

Indonesian Film Industry amidst the Covid-19 Pandemic: An Observation on Sustainability Efforts

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Keywords: Indonesian Film Industry, Sustainability, Pandemic.

Abstract: This research presents an observation of the Indonesian film industry amidst the COVID-19 pandemic. The pandemic has impacted the film industry such that film workers, from directors to theater ticket booth attendants, have lost their jobs or suffered drastically reduced incomes. This research examines how the Indonesian film industry has attempted to sustain production throughout the pandemic by any available means. This research focuses on the various efforts and platforms of production that film workers and communities have engaged in to keep the industry afloat. These efforts are categorized and interpreted to show that although the pandemic has hit the industry hard, workers have found creative ways to survive and sustain the industry, albeit barely in some cases. In the future, these various means of survival may ensure the sustainability of the Indonesian film industry.

1 INTRODUCTION


This research investigates the challenges the Indonesian film industry has faced during the COVID-19 pandemic and the efforts to resolve these challenges. Very few scholarly articles have explored the Indonesian film industry during the pandemic, and so most of the references used here are online media reports. Mainstream Indonesian online media platforms, such as Tribunnews, Kompas.com, Detik.com, Kumparan, Liputan6.com, Katadata, Republika, and MediaIndonesia, have reported on the Indonesian film industry at least once during the pandemic from various perspectives: that of directors, actors, producers, movie theater owners, and general film workers. The discussions presented in media reports are generally short and simple, with a lack of depth and analysis. Thus, this research attempts to fill the academic gap regarding the discussion of this issue in the Indonesian film industry.

The novelty of this research lies in the fact that it is one of the first academic articles to address the Indonesian film industry during the pandemic. As such, the present research is vital to providing the local and international public with credible information about how the Indonesian film industry

is faring during the pandemic. As the pandemic is ongoing, further research is required to present a complete picture of the issue. This research will lay the foundation for other scholars who wish to study this situation.

The COVID-19 pandemic has severely impacted many industries, including the film industry. Globally, film productions, distributions, exhibitions, and consumptions have been postponed or canceled. Consequently, millions of film workers have lost their jobs. Interestingly, the disaster genre (into which the pandemic itself fits) has always been one of the best-selling genres. According to Davis (2017), "Pandemics are also a perennial subject of film, television, literature and online games and pandemic narratives travel across and blend the genres of science fiction, alien invasion, and zombie horror." For instance, Soderbergh's 2011 film *Contagion* resembles today's situation. The plot revolves around a pandemic caused by a virus transmitted by respiratory droplets, providing an eerie prediction that came true in the form of COVID-19.

There is no instance of film production in which workers can be guaranteed that they are 100% safe from contracting the coronavirus on set. One can take the case of Tom Hanks and his wife, Rita Wilson, who contracted the coronavirus in early 2020 in Australia

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when filming Luhrmann's biopic on Elvis Presley. Hanks was surprised when he and Rita were diagnosed with the virus—as he stated in an interview, “It was relatively early in Australia's response to the coronavirus, and they wanted us not to give it to anyone else... [T]hat's why we were in lockdown” (Moreau, 2020).

When the Hollywood production line reopened, a very strict (sometimes frustratingly so) health protocol was implemented. For example, during the production of the latest installment in the *Mission Impossible* series, Tom Cruise lashed out at two crewmembers who ignored the safety measures. He does not regret it. “No apologies,” he said in an interview. “You can tell it to the people that are losing their homes because our industry is shut down. It's not going to put food on their table or pay for their college education. That's what I sleep with every night. I'm beyond your apologies” (Saeed, 2020).

In Indonesia, Joko Anwar stated that about 30 film productions were canceled by May 2020 (10 productions per month on average) (Al Farisi, 2020). That trend translated to 100 canceled films by the end of 2020 and a total loss of as much as 2 billion rupiahs. The Indonesian Ministry of Tourism and Creative Industry (Kemenparekraf) confirmed that 80% of the film industry stopped operating during the pandemic (CNBC, 2020). Even worse, according to Shanty Harmain, producer at Base Entertainment, the Indonesian film industry had been experiencing growth at a rate of about 20% per year (Azizah, 2020), which was halted when the pandemic limited film production.

Also, Lala Timothy, producer of Lifelike Picture, explained that 90% of Indonesia's film industry workers are freelance workers (Firmansyah & Pandamsari, 2020). If a job gets canceled, they receive no income, as they do not enjoy the same benefits as full-time workers.

Canceled productions also affect the distribution line, exhibition, and consumption. The number of films produced decreases, meaning that those working along the distribution line will have no jobs and movie theaters will have nothing to exhibit. According to *Filmindonesia.or.id*. (n.d.), there are 343 movie theaters in Indonesia, most of which are owned by Cinema XXI and CGV, followed by Cinemaxx and other small companies.

In an interview, Dewinta Hutagaol, Cinema XXI's head of corporate communications and brand management, stated that the pandemic is the worst situation they have ever faced, as they had to close all 1182 of their movie screens (Tionardus, 2020). Similarly, CGV closed all 397 of its movie screens,

and their 669 employees had to accept a 50% pay cut (Aldin, 2020). Moreover, CGV has planned to permanently close 30% of its movie screens to cover losses incurred due to the pandemic (Kartikasari, 2020).

Consequently, the audience's consumption experiences have also changed. Movie theater closures have driven the audience back to TV and, to an even greater extent, to online and streaming consumption—in the latter case, numbers are growing exponentially all around the world. One study shows that, in Germany, the “young audience has returned to Public Service Television, mainly because they find reliable news there. Nevertheless, streaming services are increasing their subscription numbers” (Mikos, 2020). Similar perceptions are present elsewhere. For example, Alexia Quadrani, head of the U.S. media equity research for J.P. Morgan (2020), believes that “a permanent shift has taken place across the industry from a linear platform to a digital platform.”

Furthermore, a study by Nielsen focused on North Asian countries (Japan, South Korea, Hong Kong, Mainland China, and Taiwan) shows similar trends (i.e., increased TV viewing, extensive use of social media for conversing with others, the growth of new apps that support an indoor lifestyle, and overly cautious advertising) (J.P. Morgan, 2020). Nielsen's study on the Indonesian audience's consumption across 11 major cities also presents growing numbers of TV viewers during the pandemic (Lubis, 2020).

Such findings align with the results of a study showing increases in the public's use of mass media, social media, and messenger services during the pandemic. The researchers claim that “the motivation to seek entertainment and comparison had a bigger influence on the increase in media use during the crisis. We argue that this might relate to the high level of fear and stress related to the impact of the pandemic” (Rochyadi-Reetz et al., 2020).

Moreover, Budi Irawanto, chairperson of the Jogja-NETPAC Asian Film Festival (JAFF)—as well as a lecturer in the Faculty of Communication Science and the Faculty of Social and Political Sciences at Universitas Gadjah Mada—states that companies like Netflix and GoPlay have experienced an increase in their numbers of subscribers. Specifically, Netflix experienced an increase of 15.8 million paid subscribers from around January to March 2020, while GoPlay reported that the time spent on the platform increased tenfold during the pandemic compared to before the pandemic (Fisipol, 2020).

The issues mentioned above related to the line of film production, distribution, exhibition, and

consumption are the background on which this research discussion is based. Through observation and research, the present work will explore how the Indonesian film industry is struggling to overcome and survive the current unprecedented situation.

2 RESEARCH METHODS

This research follows a qualitative. As very few academic works have discussed the status of the Indonesian film industry during the pandemic, most references used in this research are taken from local and international online media reports published between March 2020 and April 2021. In total, this study uses 12 local online media sources as references: Tribunnews, Kompas.com, Katadata.com, Lifestyle.com, Republika, CNBCIndonesia, Lokadata, Kumparan, Detik.com, MediaIndonesia, AntaraNews, and Liputan6.com. As these mainstream online media sources have large readerships, they are assumed to represent the Indonesian media in general regarding the Indonesian film industry's situation during the pandemic.

In addition to these online media sources, this research also refers to some academic articles and a local website specializing in Indonesian film (filmindonesia.or.id). This research also uses some international online entertainment-based media sources, such as *Rolling Stone* and *Variety*, to compare how the film industry has fared globally during the pandemic. Additionally, the current study references international online survey media sources such as J.P. Morgan, Marketwatch, and Nielsen to support the research.

All collected data are categorized, observed, and analyzed to understand the condition of the Indonesian film industry from various points of view, including the viewpoints of producers, film workers, actors, and directors. The international references are used to compare the Indonesian film industry to the film industries of other countries—especially the U.S., which is considered the mecca of the global film industry. This comparison shows how the Indonesian and global film industries have faced similar problems despite their unique characteristics. If people learn from each other's efforts to sustain the industry, everyone in the industry will benefit from these efforts.

The Indonesian film ecosystem has seven aspects: creation, production, distribution, exhibition, audience literacy and appreciation, music and film education, and film archiving. However, due to the limitations and scope of the present research, this

research will focus on three aspects—namely, production, distribution, and exhibition—as well as one additional aspect (i.e., consumption).

The local online media references are broken down as follows: six sources related to production, four sources related to distribution, six sources related to exhibition, and three sources related to consumption. By observing and interpreting the situation before and during the pandemic for each aspect, this article attempts to show what the Indonesian film industry will be like after the pandemic. Hopefully, the observations and analysis of the data will provide readers with adequate information on the Indonesian film industry's status during the pandemic.

3 RESULTS AND DISCUSSION

If the film industry is to survive, film production, as the business core of the industry, needs to develop a production strategy that is suitable for the current pandemic situation. In Indonesia, film production has slowly resumed with great caution, as most film production processes involve keeping many people confined in a small space for a long time. Producers' creativity is challenged as they think of ways to create safe working environments.

To support the sustainability effort in the film industry, Kemenparekraf issued a document policy in July 2020 entitled "An Implementation Guide on Hygiene, Health, Safety, and Environmental Sustainability for the Creative Economy Sector." The report provides detailed technical tips for film production. For example, the only time an actor cannot wear a mask is when he/she is in a shot. Also, touch-up makeup should be done applied by the actor him/herself rather than having a makeup crew; similarly, actors are encouraged to bring and use his/her own makeup. Distancing, regular disinfecting, creating partitions, and other innovations are also practiced to maximize the protection of all crewmembers.

Health protocols are also essential to film production during the pandemic. However, the cost of adapting to the new health protocol in film production is high, according to Angga Dwimas Sasongko, CEO and founder of Visinema Pictures. He urges film companies to allocate health budgets to ensure the safety of workers (Putri Alvita, 2020). The safety of all crewmembers must always be the first priority in any film production process.

In an interview, Hikmat Darmawan, a member of the Jakarta Arts Council Film Committee, states that

production houses should not depend solely on ticket sales for income and that they should re-write their business model to cope with the new condition. He proposes four survival strategies for production houses. The first is to produce low-budget drama films that can be streamed on the over-the-top (OTT) service. The second is to produce animation films, as their production does not require large groups of people to gather in small spaces. The third is to not depend on big-budget box office movies. The fourth strategy is to restore old films. These strategies may not generate massive amounts of income, but Darmawan believes that these options are much better than traditional strategies (Rachman, 2021).

Another interesting occurrence observed during the pandemic is that the lack of new local and international films has benefitted the production of old and independent films, which are currently in demand as the best way to fulfill the audience's thirst for new films. Short films such as *Lemantun* (2014), *Natalan* (2015), *KTP* (2016), *Singsot* (2016), *Balik ke Jakarta* (2017), *Tilik* (2018), and *Unbaedah* (2019) suddenly went viral on social media during the pandemic (Ramdhani, 2020). This phenomenon, if maintained, can be turned into a positive long-term trend. The pandemic has made the general audience aware that there are many high-quality films that are not produced by big movie companies with big budgets.

Technology transformation can also be used to produce films during the pandemic. Lukman Sardi, a senior Indonesian actor, states that technology such as cellphones can open up new spaces for young filmmakers to work with tools that are common in everyday life and that the limitations imposed by the pandemic can boost filmmakers' creativity (Dwinanda, 2020).

Similarly, Garin Nugroho mentions a 'vertical cinema,' by which smartphones frame daily routines from a vertical orientation. He says that it is fun to make short films using a smartphone in a vertical framing, as it brings a sense of adventure to the composition, blocking, and angles taken from a different perspective (Nugroho, 2021). Indeed, vertical cinema has risen along with the development of the cellphone culture in the second decade of the 21st century (Pratiwi, 2021). *X&Y*, a virtual cinema film produced by Studio Antelope, went viral, generating 120,000 within the first ten days of its release. This phenomenon offers a promising avenue for filmmakers to explore the extent of vertical cinema in the future, especially considering that almost everyone owns a cellphone.

Hanung Bramantyo, an Indonesian director, made a short video on a cellphone with his children during the Indonesian large-scale social restriction and shared it on a video-sharing site. The film unexpectedly went viral, gaining more than 700 thousand viewers and eventually even drawing sponsors (Laraspati, 2020). Bramantyo says that sometimes creativity arises during crises.

Apart from cellphone use, the growing use of conference applications such as Zoom has also enabled filmmakers to produce films without breaking the health protocol. For example, *Rob Savage's Host* was remotely produced in England during the lockdown, as the entire movie was filmed using the Zoom conference call application. In an interview, Savage states that "it was not a pandemic movie. It was a lockdown movie. It was more about isolation" (Ehrlich, 2020). Some YouTubers applied the same strategy in their viral video *Unsubscribe*.

Some Indonesian independent filmmakers produced similar films that do not go as viral as the two titles above. For example, the 2020 short film *Sepuluh Meter* was a collaboration between Cerita Films and OCBC NISP dealing with the psychological challenges people face during the pandemic. The entire production was carried out over three weeks at home utilizing various social media applications such as conference applications, Instagram, and internet browsers (Kumparan, 2020). This shows that limitations imposed on film production do not mean that film production completely stops. The examples above show that technology transformation is one way to overcome production limitations. By using non-traditional gadgets, filmmakers can produce films, although there is no guarantee that their films will be commercially successful. The underlying point is that the goal of filmmaking during the pandemic is not to instantly make a profit but to explore new ways to safely produce films that encourage and entertain the audience.

The second and third stages of film production are distribution and exhibition. Film distribution, especially for independent filmmakers, has always been—and remains to be—a struggle. It is expensive to distribute films in Indonesia, and distributors do not support independent films from unknown producers or film houses (Arifianto & Junaedi, 2014). Also, small film companies cannot meet all of the requirements that distributors have in place. Thus, independent filmmakers distribute their films through non-mainstream channels such as local (usually city-based) film festivals, film communities, and colleges or universities.

The film industry at large could consider following this distribution strategy to sustain itself, though they cannot expect huge profits if they do. Platform transformation is central to this strategy. Due to the restrictions placed on social gatherings, such as going to cinemas or film festivals, the only truly safe way to distribute and exhibit films is through online digital platforms. All around the world, selling the films to the OTT service is one option for the producers to maintain a money flow even though the revenue is lower than that achieved through movie theater ticket sales. This is especially the case for films with high budgets.

Some producers chose to delay the release of new films instead of selling the films through the OTT platform, especially when the films have excellent box-office potential. These producers believe that movie theaters are irreplaceable, a sentiment that is shared by well-known director Joko Anwar. For instance, MD Pictures has delayed the release of *KKN di Desa Penari*, which they believe will be a great box-office success. Similarly, Paragon Pictures has delayed the releases of *Backstage* and *Losmen Bu Broto*, while Dee Company has delayed the release of its high-budget film *Makmun 2* (Andriani, 2021).

About six months after closing their doors in March 2020, movie theaters around the world tried to welcome back moviegoers by following a strict health protocol. The limited audience intake did not generate sufficient income for the theater owners and workers, but it is at least a start for them and the beginning of a new moviegoing experience.

For instance, on August 21, 2020, the U.S. National Association of Theater Owners, in collaboration with the CDC, released *CinemaSafe*, a set of voluntary health and safety guidelines for theater owners. Similar guidance was provided in Indonesia as an e-leaflet on August 28, 2020 (see Image 1), released by *KPC PEN (Komite Penanganan COVID-19 dan Pemulihan Ekonomi Nasional* (“Committee for Handling COVID-19 and the National Economic Recovery”)).

Although movie theaters were gradually allowed to reopen in November 2020, some movie theater chains decided to boost their income by giving their theaters new uses other than only watching films. According to Djonny Sjafruddin, the chairperson of the Association of Indonesian Cinema Companies, it will take six to 12 months for movie theater chains to recover after reopening (kompas.com, 2020). In December 2020, Cinema XXI chains announced that the public can rent spaces to hold seminars. Dewinta Hutagaol, Head of corporate communication and brand management at Cinema XXI, stated that the

innovation was implemented before the pandemic to cover their losses due to the ongoing closures of movie theaters (Kusuma, 2020).

On a similar note, CGV chains now rent their movie theaters for various purposes—such as private screenings, seminars, performances, sporting events, and even gaming—with rates ranging from Rp. 750.000 (around USD 50) to Rp. 1.750.000 (around USD 120) per room (Lova, 2021). Moreover, Cinépolis rents its movie theaters for family/individual film screenings and birthday parties (Yuniar, 2020).

Some people question of whether movie theaters will survive, even after the pandemic is over. Most of the people in the film industry believe that movie theaters will withstand the current struggle (and any future struggles that may arise). An article in *Market Watch* states that “in the end, our emotional attachment to moviegoing will fuel a recovery from 2020’s coronavirus-driven slump” (Linnane, 2020). After movie theaters were reopened, the Indonesian government, through the Ministry of Tourism and Creative Economy, was active in promoting the return-to-the-cinema movement by emphasizing the safety and convenience of watching films during the pandemic on account of the strict health protocols that were put in place (Andaresta, 2021).

The audience’s consumption and watching behavior have clearly changed. However, movie theater closures do not mean that the audience has stopped watching films altogether—the emergence of streaming platforms and OTT services as convenient alternatives to the moviegoing experience are primarily responsible. The number of platform streaming services has risen in recent years, with Netflix, Disney+ Hotstar, HBO, Go, and Prime Video leading the way among many other options.

This change in consumer behavior did not happen instantly during the pandemic but over the past two decades, according to the World Economic Forum. During this time, the economic performance of conventional film businesses has declined, while video on demand (VOD) services have increased their revenue (Krisdamarjati, n.d.). These trends indicate that digital platforms are slowly but surely taking over the conventional market. Nevertheless, as noted earlier, those in the film industry maintain their belief that movie theaters will never be replaced.

Adrian Jonathan Pasaribu, a film critic from *Cinema Poetica*, has explained that the migration of the audience to digital platforms has both positive and negative impacts. One positive impact is that the Indonesian audience is now exposed to a greater diversity of Indonesian films than ever before, as

streaming platforms have opened the audience's eyes to many local films that they might have otherwise missed. Moreover, film festivals, which used to be attended by small groups of avid moviegoers, are now flooded with audiences who watch the films online. Negative impacts include the loss of the communal nature of moviegoing and the threat to the livelihood of movie theater employees and film exhibitors (Winata, 2021).

During this difficult situation for the Indonesian film industry, the Indonesian government, through the Film, Music and New Media Directory of the Cultural General Directorate, led some activities to sustain the life of the film industry. These include (1) drafting and issuing health protocols; (2) implementing the School from Home Program in TVRI (Indonesian National Television); (3) presenting an online masterclass/workshop on filmmaking; (4) introducing the Pandemic Recording Program, (5) Film Service Program, (6) Government Assistance Program: Appreciation for the Cultural Workers Affected by COVID-19, and (7) Indonesian Films Program; (8) engaging in collaborative film screening with the Indonesian Embassy in Morocco and Vietnam in the context of celebrating diplomatic relations; (9) organizing and supporting film festivals, (10) encouraging documentary film production, and (11) facilitating film review competitions.

4 CONCLUSIONS

The COVID-19 pandemic that spread globally in early 2020 has hit the film industry hard everywhere, including in Indonesia, as film industry chains—from production to consumption—were abruptly halted. Many film workers lost their jobs, especially in countries like Indonesia, where the film industry is not as well-established as in other areas such as Hollywood.

The pandemic has brought about unprecedented challenges to the film industry. For instance, film companies cannot produce films due to social distancing regulations—even when production is allowed, strict health proposals bring about other problems such as additional budgets and limits on the number of people involved.

Decreased film production, in turn, affects the distribution link in the chain. With a small number of films produced and the widespread closing of movie theaters, distribution has almost completely stopped. Furthermore, big film companies do not want to sell their big-budgeted films to the OTT platform, as they expect to profit much more from screening their films

in movie theaters. However, some films eventually were streamed on the OTT platform to ensure companies' sustainability while they wait for the situation to return to normal.

Regarding the exhibition part of the chain, movie theater closures throughout the world pose another problem to movie theater owners. Their income has completely stopped while they continue to maintain empty movie theaters and pay their employees. Moreover, when movie theaters have been allowed to reopen, the capacity has been cut to half (or less), making it very difficult for movie theaters to bounce back from the pandemic.

Casual and avid moviegoers alike are also affected by this situation. They no longer feel a communal atmosphere when they go to the movie theaters with their friends or family, in which they used to laugh or cry together in the darkness of the theater. The pandemic situation has changed the audience's behavior, especially with the rapid growth of Netflix, Disney+, HBO Go, and many other digital platforms. These new platforms have become both an opportunity and a threat for movie theater owners.

The observations presented here show that the global film industry, particularly the Indonesian film industry, has come up with creative survival strategies. The government plays a crucial role in deciding the fate of the industry. The Indonesian government, led by the minister of tourism and creative economy, has organized several activities to keep the industry going. These include distributing social grants among affected film workers and hosting film festivals that can encourage filmmakers to keep producing films despite the challenging conditions.

The pandemic has brought the creativity out of many filmmakers. Filmmakers have improvised by making films using inexpensive instruments such as mobile phones and online meeting applications like Zoom. Scriptwriters must also push the limits of their creativity to write stories that can be filmed without the need to gather large numbers of people. Animated films represent another option, as they do not require large film crews.

In the context of distribution, platform transformation has become the most common strategy followed by film producers. By shifting the distribution to the online or OTT platform, film companies have managed to stay alive despite losses in revenue. The rise of online services has given film producers a choice regarding where they wish to show their films. The situation also minimizes the chance that one or two online platforms will dominate the industry. Film companies can also re-sell their old

films to online services, which is difficult to do via traditional film distribution methods.

A common strategy to sustain movie theaters is to re-purpose them. For example, some Indonesian movie theater chains rent spaces for birthday parties, seminars, meetings, or conventional film screenings. The reopening of some movie theaters in Indonesia has relieved cinema owners even though they are not yet allowed to operate at full capacity. Other strategies to help movie theaters include strict health protocols and encouragement from the government for people to return to movie theaters.

The pandemic has also affected consumers' film-watching behaviors. With the movie theaters closing and films halting production, the audience has been forced to look for other options, from conventional TV programs to digital movie platforms. Research shows that digital platforms have become the most preferred option for viewing movies throughout the world, as the consumers can choose what, when, and where they watch films without the hassle of leaving their homes and buying tickets. While this phenomenon reflects a bleak future for the film industry, many film workers believe that movie theaters are irreplaceable because they offer things that the digital platform cannot offer (e.g., a communal feeling, collective responses to what happens on screen, the giant screens and state-of-the-art audio systems, and, of course, the smell of popcorn).

The present research shows that the unprecedented challenges faced by the film industry have resulted in unprecedented efforts and strategies to ensure its sustainability. Difficulties have fostered extraordinary creativity and previously unheard-of filmmaking techniques. I believe that the film industry will always find a way to survive, no matter what is thrown at it. I encourage everyone to go to movie theaters and contribute to the sustainability of the industry.

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