Nostradamus Report: Paradox of Hope

2024

Johanna Koljonen

Göteborg
Film Festival

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The Nostradamus report is commissioned by the Göteborg Film Festival. It aims to sketch out the future of the screen industries 3–5 years ahead, through interviews with industry experts and research.

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Göteborg Film Festival is the leading film festival in the Nordics, celebrating its 48th edition January 24–February 2, 2025.

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Introduction

In this 11th edition, the Göteborg Film Festival's Nostradamus report continues to track, analyze, and forecast the near future of a transforming industry. This year's report is titled *Paradox of Hope*, and delves into the striking contradictions shaping trends in the audiovisual sector: the simultaneous experiences of decline and growth, threat and opportunity, fear and hope.

With market contraction, inflation, and recession challenging the industry, new business and financing models and production methods are also emerging at a rapid pace. Collaboration will play a crucial role in fostering innovation and driving sustainable solutions, especially as traditional distribution strategies face unprecedented challenges. Cinemas continue to shape the future of feature films, while artificial intelligence rapidly redefines production and storytelling. The report emphasizes the importance of cultivating strong artistic voices – not least to captivate younger audiences – while advocating for a human-centred approach in an industry pressured by synthetic media and artificial demand.

Keeping our humanity is the biggest challenge of our lifetimes and even just of this year. In 2024, over half of the world's voters can take part in elections, while Russia's war, the atrocities of the Israel-Hamas conflict, and famines exacerbated by the climate crisis continue. The stories we tell and are told matter enormously. They matter to how we negotiate our needs to both confront and escape this suffering. To whether we can believe and act on the absolute humanity of victims, without forgiving for a moment the inhuman cruelty of their leaders. To how we reconcile living and making our living inside unjust systems with our need to change them. Stories – film! – are necessary parts of the remedy.

A sustainable transformation of the film industry will involve change and collaboration, and in our small way, we too try to practice what we preach. Our new partnership with BoostHBG, experts in community engagement and innovation, will be the foundation of the new Nostradamus Collective. The idea of being a backstage area for the industry, a green room where we can talk honestly to each other, is evolving into a greenhouse

where all of us can grow. Read more about this initiative and how you can become part of it on page 68.

Two invaluable long-term partners are involved in this report. Our release event is produced in collaboration with the Marché du Film. A special episode of the Industry Insights Podcast from the Berlinale's European Film Market will be launched shortly thereafter, providing further insights.

This year, another notable collaboration also offers additional reading. In October 2023, the NoJSe children's film festival network gathered professionals from six Nordic countries for a children's media think tank funded by MEDIA – Creative Europe. A resulting report, subtitled *Nurturing Nordic Film in a Changing Media Landscape*, was produced in collaboration with Nostradamus, and is available for free download.[1]

Our gratitude goes to our key partners BoostHBG and Kulturakademin, the long-term support from Nordisk Film & TV Fond and Region Västra Götaland, as well as everyone else contributing and partaking in the initiative throughout the year.

The report owes its existence to the valuable contributions of the interviewed experts, who generously provide us with insights and foresight. Their perspectives are present where directly quoted – the conclusions remain our own.

***Johanna Koljonen**, Report Author, Participation | Design | Agency*
***Josef Kullengård**, Head of Industry, Göteborg Film Festival*
***Cia Edström**, Head of TV Drama Vision, Industry Advisor*

1 A link to the NoJSe Report, written by Johanna Koljonen, can be found in this report's list of sources.

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***Christian de Schutter**, Hype Park*
***Alex Stolz**, Future of Film*
***Kateryna Vyshnevska**, producer*
***Aleksandra Zacharchenko**, Marché du Film*

Interviewed Experts

Angela Chan

Professor, Head of Inclusive Futures, CoSTAR National lab for creative technology, UK

Angela has twenty-five years' experience in the TV industry, including roles as filmmaker, executive producer, and in commissioning at the BBC & Channel 4. She was Head of Creative Diversity at C4, focusing on under-represented creatives. Now a Professor of Creative Industries with StoryFutures at Royal Holloway, University of London, her research covers inclusive innovation in creative tech. She serves on advisory boards like the British Council Arts, Sir Lenny Henry Media Centre, and Natwest Bank's Ethnicity Advisory Board.

Fatima Djoumer

CEO, Europa Cinemas

After experience in festivals and film distribution, Fatima Djoumer joined Europa Cinemas in 1993 as Head of International Relations and Events and has overseen the development of the network, its membership and its joint activities and projects such the network conferences, audience development programmes and innovation labs, the Europa Cinemas Label. Since 2023, she is the CEO of Europa Cinemas. Europa Cinemas is a film theatre network that supports 1 280 member cinemas in 800 cities across 43 countries.

Tomas Eskilsson

Head of Analysis, Film i Väst

Tomas Eskilsson is founder and former CEO of Film i Väst, Scandinavia's major regional film fund and one of the bigger regional film funds in Europe. Since 2017, he is the Head of Strategy at Film i Väst Analysis, the research department at Film i Väst, working with audiovisual sector analyses and reports. Eskilsson authored the impactful reports Public Film Funding at a Crossroads and All That is Solid Melts into Air on the European film funding landscape and is currently finalizing the series with a third report.

Guillaume Esmiol

Executive Director, Marché du Film

Guillaume Esmiol is the Executive Director of the Marché du Film of the Festival de Cannes. Before assuming this role in 2023, Esmiol first joined the Marché in 2020 as Deputy Director, tasked with enhancing the film market's activities and operations. Esmiol also serves as the Co-Executive Director of Ventana Sur, Buenos Aires' leading LatAm audiovisual market, and the Director of Cinando, the premier online network and database for film industry professionals.

Robert Franke

Vice President Drama, ZDF Studios

Robert Franke is the Vice Director Drama at ZDF Drama with over two decades of experience in the international film, television, and digital content industry. He has a rich background in media production, content strategies, and licensing. A graduate of the University of Management and Communication in Potsdam, Franke co-founded Cmate Entertainment, and later served as Head of Content at Viewster and MyVideo. Since 2015, he oversees ZDF's drama commercialization, international coproductions, and programme developments.

Ted Hope

Producer, Cofounder, Double Hope Films

Over his 35-year film career, Ted Hope has produced over 70 films, served as a studio executive on over 60, and launched Amazon's feature film division, co-leading it for several years. As a producer, his films received 25 Oscar nominations, with six wins, and as an executive at Amazon, he led them to 19 Oscar nominations and five wins. His outstanding eye for talent has launched the careers of Ang Lee, Nicole Holofcener, Todd Field, and many others. Ted's memoir and newsletter Hope For Film are both must-reads.

Tabitha Jackson

Consultant, Film Executive

With a 30-year career in film, arts, and public broadcasting, Tabitha Jackson is committed to the independent voice, the socio-cultural power of cinema, and a more expansive set of makers, forms and audiences. Recent roles include Director of the Sundance Film Festival, Director of the Sundance Documentary Film Program, and Commissioning Editor/EP (Channel4/Film4). Tabitha is currently a Shorenstein Documentary Film Fellow at the Harvard Kennedy School and a member of the Academy of Motion Picture Arts and Sciences.

Kjersti Mo

CEO, Norwegian Film Institute;
Vice President, EFAD

Kjersti Mo is CEO of the Norwegian Film Institute (NFI) and vice president of the European Film Agencies Directors association (EFAD). She has had an extensive career as media executive both at public broadcaster NRK and in private sector media companies Egmont and Aller. At NFI and through EFAD Kjersti Mo has focused on future scenarios for the film, TV and games industries, to ensure the continued relevance of NFI and other public film financing bodies.

Hanna Reifgerst

Programmer Young Audiences,
Nordisch Filmtage Lübeck

Hanna Reifgerst studied Visual Communication at Bauhaus University in Weimar and College of Arts & Design in Barcelona. Since 2007, she has been working in script development and dramaturgy for young audiences. For almost ten years Hanna was project manager for the German funding incentive Outstanding Films for Children. Since 2022, she is responsible for the Young Audience section at the Nordic Film Days Lübeck. Additionally, she works as a freelance consultant in systemic change management and event design.

Joanna Szymańska

Producer, Shipsboy

Producer and development executive, industry activist, Joanna Szymańska is a graduate of Film Studies and Law. Alumna of international workshops including EAVE, ACE and Torino Script Lab (Story Editing). In her 15+ years career she produced numerous shorts, feature-length fiction films and international co-productions. She is a deputy chair of the European Film Academy Board, as well as a founding member of Polish Producers Guild.

Gaia Tridente

Director, MIA – Mercato Internationale
dell'Audiovisivo

Gaia Tridente (Ph.D.) is a content curator, producer, and creative executive, expert in the audiovisual ecosystem, well-known and appreciated by the international film, TV, and digital industries. In 2022, Gaia was appointed Director of MIA Market in Rome, had previously served as Head of International Scripted Productions at Minerva Pictures, Head of Programming at RomeFictionFest, and in the evaluation commissions for the European Writers Club, EWA Networks, and Eurimages.

Summary

1.
PARADOXICALLY, HOPE

In the next 3-5 years, as the market correction continues, the industry must also adjust to new technologies and workflows. Changes in the wider audiovisual marketplace are perceived as existential threats for traditional film and TV, and the ongoing climate crises, wars, and civil unrest will have unpredictable effects on markets, industries, and artists.

Paradoxically, this moment of truth is experienced as a kind of relief, providing a new clarity about priorities, values, and business models. An ecosystem approach will re-focus attention from *making the work* towards also *doing the work* to connect with audiences and build a sustainable industry.

2.
CONFRONTING THEATRICAL OVERABUNDANCE

The current volume of feature films cannot be sustained in movie theatres. Five years from now theatrical releases will be fewer, in part because of traumatic market effects, in part because of proactive and constructive selection, nurturing and curation of projects and their audiences.

3.
ENGAGEMENT THEATRICAL AS THE NEW NORMAL

The emerging shape of cinema-going can be described as »engagement theatrical«. A successful film, its communication, and the screening experience must all be specifically engaging for its audience to prioritise seeing it out of the home. This new normal adds work for exhibitors, distributors, and even producers, but provides growth potential especially for original, authorial, and unusual films. The decline in movie-going is inevitable – unless the industry decides it isn't.

4.
NEW OPPORTUNITIES FOR STRONG VOICES

The abundance of quality in the past 20 years has taught audiences to appreciate great storytelling, and a multi-year trend of excitement about strong authorial voices now extends even into the blockbuster space. Moving beyond categories like »mainstream« or »arthouse«, which are no longer meaningful to audiences, will help create a sustainable cross-platform business model for independent film. Paradoxically, such a model would rely in part on growth opportunities in the theatrical window.

5.
COLLABORATION AS INNOVATION

Scaling up existing innovations in production, distribution, and exhibition is the first step towards growing the total audience for film in theatres. Similar strategies can help independent producers to diversify away from their position of dependence on both the theatrical window and the global streaming platforms. A collaborative ecosystem requires us to view each other as colleagues instead of competitors, but increases the value and resilience of local industries, and the agency of everyone in the wider sector relative to the world's biggest companies.

6.
NEW TOOLS, NEW POTENTIAL, NEW SELF-UNDERSTANDING

Virtual Production and Generative AI tools are changing and expanding filmmaking. As an early adopter, the entertainment sector can claim a voice in shaping AI applications, and organise in defence of relevant legislation. The pace of development remains rapid, but adoption is affected by local factors like infrastructure investment and the availability of training. Filmmaking will be re-conceptualised not as the ability to produce a moving image, but as a mastery of the language of audiovisual storytelling. The industry will develop together, or be outrun.

7.
BIG BROTHER ARRIVES

AI is rapidly providing solutions for the main technical barriers to intelligently targeted advertising and truly personalised content recommendation. The value of these new opportunities will escalate competition in the Connected TV space. While the changes suggest and may produce dystopian outcomes, consumers will on the whole experience them positively. Theatrical exhibition is among the surprise winners.

8.
EPILOGUE: A MORE HUMAN INDUSTRY

In uncertain times, in an age of increased mediation and synthetic storytelling, we will lean into the human. The medium of filmmakers is film, but the medium of the film industry is people. The value of the work is created in its meeting with the human audience. The value of the business is created by the humans in it.

1.

Paradoxically, Hope

In the next 3-5 years, the market correction will continue while the industry tries to adjust to new technologies and workflows. Changes in the wider audiovisual marketplace are perceived as existential threats for traditional film and TV, and the ongoing climate crises, wars, and civil unrest will have unpredictable effects on markets, industries, and artists.

Paradoxically, this moment of truth is experienced as a kind of relief, providing a new clarity about priorities, values, and business models. An ecosystem approach will re-focus attention from just *making the work* towards also *doing the work* to connect with audiences and build a sustainable industry.

Angela Chan: *My biggest fear is that the creative industry will die on its ass while it's waiting for somebody to realise its brilliance, [expecting to] be allowed to carry on exactly the way it has. I worry that a lot of people will lose their jobs without having some further plan because we as an industry haven't thought together about new formats, new forms of expression, about using the incredible tools that are coming online now to do it.*

Tomas Eskilsson: *The public funding bodies and the industry itself – the guilds and organising bodies – are largely in denial. They are very conservative, generally striving backwards rather than looking ahead. Sometimes they are the defenders of existing models and structures, even as their members are forced to exist in the changes.*

Robert Franke: *In five years, we will see much more high-value content coming out because of the market barrier just vanishing. The creator industry will become even more important. Overall, entertainment will grow. But the markets will fragment, and film and TV in the traditional sense will become smaller.*

And if filmed entertainment becomes much more of a commodity than it already is, the value of it will just decrease further. What we're experiencing right now is kind of like what happened in the 1920s, when movies became really big, and theatre became less relevant.

Joanna Szymańska: *Among independent producers, there's a lot of fear that there is not enough room for all of us. Maybe anger. There is growing pressure on platforms to share their data, and for certain things like royalties to be regulated. People are coming to their senses. States really have to step in, because if we give in to these economic superpowers that are run by algorithms, diversity is gone.*

Ted Hope: *I still believe that cinema is our greatest art form, but right now, I'd place money that in five years' time you can equate it with jazz and dance.*

The crisis of the industry is undeniable. The effects of the structural and technical transformations of the last decade had been delayed because of low rates, competitive investment, new funding sources, an increase in commissioners, and even the pandemic. Now the effects have hit, more or less at once. Jobs are being lost, businesses are folding, TV production has peaked in the US and is peaking in Europe.[2] The business models of independent film, long on life support, are failing. The amount of content, already a challenge on every platform, will increase unfathomably. Synthetic media will edge out generic content, and greater efficiencies lead to job losses. There is real concern that feature film in general and movie-going in particular are increasingly irrelevant and will rapidly decline.

At the same time, the markets at Series Mania, Sundance and Berlin were strong, and Cannes looks promising. Theatrical admissions are all over the place, but among the many disappointments, there are also positive surprises. Shaky post-strike release schedules for the most commercial films are finding their stride. Co-production models are changing and ex-

2 This prognosis for Europe is our read on the numbers, for which see Goldberg: »Peak TV«, Roxborough: »European TV«, Fontaine: »Yearbook«, and Ene et al: *Yearbook 2023/2024*.

panding. Animation and non-fiction film are flourishing. TV production is, historically speaking, still at a very high level.

More difficult to pinpoint, but definitely real, is a strange sense of relief at streaming's market correction. Working within business models that fundamentally made no sense often felt like a stress dream, where work never ends, the rules are constantly changing, and nothing you do is ever enough. Now that fever has broken. When difficult decisions need to be made, we at least understand what they are based on.

During the last decade, local industries around the world have grown and professionalised. They have gained confidence in their ability to compete with Hollywood in quality and relevance, and experienced their storytelling moving local and global audiences. They have built skills, infrastructure, and healthier workplaces, taking enormous strides in awareness and sometimes in solutions for workplace safety, harassment, access, diversity, and rights. Diverse talent and locally specific stories have widened our understanding of what and whom audiences can connect with.

The situation is distressing, but we have never been more ready to face it.

Robert Franke: *The Americans keep saying »survive till '25«. But the market will still be in contraction then. We have at least one bad year ahead of us until all the fat has been cut off from our industry.*

Is it possible to survive doing more or less the same thing?

There are always companies who are royalty in their territories, whose brand name will help them to open up doors … It depends on what type of output you're running, but if you have too much of an overhead, you will have a hard time sustaining that.

Everybody will have to change in some regard. Even if that just means adjusting the number of projects you're developing and producing, or reducing the number of producers in your company, that will have an impact on the industry, without these companies necessarily going out of business.

Angela Chan: *We will pass through a pain point. Businesses will [fold], people will have to leave the industry, and a new wave of people come through. In five years' time, high quality production may become much*

more accessible to a range of creators, but it requires a really coordinated effort on the part of government, investment, investors, and creatives. On a countrywide level, or on a regional level for competitiveness. It also requires you to try and be open to people whose language you don't understand, like all the people I work with in AI. It's a fast learning curve.

Gaia Tridente: *Especially in countries where public support for film production is being restructured, international co-production is having a renaissance. The same is true in the rise of animated feature films, where the financing processes are [complex,] layered and require lots of effort, money, and time – co-production is crucially important.*

TV drama producers are also looking to the co-production, financing, and distribution models pioneered by the independent film industry. Series can be financed and sold by securing a local network or streamer as an anchor, or both, with equity and international distribution. Some streamers are [working with new partners], creating co-production opportunities between different countries with co-producers, broadcasters, distributors, and equity investors joining together on the same project.

In the past, we saw co-production structures used only for financial purposes. What is happening now is mainly driven by a creative lead. All the partners are involved in the development and the creative process, which should offer diverse perspectives and key elements adding value to any international story.

Many industry problems stem from work we all knew was needed, but have long neglected. Changing how we engage with audiences. Transforming cinemas. Adopting technology for greater efficiency.

We are a decade behind even on basic things like LED lights on set, online platforms for managing dailies, and digital testing of marketing campaigns. Then there are the newer possibilities: visuals that were previously out of reach. All the world's locations in a studio right next door. Distribution platforms with functioning business models for affordably produced content, without a need for gatekeeper approval. Each of these innovations is already tested and working.

In a capitalist world, in an age of global crises, many things are not within our power directly. The catastrophically escalating climate crisis. The economic dominance of the world's largest companies. The emergence of new fundamental technologies. Entire countries, and markets, succumbing to wars or social unrest. Energy prices. But we can affect them indirectly, or mitigate their effects, through democratic processes, organising, lobbying for infrastructure investments and re-skilling resources. We can green our productions. Diversify our slates. Figure out which changes in audience behaviour are irrevocable, and which result from our not knowing how to reach them.

What will not work is waiting for someone else to solve our problems. Technology companies will not spontaneously take our values, workflows and needs into account. Audiences will not suddenly behave as though they live in some completely different media landscape. This is as true for a hundred-year-old film studio as for a plucky creative collective just out of film school.

With everything changing all at once, no one can tell you what is a reasonable business model for your project or your company. Venerable institutions and powerful people have made the wrong calls over and over. If you think something different, see another opportunity, you might be right. We each have to figure out what we are not willing to compromise on, and navigate the next years, project by project, by that north star.

Ted Hope: *We haven't actually tried to build a system that places particular values in it, including the value of the system itself. What if we set some principles we stand for? And when we evaluate the movies, we see if they qualify for those principles.*

With the dominance of the global streaming platforms comes their desire to avoid controversy. That's closely linked to the global funding sources, all tied to stock market pricing and procedures. It's also related to the disappearance of a single-title-revenue-driven system, because global streaming platforms [rely] much more on a targeted audience portfolio. And with that comes the disappearance of success-based bonuses, they're all linked in a chain.

Joanna Szymańska: *In Berlin, I attended panels with high-profile execs, very well paid to make knowledgeable decisions about what audiences will like. All of them felt like chatterboxes. »Genre« this, »based on a true story« that, a complete lack of courage but a lot of patronising executive-splaining. A lot of pressure on us independent producers to be resilient, creative, pursue our dream projects. Enumerating all those things we already do.*

Some of us – I think most of us – are not in this for the money. But we would also like to make a bloody salary. At least throw us a lifeline! You don't have to commission a €10M experimental TV series. I can totally understand it makes no financial sense. But why not make a film, or a couple of films, for €2M? I accept the world in general is not very fair. But for those of us who are in power, who are in a position to make it a bit fairer, I would encourage more courage.

Angela Chan: *My fear is that we won't consider ourselves activists within the technologies, which means being a demanding consumer. Looking in an open way at how it can radicalise your production chains, who is allowed access to play with those tools, to get involved with your perception of creativity, or change your perception of creativity.*

Tabitha Jackson: *Five years is like 50 years in human time now, in what the technology can deliver, and in the pace of social change. The social change that's occurred since 2020 is pretty phenomenal, and still pushing us, in good ways, towards being able to think a different thought.*

It seems paradoxical to talk about hope in an industry determined by many of its own leaders to be, with its current practices, basically doomed. But fear is a fog that clears when we are forced to confront reality. The crisis forces us to stop and take stock of what is actually happening, and what are just stories we've been telling each other. Relearning the landscape to reshape it will require precision in our language and our thinking.

Box office totals are not admissions numbers. A subscriber number is not a viewer. Traffic is not relationships. The stock market does not measure audience relevance. Surprising and interesting are not synonyms, nor are familiar and comforting, nor beautiful and meaningful.

Across our interviews this year, a few words recurred over and over. The surprising growth in the sales of *vinyl records*, reminding us of everything we forget, ignore, and underestimate when we think about cultures as monoliths or change as binary. The word *ecosystem*, rather than industry, to start teasing out what it means that some parts of it are more industrial than others, and that collaboration is the complement and counterpoint to competition. And *humanity*, brought up so many times that we have dedicated an epilogue chapter to it at the end.

There was also great agreement on what we need to do in the next few years: *make the work*, and *do the work*.

Embrace that film storytelling is bigger, more available, more culturally central than ever – a rich environment for the most deeply resonant, cutting edge, popularly transporting work that we can be part of making. And embrace that just like every other medium, every other industry, we are a part of a wider world. We must be as creative, responsible, hard-working, and ingenious in our visions for industry, labour, and our role in the audience's lives as we are in making the works themselves.

Fatima Djoumer: *The pandemic made cinemas more fragile economically and that put a lot of pressure on them. They asked themselves: how will we get the audiences back in theatres? The independent cinema sector has always been very innovative, doing audience development activities before we even talked about audience development – school screenings and so on … but they are more proactive now, working very hard to really initiate new projects and redefine the cinema experience.*

Gaia Tridente: *What has changed is that content and story are really driving our industry. The streamers have brought a cinematic way of telling stories to a wider television audience – a multi-layered structure in the way we viewers deal and are engaged with plot, dramatic structure, and character arcs.*

Audiences have a more sophisticated imagination now, I feel. Especially younger audiences, who are aware of good storytelling, and that is what drives the potential of our series and our independent films to travel.

Robert Franke: *The way we think about stories and how we develop content will change, because the mediocre stuff will just be done with AI. So if you want to have a room in that industry, you have to come up with better content, deeply human content, which sets you apart from the sea of AI-generated stuff.*

That need to tell a story, despite being in one of the most competitive industries in the world where it likely will not generate you any income, means the people in this industry are deeply driven. This makes me hopeful.

Tabitha Jackson: *You can't critique Saudi Arabia or China, for example, through a big platform that's doing business with them or doesn't want to jeopardize its interests elsewhere. So the role of independent cinema, whether fiction or nonfiction, is to be uncompromised and autonomous and reflect the world as it is, not simply as it is seen through corporate interests or frictionless consumerism. On the high-stakes narrative frontlines of what's going on in the world, truth-telling is a crucial weapon that we need to have at our disposal.*

2.

Confronting theatrical overabundance

The current volume of feature films cannot be sustained in movie theatres. Five years from now theatrical releases will be fewer, in part because of traumatic market effects, in part because of proactive and constructive selection, nurturing and curation of projects and their audiences.

Tomas Eskilsson: *Film policy across Europe is re-focusing on the theatrical window now, and some of the necessary conversations are very uncomfortable or even forbidden – especially the issue of overproduction of film for theatrical exhibition. The record year for admissions, especially in the US, was 2003. That year there were about 4500 theatrical releases globally. Last year that number was 9150. At the same time, exhibition has become digital, which has shrunk screen availability because the biggest releases are so massive now.*

Hanna Reifgerst: *In Germany, we have more films than we could ever see – more than 200 new German and co-produced films premiering every year, three to four a week plus the international releases.*

Gaia Tridente: *In Italy, we are facing a real challenge. Many feature films have been produced in recent years. Not all have been well received and distributed, [although] some have been incredibly successful. Needless to say, reaching an audience is crucial to filmmaking. But I believe it is only by producing in large numbers that you can have more variety, experimentation, and gems that would otherwise not get made.*

Kjersti Mo: *We all deeply value the cinema as the best way to watch movies,*

much higher than the reach through other distribution, and of course the support system is mostly tailored for the theatrical release. But [theatres] have been hinting that they might not accept all Norwegian films in cinemas in the coming years.

In a year where commercial exhibitors have bemoaned the lack of tentpole titles to programme, it seems counter-intuitive even to mention the over-abundance of theatrical feature film. It also feels uncomfortable, as the topic is something of a taboo. On one hand, pointing to overproduction can come across as questioning the primacy of movie theatres as a medium for experiencing cinema. On the other, it raises uncomfortable questions about whose films should not get made. We can empathise with such worries without letting them stop us from calmly evaluating the situation.

Fundamentally, this is a mathematical equation. The number of screens is about the same[3]. The number of seats in front of those screens is declining, as more theatres upgrade to premium recliners or dining. There is the cost of the ticket (rising) and the number of admissions, which was on a downward trajectory even before the pandemic. Even commercial films mostly run in half-empty rooms. The number of films intended for theatres has risen dramatically in the last two decades, while films have gotten longer, lowering the number of possible daily screenings. At the same time, digitising cinemas allowed blockbusters even wider releases, leading to a very small number of the very biggest hits taking up an even greater proportion of screen real estate.

The Sundance Film Festival reported 17.000 film submissions this year, a record likely to be broken every year as production technology democratises further[4]. More films means more voices, more stories, more perspectives. This has the potential of growing total audiences, but we in the traditional film industry have mostly not succeeded in delivering on that

3 The number of screens grew 5.8% globally in 2019-2022. North America showed a 5% decline, while a new market like Saudi Arabia booms. As new screens are often in multiplexes and small cinemas struggle, audiences may lose access even when total screens grow. (The Cinema Foundation: *State of the Cinema*, ICO: *The Financial Health*)

4 Welk: »4 Factors«

promise. Instead, it seems the abundance of choice has contributed to the opposite.

Too many premieres make individual titles difficult to communicate – let alone build a sense of occasion for – and means that films rarely stay programmed long enough to grow through word of mouth. The growth in local productions has not meant a proportional increase in local production of the most popular genres, contributing to the continued dominance of hits from the US majors. Some local content travels better than before, but the competition is just as intense in every market.

The impact of this problem was limited as long as distributors could count on revenue from the later windows. But in a digital world, home entertainment, streaming, and television are much the same thing, often collapsing into fewer or just a single window in a market dominated by very few companies. When the streamers were competing for content, this sometimes had positive effects, but now acquisition volumes are down in particular for the kind of arthouse film that is performing well in niche theatres[5].

The theatrical window has always represented both the greatest potential income for rights-holders and, in practice, often a loss. The gamble has been that the clout of premiere reviews and other attention will translate to sales and engagement later in the media chronology. If films are not profitable, but also not seen, nor even talked about, this connection breaks down. And if streamers in particular are currently not very interested in certain types of independent film, a title's likely theatrical performance cannot be counted towards value down the line.

Observing that the theatrical window is overwhelmed and under-loved is not the same as claiming it is overrated or irrelevant. People who seem to believe that do exist, but they are very rarely exhibitors or film distributors – many of whom have nevertheless come to the conclusion that they are unable to give the current volume of theatrical titles enough support and attention. It is not unreasonable in this situation for exhibitors to be wishing for more obviously commercial titles, or for distributors to say they need smaller slates, with more time for audience work and eventizing.

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5 Roxborough: »Berlin«.

Fatima Djoumer: *When the MEDIA programme started, there were around 700 films produced in Europe, and now you have approximately 2000. From my point of view, there are far too many films. There is a lot of financial support for production – on national and also on regional levels, and all these tax incentives to bring in shoots. [But it] allows all types and sizes of film to be produced and directors to try their hand. When Justine Triet won the Palme d'Or, she was saying that she's thankful for the well-organized French financing system, which is a model for many countries in Europe and the world. It enabled her to make films as a young director that were not particularly successful. And now she has made Anatomy of a Fall.*

Guillaume Esmiol: *A study in France showed that almost one-third of the movies supported by the CNC had less than 20,000 admissions. Some would jump to the conclusion that support should focus on the films that sell the most tickets … But you can't know the future success of a movie and would end up supporting the same type of film. [This is] part of why France has such a diversity of movies. Those lower-budget films reveal new talents and directors who will find success later.*

Some films will go wide, and some will go to Cannes. But isn't there a third in the middle that no one is yearning for?

In terms of money, »a third of the films« is not as much as it sounds. Those are smaller budgets, so the support they received does not represent a third of the total – [according to] the CNC the support to these lower-budget films is €11M per year. Even if they don't have the financial success they hoped for, it's not such a huge loss. The question is, do you want to defend these more fragile films, knowing that many of them are not going to meet the audience? You do that because you're supporting emerging talent. Maybe not this film, but the next one is going to work …

Funding bodies increasingly believe that supporting fewer works but giving them bigger budgets would be more sustainable for film workers, production companies, and audiences. Such signals are often dismissed as »only wanting to make the good movies«, or popular movies, which of course is not how filmmaking works. There is also concern that supporting bigger

films would lead to fewer smaller titles overall, implying a risk that more funding would go to established filmmakers and less to the experimental or unestablished.[6]

In the worst case scenario, increasing budgets of theatrical films with popular potential at the expense of everything else can lead to the marginalisation of challenging but valuable voices, topics and forms. Increasing the budgets of all supported films instead, regardless of size, is a nice idea – but just as terrible in terms of stewardship of public resources.

We already know that just injecting more money into production without investing in structural transformation of the wider ecosystem will not solve the underlying problems. We know, because that is what we have already done. Even in countries where new funding streams could still be created, for instance by regulating production investment for multi-nationals, artificially maintaining current production levels would be throwing good money after bad.

This is the business perspective. It is possible to say, like the French, that the support is an arts investment that pays off in other ways. But even then one has has to ask whether the historically highest level of feature film production really produces significantly better cultural policy outcomes than the number of films of five, ten, or fifteen years ago.

In the ongoing transformation of theatrical exhibition, stakeholders connected to cinema have different goals. These are all worthy, connected, and arguably achievable, but not identical. We want to save theatrical exhibition, re-vitalise movie-going within the contemporary entertainment landscape, engage larger audiences for authored cinema, and build a sustainable audiovisual industry where independent production companies can thrive and a talent pipeline of auteur filmmakers is maintained.

The last two decades have demonstrated that releasing more films in theatres will not automatically deliver on any of these parameters. The mental switch we need to flip is the assumption that being able to get a film made also means it should or can be theatrical. Each film will need to

6 Established filmmakers also skew disproportionately white and male, especially in the wide-appeal film space.

earn its place in theatres individually, through cultural relevance, audience design, and artistic merit.

This probably means most countries will not have the luxury of training emerging filmmakers on theatrical films. Much of their learning will happen on complex, ambitious productions that have great value but are intended for other kinds of viewing, and many film artists will choose to continue working primarily in these areas.

Tabitha Jackson: *Although the work is not dependent on the structures, the health of the work and the distribution and exhibition are.*

Joanna Szymańska: *For some time now I've not seen myself as a filmmaker. I see myself as a storyteller, and there are so many outlets for telling stories. If this world goes to pieces, there will still be a need for a good narrative, for a myth, you know?*

Kjersti Mo: *As public film funders, we need to evolve our system to be able to work with emerging formats, and with future filmmakers who are not necessarily from film schools. It challenges us to be less specific, more open, and [to find the] competence so we avoid where if you don't make a traditional movie, we can't support you. It's about cultural relevance. Our stories, our language, not least, our perspective, and our values. There are stories that won't be produced commercially if we don't finance them. If Netflix want to finance Troll, I have absolutely no problem with that! Great, we can spend our money on other projects.*

Guillaume Esmiol: *There's always going to be traditional cinema. Do you prefer to focus especially on that, or do you prefer to diversify and have other opportunities of business?*

The kinds of valuable storytelling that public cultural investment is designed to nurture must also exist in formats and contexts where the audience can engage with it irrespective of its success in movie theatres. And separately, if we as artists and as an industry genuinely believe that theat-

rically screened feature film has a unique worth and transformative potential, we need to demonstrate our conviction not just in the quality of the work, but in the quality of its meeting with actual audiences.

Most of that work is not about the films themselves, but about audience design, release strategies, events, communication – in other words, about creating a sustainable balance between admissions, ticket cost, reach, and appeal. Experience from television and from related industries has shown that a vital production landscape can be maintained without a theatrical window, but for a resilient independent film ecosystem specifically, we need both.

Predictably popular films, and already established auteurs, are most likely to reliably break through. But surprising, important, or niche films have their own paths to audience success – including, relatively speaking, theatrical success.

Tabitha Jackson: *For me, the production of the work is the key. I don't like it when the industry says we should make fewer films. No, the work will be made, the meaning will be made. Then we'll figure out how the work can get to other people, whether it's passed hand to hand, or through the biggest platform out there – which is currently YouTube – that's fine. But if the work doesn't get made, if the essentially human endeavour of expressing ourselves is compromised by an industry decision that there are too many films … To me, that sounds Orwellian. »There are too many books, there are too many poems« – let's not go there.*

Kjersti Mo: *Denmark is [introducing a requirement that smaller titles submit an ambitious digital distribution plan] for what happens after the cinema release, before they get production support. I am looking at that very carefully. The producers have to have a much more holistic perspective on what their film can do, not a very short-sighted focus on theatrical release. That will make them more resilient to changes in the cinemas.*

Joanna Szymańska: *This is a prototype-based industry. Even if you find a formula, like this guy in Poland who was making extremely successful*

films – always in the box office Top 10 – or like Marvel, they expire. We have to support people who have creative minds and want to experiment a bit more, give a platform to stories that have not been told, rather than try to put everything in an algorithmic box saying »this will make money«.

Every film in theatres will need to work for its place, and every cinema will equally need to work for the titles on its programme. The industry at large needs to invest in cinema culture in general, and in audiences for artistically ambitious film in particular.

Should this work be left undone, an opposite outcome for the medium looms just around the corner, with film art as we know it surviving beautifully, but only for the elite few. And without a vital landscape of authored and niche cinema to renew talent, aesthetics, and relevance for the medium, commercial film too might well wither.

The Nostradamus project has previously predicted and still holds that both commercial and arthouse exhibition remain viable if the quality of the experience and the films' audience relevance are high enough. We also still believe successful commercial cinemas normalise the behaviour of movie-going, and that authored cinema is at the verge of a golden age. All this provides real opportunity to revitalise film culture and attract passionate new audiences of all ages, as will be discussed in the following chapters.

Ted Hope: *[The mainstream industry will] always guess wrong and stay with things far too long. They don't have their eyes out for new things that are more aligned with audiences. The greenlight itself is predicated on comparative analysis based on past performance history. This leads to more of the same, or variations on a theme, and to not moving fast enough.*

Independent cinema used to provide the entire industry with cultural course-correction, but it also used to be easier to bring a film into release, so those course correctors were there for us all to see. In a world where [to distribute a film you would] need a predictable licence [from a global streaming platform] equal to what your spend is, it's almost impossible to have that. And so we're going to start to guess wrong more often than not.

Hanna Reifgerst: *When radio was invented, everyone said books are going to die out. A couple of [media] did, but there are also things like the revival of vinyl records. I think it will be like that with cinema – it will be one flower within this beautiful garden of the cultural landscape.*

Joanna Szymańska: *We should really look at our audiences. A friend of mine, who is 13 years younger, recently mentioned she's already seen 70-something films this year. And I was like, whoa, when? When?! She's watching them on her mobile, or on her laptop when she's travelling. She's consuming film in this completely different way. For my twenty-something film school students, going to the cinema to see Barbie was an event for a group of friends, »let's have a Barbie party« rather than »We are going to see a film«. We have to open up to these new outlets. It has to come from the project. What is the story I'm telling? What's the best way to bring it to the audience?*

Angela Chan: *We have to think about our rights models extended to other things, the way Stranger Things has a live show and an immersive experience, etc. If you've got a great asset, how are you going to monetize that in the value chain? Not everything can do it, but in this era of fewer bigger better, it makes sense.*

3.

Engagement Theatrical as the New Normal

The emerging shape of cinema-going can be described as »engagement theatrical«. A successful film, its communication, and the screening experience must all be specifically engaging for its audience to prioritise seeing it out of the home. This new normal adds work for exhibitors, distributors, and even producers, but provides growth potential especially for original, authorial, and unusual films. The decline in movie-going is inevitable – unless the industry decides it isn't.

Fatima Djoumer: *I asked an exhibitor in Vilnius – a small arthouse cinema, one screen with a small cafe – has the audience come back? She said, Fatima, not the way they used to. Before they were coming to our cinema, now they are coming to see a specific movie.*

We haven't done a survey yet, but [it seems to be] a trend in all our countries now that audiences are coming to see a specific movie. Let's say you used to have 20 arthouse films doing 80-90% of the arthouse box office. Now it's fewer. This was always the tendency in the mainstream system, but now our audience also says, I heard about Anatomy of a Fall, but that Romanian film I can see when it's on MUBI. Of course it doesn't mean that it won't be released, or that it won't meet any audience, or go undiscovered and critically unrecognised. But a small film mainly stays small.

Joanna Szymańska: *I teach at universities and always poll my students. What films have you seen recently, in what medium? Cinema is not dead, but it has to compete much harder with everything else.*

Guillaume Esmiol: *I have three children. Going to a movie theatre is so much more expensive than watching Disney+, Netflix or Prime Video, but*

the fact that we are going out to do something together creates a special occasion. That is also part of the value of cinema.

Ted Hope: *There is a stronger power that we haven't tapped into in community and curation, where people don't care that much about selection of individual titles as long as they are able to have it in an environment that they trust and want to engage in. So how do we move towards that?*

At the start of blockbuster season in 2023, after a dire box office year, some industry commentators believed they were witnessing the end of cinema culture. Between the pandemic, the streaming platforms, and TikTok, movie-going was finally and irrevocably broken. Then came *Barbie* and *Oppenheimer*, neither of which were consistently predicted even to be hits, and created a cultural moment.

Interpreting box office numbers always requires caution, and right now there is a great deal of noise in the data. Behaviours are in flux, there is a cost-of-living crisis, release schedules are spotty since the US strikes. Theatrical audiences are rejecting films that feel poorly executed, commercially manipulative, or underestimates them. Yet there seems to be a great deal of demand for vibrant shared experiences and strong authorial voices.

This is the paradox of theatrical exhibition: there are too many movies vying for attention, but too few movies delivering on engagement. The trouble of theatres is not the abundance of superheroes or depressing European dramas, nor the lack of big studio titles. The problem is the value proposition.

Going to the movies requires money, effort, and, (usually) sitting through a film to the end even if it's disappointing in quality or has been dishonestly marketed. After a century of programming almost everything the US studios release, and every film produced in their local market, we should not be surprised that audiences have learned to be wary. The production boom across screens in the last decades has only increased audience discernment, while screening conditions in most homes have also transformed dramatically for the better.

We propose as a shorthand for this new normal »engagement theatri-

cal«, combining three meanings of the word. To succeed in theatres, the film itself must be *personally engaging*, in other words both good and relevant. Box office performance requires *proactively engaging* the attention and creativity of audiences. And the visit to the cinema itself is also *an engagement* – a prioritised appointment that one has certain expectations of.

These three aspects of theatrical engagement map nicely onto the areas of production, distribution, and exhibition, but ultimately all of them are about connecting with the audience. It is their minds, hearts, and bodies that must be moved by the work; it is their time, attention, and creativity the distributor is courting; and it is their journey through the theatrical experience that must be satisfied by the exhibitor to achieve word of mouth or a return visit.

Just existing in the world as a very good film is not enough. The surrounding media landscape offers many alternatives, and data suggests that the habit of visiting the cinema regularly is lapsing even with many of us who are old enough have taken it for granted all our lives. This has coincided with the collapse in many demographics of the reach of media traditionally central to communicating films – newspapers, linear TV advertising, glossy magazines.

Today, a film being well-reviewed in no way equates with the target audience knowing that it is, which in turn does not equate with a ticket sale. As cinemas are re-conceptualised as a kind of live entertainment, their primary competition is not with the living room screen but every other kind of night out. Every admission represents a special occasion, a social engagement, or a personal treat, a rarity that might be planned on the strength of an engaging trailer, but is unlikely to be risked on a film one has only heard about in passing.

This also helps explain the trend of specific buzzy titles driving arthouse audiences. Either you are pulled in by already having some relationship to a specific title, or the occasion is social and involves a group of people deciding on a film together, in which case the one most of them have heard of is likeliest to win.

Fatima Djoumer: *Arthouse audiences pay attention to the story, the di-*

rectors, critics, to where the film comes from, and sometimes the cast if you have well-known actors such as Isabelle Huppert. An award in Cannes or Venice can also create a great buzz and increase the chance to be successful at the box-office, because the film will be covered in the [media]. And of course, directors, like Gus Van Sant or Pedro Almodóvar, are very well known in this niche market.

Justine Triet was programmed at a lot of big international festivals. She was a recognized director only for the critics, the professionals, and a limited audience outside France. With the Oscar she'll be able to produce her next film more easily, probably even with US financing, and she will get bigger.

Guillaume Esmiol: *It's funny, when I speak with distributors about choosing a film, there is the story, of course, but they also look at where it's set, and the casting. One distributor said if one of the actors is from Corsica, he already knows he will have 100,000 admissions from and around that region. So it's the connection between the audience and the movie – its specificities [also matter]. You look at those parameters to evaluate risk, to see if anything assures you.*

The quality of the film is irrelevant if audiences never find it, while a personal connection or an engaging curator – like a trusted festival or a distributor with a strong brand identity of its own – can make someone take a chance on a work they otherwise know nothing about. Crucially, whether the audience enjoys the film or not, an unsatisfactory experience in the theatre will still make them likelier to stay at home the next time.

From the perspective of the independent filmmaker in particular, all this can feel disheartening. On the other hand, a film that feels fresh, authentic, new, or challenging can actually be easier to communicate and circulate than something generic. This effect is only expected to strengthen as we become inundated with synthetic AI content. The impact of films with a specific artistic voice and perspective is also less dependent on a giant budget. In the next five years, the expectation is for technical production costs to turn down, increasing opportunities for work that is financially responsible and creatively daring.

Adding value to the theatrical visit around a more specialised film can be about smaller investments, like facilitating lingering in the cinema atmosphere for conversation and reflection over a drink. Audiences certainly also respond to a larger chair or a larger screen, as evidenced by the disproportionate box office returns provided for commercial films on PLF screens, particularly IMAX.[7] But this then forces up ticket costs further.

Tomas Eskilsson: *It's not just about better projectors or great sound. It isn't even always you doing something, the audience will often make something an event [if you enable them to]. If I go to a football or hockey game today nothing in that experience is the same as it would have been at the start of the 00s. Museums have changed too. Everyone else has really reflected on and invested in the total experience, while we romanticise Cinema Paradiso and think that if we'd just get them into that room, like when we were children, people will never want to see films anywhere else.*

Hanna Reifgerst: *For teenagers nowadays, cinema is more of an exclusive event. Like going to the opera is for us – we love it, but can't do it often because it's really expensive. This is also the chance of a festival. If we offer lower ticket prices, people can afford cinema way more often.*

Tabitha Jackson: *My hope is that the »real« experiences don't become »premium« privileges for only the well-off. Yes the experience of going to the cinema and being transported with strangers in the dark is a powerful thing, but even that is not cheap. If we are to maximise the cultural power of the work, we should also make sure that it is accessible and within reach of as many people as possible.*

Tabitha Jackson is pointing at something vitally important: the cultural status, the power of film, depends on its position as both a mass medium and as a medium creating temporary communities – an audience in a the-

7 PLF formats are performing better than pre-pandemic, with a 40% growth in their proportion of the box office 2019-2023 in the US. In the UK, 3D and IMAX gross revenue grew 140% 2021-2023. (UNIC: *Annual Report* 2023). IMAX is the dominant PLF format.

atre breathing together, a friend group discussing a film. The impact of experiencing challenging or transformative films together should not become an activity only for the upper middle class.

The cultural meaning of visiting a movie theatre has changed more than once in our lifetimes. It means it is not set in stone, and that we can work to change it again. The decline of theatrical exhibition can probably be slowed; even growth in admissions is possible.

One central audience strategy must be to re-engage with people who used to visit the cinemas often, to learn what aspects of it they still miss, and what it would take to bring them back. Another completely different challenge involves ensuring that new audiences find the greatest diversity of film in the repertory. This includes groups such as pensioners and students, who have lower spending power, but will still expect to be respectfully engaged with – by the film, the communication of it, and the screening experience itself.

Guillaume Esmiol: *Some say that fewer people are watching arthouse films in theatres since the pandemic, even though there are many counter-examples. Maybe some really discovered streaming platforms, and an explanation can be a change of their habits. A potentially quite small number of people used to come often – and if you lose those, all the figures are lower. This is an audience we keep forgetting, the movie lovers that sometimes go to the cinema alone. In the end you need those to make your movie theatre profitable. And part of this audience is a bit older. We always speak about the young audience, but older people are just as valuable. We should consider them the same way. What do they want to watch?*

Joanna Szymańska: *My first friend group formed around going to the cinema every Saturday. We were children of the transformation [in Poland]; my father gave me 20 zloty of pocket money, which at that time was enough to have a Happy Meal and a ticket. We would go to McDonald's, because it re-affirmed our status as this new westernized generation, and then we would go to the cinema, every week. Some of the films were very good, some very bad, but we experienced culture.*

Tabitha Jackson: *Encountering real people in real situations, with real differences of opinion, who are proximate to you – that is a human experience infused with complexity and richness and frustrations, reflective of who we are and what we do as a species.*

4.

New Opportunities for Strong Voices

The abundance of quality in the past 20 years has taught audiences to appreciate great storytelling, and a multi-year trend of excitement about strong authorial voices now extends even into the blockbuster space. Moving beyond categories like »mainstream« or »arthouse«, which are no longer meaningful to audiences, will help create a sustainable cross-platform business model for independent film. Paradoxically, such a model would rely in part on growth opportunities in the theatrical window.

Gaia Tridente: *Something is happening. What everyone experienced in the last years with COVID changed the perception of what is entertaining. I'm not thinking about commercial entertainment, but about the way we are [moved] by something. We see films about characters who represent a larger-than-life perspective, or have a story, but not in a loud way. Big pieces of art with a very specific, peculiar, human way to to describe people and to tell stories. Yorgos Lanthimos is one of the best at describing how different and fascinating humanity can be … or Perfect Days, or a drama series like The Bear, that is completely centred on the psychologies of the characters … The human being, everything related to humanity, is interesting for everyone.*

We don't have the key to [guaranteed] success, but I feel the quality of everything produced in these past years makes the audiences select the best pieces of art, whether animation, documentaries or feature fiction – valuable, culturally grounded work.

Tabitha Jackson: *When we ask people on our podcast The Film that Blew My Mind where they saw their chosen film, they mostly didn't see them in*

the cinema. They saw them on television in their own homes. This is why I don't want to be too precious about the cinematic experience, even though it is often transcendent. I don't want to deprive other people like me, who didn't have a cinema anywhere near them when they were growing up, from experiencing that sense of discovery.

The curious thing about *Barbie* and *Oppenheimer*, in first and third place respectively for global box office in 2023, as well as *Dune: Part Two*, which currently holds the top spot for 2024, is how specifically good they are. In addition to having the Hollywood trappings, stars, budgets, and marketing campaigns, they are also auteur films by auteur filmmakers. Genuinely cinematic, narratively complex, and powerfully acted, they grapple intelligently and entertainingly with stories, situations and themes dismissed in advance as unfilmable.[8] How did this happen? The biggest hits of the past decade – even in the maligned superhero genre – were often excellently crafted, but rarely told in a specific, authorial voice.[9]

The 2020 *Nostradamus Report* captured a moment of excitement «unheard of since the 1990s« around independent film. Artists like Paweł Pawlikowski and Yorgos Lanthimos were connecting with international audiences, making specialised cinema feel fresh and relevant again. But it was not just that. »There is something going on with the younger generation,« observed Philip Knatchbull, CEO of Curzon. »You're into *Star Wars*, you're into Céline Sciamma. It's not mutually exclusive.«[10]

It really is just four years ago. *Parasite* had become a global phenomenon and would go on to sweep at the Oscars. A month later, the world stopped. The story of feature film in the 2020s became a crisis narrative, dominated by the pandemic halting production, closing cinemas, and accelerating penetration of SVOD platforms and the already dire competi-

8 Of the films in the 2023 top 10, the animation features *Elemental* and *Spider-Man: Across the Spider-Verse* also have similar qualities.

9 Among the possible precursors, Ryan Coogler's *Black Panther* and James Cameron's *Avatar*: *The Way of Water* were perhaps limited by genre demands. Some might also consider Zach Snyder's incoherent oeuvre in this context.

10 Koljonen: *A Creative Explosion*

tion for attention, projects, and talent. All of those things did happen, but that optimistic moment was also real.

Parasite is an excellent case study: the film itself was masterful and engaging, it was intelligently released, and it pulled in audiences beyond the traditional arthouse crowd. Another way of saying this was that years of work especially in distribution on audience design and development was really starting to pay off in relationships and curatorial trust. That work had also coincided with the emergence of a generation with no pre-conceived notions about auteur and world cinema.

Hanna Reifgerst: *I hate when people talk about children and young people as the audience of the future, it is nonsense. At least in Germany almost no audience is as passionate about film. The numbers are incredible, over 70 percent coverage – they are already in the cinemas.*

Fatima Djoumer: *We had very good figures last year. 96% of the young audience returned to theatres. Our cinemas organize a lot of [youth] activities, but the exhibitors are saying the [teens] really are very interested, as long as you have movies that are engaging for young audiences. But there are not enough. There are children's films of course. But I am not sure that Wenders' Perfect Days is engaging for a 17-year old.*

We in the industry conceptualise the film market as consisting of mainstream films and their arthouse alternatives. To younger audiences these distinctions are less obvious, and they are not wrong. *Everything Everywhere All at Once* and *Zone of Interest* have very little in common except the precision of their vision.

These titles get grouped together in a shorthand way because you once had to visit a special building to see any film beyond the most commercial (and often even those, if they were not in English). The term »independent cinema« is not much better, implying things about a film's tone and artistic ambition through reference to its financing model. These are industry perspectives on artistic processes, rooted in a past that Gen Z and most Millennials have never experienced, and Generation Alpha will not be able

to imagine. To them and increasingly to everyone, films are everywhere, pieces of content in a sea of content.

Guillaume Esmiol: *My older son is 18. He used to go to movie theatres for the big US titles, Marvel and so on. I brought him to Cannes to show him what it is, and he saw some movies of a different kind, even some that were not very accessible. He loved them. It had never occurred to him before to go see those movies. We always say the young audience is on TikTok, and that's it – but if you manage that first step of connecting them with this kind of cinema, they actually love it. They love that it's different. That's where you see the value of the local festival too, lots of people are going to movies that they don't already know.*

When we say »arthouse audiences«, we refer to people with a personal investment in feature film specifically, who are potentially interested in any beautiful or challenging festival favourite. To the general audience, the feature format increasingly often holds no special primacy – but quality, authenticity and originality do. No wonder the work of great filmmakers is resonating.

We have always said the best film art should be seen by and could be loved by everyone, and for the first time it can. This is an enormous opportunity, and a staggering challenge, precisely because we no longer have a predictable funnel to a stable segment of habitual moviegoers willing to give any great film, on any topic, a chance. Whether in homes or theatres, each work now genuinely competes on both merits and relevance. At the same time its chances in the marketplace of attention are modulated by the economic power of its backers (which for indie films tends to be low) and the addictiveness of competing media (which tends to be high).

Hanna Reifgerst: *I had the Finnish Oscar candidate Girl Picture (Tytöt, tytöt, tytöt) in my youth section last year. It's [about] three girls exploring their sexuality. At a school screening for 10th-graders a lot of really tough guys walked in with their shoulders wide. When I presented the film, they were laughing and making ridiculous comments. The screening was okay.*

Some chatting and laughing, but that's also something kids do to compensate if it gets really close to their hearts.

[After the screening and discussion] I usually stick around for a while, because almost every time there's a person who wants to talk to someone, but not in front of the whole group. I find a strategic place at the exit and sort my moderating cards, pretending to be busy. Two of these really tough guys walked up to me and I thought, now they'll tell me some truths … They said, »walla, this was a really beautiful film. Thank you so much for it. It really changed my perspective.« I stood there crying – I am crying now. Maybe if you see the right films before you're fully grown, it can change you.

But there is the question of push and pull with this audience. This film really resonated, but they would never have chosen it by themselves – they would probably go for the lighthearted, the adventurous, the romantic comedy … Nothing wrong with that! But as a festival, if you want to offer new perspectives and ways of telling stories, you really have to push them. And convince gatekeepers like teachers, parents, and media educators that it's valuable.

Assuming the marketplace for specialised films cannot grow or will not include younger audiences is a self-fulfilling prophecy with no obvious basis in fact. Younger viewers are, broadly speaking, the most loyal movie-goers. Their audiovisual literacy is high, and they don't seem to have aesthetic objections to filmmakers with specific voices, as long as the films are not boring. They may not identify as indie film fans, or even know what that means – but they are also not prejudiced against specialized film as elitist, difficult, or foreign. They are attracted to a specific title, or the specific context of its screening, but will build relationships with artistic talent and curatorial brands over time.

A curatorial brand can be a distributor/studio like A24, a local festival, an online content creator, an innovative local cinema, or a programme of school screenings. Or something else entirely – in the Netherlands, non-profit distributor MOOOV has built an audience for its »FOMO film«-branded monthly screenings of unfamiliar Asian and African titles.[11]

11 Stolz: »Benny Hæsebrouck«.

Building a direct relationship is time-consuming work, but once it is established, it will serve every title you are working on. The goal is not to open a line of sales communication, but to inspire trust in your messaging and ultimately to engage the time, creativity and network of the audience members themselves in the visibility of each film.

In a smaller market, a few thousand extra admissions can make a real difference, but may not cover the investment of new kinds of communication. On the other hand, the audience work will serve the film throughout its lifecycle. To many stakeholders, and probably to the ecosystem as a whole, the most important goal is for valuable work to be seen.

Hanna Reifgerst: *Girl Picture did get a German distributor, real cinema lovers. They promoted it as a queer film, to a mostly adult audience – there just aren't commercial prospects. But it could work really well on a VOD platform, or [communicated through] different peer groups.*

Kjersti Mo: *A fantastic admission number for a documentary that we really celebrate these days is 100,000 – still nothing like what you can reach on TV. Ibelin just passed 100,000. A film called Woolly about a girl taking over her father's farm did 30,000, and it's fantastic that it's possible to pull people into the cinema for this, but if you sum all [successful documentaries] up, it's still below a single box office hit. Ibelin is not going to have an international cinema release. It's going to Netflix. And Woolly will be published by The Guardian. These are interesting examples of projects succeeding both in local cinemas and with an international audience digitally.*

Described in *Variety* as a moving masterwork, the multiple-award-winning *Ibelin* is a documentary about a young man with a degenerative muscular disease who lives a rich life with deep friendships in the computer game *World of Warcraft*, something his family only finds out about after his death.[12] Its themes of parenthood, loss and generational divides are uni-

12 Among the awards are the World Documentary Award and World Documentary Audience Award at Sundance and the Dragon Award for Best Nordic Documentary at Göteborg Film Festival. It is rated 95% fresh on Rotten Tomatoes.

versal, while also resonating with specific communities, like online gamers and families touched by illness. It will undoubtedly do very well on Netflix, but it is also interesting to consider the counterfactual – what would it have taken for it to have a great international run?

The Finnish fiction film *Girl Picture* discussed by Hanna Reifgerst is a similar example. Any film that moves young viewers deeply has the potential of a significant theatrical audience, and an audience award from Sundance and a 99% Fresh rating should help. But even in a relatively large market, banking on your ability to bring wider audiences to cinemas for an unusual kind of film would be an enormous gamble. A huge marketing campaign not being financially viable, the next best thing is doing pretty well within an existing niche.

A significant international run for films like these is not, on principle, impossible. There have been examples of young online audiences latching onto a theatrical title and driving up admissions. We just don't know how to achieve that predictably, at scale, and at an acceptable cost. Producers, sales, distributors and exhibitors would have to collaborate across markets, ideally with investment from the later windows, as not to unnecessarily duplicate too much of their work. All of them would need to know how to reach and engage the specific audiences, and how and when to programme the film for each particular local context. Such skills are not consistently present, and even if they were, the collaboration structures are also not in place.

Two completely opposite conclusions should be drawn from this thought experiment. First, that a global streaming platform release, after theatres in the film's home market or a limited international run, can be a great destination for certain films. The work of connecting wider audiences with films of great quality should happen across the entire ecosystem.

Second, that not every great niche title will have that opportunity, or be best served by a major streaming platform, and in such cases a significant theatrical window is a key component of financial viability. It follows that scaling up capacity, skills, and efficiency in the production, distribution and screening of independent film – to make and communicate titles at viable cost – is absolutely and urgently necessary.

Joanna Szymańska: *The role of public broadcasters is super important. Everybody who is invested in audiovisual culture – not in audiovisual industry as such, but audiovisual culture – should really be very honest with themselves. What do we want from this? What do we want from our work?*

Tabitha Jackson: *The public broadcasting system was built on the model of not simply giving people what they want, but giving them what might be valuable. It's a somewhat condescending approach but particularly in a world where filter bubbles and algorithms are training us to get more of what we already want, opportunities for providing things that you don't yet know you want are vital. Not just, »Cinema is wonderful. Go watch cinema.« How do we provide community around the ability to screen?*

There also has to be some element of discovery. It happens at festivals all the time: you can't get a ticket to the film you want to see, so you see the other thing to get out of the cold, and it is that other film that ends up blowing your mind.

Kjersti Mo: *The cinema is important, and the artists love the big screen for their art, but as cultural policy … We did an interview study of 7-to-14 year-olds, and they really like to go to the cinema, primarily because they get candy. That's the main reason. Reason number two was to do something with family and friends.*

I don't remember the numbers for this age group, but the average in Norway is to go to the cinema twice a year. The Norwegian market share is just over 25%. If you only see a Norwegian film less than once a year, you won't have a relationship to the stories, the storytellers, or the language. In this perspective, we really have to fight for [audiences] seeing Norwegian quality content on all platforms, on a daily basis, or else we will lose them.

5.

Collaboration as Innovation

Scaling up existing innovations in production, distribution, and exhibition is the first step towards growing the total audience for film in theatres. Similar strategies can help independent producers to diversify away from their position of dependence on both the theatrical window and the global streaming platforms. A collaborative ecosystem requires us to view each other as colleagues instead of competitors, but increases the value and resilience of local industries, and the agency of everyone in the wider sector relative to the world's biggest companies.

Ted Hope: *The cultural industries have to build in processes to reinvent themselves every step of the way. I say as a joke, but it's really true, that global indie film is 40 years of doing the wrong thing. We've neglected what we needed to do. Everyone likes to be a builder, nobody likes to do the maintenance. We need more maintenance workers to build back what we've allowed to rust.*

A forward-thinking investment strategy might be to shift your production funds into something more like 60% for production, 25% for marketing, and 15% for ecosystem building on a collective basis. Of course you need a code of collaboration between the different ventures in the ecosystem build. As it starts to drive revenue, as you get proof of principle of what's working and can double down, I think that split [can be] flipped between the 15 and the 25. Less money will actually have to be spent on marketing.

Fatima Djoumer: *Despite my fears we still have people who love arthouse films coming into this business, great people with real vision, avant-garde ideas. In our network, Kino Rotterdam opened in the Netherlands a few years before the pandemic. They are very modern in terms of advertising, but show classic films as well, on a 70 mm projector! And promote some titles with a pizza because they have a restaurant – this wonderful mix of ways of attracting different people.*

What is stopping innovations in distribution and exhibition from scaling?

[Exhibitors] don't have all the skills that are required nowadays. That's why we do networking, bringing people together in our labs to share best practice. They see something and say, oh, I'm going to do the same. In a lot of countries people [struggle even with] digital marketing – that's why we are launching a new professional training scheme this year, the Training Boot Camps. There are countries where there is no money for exhibition, nor public support for training.

About 55% of Europa Cinemas are one-screen venues. They have very small teams. Sometimes cinemas contact me and say, we would very much like to do this or that, to apply with other cinemas for our innovation fund Collaborate to Innovate, but in the end they don't. When I see them again, they say, we had no time.

Robert Franke: *For me the number one thing is that we all educate each other in order to stay relevant and competitive. Otherwise we will be outcompeted by other industries, by people from the sidelines who use these technologies in a completely different way to create whatever it is people want to see.*

It's really about the sharing of skills – making transparent what type of skills are needed in order to be competitive. The better we are at exchanging these magic recipes, and distributing them amongst each other, the more skill will penetrate our industry, and the easier it will be to find the right people to help you achieve your goals.

Changing the market power of the world's biggest companies is only possible on the regulatory level, but the economic logic of the ecosystem as a whole does not preclude meaningful positive change for independent filmmaking. The basis of sustainability must be producing content at the right price for each medium and release strategy, of course, but as discussed in previous chapters, even more important would be growing the total market – getting better at attracting, activating, engaging, and retaining audiences.

Identifying best-practice examples of innovation in production, distri-

bution, and exhibition is relatively simple. They tend to build on the same principles, which it feels almost banal to list: creating brands and a sense of occasion, building relationships, engaging with communities. Meeting people's needs and catching their attention where they actually are. Employing new technology. They have almost always been developed iteratively, through testing small and failing forward. They have often been documented and publicised, ready to be copied and adapted in other places. They mostly weren't.

The recent boom years in production contributed to this passivity. Those who could afford to look forward and explore change didn't feel an immediate need, while most that had time, especially during the pandemic, lacked the means, the manpower, or the mental bandwidth. Fear or denial may also have played a part.

Robert Franke: *All these indie producers who have been in the industry for ever are still running the old business model. Making the switch will be extremely hard because it requires so much outside of talking to your local film board or to a distributor … Imagine being a filmmaker, and now you also have to talk to your audience. These used to be highly specialized professions! All of a sudden you have to do marketing, be tech-savvy, know how to tag YouTube videos and how to produce them yourself in order to be cost sensitive. Not all of the arthouse producers I know are willing or capable to learn it all. That is not neglect, it's being overwhelmed by what is required to stay relevant and successful. And I can say that because I hate working on YouTube or spending a lot of energy to understand tech.*

Kjersti Mo: *The distributors have been trying to get cinemas to share data so that they can work together, make more informed decisions and be more precise in marketing. But the cinemas are [a mix of] publicly and privately owned, and establishing a good collaboration with data sharing is not straightforward.*

Angela Chan: *The industry is an ecosystem, and the broadcasters and major commissioning bodies have a role in bringing it together, especially*

when change is going on. But right now, these impacts are hitting them at such a rate that they are busy looking after themselves. Trade bodies, unions, people like the Film and TV Charity here in the UK – they are all really important for raising issues, not hiding them. If you work as an ecosystem, you can look after the freelance community too.

Tabitha Jackson: *The margins are the most valuable and thrilling place to see what free creative expression can do in terms of expressing authentic, uncompromised subjective experience in new cinematic languages, with fearless truth-telling. In the documentary space, as filmmakers find new ways to collectivize, it becomes more possible to make the work without depending on old inequitable systems of gatekeeping. [The feeling is that if they] focus their energies and resources on what they value – culturally, politically and socially –within reimagined structures that reflect a different set of values, the old ways that are no longer fit for our times will fall away. It seems possible, and it certainly has precedent.*

Sundance, in its own origin story, didn't chase the market, it expanded it. It provided an alternative to the existing [Hollywood] systems that were not reflecting the abundant creativity and authentic lived experience out there. Then, in the 90s, the market found that the work could sell, be branded and commodified, and went crazy for it. Perhaps that is where we are again. Making space for an alternative. Not being constrained by our present reality.

Historically the most innovative spaces in film have been the margins and the edges – the low-status environments, where people have the least to lose from experimentation, and the most to gain from engaging with new technologies, themes, audiences, and approaches. As the independent film world confronts new technological realities and attempts to make the leap to multiple sustainable business models, these innovative spaces are of two different kinds.

One is exemplified by impact documentaries, which in the last decade have adopted multi-platform storytelling and novel funding structures ranging from brand partnerships to direct audience relationships. Want-

ing to change an audience's convictions or behaviour, which is the whole project of this kind of film, incidentally requires you to know who your audience is and where they are. This margin consists of mostly traditional independent filmmakers and distributors, who have never taken a wide theatrical release for granted, and have therefore been forced to work the way we all must now.

Another type of example is the enormous innovation and growth in independent animation. Animation's technical traditions have likely made professionals in the field less intimidated by new workflows overall. At the same time the wide availability of digital art tools and supportive online communities for independent artistic study has lowered barriers of entry, bringing in people who understand online distribution platforms and fan communities. This margin illustrates the effect of democratizing technology – that great work will get made whether or not the traditional industry is part of it, though we can be.

Both spaces produce work that succeeds in traditional distribution channels, including cinemas, streaming platforms, and TV. But importantly, they also support other career paths and business models, with work getting seen and professionals making a living at a great variety of scales. This is also possible because being based in a filmmaking hub, with exorbitant costs of living, is no longer as necessary to have a career.

What is necessary, and what has powered every example of fan filmmakers, creative collectives, or the self-taught who have crossed the creator/professional divide, is collaborating with and learning from others. This is true for technical skills, for market insights, for business innovation, for all of it. Often the collaboration itself becomes or births the market-changing innovation.

We must build new structures and networks together, because the traditional independent film ecosystem is not sustainable. The power imbalances in the media market are such that no one else will do it for us, while creating viable parallel models actually changes that power dynamic for the better. Having other options will never diminish the value of your marketable work in commercial spaces, but it might make you a braver negotiator.

Joanna Szymańska: *Producers had turned away from a [collective] approach to the individualistic, every man and woman for themselves. I get where it's coming from: [existing in] survival mode. But life is not a zero-sume game. And I find it disturbing, because right now it's not only about who's in [political] power, but also who's in economic power. The platforms are not enemies, but they are a new, super-strong player with a completely different mindset.*

I'm a lawyer by training. When anybody tells me a contract is non-negotiable, I'm like, please, everything is negotiable. But it's so much harder if you are an individual or a small independent company dealing with a commercial powerhouse. You have zero bargaining power. I feel independent producers somehow lost the understanding that united we are much stronger. But I also understand it on a human level.

When you're presented with a chance, for the first time in your life, to get to fulfil your vision without anybody asking you any questions – it's a very hard no, you jusrt gratefully take it! I still see [my Netflix film] as my best production artistically, and commercially, depending on whose metrics you adopt. It was a fantastic experience, but it doesn't blind me to the economic reality.

There would have been power in just talking to each other?

Talk to each other, gossip! I always tell my students, just gossip, guys. To know the market you're in, to understand its complexity, to have the data to build your strategies on – that's power.

Ted Hope: *There's more collective action in the United States film industry than ever before – a group of people that have historically been self-interested in all their practices, so they've had trouble doing unified action. I see a big change, and that's reflected in greater strength in the historic labour movements in the industry too.*

In the US, producers [do not have] a union. But we can still have standardized codes of cooperation. Simple things, like healthcare and agreeing not to do free work. When you have a system that is so dependent on four to six financial entities, whether we claim otherwise or not, we're all working for [them].

Since the sector is already under enormous pressure, change in the independent cinema ecosystem has to begin with the lowest-hanging fruit. In practical terms this means talking to and learning from each other in order to copy and scale up innovations that have already proved viable, to support each other in interactions with more powerful stakeholders, and to think about solutions to shared problems together.

Film is a people business anyway. The mindset shift is to look at each other in almost all situations as colleagues instead of competitors. Not only will this accelerate the value of our networks and produce lifelong professional development automatically, it will also reveal whose values, practices and partnerships are worthy of our time. Searching for solutions together allows us to identify win-win scenarios, while testing things together and sharing what we have learned lowers everyone's risk.

Joanna Szymańska: *On the European level there are more and more co-productions on a, how to say this, friendly basis. I'll work with you for a smaller budget because I appreciate your qualities as a human being, rather than going with that person I hate who gives me money. I think COVID changed this, people started valuing their life more. I recently had a conversation with a distributor who said, listen, I can only give you this much, and I know our competition is offering you twice that. But I thought, I'd rather work with you and find my money elsewhere, because it will be an equal partnership, rather than somebody imposing on me what to do with my film. And they said, I won't take all the rights, just sell them to a private investor. This kind of organic connection can work for everybody. Everyone won't make tonnes of money, but everyone makes enough to make the film, make their salaries, make some profit, and move on.*

Ted Hope: *You need to say, okay, these are ten ecosystem improvements that we collectively – across this and that nation – are going to work to build. We don't expect them all to succeed, some will be utter failures. But we're all going to do these, and we should probably also each do some on our own, as initial case studies to build upon. There are a lot of things on a small scale, successful or not, that modelled out a little bit can be learned from by others.*

Fatima Djoumer: *We are on the fourth round of the Collaborate to Innovate programme. The projects that are doing especially well are all the data sharing and analysis projects, and the flat rate subscription model, like Cineville, which has been very successful and will be implemented in Sweden [next], after the Netherlands, Belgium, Austria, and Germany.*

Even if a project is not as successful as the exhibitors would have wanted, I see it as very positive, because in the process they really question themselves and emerge with new [perspectives]. There is a French project, for example, interviewing directors on the [live streaming] gaming platform Twitch to promote movies. The exhibitors say they never thought these people might be open to different content. They had a prejudice that [gamers] only like mainstream things. Sometimes it's good to get out of your comfort zone and test something. Collaborate to Innovate is exactly for this, and I love it for its success, but also for the failures.

There are short-term situations where we do compete, for the same resources or talent, but even then long-term goals tend to align. If we believe in our own fine words about the power of cinema, co-operating on a vibrant film culture will grow the audience for everyone. If we believe the medium is doomed, what are we even doing?

The radical idea to grapple with is not that working together benefits us all, it is that we have power to change the entire system. Cultural systems are not natural laws; some parameter is always possible to shift. Every time a national funding system was totally renewed, new voices expanded a marketplace, or an innovative contract was negotiated, it happened because one person saw a possibility and talked others into working towards it too. If it feels overwhelming, the consolation is that we don't have to go at it alone.

Joanna Szymańska: *The biggest problem of our industry is that we are not informed enough. You should at least know the rules of the game, rather than thinking »it is what it is«. Learning them just requires effort and [confidence in your abilities]. I do a four-hour class for my first-year students on how the [film fund] operates, who appoints whom, where to find*

the regulations. It literally only takes one well-prepared lecture to understand. Then, of course, it takes some courage to actually go to the minister, but that's possible too. You can just ask for an appointment.

Ted Hope: *There is greater opportunity for worker-owned enterprise of different scales to exist now than ever before. But that has to come with both the demystification of information and process, and the democratisation of access to the tools throughout the value chain. Artist-owned enterprise in America has often been looked at as a vanity label, that they get »passion projects« made, which is a euphemism for non-commercial. I don't agree. All I do is passion projects, and I've had commercial hits. A lot of folks now want to come up with models of production, both for individual projects and more ongoing ways for the various participants to actually share in success along the way.*

Things like crewfunding, where the team defers payment for ownership? Or more like co-ops?

There's multiple models that one can look at, but they were never taught – American film schools don't try to create change-makers. They try to make compliant creators.

In Europe, film schools make auteurs, but do not teach how to operate in the industry. We'd need something in-between …

We need to create idiosyncratic, authored business, the same way that we can make authored works.

6.

New Tools, New Potential, New Self-Understanding

Virtual Production and Generative AI tools are changing and expanding filmmaking. As an early adopter, the entertainment sector can claim a voice in shaping AI applications, and organise in defence of relevant legislation. The pace of development remains rapid, but adoption is affected by local factors like infrastructure investment and the availability of training. Filmmaking will be re-conceptualised not as the ability to produce a moving image, but as a mastery of the language of audiovisual storytelling. The industry will develop together, or be outrun.

Guillaume Esmiol: *I'm not going to be making crazy statements about a whole movie being produced and shot by AI in three or five years. But there will be a much higher use of it, beginning with our emails all the way to content production, for example with more VFX and animation produced with AI. Or helping writers by automatically identifying problems in the scripts, suggesting casting, creating voices …*

Robert Franke: *In 3-5 years, a good part of the production process will be completely transformed by AI. How you do things, how much time you allocate to each part of the production process, will affect how fast you can churn out content. It's still assisted work. For the foreseeable future, I don't see that you'll just prompt something to make synthetic entertainment.*

What are you using it for today?

Productivity gains. Making things like translations and creating marketing materials faster. When you don't have to wait as long for other people to deliver something, or for as many stakeholders to approve it, the level

of effort you have to put into coordination decreases. And in production and post-production, things like Photoshop and After Effects using AI is already making an impact.

Angela Chan: *Virtual Production is not used very widely yet, because the production chain isn't quite there. We don't have the assets available, we don't have the skills. If there's proper investment at all levels in the transition, then the cost of production will come down. There may be an initial increase in costs to government, say, for infrastructure.*

There are benefits to the environment from VP, [but] AI has environmental impacts that I don't think anyone's being very honest about. How do we measure the real cost of production to the planet, to the individual worker, and to the company? To have a flourishing industry, we need to be aware of all these costs, otherwise none of it's sustainable. Not just on a planetary level – right now, we're losing so many people because they can't afford to work in the industry.

The wider audiovisual industry is an early adopter of generative AI, and its impact should be understood as part of the digital transformation. AI functionality and entirely new sets of tools were integrated first into existing software and digital workflows where specific problems to solve or rote tasks to automate were easy to identify and address.

Attempts have apparently also been made to replace visual artists with, as they are derisively called, »prompt bros« without relevant training in the specific field. These experiments have gone poorly, since producing an attractive image is only part of the job. It is just as important to understand how your output will be used by others in the creative process, and to be able to produce iterations based on notes.[13] The lesson to be drawn from these failures is not about the potential of the technology, but about the nature of the human labour.

There are also many successful examples, especially from programming, of highly skilled creatives using AI tools for efficiency, assistance,

13 Such projects tend to be covered by NDAs, but disgruntled employees have been happy to discuss their new competition online.

and professional development. AI tools can be very useful – if the humans involved have a nuanced understanding of the tasks and workflows, and a deep ability to evaluate output that might superficially seem sufficient. In the context of filmmaking, this raises a number of important questions about training.

Robert Franke: *One risk I find fascinating is how tech companies are letting a lot of people go because one senior developer with AI can achieve more than 10 junior developers. But if you need somebody senior, you still have to train people to become senior in order to be productive. The same is true for post-production, editing and all that. Once that person retires, if you haven't invested in the next generation, we'll have a problem as an industry. Capitalism is not taking that into account. At the end of the day it's about judgment. The more experience you have, the better your judgment is. How do you build up that level of experience?*

Angela Chan: *In terms of skills there is a disaster scenario where everything's automated, and a better scenario where you get involved and can actually talk about co-piloting. Right now [many of these technologies are] a very clever trick, but you then don't have the creative controls to say, actually, that's not quite what I wanted. I want it to look like this.*

All the work going into authentic representation now – nuance, voice – are things that humans are terribly clever at. We can recognize believability in an instance, and you don't need to articulate why. That's the thing AI finds the hardest, authenticity in representation, cultural subtlety, and nuance.

In the last century, filmmaking skills have specialised. A director must understand storytelling through light and movement, for instance, but does not necessarily need a deep understanding of the principles of lighting, or the possibilities and operation of a specific camera.

Digital cameras and music production tools have democratised access to the arts for talented people of all backgrounds, but they have not made artists or artistic training redundant. Similarly, the ability to AI-generate a

superficially impressive environment asset or piece of music is very different from the specific knowledge that a carpenter or composer brings to why and how their work produces a narrative or emotional effect.

For the foreseeable future, this will remain true for film. The underlying knowledge is still necessary, but will be used in new combinations as the roles evolve from their current basis in how a set worked in the last century. This may challenge in particular the artistic professions that have historically been taught in a practical way, through experience gained with physical equipment, and where articulating nuances precisely in words may not even have been required. Film schools may need to become like conservatories, where even a composer who will always use digital tools in their work will still learn musical theory, notation, to play an instrument well, and to conduct an orchestra.

Angela Chan: *In technological terms, the transition is happening incredibly quickly. In behavioural terms, it's going to be much, much slower. The traditional creative industries have very mature production chains, very set ways of doing things. To change those production flows is really hard, because it's not just behavioural change. It's about importing a load of skills that maybe don't exist in one person yet.*

That is where cultural intermediaries can get involved to help – this whole layer of things like universities funnelling [know-how and] funding. But you have to be open to it. The concern is inertia, that this attitude of protecting the way we've always been doing things will prolong the pain. If you don't actually open yourself up to what new technology can do and with whom you can do it, it will be more than five years for sure before we transition.

Tomas Eskilsson: *The change will happen faster in TV, which is so much more industrial, than in feature film, which is infinitely more conservative. Implementing new technologies in this sector has always taken surprisingly long, for instance less than one percent of European films are using Virtual Production today.*

Kjersti Mo: *We had a feature film seminar last autumn, and the moderator asked the audience how many had tried Chat-GPT for generating video. It was two or three people. I guess that is about to change, but I don't know how fast. This can affect their ability to compete with filmmakers from other parts of the world where they don't have the same support systems [and can't be] as conservative.*

The workforce of the traditional film industry is protected somewhat by its specialised skills, its ability to know and communicate why one choice is different from another. That benefit will gradually decrease over the next five years. There are plenty of talented, educated, dedicated storytellers out there who will be happy to step into the new filmmaking positions if those who are currently best suited decline to explore them.

At the same time, audiovisual storytelling grammar is also always changed by new technologies and shifts in their distribution practices (e.g. how the close-up affected film acting, or how the act structure of an hour of US network television is determined by the number of ad breaks). AI will become better at figuring out filmmaking's current rules, and the many new audiovisual technologies will keep changing filmmaking, formats, and distribution platforms.

In a few years, the relative lack of experience of a person entering the film industry will matter less than what they are bringing to the table. This is a loss, if they replace someone who might have re-skilled, but can also be good for access.

Angela Chan: *I'm a documentary maker by trade. I learned because somebody allowed me to. If you're from a working class background, a woman, an ethnic minority, if you've got a disability, that almost never happens. But somebody let me. I don't want anyone to have to wait for someone to let them anymore.*

I've found that immersive storytelling courses attract really high levels of diverse candidates. People see it as an opportunity, that no one has an advantage because it's all new. But the industry has a job in that ecosystem to provide access to that training. We have a new Immersive Storytelling MA starting at Royal Holloway this fall.

Paradoxically, generative AI will also be useful in training the very skills the models themselves are struggling with. AI coaches will be used by institutions to support individualised, interactive learning of set curricula, and to assist with basic feedback. We can also expect »being self-taught« to look a great deal more professional than it has before, as AI search helps orient a person in the wealth of already available online training resources, and natural language interfaces make learning and using digital filmmaking software easier.

Joanna Szymańska: *Technology comes from enterprises, and it's our role not to become a resource for these companies and tools, but rather than to be a conscious user of them.*

Angela Chan: *When we say that's not good enough, for instance when creators start to point out AI fails around race and ethnicity, the companies do listen. We have an opportunity to say, no, that's not the tool I want, it doesn't do what I want it to do.*

For the entertainment industry, the pace of adoption is ultimately not set by the evolution of the Large Language Models. Instead, the key factors are the still untested legality of their use of training data, and the evolving and unclear issues around copyrighting partly or fully generated media. The industry should be making active demands on the technology's applications and organising for relevant legislation.

A significant risk of litigation or backlash, or an inability to monetise, obviously make AI tools less attractive for producing final pixels in audience-facing work. Even so, synthetic video is already in professional use in lower-stakes environments like social media and online advertising, and is expected within two years to have sufficient quality and controls to output shots for theatrical features. Something similar is already happening in for instance documentary, where AI tools including deep fakes are in use for generating reconstructions of environments and characters.

For all the reasons mentioned above, such projects are handled very carefully by film industry stakeholders. But there exists a fertile delta be-

tween independent filmmaking, traditional media genres, and the creative economy on social platforms, where highly skilled storytellers with significant audiences will also emerge. This has already happened in the audio field.

Experiences from the professionalisation of podcasting suggest that without formal training and institutional support, non-fiction filmmakers in particular may struggle with things like rules around fair use, rights to a person's life story, and protecting their sources – just because learning about such things may not have occurred to them. On the other hand, they will have great expertise in aspects of the work connected to audiences, relevance, and circulation. It would be rational for the traditional industry not to treat new voices as interlopers, but foster relationships based on mutual respect instead.

Kjersti Mo: *I don't have very high hopes on lowered production costs. [The companies] are saying it will change the production process, making it possible to do things much more in parallel, more efficiently, which would mean higher productivity. You could say that would lower costs, but I haven't seen it yet.*

Angela Chan: *We haven't really deployed blockchain and micro-payments in the film industry in a way that's meaningful yet. That could be payments for complete content, or it might be thinking about what the smallest unit of creativity is.*

The pace of change in the audiovisual field is higher than ever, and strategic planning for a company or individual career may seem impossible. That is also a great leveller. If it is impossible to know the shape of the landscape ahead, we must all proceed step by step, asking what is possible, reliable, affordable, and efficient right now.

Many processes also remain slow: financing is sluggish, and making a feature film or a series of television is still a multi-year process. The gift of this is that none of them will be made in an entirely new way for quite some time. The threat is that you can get a completely traditional project funded

today, but if you test nothing, learn nothing, and implement nothing, remaining relevant even just five years ahead will be very difficult.

The next five years are best approached across the industry as a period of collective strategic up-skilling. The biggest companies in the world can afford to test and learn at some risk and cost, and many of them were technology companies to begin with. They cannot be outrun.

It follows that everyone else – even locally significant studios and production companies – should share their successes and failures with the industry so the ecosystem can evolve together. Not just because our projects are so long that testing new things one small change at a time would be far too slow. In a mostly freelance workforce, rapidly changing tools and workflows will cause huge efficiency losses for years unless they are learned and improved upon by everyone.

Directors, producers, and screenwriters are starting to glimpse the positive potential of the digital filmmaking paradigm. There is a similar creative potential in these changes across the whole value chain, if we view the people in it as carriers of deep and valuable knowledge rather than as a cost to optimise away.

Gaia Tridente: *It used to be, sadly, that a producer had to go to a writer and say, this isn't possible. You can't write this because it's too expensive. Or, it's impossible to shoot. Creativity is more open [now], even at the beginning of the creative process, with the way post-production and VFX have changed in the last year.*

Joanna Szymańska: *I'm really excited by this technological change. I'm seeing the possibilities of unleashing creativity in a way that I was never able to because of financial resources. It brings back the element of fun to it. AI [and virtual] cameras don't submit to gravity, so you can come up with anything you want. What I think should be really strongly supported is not to limit or block the technology, but that we keep the industry up-to-date with it on all levels. And that we ensure ethical use of it. Technological progress is inevitable, even when we don't want it. When people invented automobiles, horse carriages disappeared – that's it!*

Robert Franke: *I'm not saying everybody will refrain from watching a feature film, but we'll have more choice of different lengths, different formats, and enjoy different things. The thing I'm scared of, and where I don't have an answer, is how much further will our industry fragment? Down to an audience of one? Or will we as society all agree on some narratives we think are valuable, and agree that most content will be either [very short], 60 minutes, or 90 minutes? Or will we have 20 different types of formats?*

My prejudice is that shorter formats have fragmenting effects, but couldn't it also be the opposite? That getting millions of people to watch a 12-minute masterpiece has a much lower threshold?

Nobody can tell right now – the next generation will determine what is valid to them. These toddlers, who will grow up interacting with AI-powered apps. We are ten years from seeing the real effects on our market.

7.

Big Brother Arrives

AI is rapidly providing solutions for the main technical barriers to intelligently targeted advertising and truly personalised content recommendation. The value of these new opportunities will escalate the competition in the Connected TV space. While the changes suggest and may produce dystopian outcomes, consumers will on the whole experience them positively. Theatrical exhibition is among the surprise winners.

Angela Chan: *There's a massive gap at the moment between what we know is coming, what tools and capabilities we sort of know we have, and what the creative industries will do with them. Right now we lack the imagination.*

Guillaume Esmiol: *The biggest threat is the distribution. I hear people say, I've seen this French series, it's so great. Where did you see it? On Netflix. It was on a French channel first, but they didn't watch it on the broadcaster service, they watched it on Netflix later. So it's not just about [making the right content], it's about how to get to top-of-mind. You may think it's not such a big deal, that people will choose. But when you have that much choice, you don't. You [end up picking] something you didn't even want to watch.*

Data-based content targeting, whether online or on TV, has not yet delivered on its inherent promise. All internet users experience irrelevant advertising, while streaming video and audio audiences will have noted both low ad relevance and many unsold advertising slots.

When the content itself is the product, results are not much better. 19% of US viewers sitting down in front of their living room television sets have not decided specifically what to watch. Half will visit two or three services

before settling for something – indicating both weak engagement with current titles and that their first choice platform is often unable to grab them.[14]

There are three underlying problems. Target groups tend to be based on crude demographic data rather than behaviours, tastes, context, situation, or mood. The targeting rests on biased or out-of-date ideas about what kinds of people can enjoy or afford certain types of content or products. And the metadata on the content itself is at best basic, and in deep libraries often incomplete. AI is helping to address all of these challenges today, and will have transformed the viewing experience within the next 3-5 years.

Solving these issues is particularly urgent since the usefulness of internet search and social media is in free fall. The exponential growth in AI-generated content is clogging up social channels and making traditional internet search increasingly useless. In this sense, major investors in generative AI such as Alphabet (Google) and Meta (Facebook) are undermining their own business models – if users retreat from their platforms, advertisers must follow them elsewhere. Truly targeted advertising resolves that tension, and will ultimately make the major digital companies even stronger. Especially Alphabet, whose ad-funded YouTube continues as the most popular streaming platform across devices, including TV:s.

Guillaume Esmiol: *How can the [investment] obligations that local linear broadcasters have be transposed to this new kind of TV? And in consequence, what will the impact be on the financing of local cinema in these countries? The other risk is that you used to negotiate with local broadcasters, under [local] law and regulation. Now these companies are anywhere in the world, mainly the US and China.*

On balance the changes also seem positive for the media sector as a whole. Increased automation now allows existing content libraries to be activated at low initial cost. Image and sound quality can be easily enhanced, and copyrighted assets such as music identified and scrubbed. Reviewing vast amounts of content is suddenly affordable, including indexing for novel

14 TiVo: *Q4 2024 TiVo Video Trends*

data categories such as the tone and content of a specific scene, or the branded products visible at any given time. Such new metadata supports not just recommendation algorithms, but the selection of specific clips for use in marketing or to monetise on other platforms, as well as matching advertising content to the mood of the previous scene. With new commissions in decline, even small revenue streams from existing rights can be important.

Content discovery will get significantly better. Voice control of devices in the home is normalising rapidly, and the sector expects us to be speaking to AI:s for personalised content recommendations – all the necessary technology already exists.[15]

When you are talking with your TV, it really matters whether the conversation is with for instance Netflix, with a streaming portal like Apple TV, or with your television's operating system. The goal of e.g. Netflix is to keep you watching Netflix as long as possible, while Apple TV can recommend viewing across services. The TV manufacturer should just want you to love your TV, but may also have an economic interest in driving traffic to their native FAST channels.[16] Of course, if the TV:s operating system is developed by and integrated into an ad businesses like Amazon or Google, their interests will win out. And just like visibility on landing pages today, good placement in recommendation services can also become a paid-for service.

Which services, channels and pieces of content succeed is affected very strongly by how user attention is directed, and that competition will escalate as the value of advertising impressions increases. The streaming wars may be over, but the Connected TV wars are only getting started.

Guillaume Esmiol: *When I turned on my TV, it used to show a local TV channel. Now I have a portal. The TV is just a device, and traditional*

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15 Streamer examples include Tubi's conversational content discovery bot Rabbit AI , which runs on ChatGPT4, and the Cineverse advisor bot Ava, developed using Google Cloud's Vertex AI search. (Tubi: »Find Your Next«, Manfredi: »Cineverse Partners«)

16 These are the free ad-supported linear TV channels that appear on your set as, for instance, »Samsung TV Plus«. Other apps or services you have installed, such as Pluto TV, may offer additional FAST channels.

[broadcast brands are] just one option among many. I have to look for them, and there is a Netflix button on my remote. It is weird to me strategically that Europe, for instance, doesn't push for prioritizing local services on the main TV portal and the remote.

Nuanced, contextual ad targeting relies on access to complex user data, of which your TV is now also a source. Depending on local regulations, and what choices you made setting up your devices, this data may include everything happening on the screen, all the data from any connected smart home devices on your local network, and any information from device sensors (microphones, face recognition cameras, etc) of the TV or its connected devices. Fairly dystopian outcomes are not difficult to imagine even in the context of every-day capitalism, let alone in autocratic societies. Positive effects on the sustainability of local content markets go hand in hand with anti-trust concerns and threats to election safety. As data privacy continues to attract regulatory attention, so may aspects of content discovery.

The irony is that as individual consumers, we are likely to find properly targeted advertising both valuable and useful. Being able to find the precise kind of content we need at any given time is also likely to strengthen our relationship to, and use of, media formats like TV drama and film.

At a relative disadvantage in this CTV advertising and content discovery revolution are public service TV brands and niche subscription services, which may get trampled in the stampede of commercial interests. For such stakeholders, making sure to keep content recommendation functionality up to date will be a minimum requirement.

The absolute majority of advertising real estate on the TV device will be interactive, nudging us to act in some way even as we are watching – to sign up for more information, accept a discount coupon, make a purchase … Unless consumers reject this commercialisation of their homes outright, which is unlikely, ad conversion will get significantly better. This is good news across the audiovisual ecosystem. Effective advertising will increase revenue potential even for the smallest players, from individual creators to niche or local-language streaming services, and help their own user acquisition campaigns.

Guillaume Esmiol: *AI is already everywhere. What will be interesting to watch in the next few years is this business part, operations, how to target the right audience, how to potentially have other ways to promote a movie thanks to AI. Different trailers, different targeting – we are just at the beginning, once again.*

The big movie theatre networks that have [a membership or] a subscription have a database showing what you have seen. With the data of people who are going to this or that kind of movie, they should be able to do targeted marketing. I come from digital, so I think of personas – the mother, a young child, someone who is older and a lover of arthouse movies. How do I target those people? How do I get [across] that this film is made for them, at the right hour for them, maybe at the right price for them?

Theatrical exhibition may be among the surprise winners of the changing living room TV experience. Marketing a film premiere has always been a knotty problem. Consumers need to be reached, engaged, and moved to a purchase within a very specific timeframe. Bringing in crowds opening week is very important, but the marketing often starts late, when people's schedules may already be full. Linear TV was historically the answer for how to reach a large audience at a very specific time.[17] That reach is no longer reliable, and especially weak with younger viewers.

As ad targeting improves across all screens, so will the possibilities of reaching audiences not just for wide-appeal film but specialty titles as well, at the right time and affordable cost. Better reach and a higher conversion rate can be a game changer for distributors, especially for a product – movie tickets – that audiences are already used to purchasing online.[18] With movie theatres becoming a »going out« event that competes with things like concerts and sports, pre-sales of tickets are likely to increase. That should also be easier to market to than a spur-of-the-moment night out.

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17 For instance, NBC's Thursday night »Must-see TV« brand maximised ad impressions for films premiering on Friday.

18 The Cinema Foundation: *State of the Cinema.*

8.

Epilogue: A More Human Industry

In uncertain times, in an age of increased mediation and synthetic storytelling, we will lean into the human. The medium of filmmakers is film, but the medium of the film industry is people. The value of the work is created in its meeting with the human audience. The value of the business is created by the humans in it.

Hanna Reifgerst: *Many things will stay the same, because a huge part of this industry is human connection. It is people talking to people.*

Guillaume Esmiol: *When you invest in something quite risky, like a film, there's a question of trust. A leap of faith. Meeting people in person, at least you have the impression that you know them. You feel if they are serious or not. You can take a bit more time, meet up again later. When you meet in person, some things that you haven't planned can also happen. The meeting by accident, that serendipity. A market like Cannes is an accelerator of relationships and partnerships.*

Kjersti Mo: *To be a bit provocative, I sometimes say that the value of the film is released when it meets its audience. If you want to make film for your own sake, you should go to the Art Council. This is the not about always trying for the biggest audience. Having a defined target audience is wanting to make an impact.*

Ted Hope: *As much as audiences are driven to large explosions, loud noises, and wild fantasy figures that have no bearing on real life, we also lean towards [stories] that help us understand that we are seen and heard, that we're connected and similar to folks that we otherwise know nothing about.*

We love that feeling of recognition when someone says, I am just like you. You're completely different than me, you've had a world of different experiences, but deep down, we're the same. We love what it means to be human, and [the film industry down-valued] that experience trying to facilitate the easy transaction of financial exchange.

Robert Franke: *One thing that's still keeping me here is fostering people who are not the loudest voice in the room. In a lot of cases what cuts through is the people who are not necessarily the most talented, but who are very good at talking a big game. And then don't deliver. The people who have doubts, the people who have something to say, they sometimes don't cut through.*

The beauty of the creator industry is that it gives a voice to the marginalized that they did not have before. You have the space to have a real voice without the strongest elbows. All these shitty gatekeepers, people able to climb up the greasy pole of the corporate ladder, they choose to work with similar assholes. More power to people who are driven to tell a story based on human experience is a good thing.

Angela Chan: *Right now there are no training data sets as far as I know around disability. There's not much digital tracking around larger people. Some of these things are technical solutions that need to be worked through. But could I, as somebody who represents difference, lend you my body? There's something really anthropological and uncomfortable about it. But could you actually create meaningful work out of somebody just showing you their movements, micro gestures and facial expressions? The way I talk, the cadence of my speech? We're having a battle over rights as we understand them now, but could we create a new rights model, which actually puts representation on the front foot?*

Joanna Szymańska: *It's not about how many bucks can you make this once, it's how much you can live on, how much is enough. I can understand people want the seaside house and the mountain house and the house in London, but at some point you're going to run out of hours to live in those*

houses. I know this might be considered naive, but at the end of the day money is not the only measure.

Ted Hope: *This is a crass industry that dehumanizes us, and leads everything to a transaction-based model. I don't actually think that's what people want. Everyone is stuck. I believe that in art, people generate business and profits. We don't have to try to maximize or evaluate everything just down to revenue. If we did something different, actually prioritizing people and culture, you would have greater revenue overall, even if the individuals in power might get less.*

Hanna Reifgerst: *I hope technology will make our life a little easier – perhaps make [working in film] more family-friendly.*

Angela Chan: *How do we transition to all the technologies that are coming and have social justice as well, safeguarding a largely freelance community's mental and physical health? There are real-world impacts of these technologies on workers. People working in TV and film can tell you exactly where [people and projects] come off the rails, where the pressure points are. They may or may not mitigate against those. But with these new, unpredictable production flows, whether you're making an immersive AR trail or a live ABBA-style experience, we don't yet where the pain points are.*

The community of workers, especially creatives with intersectional diversity, is extremely vulnerable right now. Every single one of us with any responsibility in the industry has to be an activist now, which means actively thinking about the impacts on people of what you're doing. It's just compassion, but it requires some knowledge of the technologies.

Joanna Szymańska: *We need to have a very serious conversation, starting in local markets and maybe also on the EU level. What is the purpose of this industry? Why are we telling stories? There are no bad answers. Some people can just make films for tonnes of money. If there's an audience for that and a way to bring it to them, why not? There's nothing wrong about making money with good storytelling or storytelling people enjoy. But it's*

also the responsibility of all of us as industry decision-makers to consider how we would want to stimulate reality so that it evolves, or at least attempts to evolve, in a way that's beneficial not only for the industry but also for society.

Hanna Reifgerst: *A lot of people are leaving the industry, and I fully understand them. It's a real pity that they have to reorientate. On the other hand, there is a big chance that someone who has worked in the industry and been very passionate about film will help establish connections to other cultural industries, which will also elevate the position of film as culture in Europe.*

Tabitha Jackson: *One of the things that cinema does so powerfully is to interrogate and investigate another landscape, which is not geopolitical, not journalistic, but it is the interior. It is what it is to be human. Fiction is particularly powerful at enabling us to recognize each other and common experiences.*

All this sounds very woo, but this is precisely how the fabric of society has been weakened at the moment – by the failure to recognize the humanity in each other, even when we vehemently disagree with each other's views about the world and what should happen and how to make it better. The interior landscape particularly, post-pandemic: what is grief? What is loss? What is love? Who are you? Who am I? What is the point of all this?

These are not just luxuries, they're essential in counteracting this technological space that we are going into. The stakes are high in not losing our humanity, and artists always find a way.

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ADDITIONAL READING

The NoJSe Report: Nurturing Nordic Film in a Changing Media Landscape, published by the NoJSe network and written by Johanna Koljonen, is available for free download on the website of the Buster Film Festival:
https://buster.dk/wp-content/uploads/2024/02/NoJSe_rapport_2024.pdf

Join the Nostradamus Collective

Since its inception in 2013, the Göteborg Film Festival's Nostradamus initiative has analyzed the swift changes in the audiovisual sector to help professionals and policymakers look ahead. The annual Nostradamus report, lectures, and seminars have influenced strategy and fostered sustainable development. Our work has always relied on the collective wisdom of not just the interviewed experts, but the many professionals who shave shared insight and intelligence with us both formally and informally.

Our new endeavour, the Nostradamus Collective, is the natural next step. We will explore how to create a year-round community to create and share world-class industry analysis and critical insight together. The Nostradamus Collective aims to foster knowledge-sharing and inspire deeper engagement in how the choices of individuals can shape the industry long-term. We imagine the platform or network as a hub for industry exchange and a catalyst for cross-sectoral development.

In 2024, we teamed up with BoostHBG, which is bringing its innovation and community-development expertise to the table. Based in southern Sweden, BoostHBG is dedicated to nurturing creative talent and building professional networks in the audiovisual sector.

The Nostradamus Collective will start as a prototype, testing and iterating on methodology and execution. First-year objectives include gathering a seed community of participating professionals, selecting a digital platform to facilitate the work, and exploring sustainable partnerships to help finance project activities. A prototype meetup is planned for autumn 2024 to refine the project's structure and activities, leading up to a launch event at the Göteborg Film Festival in 2025, where the Nostradamus Collective will be officially introduced.

If you are working towards a resilient audiovisual sector, and might be interested in contributing to the Nostradamus Collective, you can sign up goteborgfilmfestival.se/nostradamus or contact Josef Kullengård for any inquiries: josef.kullengard@goteborgfilmfestival.se

Discover the Göteborg Film Festival

THE LEADING FILM FESTIVAL IN THE NORDICS

Celebrating its 48th edition in 2025, Göteborg Film Festival is the premier film festival in the Nordics, attracting one of the world's largest festival audiences with approximately 250,000 admissions annually. Dedicated to supporting filmmakers and pushing the boundaries of cinema, the festival provides a vibrant platform for professionals, filmmakers, and audiences alike.

The festival annually screens 250 films from over 70 countries including several world, international and European premieres, and is the home of prestigious competitions, such as the Nordic Competition and the Ingmar Bergman Competition.

In recent years, the festival has welcomed esteemed guests like Ewan McGregor, Juliette Binoche, Luca Guadagnino, Isabelle Huppert, the Dardenne brothers, Mads Mikkelsen, Stellan Skarsgård, and Alicia Vikander. Until his passing in 2008, Ingmar Bergman was the Honorary President of the Göteborg Film Festival, a position now held by director Ruben Östlund.

Göteborg Film Festival is also a key industry platform, annually drawing over 2,000 industry accredited from more than 50 countries. The festival encompasses several significant industry events.

Nordic Film Market is the world-leading marketplace for Nordic films and talent. The market features around 60 Nordic feature projects, providing a vibrant platform to discover new talents and trends from the region. Attended by buyers, sales agents, festival programmers, producers, and funds from all over the world, Nordic Film Market showcases market screenings, works in progress, and films in development seeking financing and co-production opportunities.

TV Drama Vision is Göteborg Film Festival's international conference and marketplace for drama series. The two-day programme attracts dele-

gates from all over Europe and presents some of the most exciting creators, producers, and executives shaping today's drama series landscape. Annually presenting 100 speakers and 50 showcased series, it spotlights business trends, storytelling, audience outreach, and financing.

Beyond Nordic Film Market and TV Drama Vision, the industry platform includes **Nordic Film Lab**, an exclusive talent lab and networking forum for emerging Nordic directors, writers, and producers, and **Film Forum Sweden**, a forum and meeting place for the Swedish film industry. **The Göteborg Film Fund** provides development funds to films and residencies to filmmakers in countries and regions facing economic or political challenges.

Since 2013, Göteborg Film Festival has commissioned and presented the annual **Nostradamus report**.

During the festival, it all comes together at Hotel Draken, which serves as the industry hub. Built atop the iconic Draken cinema, the hotel features 500 cinematic-themed rooms and excellent networking venues, making it the perfect location to meet.

Göteborg Film Festival connects the Nordics with the world. The 48th Göteborg Film Festival will take place January 24 – February 2, 2025.

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