

# The effects of Covid-19 pandemic towards conventional theaters and online streaming services in Indonesia

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## ABSTRACT

The Covid-19 pandemic has drastically disrupted all business sectors in Indonesia such as the arts, cultural, and entertainment industries. This circumstance necessitated the conversion of numerous conventional movie theatres and online streaming providers. This scientific article examined the impact of the pandemic on the entertainment industry, specifically theatres of XXI and CGV and movie streaming; Disney+Hotstar and Netflix. The qualitative method was used to develop this research. The dataset was taken from the survey taken from McKinsey & Company website in 2020 and articles. The authors conducted an analysis of the changes based on two theories; New Media from Martin Lister, Jon Dovey, Seth Giddings and Kieran Kelly and Uses and Gratification Theory from Katz, Blumler, and Gurevitch. The research findings demonstrate that internet streaming services can meet the entertainment needs of lonely individuals at home and result in a paradigm shift away from the belief that new films are only released in theatres.

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## 1. Introduction

The first case of the coronavirus disease (COVID-19) emerged in Wuhan, China, in early 2020 [1] Meanwhile, the first confirmed case of COVID-19 in Indonesia was on 2 March 2020 [2]. Since that time, the majority of activities have been carried out digitally. The pandemic problem quickly spread globally, driving the pace of change in cinema circulation patterns — both online and offline film showing and distribution [3]. In Indonesia, the outbreak impacted a variety of sectors, including cinemas. Most countries shut down film productions, film theatres and universities where new generation of filmmakers were trained. As a result, cinemas have been temporarily closed and film and television production has ceased. Due to lockdowns, an increased number of people were forced to organize their work and leisure time at home. Domestic media consumption grows as more individuals stay at home [4]. The devastating effect of the COVID-19 epidemic is being reflected in people's changing behaviors and lifestyles, particularly their media intake. Social conventions of segregation and isolation have increased at-home digital usage, resulting in an increase in demand for subscription-based streaming services [5]. As a result, certain trends have already emerged. The prominence of streaming services and online media continues to grow. The advancement of information and digital technology, which is centred on the internet, has shifted the focus of multinational corporations. Digital technology can assist these businesses in transcending geographical boundaries and avoiding the high costs of establishing a physical presence in a foreign country [6].

Cinemas are in trouble, as blockbuster films have been pushed back to 2021, and some to 2022, while arthouse films have been delayed owing to production slowdown. Indeed, the pandemic serves mainly to highlight issues and tendencies in the audio-visual business that have been simmering for some time [4]. On September 18, 2021, the Company reopened CGV cinema operational activities in accordance with Minister of Home Affairs Instruction No. 42 2021 regarding the Enforcement of Activity Restrictions Community Level 4, Level 3, and Level 2 Corona Virus Disease 2019 in the Java and Bali Region. There are two cinemas located throughout Indonesia, specifically in the following cities: Tangerang City has two CGV Cinemas: CGV Ecoplaza Citraraya Cikupa and CGV Ecoplaza Citraraya Cikupa. Meanwhile, Palembang's CGV Cinema has one which is CGV Social Market [7]. As a result, the government has established several protocols that the society must follow if new normal conditions are implemented. In accordance with the provisions, all staff and spectators must wear a double mask in all areas of the cinema. Before entering the area cinema, staff needs to check the audience's body temperature, reduce auditorium's seating capacity to maintain a safe distance between spectators. Next, before and after the film screening, thoroughly clean the Auditorium, including the seats. Hand sanitizer gel should be available too [7]. There are a plethora of online streaming services available when it comes to movies. These platforms, which include the internationally renowned Netflix, Amazon Prime, Viu, Mola TV, Iflix, Video, and Disney+ hotstar, enable moviegoers to watch both old and new releases.

Online streaming services are not, in fact, novel concepts. Indeed, Netflix has been operating in Indonesia for nearly six years, beginning operations on January 7, 2015. With the end of the pandemic still unknown, the growing reliance on these online streaming services. Due to the significant changes brought about by the Covid-19 pandemic to both traditional theaters and online streaming services, this paper will focus on the effects felt by both. From the aforesaid discussion, it can be inferred that the digital era has undeniably opened up avenues for streaming services to connect and engage with customers in real time. In order to remain competitive, it becomes imperative for the service providers to focus on key drivers that impact the customer's decision to stay connected to the firm and provide it steady flow of sales in future [8]. Hereby, in this research, we analyzed the impact of the Covid-19 pandemic on Indonesia's traditional movie theaters XXI and CGV and online streaming services, Netflix and Disney+hotstar.

Netflix is one of the US-based platforms benefiting from the lockdown measures due to the COVID-19 global pandemic. According to its quarterly reports (Netflix, 2020a), in the first 6months of 2020, Netflix added 26 million new subscribers worldwide, which is almost the same as the number of subscriptions throughout 2019 (28 millions) [9]. Netflix released 126 original series or films – more than any other single American television network or channel [10]. Netflix has identified Southeast Asia, particularly Indonesia, as a target market for its expansion. Netflix sees Indonesia as a very promising market with a large population, 132 million internet users, and 371 million mobile internet users. Netflix first entered Indonesia in 2016, becoming the country's first video-on-demand service provider [11]. No matter the details, with a Netflix button on the service's devices and Netflix content prominently embedded throughout its promotional materials, it was clear that Partner TV's brand was directly tied to Netflix. Yet, in collaborating with Partner, it was equally clear that Netflix was entering a pay-television market that had become increasingly competitive over the previous several years [12].

On the other hand, Disney+ hotstar is the latest online streaming service to enter Indonesia. Disney+ hotstar is an online streaming service made by Walt Disney Company. It is also in partnership with hotstar, which is online streaming service from India. With big studios name such as Pixar, Marvel, 20<sup>th</sup> Century FOX, and National Geographic, it never lacks variety of contents. Although new, Disney+ hotstar has gained the spotlight as the most subscribed online streaming service with 2.5 million subscribers in Indonesia alone [13].

An Over The Top (OTT) media service like Disney+hotstar and Netflix are streaming media services that offered many advantages for viewers via internet. The cost of an OTT services is very low. Premium subscription of Amazon Prime Video starts from a price of Rs 999/year. The control of choice stays in the consumer's hand. The consumer can choose between different contents. OTT platforms can be watched in different devices such as televisions, mobile phones, tablets and laptops [14]. Individuals may have divergent motivations for interacting with identical media, as well as divergent levels of gratification. Numerous studies indicated that individuals use technology for a variety of purposes, including to meet their own social and psychological needs [15]. Online users

access and share information via digital media technologies [16]. Others make use of technologies to make purchases [17], [18], [19] or for entertainment [20], [15]. Alternatively, they employ them to communicate, establish relationships, and solicit affection [21], [22], [23], [24].

## **2. Theoretical Framework**

### **2.1. Understanding New Media**

According to Martin Lister, Jon Dovey, Seth Giddings and Kieran Kelly (2009) the 'new' in new media carries the ideological force of 'new equals better' and it also carries with it a cluster of glamorous and exciting meanings. The 'new' is 'the cutting edge', the 'avant-garde', the place for forward-thinking people to be (whether they be producers, consumers, or, indeed, media academics) [25]. Additionally, they noted that the term 'new media' has gained currency as a result of its helpful inclusion. It avoids the reductions inherent in some of its alternatives at the expense of its generality and ideological undertones. Additionally, media firms must contend with the reality that the marriage of computer-based communications and established broadcast technology has created an entirely new and fluid field of media production. The conventional distinctions and classifications between various media processes are dismantled and reconstructed. The specialized craft skills required for twentieth-century media production have become more widely available to the general population, owing to an expanding baseline of 'computer literacy,' information technology skills, and, most significantly, the availability of software that increasingly enables the production of 'user-generated content.' Through network-based distribution, a diverse range of consumers can access a diverse range of media at a variety of different times throughout the world. Consumers and users increasingly have the ability to customize their media consumption in order to create customized menus that meet their unique and specialized demands [25].

### **2.2. Understanding Uses and Gratification**

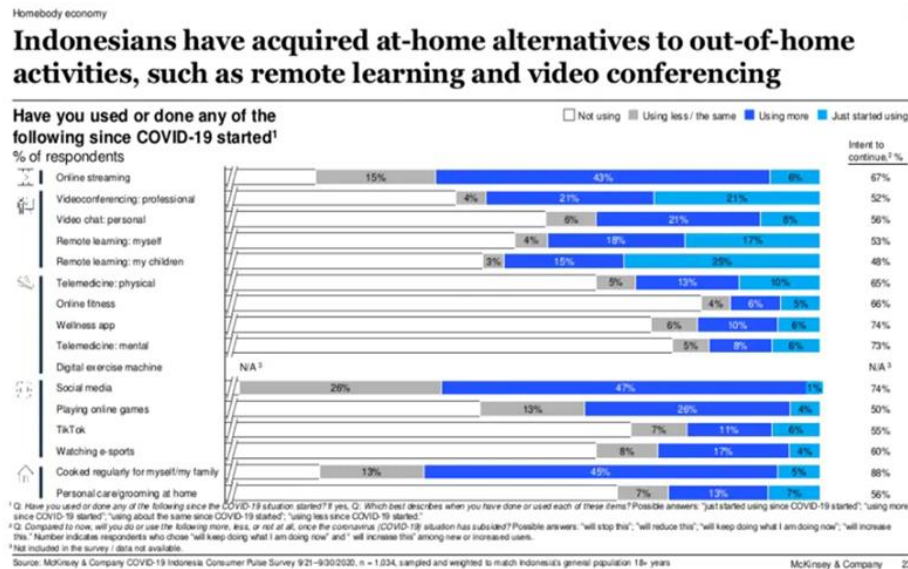
According to Katz, Blumler, and Gurevitch (1974), Uses and Gratification theory is more concerned with how the audience uses specific media to meet their needs. They stated that audiences are responsible for selecting the media organization that would best serve their needs; and that media outlets are used by the audiences to fulfill specific gratifications. People are active users of media and select how they will use it [26]. There are five fundamental assumptions they elaborated. First, the audience is engaged and purposeful in their use of media. Second, the audience takes the initiative in associating need gratification with specific media choices. Third, the media compete with other sources to meet audience needs. Fourth, the public has sufficient self-awareness of their media uses, interests, and motivations to provide researchers with an accurate picture of those uses. The last, the audience alone can rate media content. Another concept comes from [27]. They stated that people use media as entertainment; scan the environment; a diversion; a substitute for personal relationships; and a check on personal identity and values. On the involvement factor, Galloway and Meek (1981) submit that motivation to use any mass medium is also affected by how much an individual relies on it [28].

## **3. Method**

Before you begin to format your paper, first write and save the content as a separate text file. This research analyzed the impact of Covid-19 Pandemic towards the conventional movie theaters, XXI and CGV, and online streaming services, Netflix and Disney+ hotstar. The researchers used the qualitative method to elaborate the research. There are some stages that we did in conducting this research. First, we elaborated the survey taken from McKinsey and Company website regarding Indonesian consumer sentiment during the Corona virus crisis. Second, we related the survey with the theory of New Media to see how the pandemic affects people's needs, perceptions, and behaviours. Third, we applied the Uses and Gratification theory to identify whether online streaming services meet the audiences need by comparing the movies that are released through conventional movie theaters, CGV and XXI to the ones released on the online streaming services, Netflix And Disney+hotstar. Lastly, we concluded our analysis by explaining how the Covid-19 pandemic has affected the conventional movie theaters and online streaming services in Indonesia.

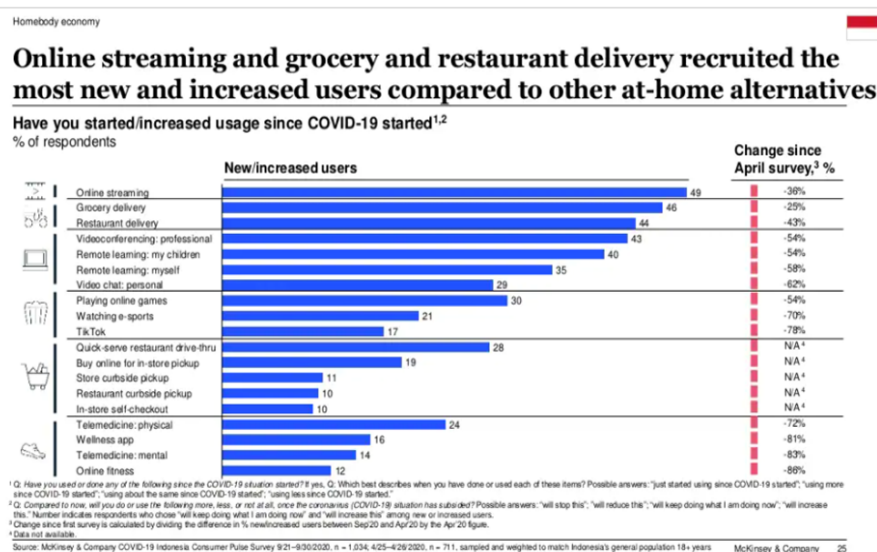
#### 4. Results and Discussion

Broadcast media through digital and mobile technologies. Very often, they are watching TV channels, movies, series, shows, etc. through online streaming services that are readily available through ubiquitous technologies, including smartphones or tablets [29]. The individuals' technology acceptance is influenced by their extrinsic motivations, including their perceived usefulness [30], [31]. Below, there is a survey taken from McKinsey and Company [32] regarding Indonesian activities during the pandemic in 2020.



**Fig. 1.** Survey of Indonesian activities during the pandemic in 2020. *Source:* McKinsey and Company

From the data above, the researchers viewed that Covid-19 has affected Indonesian activities. People tend to do online activities such as playing Tik Tok, playing games, video chat personal, professional videoconferencing, or online streaming. The survey showed that Indonesian media consumption has been increasing. The highest intention to continue media consumption was on social media as it reached 74%. Besides that, we can see that people intention in doing online streaming is also in high percentage. It reached 67%. From this data, we can conclude that during the pandemic, Indonesian people have shifted their offline activities into online activities by accessing social media and online streaming. This survey is also supported by another data that also taken from McKinsey and Company website in 2020.

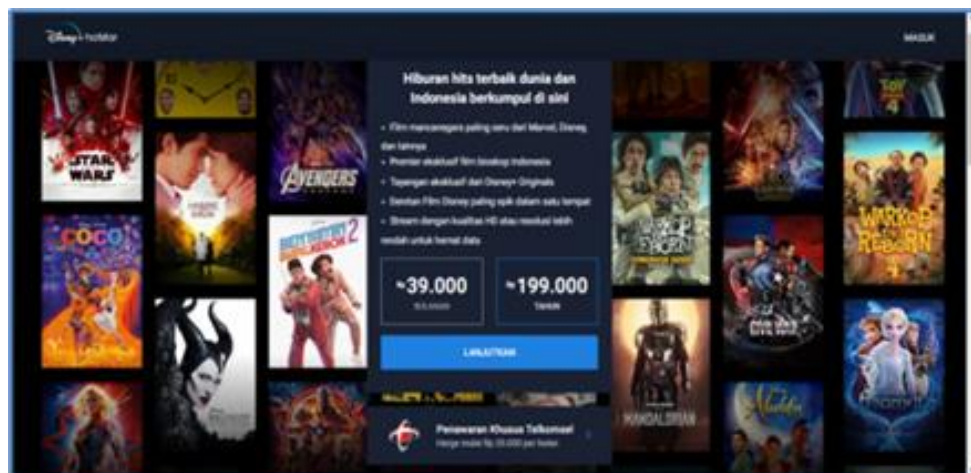


**Fig. 2.** Survey of Indonesian consumer sentiment during the coronavirus crisis in 2020. *Source:* McKinsey and Company



From the data above, the researchers viewed that Indonesian consumer sentiment during the Covid crisis in 2020 had been increasing too. The users increased on online streaming until 49%. Grocery shopping and restaurant shopping reached 46%. Professional videoconferencing reached 44%. Meanwhile, the lowest survey went to online fitness that reached 12%. From this survey, we can conclude that online streaming is the most favorite activity during the pandemic. In further point of view, the researchers see that it happens because online streaming can provide many entertaining movie features to watch.

Our next observation goes to Disney+ hotstar. Disney+hotstar does not only enable their audience to watch movies on various media ranging from laptops, mobile phones, tablets, and televisions. For TVs, it enables the streamers or audiences to access 4K movie watching experience with Dolby Vision and Dolby Audio. Disney+ hotstar also established a partnership with Telkomsel an internet and SIM card provider. Being the most used internet provider in Indonesia, this surely is advantageous for movie lovers since the price is now more affordable and yet can watch the latest Disney movies and TV series. The payment is also convenient because they need to just download the Telkomsel app. The movies on Disney+ hotstar range from Disney movies, Pixar movies, exclusive Indonesian movies, to Disney+ originals. Social media marketing that has been done by one of the online streaming services namely Disney+hotstar has given a significant relationship with consumer purchase intentions. The consumer engagement acts as a mediating variable in influencing social media users to obtain consumer purchase intentions [33].



**Fig. 3.**Figure 3. Disney+hotstar features with their advantages.

From the description above, Disney+ hotstar represents a form of new media. Its features have enabled many movie lovers to watch movies with high quality experience and convenient payment. As stated by Martin Lister, Jon Dovey, Seth Giddings and Kieran Kelly, "Consumers and users are increasingly able to customise their own media use to design individualised menus that serve their particular and specific needs." From this statement, we can see that Disney+hotstar has attempted Indonesian people to explore many features that they have and convenient payment they provide. As a result, it is vivid that Disney+hotstar want to serve Indonesian specific needs better.

The next observation goes to Netflix. This online streaming service strives to provide quality video streaming service and customer experience. Netflix offers three price plans in the U.S.: Basic, Standard, and Premium [34]. Subscription plans differ mainly based on video quality and number of simultaneous screens. On Basic, content is provided at 480p resolution and only one screen can be watched at the same time. With the Standard plan, video resolution bumps up to 1080p and two screens can be used simultaneously. Users get 4K+HDR video quality along with four simultaneous screens, when subscribed to the Premium plan. Currently, the prices are \$8.99 for Basic, \$13.99 for Standard, and \$17.99 for Premium [35]. Netflix's most notable feature has many original series directed and starring award-winning directors and actors, which create a two-tiered model useful for viewers and partners alike. It also has a new feature "Downloads for You", which downloads movies based on the user's preferences regardless if the user is connected to the internet or not. With feature, according to Patrick Flemming, the Director, Product innovation at Netflix, there will always be movies waiting for the user to watch. It is already available for android users in Indonesia and is still currently being developed for iOS users. Similar to Disney+ hotstar, Netflix also shows

new movies on its platform. Some of the notable ones during the pandemic are *The Half of It*, *All the Bright Places*, *Guru-guru Gokil*, *The White Tiger*, *Malcolm & Marie*, *To All the Boys: Always and Forever*, *Moxie*, and *Yes Day*. Netflix, as a form of new media, also provides an accessible and convenient way of watching movies.



Fig. 4. Netflix features with their advantages

From the description above, various subscription packages that Netflix offered made people able to choose the kind of entertainment that fulfills their needs with affordable prices. Netflix offers us to make our movie watching experience better. As a result, both Netflix and Disney+hotstar represent the forms of new media. Not only because they bring new and old movies to the audience during the pandemic and make the process of subscription simple and quick, these online streaming services also continue to refine their features that will result in a better movie watching experience.

The next analysis goes to XXI and CGV. XXI movie theater XXI decided to re-open its theater on October 17<sup>th</sup>, 2020, but officially on November 16<sup>th</sup>, 2020.

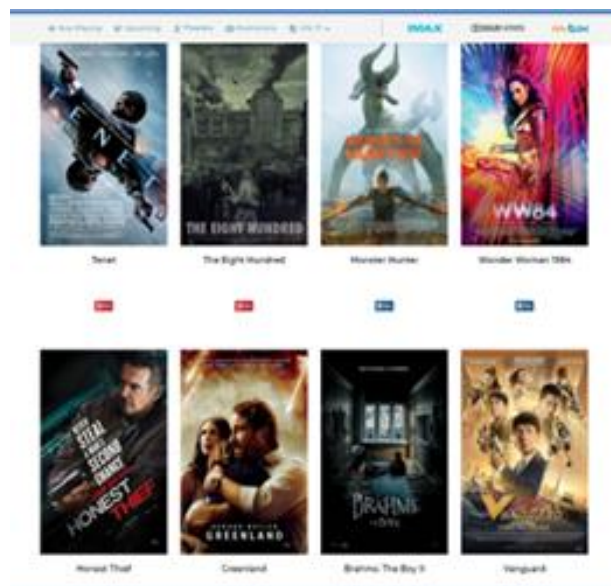


Fig. 5. XXI Movies during pandemic

In the pictures above, we can see some of the movies that are available at XXI. However, in the middle of the pandemic, the number of new movies at XXI in Indonesia is limited and not equally distributed. For example, Jakarta's XXI screens more movies even the ones that were released back in 2020 such as *Wonder Woman 1984* and *Tenet*. In addition to that, there are protocol rules implemented at every XXI. These rules are part of XXI *New Habits*. These rules include using mask and hand sanitizers, social distancing, and online payment for the tickets (suggested). However, some of the rules also limit the number of movie goers that are allowed to get in. Those two rules are only 50% of the maximum capacity of each studio that's allowed to be filled in, and they have to keep a distance of at least a meter between the seats in the waiting room. Moreover, some XXI in Indonesia has a rule that regulates age limit for those who want to go to the movie theaters [7].

Another consideration when we watch the movies in conventional theaters is the ticket price. Taken from 211cinplex website, the ticket is split into two categories, 2D and IMAX 2D. For the 2D movies, the price is Rp.30.000- 35.000 per person (depending on the mall where the theater is located). For the IMAX 2D, the price is at Rp. 40.000 per person. Looking at the XXI, we can see that it has adhered to the safety protocols regulated by the Governments. There are now new protocols in place to keep the actors and crews safe. Yet even with the best of intentions new reports indicate that the virus is spreading across the globe on films sets too [36]. In doing so, it also poses several limitations in the movie watching experience, one of which is the fact that there has to be a distance between the movie watchers. Some movie theaters even forbid audiences of certain ages from entering the movie theaters. Since it was reopened almost 7 months after it was shut down for the first time, some movies had already been screened on online streaming services. As we've also mentioned above, the movies available are not equally distributed. The ticket price remains the same as it were before the pandemic. Based on our point of view, as a conventional movie theater, XXI doesn't entirely meet the need of entertainment of the audience during the pandemic.

Referring to the theory of Uses and Gratification from Katz, Blumler, and Gurevitch (1974), they stated, "Audiences are responsible for selecting the media organization that would best serve their needs; and that media outlets are used by the audiences to fulfill specific gratifications." However, if we take a look at what XXI offered, they did not serve people's needs well and not fulfil their specific desire. People have to obey the health protocols, the audiences are limited, the ticket price is quite expensive.

The last observation goes to the conventional movie theater, CGV. CGV re-opened some of its theaters officially on October 21<sup>st</sup>, 2021. Just like XXI, not all CGV are available and the movie options that are available are vary depending on the movie theater. For example, there are 9 movies screened at CGV Grand Indonesia, and they are *4Dx2D Godzilla vs Kong*, *Godzilla vs Kong*, *The Unholy*, *Demon Slayer: Kimetsu No Yaiba The Movie: Mugen Train*, *Barb & Star Go to Vista Del Mar*, *Crayon Shin-Chan: CRASH! Rakuga Kingdom* and *Almost Four Heroes*, *Detective Conan: The Scarlet Alibi*, *Raya and the Last Dragon*, *Stand by Me: Doraemon* (source: CGV at Grand Indonesia).

When CGV theatres re-opened, they have also implanted several health protocols to ensure the safety of the staff and audience. The Company has prepared several health protocols in accordance with Ministry of Health and local governments regulation, among others: 1. Audiences and visitors must be at least 12 years old and must have taken the second dose of vaccine; 2. Visitor tracing system with QR Code from PeduliLindungi Apps; 3. are Staff and audiences are required to wear double masks in cinema area; 4. Checking the audience's temperature before entering cinema area; 5. Reducing seats capacity in auditorium to maintain safe distancing of the audiences; 6. Auditorium and seats cleaning before and after movie screenings; 7. Provide hand-sanitizer; 8. Tickets, foods and beverages transactions through digital (cash-free) such Company's website and application or through ticket, food and beverage machine in the cinema; 9. Eating and drinking are allowed in the auditorium, however the face mask must be used afterward; and 10. Posting communication materials in the cinema area for visitors and through online to improving knowledge of health protocols in the cinema [7]. Screening of films at the CGV cinema starts at 12.00 WIB and screenings will end according to the operating hours of the shopping center where CGV operates. CGV also has several ticket prices available, each offering a different watching experience. However, not all CGV cinemas have the same options for the studios and thus the ticket prices.

Since CGV also re-opened in October, more than 5 months after it was first shut down, but still limited to only some cities, it lost its chance to screen new movies. This was only made worse by the fact that not CGV cinemas screen the same movies. This of course comprises the movie goers need to go to the cinema and watch new movie releases. In regards to price, CGV is more costly than XXI. Some movie theaters still charge Rp. 50.000 for 2D movies (In comparison, XXI only charges Rp. 40.000 for IMAX 2D). With not all movies being equally distributed at all CGVs, this discourages movie goers from going to the cinema even more, especially since the pandemic has caused financial damage towards many sectors and industries. In conclusion, CGV in some ways also doesn't meet their audiences' need for affordable, convenient, and new movie watching experience especially during the pandemic.

Referring to Katz et al (1974), "Uses and Gratifications theory asserts that people are active users of media and select how they will use it". However, the researchers view that the conventional theatre CGV does not meet audiences' satisfaction. The audiences have to follow the health protocols, pay highly, and they cannot select the movie they want to watch as every theatre has a different movie to watch. As a result, the satisfaction that can be got by the audiences through conventional theatres is less than in online streaming.

## 5. Conclusion

To sum up, online streaming services, in this case Disney+ hotstar and Netflix, meet audiences' needs. The flexible, and affordable subscription plans, convenient payment, accessible and varied movie features, and obviously better watching experience make these online streaming services the winners during this pandemic. The increasing users is the proof that they meet audiences' needs. They satisfy more needs than the conventional movie theaters, XXI and CGV. Limited movie features, standardized health protocols, costly ticket prices and less-convenient service that the conventional theaters have made audiences choose online streaming services. Pandemic has shifted the way people live, think, and act. Pandemic gives advantages for the improvement of online streaming services. On the other hand, it also gives some downsides for movie industries especially conventional movie theaters. To conclude, pandemic broadens people's perspectives. Audiences get used to access the New Media, movie producers, actors and actresses get used to think creatively to fulfill people's needs and gratification.

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