Bachelor's project

NTNU
Norwegian University of Science and Technology
Department of Art and Media Studies

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Coming Soon to a Theatre Near You

A Conjecture in Cinema Future

Bachelor's project in Film Sciences
Supervisor: Svein Høier
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Introduction

This text will speculate in the future of movie theatres, with a focus on Norwegian cinemas, distribution windows and streaming. To consider their future, it will inspect the history and present of Norwegian movie theatres. It will look at how cinemas have evolved to deal with emerging audio-visual competition throughout the years, specifically from television and physical media. What impact have these competitors had on theatre attendances, if any? This will be a basis to understand the newest challenger, namely streaming. Streaming, which this thesis consider a major threat to the theatre industry, will be further inspected. We will seek to understand how theatres operate and what makes the Norwegian industry unique. This is to identify factors that make them an attractive supplier of audio-visual content, despite other alternatives. However, streaming has rapidly evolved, especially over the last year of pandemic and lockdown. Will theatres be able to cope with the changes set in motion? I shall utilize documentations of said change as well as relevant bodies of work and comments from filmmakers and others within the industry (full bibliography, in Chicago, attached at the end). I will also implement samples of an interview with CEO of Trondheim Kino, Arild Kalkvik, conducted by myself. Topics of discussion were municipal theatres, changes in attendances, immergence of streaming, exclusivity and hopes for the post-Covid future.

Background

Movie theatres have come a long way from their humble beginnings. The first theatre in Norway, *Kinematograf-Theateret*, opened in Oslo 117 years ago in 1904, 8 years after the Skladonowsky brothers displayed film for Norwegian viewers for the very first time at the Circus Varité. And in 1913 a law was passed which saw theatres becoming municipally governed. As of 2017, 290 theatres still were, while 153 were private. (Wålengen, 2019). The importance of the municipal aspect of Norwegian theatre affair should not be understated. It has caused some controversy as municipals have been accused of limiting the domestic film industry as they recieve a piece of the proverbial pie. In neighbouring countries there is more of a vertical integration structure as the production companies distribute and screen films in their own cinemas and so all of the profit is kept for themselves.

Trondheim Kino is municipally owned and some have claimed that Trondheim's licensing scheme has limited them. (Unheim & Trengereid, 2018). But it has also limited damage during these turbulent times and allowed theatres to operate sustainably while offering a wide film selection, also in local communities. It helped revolutionize theatre distribution, too. We will pick the latter back up when examining theatres' technological advancement. Arild Kalkvik points to the fact that in many other countries there are pure commercial cinemas, dedicated to blockbusters and pure art cinemas, dedicated to the smaller independent films. "[…] In Norway, municipal theatres show *every* film. They screen small films, films for kids, films for adults- everything" (translated). The challenge of that is that they have to adapt every day to appeal to different audiences, both the cultural- and the "popcorn" audience. It also means that they must transform the theatres from a venue for children and elderly at day time to a place for youth and adults later on the evening. A basic understanding of municipal affairs is important to understand the unique cultural role of Norwegian cinemas.

In the period after WWII and to 1961 Norwegian cinemas sold tickets for 1B NOK (out of which the government claimed 325M) and were headed towards a golden age. However, a square shaped box with a black and white screen had other plans. By 1967 Norwegian theatres had an average attendance decrease of 30%. (Evensmo, 1992). The death of theatres was predicted after the television infiltrated living rooms across the country during the mid-1960s. And though theatres are still breathing

55 years later, their prognoses were not unfounded. The record attendance of 35 million Norwegians in 1960 had dipped down to 9 million in 1992. (Unheim & Trengereid, 2018). In the 1980’s the VHS (Video Home System) was introduced, but it did not inflict the same damage as the TV did. This was due to the fact that several theatres had already been shut down in the previous decade (Unheim & Trengereid, 2018). And while we never quite reached the heights of 1960 again, attendances stabilized north of 9 million after the low point of ’92. The television can naturally not take *all* of the blame for the decrease, as during the same period people became wealthier and spent money on different other leisure activities. The time and money were spent on the likes of cars, gardens, vacations, apartments and cabins (Evensmo, 1992). However, it will be difficult to compare theatre attendances with non-audio-visual competitors. Therefore, this text will only discuss those which are in the film/TV audio-visual entertainment business as comparable competitors, thereby also excluding user created audio-visual content on platforms such as YouTube or TikTok.

The theatre industry

Some might even argue that theatres are in an entirely different business than home-entertainment, which is why I think it is beneficial to inspect how theatres operate. Their finances are not solely dependent on films. For one, they make a substantial amount of their money from concession stands or kiosks, which its rivals, of course, do not. This is an important part of business because it is the only income they do not share with any third parties, and it is indeed vital for a theatre’s financial health. They are also in the advertisement business. The time before a film starts is shared between payed advertisement from various companies and trailers for upcoming films, supplied by the studios. Advertisements can also be found on the back of tickets and other places in the theatre. (Stensland, 2008).

Yet without people coming to see their films no one will come to watch commercials or buy their, comparatively, expensive soda and candy. This is also why Norwegian theatres depend on production companies to offer fresh produce, films that will get people through their doors. They have mostly relied on Hollywood to produce blockbusters to attract the masses to the theatre seats, which constitute roughly 70-80% of sales. Though, after the turn of the century, domestic films have increased in popularity as well. One reason for this is that they attract the audiences that would otherwise not go out to see a foreign language film at theatres. (Kalkvik, 2008). In our interview, Kalkvik also noted that Norwegian attendances of Hollywood films have decreased, while ticket sales for domestic films have increased. Domestic films are doing well and ipso facto, domestic productions are given more trust and higher budgets. Success breeds success, as it so often is.

What cinemas, linear TV, physical media and streaming have in common is that they all compete over a consumer's limited appetite for audio-visual entertainment and are all outlets for the film industry. This is why I argue seeing them as competitors are justified, while I naturally acknowledge movie theatres' unique role as a social and collective experience, too.

Home theatre evolution

Televisions evolved, sound systems evolved and so did physical media. In other words, home theatres evolved. After VHS, DVD entered the market in 1997. It was a newer, sleeker format of physical media that had a much superior picture- and sound quality. Its Norwegian sales peaked in 2004 (Berge, 2010). In 2007, 1080p and Blu-Ray Disc entered the home-entertainment race and surpassed DVD-player sales by 2011 (Berge, 2012). In 2016, 4K UHD HDR Blu-Rays released, but it has failed to make the same noticeable impact. One reason for this was that the difference between 4K and its 1080p predecessor was not as apparent as it was between previous iterations. It is still one of the best sound -and picture quality offers at home, though. The other reason is that by 2016 we were well in the age of streaming. Sales and rentals plummeted from a 2.2 Billion NOK turnover in 2009 to 421 Million NOK in 2016 (Unheim & Trengereid, 2018). Most physical media stores have closed their doors in Norway, as they have been engulfed by the new digital challenger, spear-pointed by Netflix, who ironically started out as a DVD rental service by mail order.

Digital absorbing physical was to be expected as each new step in home media appear to replace the previous. The increasing quality of physical media and home theatres does not seem to have kept many people out of theatres, though. One could even argue that it has increased interest for film overall. Physical media may have become peripheral now but it has certainly laid the groundwork for VOD and streaming to enter a market where customers are groomed to watch films at home, with advanced home systems to watch films on.

Movie theatre evolution

How, then, has movie theatres kept reinvigorating themselves through their, over one century, long history? The biggest technological innovation after cinemas got established came in 1927 with *The Jazz Singer* (A. Crosland). This was the first film with synchronized sound and the *talkies* were here to stay. (Sharman, 2020). This hints to the fact that the evolution of theatres is often tied to evolution in film production. The first sound-equipped movie theatre domestically came soon after in 1929 at Eldorado, Oslo (Wålengen, 2019). And after that, experimentations with Technicolor, *The Adventures of Robin Hood* (1938, M. Curtiz & W. Knightley) became the first commercial success overseas in colour (Halvorsen, 2018). For comparison, Norwegian television broadcasts in colour did not become standard until 1975 (Fordal, 2020). As a response to the impact of the television, theatres transformed large one-screen theatres to multiplexes with several screens. This allowed simultaneous screenings for different target audiences and helped the flow of income and increased flexibility. (Unheim & Trengereid, 2018). Television entered American households already in the early 50’s and theatres saw declining audiences. One answer was to expand the screen. 20th Century Fox’s biblical epic *The Robe* (1953, H. Koster) established the wide-screen aspect ratio, a more immersive and cinematic projection than what the TV could produce at the time. This quickly became the standard. (Nadel, 1993). After a few earlier attempts, the first proper 3D film in colour premiered with Warner Bros.’ *House of Wax* (1953, A. De Toth) (History Staff, 2009). The fact that this released the same year as the wide-screen format is likely no coincidence. More likely is it that they came as direct responses to sinking ticket sales after the television increased in popularity around the same time. 3D is still around today, though its popularity has ebbed and flowed throughout history. These days 4D, or 4DX, is being experimented with. 4DX can release scents, fog, shake or tilt your seat, squirt water and much more. It is still in a developing phase, however. In 2018, Odeon Kino, the daughter company of AMC ushered in Norway’s first laser-projection IMAX theatre (Brekken, 2018). The master’s thesis by Unheim and Trengereid (2018), points to immersion (3D, IMAX, Dolby sound systems etc.) and comfort (reclining leather chairs, air-condition etc.) as trends Norwegian theatres develop to solidify its quality and its place as “the superior place to consume film”. The immersion theatres offer is generally hard to match elsewhere. But there is no guarantee the person in front of you will not look at their bright phone for the duration of the film. And when it comes to comfort, some would prefer their own coach at home. One would be hard-pressed to declare an *objective* superiority either way, despite what theatres may claim. But they do what they can to innovate and improve as much as possible. “Eventification” is another way to attract audiences. Dressing up the theatre and their employees in the theme of a film is an example of this. This is to make the experience more special, memorable and increase the likeliness for another visit. (Unheim & Trengereid, 2018). New additions can still entice people to go out of their way to watch a film at the theatre, despite higher prices. One might call some of these additions "gimmicks" but gimmick or not, technological advancement illustrates theatres' will to constantly evolve and explore new methods. Screenings with reclining seats, eventification, 4DX and similar concepts are specifically aimed at the younger audience (15-25) whose theatre attendance is decreasing according to a study of UK, American and Canadian numbers (Follows, 2019). That is according to CEO of Nordisk Film, Jannicke Haugen, who can see a similar trend in Norway. They are becoming increasingly difficult to attract as other audio-visual offers compete for their attention. Haugen points to videogames as one competitor. (Falk, 2020). Video-games are not elaborated upon further in this text, but it is another example audio-visual entertainment that is not film or TV but still seizes a considerable amount of attention, specifically from this age group. Decrease in this audience is worrisome because they are the most active theatre visitors (Film & Kino Staff, MPD).

From celluloid to digital

One of the most important theatre developments in recent history happened in 2010. This was the abdication of celluloid film and towards another era of digital photography, digital postproduction and digital projection in theatres. Some filmmakers still swear by shooting on real film, of course. With the exception of smaller independent theatres, the days of 16, 35 and 70mm celluloid exhibition are all but gone, for better or worse. 11 years ago Norway became the first country in the world that managed to digitalize every major cinema nationally. In broad strokes, the municipal structure was influential in the procedure and it was a costly one. But it was an investment that was needed to be done. In addition to being more cost efficient, digital distribution makes more titles available, gets them out to theatres quicker and overall allows for more flexibility in screenings. (Film & Kino Staff, 2010). There is more to this than what the context of this text allows for elaboration upon, unfortunately, but overall, digital advancement has helped sustain theatre attendances. However, it has also birthed a new competitor.

Streaming and technological shock

I have used and will use “streaming” or “VOD” to merge SVOD (subscription based video-on-demand), TVOD (transaction based video-on-demand, for limited access to a title, usually 24-48 hours), PVOD (premium video-on-demand, for limited access to a newly released film at a higher price, usually for 24-48 hours) and EST (electronic-sale-through, for permanent access to a title). I will refer to them respectively when necessary.

With the breakthrough of streaming, people saw this as the final nail in the coffin for cinemas, much like they feared when television or VHS were introduced. It still is a lurking fear for some. But as we shall see, for now, the rumours of its death may again have been exaggerated. It is logical to assume that masses flocking to streaming, which has already mostly consumed the physical market would also take a bite out of theatre audiences. Still, the numbers do not lie. Unheim & Trengereid (2018) pins down streaming’s breakthrough at circa 2010, when the price/performance relation was adequate and technology became advanced enough. They refer to this as *technological shock*, which is what happens when new technological innovations enter an already established market. (Unheim & Trengereid, 2018). Therefore, we must look at Norwegian box office sales from 2010-2019 to see if any impact is evident. The five last *normal* years, excluding 2020, from 2015-2019, the average attendance has been roughly 12 million. This is a slight increase from the previous five years of 2010-2014 of around 11.5 million. 2016 holds the highest attendance record since the turn of the century. 2000-2009 averaged approximately 12 million tickets sold. (Medienorge Staff, 2021). The numbers have remained stable and do not demonstrate the kind of damage one might imagine the shock would do to theatre attendances. 10 years may not be enough time to see an impact, and so it is important to keep in mind that VOD is still in its preadolescent age. It is not until very recently that most major studios released their own services and the digital market has become very crowded over the last years. That is an illustration of rapid change, and there is no reason to believe that streaming will not be around for decades to come. The introduction of television might have been more of a ground-breaking, disruptive shock because it was the first time audio-visual content became available outside of theatres. Very likely is it that TV and the subsequent introduction of physical media and streaming is what have hindered ticket sales from reaching the heights of the post-war era. Another reason could be that it has lost the novelty it once had and that there is simply more technology, more to do and generally more distractions. But so far, theatres appear to have sustained through the technological shock as numbers have indeed remained stable. That being said, will it stay this way if streaming continues to grow at the speed it currently has? What will happen to the power relation between studios, streaming services and movie theatres? While ticket sales have not decreased yet, one should be wary of the bigger picture.

Norway was early on the playing field regarding streaming, as it was with digitizing theatres later on. Advanced technology and broadband and solid consumer economy allowed for early experimentations by TV2 and NRK already in the early 2000's. Streaming did not explode until 2010 when technology and internet were advanced enough for major investment and aggressive expansion. (Unheim, & Trengereid, 2018). Film/TV is the focus in this text but it applies to other media as well. Almost 9/10 Norwegians have access to a music streaming service, for instance. And over half of the population has a Netflix subscription. (Colbjørnsen, Tallerås & Øfsti, 2020). As suggested earlier, one could argue that physical media increased the interest in watching audio-visual entertainment in general and may not have directly *stolen* audiences. Streaming is the same, if not heightened to another level, because we consume more content now than ever before. Arild Kalkvik noticed, "Every study supports the notion that those who watch films, watches film everywhere. So those who go to the theatre the most are the same people that stream the most" (translated).

As of today, Netflix, who started in 2007, is the biggest streaming service with global subscription numbers at around 200M. Second is Amazon Prime Video with 150M and at third place is Disney+ who has rapidly hit 100M subscribers just 16 months after their release, though Norway among others, had to wait until September, 2020. (Jansen, 2021). The new trend of multiple studios creating their own services also causes a more fragmented market, forcing the consumer to hold down multiple monthly subscriptions to access "all" the desired content. If these numbers continue to rise at their current velocity, and they find a sustainable way to maximise monetisation, it would signify a serious shift in the plates of the industry. To do so they would hope to stop piracy but that is easier said than done. But as of now, though, a theatrical run remains the best hope of financial success, generally speaking.

Unlimited content & cookies*

Any film can now be seen anytime, anywhere- except this is not completely true. Streaming services often make the broad claim of "unlimited availability" of content, but this is *contingent* on various factors, as discussed by Colbjørnsen, Tallås & Øfsti (2020). They build a "pyramid of availability" with levels of which availability is contingent upon. The bottom level is "ontological availability" –if the content merely exists, followed by "technological availability" –if it exists in a format playable on a technological device. The next two are "legal availability" –if the content is licensed to be shown and "financial availability" –if the content has an acceptable price, both for distributor and user. The top of the pyramid is "presented availability" –if the content is presented to the user, based on algorithms, editorial choices or a combination. The product must usually fulfil all these levels to be selected for viewing by the user. (Colbjørnsen, Tallås & Øfsti, 2020). Through case studies Colbjørnsen, Tallås & Øfsti (2020) present that fragmentation of content, split across different streaming services or other places in different windows, makes it difficult to access a wide selection especially of Norwegian titles. These are few and far between on major services. This regards other nations' domestic representation in such services, as well. Despite a vague promise of unlimited content, the availability of a concrete title is not a given. (Colbjørnsen, Tallås & Øfsti, 2020). I include this aspect for two reasons. To identify some weaknesses of streaming, for one, and also to glimpse at the challenges we might face in an even more fragmented media landscape- especially in the unlikely event of movie theatres' demise.

In "presented availability" is implicitly one of streaming's strengths, too, one that movie theatres do not possess. "Presented availability" is based on the service's knowledge of you and calculate tailored choices for your viewing pleasure. Big data allows them to know their customers much better than theatres do theirs, which is a weakness at latter's side. One could argue that this detracts the humanity of selecting a film, but from a marketing standpoint, it is beneficial. Theatre organizers are focused on ways of getting to know their audiences better. Some theatre chains have developed applications that use *cookies* to gain more knowledge, allowing more targeted marketing (Unheim & Trengereid, 2018). It is still incomparable to the system streaming services wield, though.

Vertical integration

Disney+ is one of many examples of production companies resorting to digital, vertical integration by cutting out the middle man and creating their own streaming services. And thereby control production, distribution and exhibition (on their platforms). This is because selling or leasing out rights to streaming services is not that lucrative. Despite the aforementioned falling sales of physical media, sometimes that is more profitable than selling them to SVOD services such as Netflix. (Unheim & Trengereid, 2018). Netflix and Amazon have also begun to invest a significant amount in their own productions. Netflix's very first original was the co-production with Norwegian TV, the *Lilyhammer* series (2012-2014, G.H. Hopland et.al) (Marek, 2020). Netflix has of course gone on to produce numerous shows and films since, to various degrees of quality. Norwegian theatres tend to pride themselves of exhibiting only a certain pedigree of quality of production. Certainly not every theatrical film is better than every streaming original, but the former tend to have a higher threshold of their film selection. One big statement from Netflix, though, was their co-operation with auteur filmmaker, Martin Scorsese and the since Oscar nominated, *The Irishman* (2019, M. Scorsese). TV shows has usually been their focal point but this was an illustration of their intent with movies. In fact, they are currently establishing themselves as a film production company to be reckoned with, as they seek to release a shocking 70 films in 2021 (Lismoen, 2021).

It is often unclear to the public whether a film on streaming platforms was successful or not. The success or fail of a film's theatre run is evident, but it gets much more complicated when it comes to streaming. Their model on calculating a film or series' success is vague and not made any easier to understand by their hesitation to release viewership numbers. This in turn makes it difficult to compare the viability of an individual film on streaming in contrast to a theatrical run. It also becomes difficult for filmmakers to negotiate fair terms.

Distribution windows

With VHS came the distribution window- a central topic in our discussion. The distribution window is the period of a film where it is exclusively available at theatres before the home release. It is not the most customer-friendly, as it limits their options, but that is the point of it, too. Norwegian theatres usually pay a 40-50% royalty of the ticket sales to keep the window, which has been essential to sustain theatre attendances (Unheim & Trengereid, 2018). The release window gives the consumer no legal choice but to watch the film in theatres or wait for the home release and this provides a significant competitive advantage. Illegal pirating has slightly muddled the waters, though. Pirating is sometimes resorted to, even by the most law abiding citizen, if it is the only place the title is available in the country. To prevent as much pirating as possible in one country, following the premiere in another, parallel world premieres have become the norm (Film & Kino Staff, MPD). The legal wait, too, has shortened from around 170 days in 2000 to just a three month period, as of 2019 (NATO, 2019). The push to decrease the window has been going on for some time now. Streaming is pushing hard but it has also been pushed in relation to release of physical copies. In 2010 Disney announced they would release *Alice in Wonderland* (2010, T. Burton) 12 weeks after theatrical release instead of the usual 17 weeks. Some theatre chains threatened to boycott the film altogether. (Dawtrey, 2010). A similar, but more drastic, situation is found today as we find ourselves in the midst of a pandemic. The aforementioned *Irishman* only got a limited theatre run and that appears to be the extent that Netflix is able to release their films outside of their services. Kalkvik at Trondheim Kino informs that Netflix have offered their films to theatres, but because the streaming giant refuses to respect the release window, theatres refuse to screen them. Netflix lost 3 Billion USD in 2019, but despite that their stock prices keep rising, and that may explain why they are hesitant to change their methods (Metz, 2020).

Covid & straight-to-streaming

During a year where people have been spending *a lot* of time at home, studios and streaming services have investigated new distribution models and other alternatives of getting their content out to the public. Their models have proved very successful, too. Meanwhile movie theatres have largely had their hands tied behind their back as they have been partially shut and/or limited by social distancing. Many theatres have even been forced to shut their doors permanently, as a result of restrictions, limited attendances and limited fresh produce. Yesterday, as of writing moment, the renowned Arclight Cinemas and Pacific Theatres announced that they would not be able to reopen, to great dismay of many movie-goers and filmmakers (Lang, 2021). This is of course a big illustration of the struggle theatres have been facing during this time, as even cinemas of their stature are unable to survive.

Studios and distributors have gone about various alternative approaches in the wake of this. Some have opted with the safe choice by pushing back the releases to premiere when it is safe for people to return in masses. Others have tried more experimental means. I argue a discussion of the impact of Covid is very important when speculating in the future of theatres. Even though the current circumstances are extraordinary, it may well have set irreversible processes in motion, or accelerated them. Distribution windows have been put under higher pressure than ever before. The reference to “a more drastic situation” earlier regard studios pushing to release their films, not 12 weeks after theatrical release, but *the same day.* America’s biggest theatre chain, AMC, decided to boycott

Trolls: World Tour (2020, W. Dohrn) and any other Universal production after the studio released the animated film for PVOD- and to great success, mind. The film earned 100M USD in online sales after just three weeks. (Faughnder, 2020). This is another illustration of the tension and tug of war regarding the distribution window between theatres and studios. We shall now take a short look at how two up-and-coming streaming services; HBO Max and Disney+, have exploited the situation, especially in USA- closest to the pulse of Hollywood. I contend that a discussion of what is happening in America is relevant to a discussion of Norwegian movie theatres despite different markets. The film industry is naturally interconnected and international, as are most major streaming services, and so what happens in the States often has ripple effects felt across the world. Some of their experiments are currently conducted within the US, but some internationally, too.

In the US, Warner Bros. announced they would release their entire 2021 slate to the AT&T owned streaming service HBO Max, simultaneously as they release in theatres. There they will stay for 31 days, before continuing to play in theatres and/or becoming available for purchase and rental. WB's films scheduled to release later this year in this SVOD/theatrical model includes *Matrix 4* (2021, L. Wachowski), *Dune* (2021, D. Villeneuve) and *The Suicide Squad* (2021, J. Gunn). *Wonder Woman 1984* (2020, P. Jenkins) was one of the first to be released in this model, already in December 2020. It proved to be successful, as it helped hit their subscription goal two years early. (Behnke, 2021). Some have speculated that the disappointing results of *Tenet* (C. Nolan, 2020), which was meant to lure the audiences back to theatres, actually had the opposite effect, and led to studio executives deciding to delay premieres or consider other models (Lodge, 2020). The *Wonder Woman* sequel was seen 14.9 million times on their service (Abdulbaki, 2021). The simultaneous release can be thought to have hindered some box office sales, but it is impossible to estimate how many of those would have gone out and bought a ticket at the theatre. At writing moment, the monster showdown *Godzilla vs. Kong* (2021, A. Wingard) is the highest grossing film to premiere in the pandemic and has currently earned north of 285M USD after North American and Asian release, despite the same-day release in the States. Now that things are slowly but steadily opening up again, this is a welcome sign for theatres, showing that the interest of watching films on the silver screen remains high. Chief-analyst for boxoffice.com, Shawn Robbins said "For anyone who may have doubted the pent-up demand for movie-going, this performance is yet another sign of just how resilient the theatrical industry can be […] If *Godzilla vs. Kong* can break out to these numbers in a still-handicapped domestic market with a simultaneous streaming release, imagine what other blockbuster contenders will be able to achieve in the months ahead when given a reasonable window of theatrical exclusivity from day one." (Whitten, 2021).

Disney films, quite extraordinarily, accounted for close to 40% of the US box office sales in 2019 (Whitten, 2019). One of their executives, Bob Iger, previously expressed zero interest in altering the theatres' exclusivity window. He claimed that there were no reason whatsoever to move their films out of theatres any faster than they already did. (Film & Kino Staff, MPD). But this was said before a global pandemic, and Disney along with other studios now seem to have other ideas. During this time, Disney has explored several models. The theatrical wide release of *Mulan* (2020, N. Caro) was scrapped in favour of exclusive PVOD release. Customers of their service could pay an additional 30 USD to rent the remake in an SVOD/PVOD combination. *Soul* (2020, P. Docter) was released for SVOD. Neither of them had a major theatrical release. *Raya and the Last Dragon* (2021, C. Estrada & D. Hall) released simultaneously in selected theatres as it did for PVOD. Disney CEO, Bob Chapek hinted at a *wait-and-see* plan for the foreseeable future; "We are going to be watching very closely the re-opening of theatres and consumer sentiment in terms of a desire to go back to theatres, to see if that [theatrical window] strategy needs to be revisited". (Gruenwedel, 2021). Chapek's comment indicate that Disney, and others, are reconsidering plans before the pandemic, and perhaps before plans of their own streaming service. Paramount is another studio that is set on reducing the window. They announced their big titles will go to their SVOD service Paramount+ after a brief 30-45 day theatrical window (Kay, 2021). The Covid-19 pandemic has spoilt us in that we have become accustomed to shortened or even removed distribution windows. And because we have become more impatient, Chapek does not think there is a way back for months-long exclusivity windows. After a while films are "[…] just sort of sitting there, collecting dust" he said. (Steigrad, 2021). Comments like these from a studio the size and appeal of Disney should cause some worry for theatres that are dependent on Hollywood productions, although this does not come as a surprise to them as change has been in the cards for some time.

My source claims it would be naïve to think that studios would not force a narrowing of the window, pandemic or not. It is inevitable as they seek to establish their own services- and are thereby dependant on exclusivity of content to fuel demand. Studio motivation for developing their own platforms is to find a way to keep all of the profits to themselves, without sharing with a third party. Their accountants may have calculated that 100% of "nothing" from streaming services might just be more than 50% of something from theatres. Digital distribution is much cheaper, as well.

Even if the day-and-date model is not used, people might be tempted to wait out a shrunken window of circa 30 days to watch the film at home. The year of Covid-19 have given more power to streaming services and certainly given studios more knowledge about their possibilities outside the theatre.

Adjunct professor and entertainment consultant, Gene Del Vecchio makes a case for vertical integration as he suggests that this would be the perfect time for studios to join forces and swoop in and buy limping theatre chains. They could better adapt the managerial structure to the current consumer climate, now more focused on entertainment flexibility than ever before, according to him. (Vecchio, 2020). The question is if they would want to do so, or rather invest in a digital future. That is what they are doing now, as they move exclusivity out of theatres and into their services. What Netflix, Amazon and the established studios effectively are doing, is offsetting the industry as we *knew* it.

Domestic fallout

HBO Max is unavailable in Europe and we do not share their same-day release model. However, *Wonder Woman 1984* arrived at HBO Nordic just two months after its theatrical release instead of the usual three months (Spigseth, 2021), to a reduced royalty, according to my source. Disney's model has mostly been the same in Norway as it has in the US. But also according to him, they unexpectedly demanded the same royalty on day-and-date release as they usually do for a three month window. They were disappointed to learn that Disney released films like *Mulan* (2020) directly to their platforms. These films had been marketed by Norwegian, municipal theatres in belief that they would have a normal release, but in doing so they indirectly marketed for a competing platform instead.

We must now see how Norwegian distributors acted during the phases of theatre lockdown and its subsequent re-opening. Distribution companies had several domestic titles in theatres when everything closed, as well as international titles released or in the pipeline. (Øfsti, 2020). Øfsti (2020) points to three key phases of theatre lockdown and its reopening. The first, just after cinemas shut, second phase saw a soft re-opening and the final phase where we are now, in writing moments, as theatres have opened again but still at reduced capacity. Theatres closed March, 2020, and discussion immediately began of what their next moves would be; to release on VOD, wait and see or push back releases. The forced closing was eventually extended to 15th of June. (Øfsti, 2020). *iHuman* (2020, T. Schei) became the first Norwegian PVOD release ever. Norwegian distributors made their films available for various types of VOD and shortened the windows between the types. Some films only had a four day window of EST before it went to TVOD. (Øfsti, 2020). The various places they were released and for various time periods caused fragmentation.

Cinemas were eventually allowed to reopen 7th of May but at a max capacity of 50 per screening. During this second phase, the Norwegian Film Institute was supportive. They adapted their support schemes to re-release several titles that had been hit by the lockdown, as well as including VOD releases in their quality film imports scheme. (Øfsti, 2020).

The third phase increased max capacity to 200 people, but social distancing rules remained. This meant that few screenings could actually allow 200 patrons, which was a worry for many within the business. In a letter to Minister of Culture, Abid Raja, members of Norske Filmdistributørers Forening, Produsentforeningen Virke and Film & Kino wrote; "The interpretation of one meter from shoulder to shoulder could do irreversible damage. It may well already be too late for theatres' reputation as a meeting place for the big film experiences. The structural changes that have surfaced following theatres enforced closing during the Corona outbreak have caused a drought of content and audiences could easily be tempted by other offers. It could take years to rebuild theatres' unique position" (translated) (Film & Kino Staff, 2020). This deep concern inside the trade should indicate the gravitas of the situation and the level of concern. As of now, the instructions are to keep the one meter rule for another year, as revealed by my source. They also feared that structural changes that benefit streaming services will pose a huge threat to local theatres. Guttorm Petterson of Film & Kino said "[…] In the increasingly difficult competition of people’s attention we are deeply concerned for the future of theatres, which would impact the entire Norwegian film industry as theatres are responsible for 70-80% of a film’s gross in Norway” (translated) (Film & Kino Staff, 2020). In 2020, Norwegian theatres had almost 4.85M ticket sales, compared to the previous year’s 11.29M sales (Medienorge Staff, 2021), and so Øfsti (2020), quite aptly, refers to the distributors’ experiments as *damage limitation*. Norwegian titles have for a long time struggled to find traction in the digital home markets and thus cannot thrive outside theatres. (Øfsti, 2020). Much indicates that PVOD or other VOD-models are neither sustainable nor very profitable for domestic titles as we are a comparatively small market. Municipal and private theatres were granted a support scheme for 2020, but they remain unsatisfied by the current, unpredictable plan for the 2021 backing (Film & Kino Staff, 2021).

Movies made for the big screen

When a filmmaker sets out to make a film, the hope is usually that it is seen by most possible people in theatres. Artists and filmmakers are among those that have been against same-day releases, shortening of the window or unforced straight-to-VOD release. Filmmakers would above all prefer their films to be experienced in theatres. Monetization is naturally one reason, but so is the experience of the cinematic art form. I want to highlight a few comments from filmmakers to illustrate the challenge studios face from talent.

Christopher Nolan has been working with WB since the early 2000’s but was disappointed by their plans with HBO Max. “Some of our industry’s biggest filmmakers and most important movie stars went to bed the night before thinking they were working for the greatest movie studio and woke up to find out they were working for the worst streaming service,” Nolan said. The *Tenet* director also noted that “Warner Bros. had an incredible machine for getting a filmmaker's work out everywhere, both in theatres and in the home, and they are dismantling it as we speak". (Masters, 2020). According to him, then, Warner's decision is a damaging one to the existing foundation of filmmaking and distribution.

Aaron Sorkin and Patty Jenkins were grateful that people were able to see their new films in a safe way (on Netflix and HBO Max, respectively) on one hand, but still expressed concern of permanent changes being made on the other. "We're all scared that everything's going to change now, that movie theatres are basically going to become, like, art houses, and that the films that you and I make will only be seen on streaming services," *The Trial of the Chicago 7* (2020) director said to his colleague. But he goes on to say he does not think that theatres will perish any time soon and points to movie-going as a collective audience-experience that humans have been addicted to for thousands of years. (Vary, 2020). This is another important aspect of audience motivation. Many people do not only go to theatres for the film itself or sound quality or the size of the screen. They also seek it out as a social event with friends and family and/or as a collective experience with a filled audience. The collective experience is often felt the most when the film playing has a pre-existing fandom such as a Star Wars or a Marvel movie. In these circumstances people will usually want to watch the film with fellow fans, sometimes even dressing up in anticipation for the premiere. (Flynn, 2018). The shared viewing also adds to the experience, for example, when a comedy elicits laughs across the audience or a horror movie causes people to scream and jump in their seats.

Dune (2021) director, Denis Villeneuve also points to the collective experience as essential to movies. He expressed dissatisfaction of their decision to release his and others' films straight to HBO Max, even after the virus *should* be under control. "Streaming services are a positive and powerful addition to the movie and TV ecosystems" he said, "but I want the audience to understand that streaming alone can't sustain the film industry as we knew it before Covid. Streaming can produce great content, but not movies of *Dune*'s scope and scale. Warner Bros.' decision means *Dune* won't have the chance to perform financially in order to be viable and piracy will ultimately triumph. Warner Bros. might just have killed the *Dune* franchise". The monetary aspect of a theatrical run compared to straight-to-VOD is again highlighted here, as he fears insufficient numbers will prevent investment in sequels to his sci-fi epic. Villeneuve finally communicates that humans have always had a deep need of communal storytelling experiences and theatres represent one of the last platforms we can get this. He concludes "Once the pandemic is over, theatres will be filled again with film lovers. That is my strong belief. Not because the movie industry needs it, but because we humans need cinema, as a collective experience". (Villeneuve, 2020).

None of the cited directors fail to see the advantages of streaming, but to avoid one-sidedness I should at least include one more positive statement towards VOD. *Avengers: Endgame* (2019, J. & A. Russo) co-director, Joe Russo, calls attention to the rapid change of the status quo "[…] the world is disrupting and it's changing at lightning speed and the pandemic has certainly accelerated that change". He also discussed the fact that some films are more suited for VOD distribution and pointed out that this distribution type makes titles available where it otherwise would not be- and often to more reasonable prices than a movie ticket. On the topic of HBO Max, *Wonder Woman 1984* and same-day release he noted "I think that that's just a sampling of what the future will look like, but I think they [theatrical release and VOD release] can supercharge each other and those that want the theatrical experience can get it and those that, […] for other reasons, economic or health or whatever those may be, have the opportunity to see it in their own home". (Barnhardt, 2020). The economic- and health aspects are irrefutable. Interestingly, though, he does not appear to believe VOD release will cannibalise the theatrical attendances, but instead boost one another in terms of marketing and demand. While not completely unthinkable, concern for cannibalism is warranted, indeed. The change is, superficially, good for the consumer, lest it remove the theatre option altogether.

Conclusion

In this text I have identified a few strengths and weaknesses of- and threats to Norwegian movie theatres. As movie theatres' strengths I discussed their will to constantly evolve. A significant advancement was the digitization of cinemas- important for flexibility and availability. Another was additions targeting specific groups. Throughout history we found that they reinvigorated themselves technologically to always remain one step ahead to solidify their place as *the superior place to consume film*, or at least aspire to be just that. It is also a collective experience that we as a species demand. These are some indications of their tenacity and endurance in face of several death sentences. This constitutes reasons for optimism for their future. Its weaknesses have been put down to lacking knowledge about their audience, decreasing visitations from their biggest target group, namely young people and finally a possible frailty in the face of shrinking distribution windows and new models. Streaming services and the multitude of them are not without their own weaknesses, of course, as they make piracy much easier and fragment a media landscape. Piracy is a threat to the movie industry as a whole. Streaming does pose a great threat in that they offer more flexibility than movie theatres can. They also lead the increasing pressure on the exclusivity window, along with studios and consumers in part. The Covid-19 pandemic may have made irreversible changes in relation to this as the consumer has become accustomed to more flexible distribution models. In addition to day-and-date release, the pandemic has caused delays of many films that theatres would have wanted playing as they rely on fresh produce to attract attendances. The situation has weakened theatres position, maybe permanently. It is still too early to draw conclusions as of what direct impact all the change will have in the long term in a post-Covid world, when, or if, masses will flock back and what models will become the norm. Kalkvik remained hopeful for the future and pointed to theatre demand and safety. Encouraging to theatre demand, a UK survey shows that 59% cited cinema-going as the outside-of-home activity they miss the most (Boxoffice Staff, 2021). And encouraging to theatre safety is it that as per October 2020, zero people have contracted the virus in cinemas, due to seating arrangements and restrictions (Sychowski, 2020). The physical and social nature of cinemas has obviously been a disadvantage during the pandemic, but it will again become an advantage that streaming is unable to replicate.

It should also have been made clear that the rise of streaming is not directly evident on Norwegian ticket sales, which has remained stable even after the shock. What has been made evident is that there is a huge, dynamic market for emerging digital platforms and it is changing the game completely. That VOD has seriously impacted physical media and not theatre attendances is a testament to theatres unique position. But in the end, it all depends on where consumers are willing to spend their money and if that goes more towards subscriptions than tickets, it will eventually impact every theatre, private and municipal. This will remain a threat that theatres must adapt to for years to come. Like before, they must keep improving in order to remain attractive to the consumers. This may now be more important than ever as competition increases, relationships with studios complicates and they risk a weakening of a competitive edge in distribution windows. Considering how fast things are changing this text may be rendered obsolete by next week, though hopefully not. But as of now, should theatres be considered dead and buried? As cinemas have become a resilient, deep-rooted cultural institution (especially in Norway), an important social venue and a highly valuable outlet for the industry, evidence suggests; not quite yet.

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