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*Implications of the Streaming Phenomenon on Distribution –
Disruption of traditional theatrical distribution and content overload*

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Click & Play: Navigating New Horizons of Film Distribution

Introduction: The Streaming Phenomenon

Picture yourself two decades ago. The original *Spider-Man* blockbuster hit cinemas during the busiest period of your university semester. Missing it meant waiting a few months for the DVD release. You debated; a movie ticket for \$15 at the expense of your busyness, versus a DVD at close to the same price for a delayed but more flexible viewing experience. With no other options (except pirating), the allure of the big screen and surround-sound system convinced you to rearrange your schedule for the cinematic thrill. Fast forward to today, the latest *Spiderman: Across the Spider-Verse* releases in cinemas during yet another hectic work season. However, you do not hesitate to forgo its theatrical run knowing that the film will be released on Disney+ in no time. Better still, for only \$14 a month, you can indulge in not just the latest Spidey cinematic masterpiece, but also the entire Marvel library whenever and wherever.

Evolution of Film Distribution

Streaming is dominating as audiences' go-to source for films, but it is severely disrupting the industry's tried-and-true model of theatrical distribution. Since the first public film screening by the Lumière Brothers in 1895, cinema has been the hallmark of *scarcity* and *exclusivity*. Each year, cinemas specially curate a slate of films and schedule limited sessions for each film according to their respective theatrical windows, which is traditionally 150 days. Theatrical window refers to the number of days a new film is exclusively screened in cinemas until it enters subsequent ancillary markets¹ like DVDs. However, the 1980s digital era saw the rise in more hi-tech ancillary markets like cable television and video games which contributed to the further shortening of the theatrical window from 70, 45, to even 14 days. Yet, cinema remained the apex of the distribution chain. Australian audiences steadily patronised cinemas while film distributors heavily relied on the trickling effect of theatrical success into ancillary markets to maximise profits throughout the film's lifetime (Screen Australia, 2023; Arkenberg et al., 2020). In fact, film distributors were convinced that missing out on a substantial theatrical run is '*leaving money on the table*', as historically proven by films like *Glass Onion* (2022), which lost out on millions at the box office (Whitten, 2022). This consensus was at least until the 2020 pandemic which escalated the streaming phenomenon and challenged the traditional theatrical distribution model.

¹ Ancillary markets are non-theatrical channels of film distribution.

How Did We End Up Here: Streaming in the Post-Pandemic World

With nationwide lockdowns that closed cinemas and restricted people to their homes, Australia's cinema attendance dipped to below 50% by 2021 (Screen Australia, 2023). Instead, from 2020 to 2021, audiences turned to streaming platforms like Netflix and Stan which saw over 10% and 50% increases in subscriptions respectively (BCARR, 2022). More streaming platforms including Australian streamer *Binge* launched during the pandemic, with over 200 streaming services operating worldwide today (Pattison, 2023). This phenomenon presented audiences with endless possibilities of ways to consume films, severely fragmenting their channel preferences and demand for content (Hennig-Thurau et al., 2021). In fact, Hadida et al. (2020) coined this as a shift from market-led to demand-led, where streamers impose a 'convenience' logic that prioritises *quantity* over quality of content. While streaming offers a direct-to-audience opportunity, distributors today are increasingly perplexed by countless paths to market, or distribution strategies, that streaming presents (Bizzaca, 2022; Screen Australia, 2015). If streaming has proven to be problematic, how have distributors been responding and what can be done to navigate these new horizons of film distribution?

Scope of Research

Firstly, this paper compares film distributors' considerations of theatrical versus streaming releases. Then, the paths to market of three Australian films – *Ride Like A Girl* (2019), *A Sunburnt Christmas* (2020), and *Elvis* (2022) – will be analysed. In particular, the effect of theatrical-to-streaming window on film success will be scrutinised. The findings subvert the traditional belief that longer theatrical windows garner greater film success². Instead, they point to the greater significance of strategic marketing to drive a film's success. The paper concludes with three marketing tactics stimulating audiences' senses for Australian distributors to more effectively reach their fragmented audiences.

Assumptions and Limitations

All research and findings in this paper pertain to *film distribution* and are from the perspective of distributors. The author also acknowledges three limitations. Firstly, given the broad topic of film distribution, the scope of this paper is restricted to the selected issues of i. Disruption to the traditional theatrical distribution model, and ii. Content overload, both arising from the

² Film success is measured by i. *Critical evaluation*, ii. *Financial performance*, and iii. *Movie awards*. Refer to [Page 6: It is Theatrical and Streaming](#).

streaming era. Secondly, there is a lack of actual data for film viewership and marketing budgets due to regulations that prevent public disclosure for in-depth examination. As such, analysis will be made from the author's observations and inferences, drawing upon research and literature to confirm investigations. Lastly, the limited sampling of three Australian films is strictly an indication of the relationship between theatrical-to-streaming window and film success which cannot be generalised to all films.

The Issue of Streaming: Disruption of Traditional Theatrical Distribution

Is it Theatrical *versus* Streaming?

A distributor's role involves strategising for distribution and marketing (Provost, 2023). Distribution denotes the channel(s) used to reach audiences, while marketing denotes how a film is positioned to its audience. Distributors' overall goal is to reach the target audience and maximise profits at the lowest cost (Provost, 2023; Screen Australia, 2015). The table below illustrates distributors' key considerations for theatrical and streaming release modes when constructing their paths to market.

Table 1: Comparison of Variables between Theatrical-Only and Streaming-Only Releases

Theatrical-Only Release	Variables	Streaming-Only Release
<ul style="list-style-type: none"> • High P&A (Print & Advertising) costs • Box office revenue is split (35% to 65%) between distributor and exhibitor, subjected to contractual agreements • Most of film's box office earned from opening weekend • Higher risk of breaking even as not every film is a guaranteed success 	Distributor's Cost & Revenue	<ul style="list-style-type: none"> • No need for Print costs • Lower marketing costs • One-time licensing fee paid by streamer which distributor enjoys 100% of • Viewership does not garner revenue
<ul style="list-style-type: none"> • Wider reach but at higher costs • Marketing is directed to a broader scope of audiences • More difficult to track audience viewership as theatres do not have capacity for such data collection 	Marketing & Scope of Audience Reached	<ul style="list-style-type: none"> • Marketing is more targeted and cost-efficient as streaming platforms are data driven • Data is collected directly from subscriber information, watch history, and preferences • Marketing is required across more channels due to audience fragmentation
<ul style="list-style-type: none"> • Dolby Atmos surround-sound system • Big screen 	Art & Prestige	<ul style="list-style-type: none"> • Quality of sound and picture is dependent on audiences' home system
<ul style="list-style-type: none"> • Communal experience • Scarcity and exclusivity 	Value to Audiences	<ul style="list-style-type: none"> • Convenience • Immediacy • On-demand access • Wider variety of content


(Screen Australia, 2015; Bizzaca, 2022; Bizzaca, 2020; Arkenberg et al., 2020; Groves, 2017; Arnold, 2017)

It is Theatrical *and* Streaming!

Given that both modes bear their own pros and cons from the table above, the theatrical mode is not necessarily more superior and profitable than the streaming mode as traditionally believed. Instead, distributors today have embraced the streaming era as an inevitable future and have adapted their strategies to leverage the strengths of streaming. Established professionals in the field like Madman Entertainment's Senior Marketing Manager, Michael Matrenza, reveal that distributors manipulate various combinations of theatrical, streaming, and ancillary market windows to construct the most effective distribution strategy (Bizzaca, 2022). This integration of hybrid distribution modes is evident in Australian films like *Ride Like A Girl* (2019), *A Sunburnt Christmas* (2020), and *Elvis* (2022) – all of which have varying paths to market that will be analysed in the following section. In fact, the success of each film will also be examined to determine if shorter theatrical windows compromise film success as traditionally believed. However, it is first important to define how film success is measured. Simonton (2009) proposes a triad of indicators for film success: i. *Critical evaluation* by film critics and audiences, ii. *Financial performance* from the box office, and iii. *Movie awards*. Thus, the following case study analysis will be conducted based on Simonton's triad.

Australian Case Study: Theatrical-to-Streaming Window and Film Success


Film 1: *Ride Like A Girl* (2019)

<i>Ride Like A Girl</i> (2019)		General Information
	Distributor:	Transmission
	Theatrical Window:	150 days
	Genre(s):	Biographical Sports Drama
	Synopsis:	15-year-old jockey Michelle overcomes impossible odds for a shot at the 2015 horse-racing Melbourne Cup.
	Theme(s):	Family, passion, self-belief, perseverance, female discrimination, Australian outback
Primary Audience:		Aspiring females with big dreams (Skew 13-21+)
Path To Market:		26 September 2019 Australian cinemas → 10 March 2020 Global Blu-ray DVD sales → 26 June 2020 SVOD ³ on Stan & Paramount+, PVD ⁴ on Amazon Prime
Simonton's Film Success Triad		
Critical Evaluation	Film Critics:	<ul style="list-style-type: none"> • “<i>Genuinely inspirational</i>” – Kate Rodger, NewsHub • “<i>Unavoidably moving and triumphal</i>” – Graeme Tuckett, stuff.co.nz • “<i>A rousing crowd-pleaser</i>” – CJ Johnson, ABC Radio Australia
	Audience (Adapted from IMDb, Rotten Tomatoes, and Letterboxd):	Slightly cheesy, nothing striking, plot was predictable and requires a better title but inspirational, heartfelt, and tear-jerking with beautiful visuals and authentic performance
	Average Ratings:	<ul style="list-style-type: none"> • 7/10 on IMDb • 67% on Rotten Tomatoes • 3.1/5 on Letterboxd
Financial Performance	Total Box Office (AUS):	\$11,577,871 (Screen Australia, 2019)
Movie Awards	Accolades:	Examples include CinefestOZ and 3 AACTA Awards Nominations for Best Film, Best Actress, and Best Original Music Score
Overall Success	Film Ranking (AUS):	#1 of 2019 (Screen Australia, 2019)

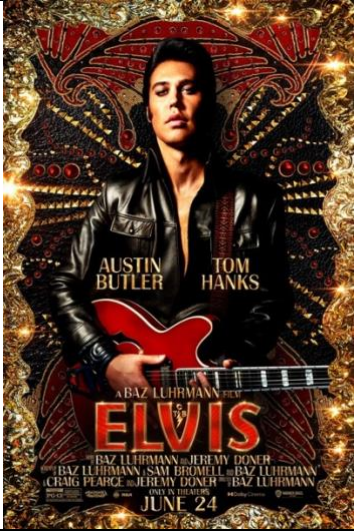
³ Refers to subscription video-on-demand.

⁴ Refers to premium video-on-demand.

Film 2: A Sunburnt Christmas (2020)

A Sunburnt Christmas (2020)		General Information	
	Distributor: Stan		
	Theatrical Window: 0 days		
	Genre(s): Comedy		
	Synopsis: The year’s summer Christmas turns topsy turvy when a strange man dressed as Santa Claus crashes his van into a family’s outback farm.		
	Theme(s): Family, festivity, Australian outback		
	Primary Audience: Australian families		
Path To Market:		11 December 2020 Direct-to-streaming on Stan	
Simonton’s Film Success Triad			
Critical Evaluation	Film Critics:	<ul style="list-style-type: none">• “A wacky and sweet film” – Luke Buckmaster, The Guardian Australia• “Instantly an Aussie Christmas classic” - Andrew F Pierce, The Curb• “A heart the size of the Outback with loads of fun and brim-full of charm” – Brad Newsome, The Sydney Morning Herald	
	Audience (Adapted from IMDb, Rotten Tomatoes, and Letterboxd):	Predictable storyline, cliché with not very high-class acting but fun, quirky, charming, authentically Aussie, and well-rounded for the whole family	
	Average Ratings:	<ul style="list-style-type: none">• 6.8/10 on IMDb• 92% on Rotten Tomatoes• 3.3/5 on Letterboxd	
Financial Performance		Total Box Office (AUS):	Not applicable
Movie Awards		Accolades:	None
Overall Success		Film Ranking (AUS):	#7 of 2020 (Buckmaster, 2020)

Film 3: *Elvis* (2022)

<i>Elvis</i> (2022)		General Information
	Distributor:	Warner Bros. Pictures Australia
	Theatrical Window:	70 days
	Genre(s):	Biographical Musical Drama
	Synopsis:	Throughout Elvis Presley's rise to fame, he transforms America's Rock and Roll culture and addresses racism within the country.
	Theme(s):	Music, racism, talent exploitation, greed, ambition, history of rock and roll
Primary Audience:		Australian fans of Elvis Presley and/or Rock and Roll (Skew Female 65+)
Path To Market:		25 May 2022 Cannes Film Festival → 23 June 2022 Australian cinemas → 9 August 2022 PVD → 2 September 2022 SVOD on HBO Max, Netflix, Binge, and Foxtel → 13 September 2022 Global Blu-ray DVD sales
Simonton's Film Success Triad		
Critical Evaluation	Film Critics:	<ul style="list-style-type: none"> • "There are aspects of <i>Elvis</i> that is cinematic mastery and there are other parts that is bilge. It's a mess of contradictions as well as being... just a mess." – Wenlei Ma, news.com.au • "A suffocating dream" – Laura Brodnik, Mamamia • "Baz Luhrmann's whirlwind biopic is cinematic dynamite" – Mark Kermode, The Guardian Australia
	Audience (Adapted from IMDb, Rotten Tomatoes, and Letterboxd):	Predictable storyline, cliché with not very high-class acting but fun, quirky, charming, authentically Aussie, and well-rounded for the whole family
	Average Ratings:	<ul style="list-style-type: none"> • 7.3/10 on IMDb • 77% on Rotten Tomatoes • 3.4/5 on Letterboxd
Financial Performance	Total Box Office (AUS):	\$33,486,309 (Screen Australia, 2022)
Movie Awards	Accolades:	<p>Examples include</p> <ul style="list-style-type: none"> • 129 nominations across Academy Awards and Golden Globe Awards like Best Original Screenplay, Best Picture, Best Director, Best Film Editing • 41 wins including Best Sound, Best Visual Effects at AACTA Awards
Overall Success	Film Ranking (AUS):	#1 of 2022 (Screen Australia, 2022)

Key Insights: Strategic Marketing and Film Success

Despite the differing paths to market, all three films have garnered unprecedented success as top Australian films in their respective years (Buckmaster, 2020; Screen Australia, 2019; Screen Australia, 2022). Thus, this proves that shorter theatrical-to-streaming windows – including direct-to-streaming (0 days) – indeed do not compromise a film’s success potential. Instead, strategic marketing was utilised to drive success. For instance, despite the niche subject of horse-riding, *Ride Like A Girl* drew relevance to its predominantly female audience by emphasising themes of perseverance and female empowerment in its marketing materials (Playmaker Digital, 2023b). With *A Sunburnt Christmas* being a Christmas special released mid-pandemic in December 2020, Stan anticipated audience consumption to occur as a communal activity with friends and family at home, thus the decision to release the film straight to streaming. Since *Elvis* attracted mainly older audiences who are not common patrons of cinema, the film’s distributor opted to utilise influencer marketing to appeal to younger audiences through word-of-mouth and celebrity events to increase reach (Playmaker Digital, 2023a). While being tactical in constructing a path to market is important, this insight of strategic marketing bearing greater significance to garner views and drive success aligns with prior findings highlighting the need for distributors to thoroughly understand each film’s genres, themes, and target audiences (Bizzaca, 2022; Screen Australia, 2015; Bizzaca, 2020).

The Bigger Issue of Streaming: Content Overload

Indeed, a bigger issue amidst the streaming era faces audiences and distributors: content overload. The ‘convenience’ logic that streamers adopt prioritising quantity of content becomes overwhelming for audiences. This is described by Schwartz’s (2004) Tyranny of Choice which purports the inverse effect of discomfort and indecisiveness from having too many options, rather than enjoying the luxury of choice. The industry has indeed reached ‘Peak TV’ with infinite content produced every year (Koblin, 2020). For distributors, an implication of this is a bottleneck on consumer attention (Shachar & Ball, 2016). Thus, distributors must be even more strategic with marketing to cut through to their increasingly fragmented audiences with decreasing attention spans. This aligns with Simonton’s (2009) findings that reported that marketing is the most influential contributor of the success triad. Thus, the above case study and literature reveal that strategic marketing is truly the linchpin of distribution to most effectively reach audiences and maximise revenue at the lowest costs. So, how can Australian film distributors innovate their marketing strategies?

Strategic Marketing Recommendations: Sensory Appeal

Audiences perceive moviegoing as a social event (Screen Australia, 2015). This aligns with social motivational theory which explains that humans are oriented towards seeking social interactions and maintaining bonds (Chevallier et al., 2012). Such social value can be derived from forging shared memories through tangible elements pertaining to audiences' five senses to enhance memorability and sentimentality (Jolly et al., 2019; Zatori et al., 2018; Nägele et al., 2020). Since films are inherently intangible, incorporating such tangible elements also alleviates audiences' inability to gauge enjoyment which encourages them to engage with the film (Ford et al., 1988). Thus, the following section recommends three marketing tactics that Australian film distributors can adopt to stimulate audiences' five senses and enrich their moviegoing experience.

1. Taste

The movie watching experience can be accompanied by dishes featured in films. This is especially effective for films with strong associations to iconic foods like ratatouille from *Ratatouille* (2007) and Royale With Cheese from *Pulp Fiction* (1994). This allows audiences to savour what they see on screen, transforming their passive moviegoing activity into active engagement. More so, eating brings people together, facilitating the social aspect (Dunbar, 2017). London's *Taste Film* is a pioneer of this immersive social dining experience. Australian film distributors can adapt this idea in several ways. Firstly, a similar taste cinema restaurant can be set up to showcase films that feature the Aussie cuisine. Secondly, distributors can offer a similar immersive dining package that audiences can purchase at the box office to enjoy in the cinema. Alternatively for films streamed at home, the meals can also be made available for catering on the streaming site that audiences can pre-order.

2. Touch

Merchandising is a familiar ancillary market. While it is costly to mass produce film merchandise, there has been little appreciation for their sentimental value. Since merchandises are tangible products that audiences can bring home, their sentimental value is derived from the memories associated with the movie experience which can be preserved even after the merchandise's functional value decreases (Yang & Galek, 2014). Examples of film merchandise include the limited-edition *Hot Wheels Corvette Car* and *Impala Inline Skates* from the latest *Barbie* (2023) film. Interestingly, limited-edition merchandise can imitate the

scarcity and *exclusivity* appeal of cinema. Hence, Australian film distributors should invest in producing film merchandise to sell in cinemas and on streaming sites.

3. All Senses

London's *Secret Cinema* reimagines classic films like *Grease* (1978) and *Romeo and Juliet* (1996). As a movie, musical, and escape room all-in-one, this captivating experience transports guests into the verisimilitude of the story world as if they are a character from the film. Prior to the event, guests are allocated a persona and a mission. They are also encouraged to purchase clothes and props sold on-site and online that they can don during the event to blend into the story world. During the experience, guests engage with one another and live actors in meticulously constructed and disturbingly accurate sets from the film. This fully immersive social experience enhances their movie experience and memorability through active participation. With abundant resources like sound stages, production expertise, and emerging actors across Australia, Australian distributors are equipped to recreate similar experiences that bring films to life for Australian audiences.

Conclusion

While streaming has disrupted the traditional theatrical distribution model, film distributors today have integrated the various distribution modes to construct the most effective path to market. This was demonstrated through the analysis of three Australian films which also proved against the belief that shorter theatrical runs compromise film success. Instead, it was the films' strategic marketing that drove success despite their varying theatrical-to-streaming windows. This was reiterated by the bigger issue of content overload resulting in the severe fragmentation of audiences and shortened attention spans, highlighting the need for more intentional marketing strategies to cut through to audiences. Since audiences perceive moviegoing as a social event, Australian distributors can employ marketing tactics that stimulate audiences' senses to enhance the memorability and sentimentality of their moviegoing experience.

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