (e.g., *Dvēseļu putenis / The Blizzard of Souls*, 2019; *Janvāris / January*, 2022; *Zeme, kas dzied / The Land that Sings,* 2024), artistic excellence, potential for international recognition, use of new technologies, sometimes also films with commercial value and the potential to reach a wide audience are co-financed. (*Jumprava. Lielais notikums / Jumprava: The Big Event,* 2025) [Rietuma 2025].

Ilze Korjusa, Head of Content Strategy for Digital Media at *Tet*, points out that there are different models of cooperation with independent producers. It depends on the producer's chosen strategy for promoting the film. *Tet* has participated in projects as a minority co-producer (e.g., *Mātes piens / The Soviet Milk*, 2023), acquired the screening rights by investing in the production process (e.g., *Vecāku sapulce / Parent Meeting*, 2025) or negotiated the screening rights on the *Tet TV+* platform by watching the assembled footage before the film premieres or after it is distributed in cinemas (e.g., *Marijas klusums / Maria's Silence,* 2024). The amount to be invested depends on many elements, including the exclusivity factor, the length of the screening window, the exclusive window for VOD publication, etc. When assessing cooperation, *Tet* prefers projects that have received financial support from the National Film Centre or the Culture Capital Foundation. Firstly, it is a guarantee of the quality and ambition of the finished work, and, importantly, it helps to ensure that the producer will have sufficient funds to complete the film. For *Tet* to decide on cooperation, it is crucial that both the authors and the producer have prior experience, and that the film's message, story uniqueness, and relevance to contemporary Latvian audiences are clearly demonstrated. Additionally, *Tet* requires that the producer has secured at least 70% of the necessary budget for the project, which helps mitigate the risk of the film being stalled due to a lack of funding [Rietuma 2025].

While streaming platforms have supported a range of Latvian fiction films as minority funders, the most significant investment has been in television series, which are regarded as highly valuable and appealing to audiences.

Historically, since the early 1990s, TV series in Latvia was a neglected format, primarily developed by television companies under conditions of limited funding. Until 2020, the National Film Centre was unable to financially support TV series despite a global revival of high-quality TV series driven by platforms like *Netflix*.

In Latvia, the resurgence of quality series became feasible due to additional funding made available to the National Film Centre during and after the COVID-19 pandemic. With support from various funds, including the European Regional Development Fund, the National Film Centre has financed six high-quality series since 2020. In 2020, the National Film Centre launched its first competition to produce high-quality TV series, with a total funding of EUR 1 million. This funding was awarded to two series: *Emīlija. Latvijas preses karaliene / Emily. Queen of the Press*, 2021) and *Kriminällieta iesācējam / Crime Solving for Beginners,* 2022) [NKC 2020].

In 2022, the government, at the initiative of the Ministry of Culture, allocated € 5.1 million from the European Regional Development Fund REACT-EU funding and € 0.9 million from the state budget to support the Latvian film industry in mitigating the negative effects of the COVID-19 pandemic. The total funding of € 6 million was distributed through a competitive process to nine projects, including four high-quality TV series: *Pansija pilī / Pansion at the Mansion,* 2024*, Padomju džinsi / The Soviet Jeans*, 2024*, Dumpis / Mutiny,* 2024, and *Asistente / The Assistant*, 2024. The highest levels of support were received by *Pansion at the Mansion* (€ 1 123 308.29) and *The Soviet Jeans* (€ 1 027 021.53) [KM 2022; NKC 2023; NKC 2024].

These series, produced by independent Latvian companies, were primarily financed by the grants distributed by the National Film Centre and funded by REACT-EU, with local streaming platforms contributing with minority co-financing (typically around 20% of the budget). Notable examples include the series *Emily. Queen of the Press*, which received funding from the National Film Centre, *Tet*, and *LTV*, and *The Soviet Jeans*, financed by the National Film Centre and *Go3*.

The Soviet Jeans, which tells the story of a young Latvian man dreaming of freedom, rock and denim trousers twelve years before his country's independence, achieved significant acclaim as the first internationally recognized Latvian series, selected for participation in the 2024 Berlin International Film Festival's European Film and co-production market, and awarded two prizes at *Series Mania*, Europe's largest event dedicated to television series, held in Lille, France [Cineuropa 2024; Berlinale 2024].

Ilze Korjusa from *Tet* emphasizes that cooperation between independent producers – film production companies, the National Film Centre, and *Tet* is essential in series production due to the high production costs. *Tet* produces 4–5 TV series annually. To ensure the quality of the Latvian-language series content, the support of the state, as a primary financial backer, is crucial. This partnership is vital for producing high-quality series and ensuring the continued availability of quality content. Korjusa highlights that *Tet* has successfully collaborated on projects that are financially supported by the National Film Centre. These projects have been among the most-watched series on the *Tet TV*+ platform, including *Emily. Queen of the Press*, *Mutiny*, and *The Assistant* [Rietuma 2025].

It is common for projects that receive partial support from local streaming platforms to be marketed as the exclusive original content of those platforms. A notable example is the television series *Emily. Queen of the Press*, a seven-part series about the independent Latvian press magnate Emīlija Benjamiņa. While the series was funded through a combination of grants from the National Film Centre, *LTV*, and *Tet*, it was marketed as an original production exclusive to the *Tet* platform prior to its premiere, despite *Tet* being a minority funder of the project. Information regarding the public funding by NFC of *Emily. Queen of the Press* can be found in the relevant sources [NKC 2020]. The financial contribution of *Tet* to the film's budget is not publicly available.

It is noteworthy that *Emily. Queen of the Press* marked an unconventional trend in the distribution of TV series in Latvia. In 2021, the series was screened in Latvian cinemas, attracting 18 276 viewers [NKC 2022]. Several years later, the NKC-supported series *Pansion in the Mansion* and *The Soviet Jeans* continued this trend. In 2024, *Pansion in the Mansion*, a screen adaptation of Anšlavs Eglītis' popular novel set in 1930s Latvia, attracted 46 614 viewers in cinemas before transitioning to the streaming platform *Tet*. These admissions enabled *Pansion at the Mansion* to secure a spot in the top ten most popular Latvian films of the year, placing ninth [NKC 2025].

It should be noted that *Tet* has started to produce original series independently. For example, the crime series *Bezvēsts pazudušās / Missing Persons*, 2020 and *Nelūgtie viesi / Uninvited Guests,* 2023; 2024, commissioned by *Tet* and produced between

2000 and 2022, illustrates this trend. According to Korjusa, *Tet's* series *Uninvited Guests* has also been the most watched content on *Tet TV+* for many years, and *Missing Persons* is still a much-watched series. In addition, crime dramas and action comedies are popular with *Tet TV+* viewers. *Tet TV+* has successfully produced series with less investment, especially comedies [Rietuma 2025].

Improvement of statistical data gaps

Although cinemas are no longer the sole platform for distributing Latvian films, statistics have traditionally focused exclusively on the number of viewers within theatrical space. One of the key functions of the National Film Centre, as outlined in regulatory enactments, is to compile statistics on the audience for Latvian cinema. The data collected and published annually in the *Facts & Figures* edition has primarily provided a quantitative overview of the Latvian cinema audience [NKC 2006–2025].

The dynamics of cinema attendance, including fluctuations in viewer numbers, have largely depended on various factors, such as the funding available to the cinema sector during different periods, the number of films produced, their popularity, and broader societal trends.

The peak in cinema attendance and interest in Latvian films occurred in 2018 when these films accounted for 22.07% of the total market share. This was followed by similar levels in 2019 (20.16%) and 2020 (19.90%). The significant decline observed in recent years can be attributed to the COVID-19 pandemic and the associated restrictions (2020–2021), as well as shifts in audience habits, with many opting to watch films on streaming platforms where Latvian content is also available. Positive trends emerged in 2024, when Latvian films regained a significant market share (19.54%), attracting 409 145 viewers to cinemas, thanks to the success of the animated film *Flow* as well as other popular Latvian films [NKC 2025].

year	LV films screened in the cinemas	admissions	market share (%)
2018	48	556 832	22.07
2019	54	548 938	20,16
2020	41	178 963	19,90
2021	52	79 407	15,77
2022	75	188 352	10,98
2023	64	167 149	8,24

Data: National Film Centre of Latvia, 2024

Figure 1. Films, admissions, market share

One of the most significant factors influencing the collection of data on national cinema audiences is technological change, which has reshaped both film distribution practices and viewing habits. In response to regulatory amendments introduced in the Cabinet of Ministers regulations in 2024, electronic media providers that produce television programs and/or on-demand audiovisual services are now required to submit annual reports on the number of viewers of Latvian films broadcast on television and/or made available on streaming platforms [Ministru kabinets 2017].

In 2024, for the first time, the National Film Centre was able to collect comprehensive data on the consumption of Latvian films, not only in cinemas but also across streaming platforms and linear TV. Prior to these regulatory changes, statistics on viewership for Latvian films aired on Latvian Television were available for institutional use, providing a preliminary understanding of audience engagement following their theatrical screenings. However, data on the consumption of Latvian films on streaming platforms was previously unavailable. Additionally, Latvian films continue to maintain a stable audience on television, which serves as a crucial distribution channel, especially considering that Latvia has the fewest cinema screens among the Baltic states [NKC 2024].

Combining data, it can be concluded that in 2023, 12 002 169 viewers watched films produced in Latvia with public funding between 2019 and 2023 across cinemas, television, and video-on-demand (VOD) platforms. Notably, only 165 055 viewers (1,39% of the total audience) watched these films in cinemas.

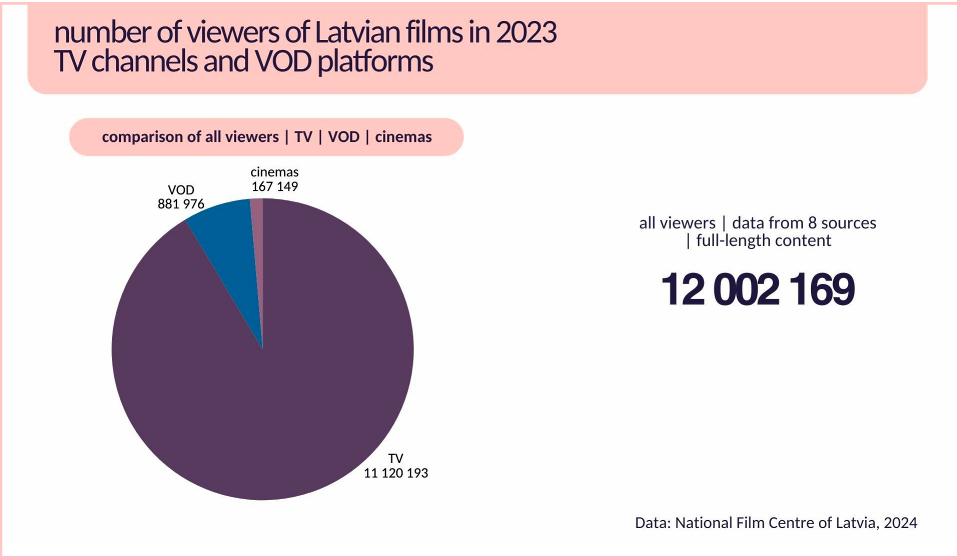

Figure 2. Number of viewers of Latvian films in 2023.
On TV Channels and VOD platforms

The data collected in 2024 reveals a clear trend: the primary distribution channels for Latvian films are now linear TV and video-on-demand (VOD) platforms rather than cinemas. Analysing the audience and viewership data of films produced with state aid across various platforms – cinemas, video-on-demand (VOD), and television – it becomes evident that distribution through both linear TV and VOD substantially enhances audience reach and film accessibility. In contrast, cinemas have become the least prominent platform for film exhibition.

For instance, the feature film *The Soviet Milk*, one of the highest-grossing films in Latvian cinemas in 2023, attracted 55 873 viewers in theatres. However, the film reached a significantly broader audience across other platforms, with a combined viewership of 118 731 on linear TV and the *TET* streaming service, more than double its cinema admissions. Notably, the largest audience segment, approximately 100 000 viewers, was achieved through traditional linear broadcasting on *LTV*.

Similarly, the film *January* garnered 45 727 admissions in cinemas. In contrast, it was viewed by 77 084 people on TV and VOD platforms. Overall, *January* reached a cumulative audience of 122 811 viewers across all distribution channels in 2023. This data underscores the critical role of multi-platform distribution in maximising the reach of publicly funded films.

Data collected by the National Film Centre reveals that the availability of films across multiple platforms, including television, greatly enhances viewership and broadens the audience for both feature films and, in particular, documentaries, which typically attract smaller audiences in Latvian cinemas. For example, the documentary

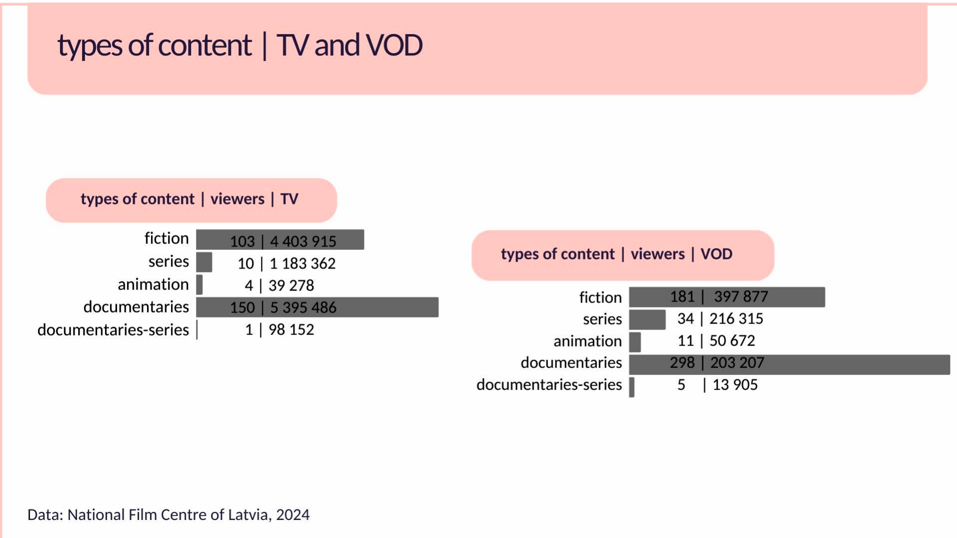

Figure 3. Types of content on TV and VOD

Zemnieki / The Land, 2022, recorded just 2080 admissions in cinemas, yet its total audience grew to 80 898 through TV and VOD platforms. The majority of this viewership was reached via Latvian television broadcasts. It is noteworthy that documentaries are the most popular category of content on VOD platforms, followed by feature fiction films, TV series, and animation. These trends are consistent with the distribution of viewership across television, highlighting similar content preferences on both mediums.

In 2023, the most widely viewed film supported by public funding on VOD and TV was the high-quality TV series *Emily. Queen of the Press*, produced with financial support from the National Film Centre and co-financed by the streaming platform *Tet*. The series garnered a combined audience of 203 835 viewers across Latvian television and *Tet*.

Conclusion

The distribution of films through both VOD platforms and television significantly extends the reach of Latvian films, providing broader and more sustained audience engagement compared to the limited screening times available in cinemas. Notably, VOD platforms allow films to remain accessible over extended periods, thus increasing their potential viewership.

The data collected by the National Film Centre in 2024 clearly indicate that the primary audience for Latvian films prefers viewing them on linear television, specifically on (*LTV*). It is also worth noting that films broadcast on *LTV* are accessible for a limited period on the *LTV* platform replay.lv, further enhancing their availability.

These findings underscore that Latvian films are more likely to be consumed in home settings (via TV and VOD) rather than in cinemas. Given that professional film production in Latvia is predominantly supported through public funding, comprehensive viewership data across various platforms – not just cinema admissions – provides a more accurate and nuanced assessment of the total audience reached by publicly funded films. This, in turn, offers valuable insights for evaluating the impact and accessibility of national film productions.

The increasing involvement of streaming platforms, like *Tet* and *LMT*, in the financing and producing of Latvian films and TV series highlights a significant shift in the Latvian film industry. These platforms are not just acquiring the rights to films. However, they are also playing a pivotal role as co-funders or even primary funders, which has become essential for many independent producers to secure the necessary funding for their projects. Additionally, platforms also produce and finance content specifically intended for distribution on their own platforms, with *Tet* being the most active in this regard.

However, the lack of publicly available financial data on the contributions of streaming platforms to independent producers limits a comprehensive understanding of their full impact on the industry. Despite this, the continued success of co-financed projects and the growth in original content production suggest that streaming platforms are integral to the evolution of the Latvian film and TV sector, providing essential financial backing, as well as ensuring the visibility and sustainability of local content in the competitive global entertainment market.

Undoubtedly, the changes in the audiovisual ecosystem – particularly the production, distribution, and exhibition of films in the era of streaming platforms – represent a complex subject that demands further in-depth and ongoing data monitoring. A promising direction for future research is the European Audiovisual Observatory's efforts to conduct a more comprehensive analysis of the life cycle of various film types, including national, European, and U.S. productions. This analysis would trace their distribution from theatrical exhibition to TV and VOD platforms, thereby encompassing the full cinema-TV-VOD lifecycle [European Audiovisual Observatory 2025]. Moreover, Latvian cinema, along with its distribution and consumption practices, merits further investigation within the broader context of European film industry trends.

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