

Screen Industry Snap-Shot: A Study of the Bruneian Screen Industry amid the COVID-19 Pandemic

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Abstract

This is the first data-driven pilot study that is focused on the micro-scaled but burgeoning Bruneian screen industry. The scope of the study includes employment modes, frequency of productions, payment codes of practice and exhibition platforms, based on the data collected by both online surveys and semi-structured, face-to-face interviews between January to June 2021. The aim of this paper is to investigate the possible creation of a temporarily closed system of interaction between the local screen industry and other Bruneian businesses. It is hypothesised that the COVID-19 pandemic and subsequent action taken by the Bruneian Government to restrict international travel and border crossings resulted in a new and rare interchange of production-based activity. The study targets a wide variety of parties, from industry professionals, e.g., production house managers, senior producers, freelancers, and the so-called gig-lancers, to governmental policymakers, i.e., representatives from Authority Info-communications Technology Industry (AITI) in Brunei.

Keywords: *Bruneian Screen Industry, COVID-19, Economic Impact, Film Production, Brunei Bubble, Closed-system of Interaction*

Introduction

Since the first case of COVID-19 infection in Brunei was detected on 9 March 2020, it took less than two months to contain the first wave of the pandemic when there was no local COVID-19 infection case reported on 6 May 2020. The next fifteen months without any community transmission of the virus in Brunei described “an unexpected COVID-19 success story” (Hayat, 2021), allowing Bruneian people to enjoy their business-as-usual lives inside the ‘Brunei Bubble.’ During the same period of time, Brunei’s Southeast Asian neighbours such as Malaysia, Indonesia fared the pandemic much worse; therefore, the Brunei government has since imposed strict air and borderland controls with the outside world in order to contain the virus. As of the time of this writing, Brunei has been enduring a more severe and graver second wave COVID-19 outbreak since 7 August

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2021, after zero community infection for over 450 days (Huaxia, 2021). So, such a strict border restraint is still in place in the sultanate.

The aim of this paper is to investigate the possible creation of a temporary closed system of interaction between the local screen industry and other Bruneian businesses. It is hypothesised that the COVID-19 pandemic and the subsequent action taken by the Bruneian Government to restrict international travel and border crossings resulted in a new and rare interchange of production-based activity, which included but is not limited to the following:

- an increased demand for locally produced screen content by the private business sector;
- a rise in the prevalence of non-screen industry professionals producing content for payment;
- a disruption to the established screen production hegemony.

Evidence used to support this hypothesis is derived from the first data-driven pilot study focussed on the economic impact of the small but burgeoning Bruneian screen industry amid the first COVID-19 outbreak. The scope of the study is comprised of a variety of screen industry aspects such as employment modes, frequency of productions, payment codes of practice, and distribution platforms. All the data for this research was circulated and collected by an online questionnaire, followed by a series of semi-structured, face-to-face interviews with senior producers, freelancers, and what this study terms 'gig-lancers,' as well as governmental policymakers from Authority Info-communications Technology Industry (AITI) in Brunei, between January to June 2021.

Scope of Study

The dearth of rigorous academic study into the inner workings of the Bruneian Screen Industry meant the authors took great care to ensure appropriate and valuable data was collected for this investigation. As this was the first attempt to identify and analyse the economic boundaries of the Bruneian Screen Industry, great importance was devoted to the type of the information gathered both in terms of the period under examination and the participants involved. The onset of the COVID-19 pandemic and subsequent restrictions placed on travel meant the year 2020 represented a rare opportunity to study the Bruneian Screen Industry with little to no outside influence from larger and more developed media production hubs such as Singapore and Malaysia. The irregular occurrence of Brunei's border closure created what may be viewed as a temporary closed system of interaction between Bruneian businesses and local production companies.

The authors purposely limited the information gathered to Bruneian-based production houses engaged in paid services with Bruneian businesses. These paid services included, but were not limited to, television commercials, motion picture social media content,

feature films and television productions for the Brunei Government-owned and operated Radio Television Brunei (RTB).

All production houses that attended an industry breakfast meeting called the ‘Unnamed Creative Talk’ were invited to participate in the production survey. A select few additional production houses were also invited to participate because the authors had deemed them to have a noticeable presence in the Bruneian content creation industry. The production houses that participated in the survey represented established businesses (existing more than ten years) as well as start-ups less than a year old. For the sake of simplicity and due to the fact that this study would focus upon the economic side of production, only producers were asked to take the survey and participate in the interviews.

The authors gathering information from the following four areas:

- Production levels in 2020;
- Economics of production;
- Exhibition of production;
- Economic impact of production upon other sectors in Brunei.

It was only through the examination of the data gathered from these four areas that the authors began to recognise a correlation between an increased level of production-based activity and the closure of Bruneian borders. In order to build a more robust conceptual framework of this correlation, the operational infrastructure of the screen industry was analysed as a social system. Unlike biological, chemical, or other physical systems, social systems require participatory interaction to stimulate cyclical activity. So, this analysis of the Bruneian Screen Industry sought to identify how particular attitudes, beliefs and perceptions concerning local production houses could have changed as a result of the pandemic.

The further recognition of the system of interaction as ‘closed’ instead of ‘open’ highlights the extraordinary circumstances resulting from the restriction of international travel and border crossings. Simply put, the bubble meant to protect the population of Brunei from COVID-19 has resulted in a previously implausible self-contained arrangement of interaction between local businesses and domestic production houses.

Methodologies

Information about the Bruneian Screen Industry was collected via a two-step process. First, producers of local production houses were given a google link with the written description: ‘Please only one survey per company and feel free to share to any professionals making video content as a business in Brunei’ (Google Form, 14 February 2021). The rationale for ‘sharing’ the link was to potentially grow the available database of known domestic production houses and include any additional established content creators that might have been overlooked. It is not certain if any of the producers shared the link but it ultimately garnered no new participants for this survey.

The Google Form consisted of 11 questions: ten of which were in multiple-choice format from which participants could select only one answer that best described their production company. An 'other' option was available for producers who felt none of the multiple-choice answers suited their situation. At the end of the survey, the participants were asked if there were any missing questions or subject areas that they felt needed to be investigated related to screen/video-based productions.

On 1 March 2021, the survey was closed. A total of 13 production companies participated. The information gained from this survey was used to formulate the framework of the Industry Snap-Shot research. Producers who elected to provide additional information in the form of an individual interview were contacted privately. Five private interviews were conducted with the producers who completed the Google Survey in which anecdotal information and further elaboration were provided regarding the state of screen production in Brunei during the COVID-19 pandemic. All interviews were conducted for 30 minutes in a casual setting such as a coffee shop. Leading questions based upon the individual producer's responses were asked to give the interview a structure. However, participants were allowed to discuss a variety of tangential topics that pertained to the Brunei Screen Industry. All interviews were recorded for transcription purposes.

Literature Review and Rationale

The global COVID-19 pandemic has caused many robust and thriving industries to lose ground and fall into economic despair. In the first half of 2020, some industries were completely shut down due to the different levels of lockdown restrictions implemented by most countries around the world to battle the pandemic. Silva (2021) noted: 'As a result of the COVID-19 pandemic and the many infected ships in the first quarter of 2020, the entire cruise industry was stopped, and a prohibition on resuming this industry was imposed worldwide.' Among these deeply struggling and daunting industries, the film and tourism industries were two of the most gravely damaged ones (Liu, Chin, Nechita & Candrea, 2020).

Filmmaking and other forms of screen production amid the COVID-19 pandemic has been extremely challenging, if not terrifying, especially before vaccines were made available. "Whether it's a film, TV show, or commercial, it's a complex assembly that requires dozens, if not hundreds, of people working together in a relatively confined space over a long period of time. Working in any kind of isolation is impossible" (Lindahl, 2020). However, as the famous catchcry of show business stresses, the show must go on, so too the entertainment industry must reopen from the complete shutdown caused by the coronavirus and resume production.

In early April 2020, when California was still under a strict stay-at-home order, Hollywood studio executives started to discuss how to implement a slew of safety

protocols from insurance to testing, crowd gatherings and craft services, in order to “get the industry back on its feet while ensuring the safety of everyone involved” (Andreeva & Fleming Jr, 2020, para. 1). For example, Art Director and Prop Master, David Bridson, elaborated: “Creating a safe workplace when you are bringing so many things from the outside — people, materials, grip equipment, lighting equipment — all of that is going to have to go through some kind of checkpoint” (Lindahl, 2020, para. 11). While productions slowly resumed, the international film industries looked for new platforms to distribute new releases to directly appeal to viewers at home (Sweeney, 2020). This new strategy has made online streaming and other over-the-top (OTT) distribution platforms become more and more popular and profitable globally.

In spite of the state of ravages and reshuffles for the global film and screen industries amid the global pandemic, the screen industry in the tiny sultanate of Brunei had fairly turned the tide against such a downturn and even enjoyed a production boom for fifteen months between early May 2020 and 7 August 2021, before Brunei’s ‘unexpected COVID-19 success story’ (Hayat, 2021) temporarily halted. Historically, since the release of Brunei’s first feature film *Gema Dari Menara* (1968), in which a melodramatic family tale manifested Brunei’s ‘booming post-curfew years in the late 1960s as a time capsule of Brunei’s lost pop history’ (Espina, 2013; Kathrina, 2021; Liu, 2021b), it was not until 2013 that Brunei’s second feature film *Ada apa dengan Rina* (Harlif Hj Mohamad & Farid Azlan Ghani, 2013) was produced and released in the domestic cinemas. While Liu (2021a) contended that Bruneian local image-makers took advantage of digital technologies and thrived with digital content creation and circulation for online self-expression and cinematic storytelling (p. 218); “it is difficult to analyse the status of Bruneian film-making through the perspective of a mature industry, which is why one might claim that the Brunei film industry is an emergent one in its infancy” (Liu, 2021a: 216).

Moreover, Liu pointed out some consistent themes such as family values and filial piety closely relevant to the predominant *Melayu Islam Beraja* (MIB, lit. Malay Islam Monarchy) philosophy revealed in contemporary Bruneian films “can act as an asset for Bruneian filmmakers, enabling them to nurture a distinctive Brunei screen culture and strengthen the emergent Bruneian film industry” (2021a: 232). It is evidenced by a successful golden jubilee celebration and weeklong re-screening of Brunei’s first feature film *Gema Dari Menara* (Director’s surname, 1968) in October 2018. “All the re-screenings for this ‘hidden gem’ of Brunei cinema have been sold out through pre-purchased tickets without any promotion effort” (Chin & Liu, 2018: 47-48). Fischer believes “a Bruneian Screen Identity is directly connected with an audiences’ demand for (Bruneian) content ... less about featuring Bruneian locations, language/slang or even culture. Rather it’s an elevation of Bruneian films above the pitfalls and snares indicative of the Hollywood hegemony” (Liu, 2021a: 231-232). To achieve such an elevation will benefit the Bruneian film industry’s long-term establishment and development.

In this research, however, the authors' primary purpose is to investigate the possible existence of a temporary closed system of interaction between the local screen industry and Bruneian businesses. In doing so, it is important to understand that film production is a social system by which members of the screen industry interact with clients, funders, government officials, audience members and the general public through the four stages of pre-production, production, post-production, and exhibition.

Social systems are understood to be 'contrived' and 'imperfect' because the foundations for interaction are "anchored in the attitudes, perceptions, beliefs, motivations, habits, and expectations of human beings" (Katz & Kahn, 1978: 37) rather than in physical necessity. For this reason, the resources needed from the environment (i.e., inputs) cannot be assumed because, while stakeholder participation may be predicted, it cannot be made certain. Thus, systems theory can be seen to bear a striking resemblance to the production of screen-based content. The economic and business-related interaction between the Bruneian Screen Industry and its sources of capital is an under-researched area. None of the above existing literature has been discussed yet. Mohamad (2020) gave an overview of the emerging Bruneian creatives' 'affective work and labour on social media; her analysis, however, was more focused on individual creatives who work beyond the screen industry.

Although the COVID-19 pandemic has imposed an unprecedented challenge for many business sectors, it also provides a rare opportunity for the authors to observe closely the operation of the Bruneian Screen Industry at a time when the country remained insulated from the outside world, including its close neighbours, during the over a yearlong de-escalation process. This 'insulation' produced what could effectively be seen as a closed system of interaction between local, Brunei-based stakeholders. It must be clarified that closed systems typically only involve a single actor, but in this study, the authors examine two actor groups: Brunei-based businesses and local production houses. However, for this study, the definition of a closed system as a "system that does not interact with the external environment" (Daft, 1997: 55) will be applied as the localised interaction and resulting screen-based productions were not intended to exit the system, or in this case – the physical border of Brunei.

There are two key factors that help strengthen the proposed concept of Brunei as a closed system of interaction. First, external entities such as production houses from Singapore, Indonesia and Malaysia were not allowed to enter Brunei thus, local businesses were required to hire local production companies for their production needs. Second, the vast majority of the Brunei population was not allowed to exit Brunei due to the borders remaining closed to international travel. The result of this closure meant a large portion of Bruneian capital typically spent abroad was now repurposed for local expenditure.

Through this study we tend to use Bruneian Screen Industry, instead of Bruneian film industry, to be as inclusive of screen-based businesses as possible for our research target,

not only limited to the film production business, because the Bruneian film industry is still an emergent one in its infancy stage (Liu, 2021a: 216). By employing Bruneian Screen Industry, we mean to include all the modes of screen productions, from the content made for tiny mobile phone screens, as well as for tablet computers, indoor and outdoor multi-screen displays, and television screens, to feature films and commercials shown on big screens in cinemas. Besides, we have the following two terms to classify the two types of active players in the Bruneian Screen Industry:

1, *Established* - This term, with reference to Bruneian production companies, identifies production-centric businesses that have operated continuous economic cycles over a period of 12 months in which money recouped from paid jobs has further perpetuated operational sustainability.

2, *Gig-lancer* - Permanent job in another industry such as social services but will take production jobs when an opportunity arises. The Gig-lancers represent a substantial portion of Brunei's social media content creators. While they do not immediately threaten established production companies, they do impact the pay rates for productions. In many cases, Gig-lancers are able to severely undercut other content creators because media production is not their main source of income. One of the reasons for the formation of the 'Unnamed Creative Talk' was to address the impact Gig-lancers had on potential clients in undercutting proposed production budgets. Additionally, producers expressed some concern that Gig-lancers were reinforcing the perceived low production quality stereotype commonly associated with the Bruneian Screen Industry.

Data and Analysis

The data and analysis section examines four major areas indicative of the economic boundaries of the Bruneian Screen Industry and the degree by which social system-based interaction occurs between the local production houses and domestic businesses. The sections were identified because they offered the widest catchment of information without overly taxing when answering. As mentioned before, the purpose of this study was to gather the information that could be used as a starting point for further, more in-depth research about the Bruneian Screen Industry.

Each of the four areas was composed of at least two questions that sought specific information regarding the production of screen-based content in Brunei. An overview of the four sections and brief description is as follows:

Production Levels in 2020: This section is specifically interested in identifying if the year 2020 offered less than, equal to, or greater than production opportunities due to the closure of the borders. This section consisted of two questions.

Economics of Production: This section is focused upon the economic exchange between production houses and local businesses. It investigates the possible existence of consumer bias and the likelihood of incentivised pricing. This section consisted of two questions.

Exhibition of Production: This section sought to identify the three most commonly used distribution/exhibition platforms in Brunei. This section consisted of three questions.

Economic Impact of Production upon other sectors in Brunei: This section examined how production budgets were spent and the economic ‘footprint’ of production capital on other sectors utilised in content creation. The sample size of the survey was 13 production companies. The producers or managing directors of these established businesses indicated an interest in participating in this study when it was first suggested at the authors' creative industry breakfast meeting.

Production Levels in 2020

The COVID-19 pandemic and ensuing travel restrictions presented a rare opportunity to investigate the type, number and level of interaction between the Bruneian-based production houses and local clients. The first section of the Google Form survey was concerned with gathering data indicative of how the interaction experienced by production companies in 2020 differed from 2019. This section was titled Frequency of Screen/Video-based Productions and consisted of two questions.

Question 1: How many screen/video-based productions were made by your company in 2020?

The function of this question was to establish the parameter of activity of local production houses. There was no distinction made between paid and non-paid productions. Participants were provided with a selected range that was grouped by ten and asked to select the group that represented their production level in 2020. The production range selected by the participants is evident in Table 1.

Table 1. Production levels of 13 Bruneian production houses in 2020

Number of Productions (12 months)	Number of Production Companies
1-10 productions	3
11-20 productions	4
21-30 productions	2
31-40 productions	1
41-50 productions	1
51-60 productions	1
61-70 productions	0
71-80 productions	1

Source: Online survey questionnaire disseminated between 14-28 February 2021)

Data and Analysis: The information gained from this question indicates that there was quantifiable interaction between production houses and local businesses in 2020. This interaction is representative of a social system and, therefore, a substantial starting point to further investigate the interchange between the local production houses and businesses during the COVID-19 pandemic. This interaction alone does not prove the existence of a close system of interaction. However, it provides an appropriate commencement point to examine how production during the pandemic differed from previous years.

The number of productions also allowed the authors to categorise the 13 production companies into three groups. The purpose of these groups was to provide interpretative order and ease of clarification when formulating conclusions through this data analysis. Group 1 includes the production companies that created 1-20 productions in 2020; Group 2 the production companies that created 21-40 productions in 2020; Group 3 the production companies that created 41-80 productions in 2020 (see Table 2)

Table 2. Three groups of production companies based on 2020 production numbers

Number of Productions (12 months)	Number of Production Companies
Group 1	
1-10 productions	3
11-20 productions	4
Group 2	
21-30 productions	2
31-40 productions	1
Group 3	
41-50 productions	1
51-60 productions	1
61-70 productions	0
71-80 productions	1

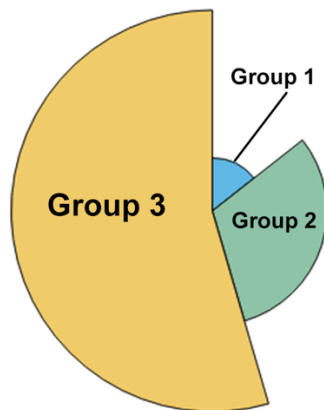
Source: Online survey questionnaire disseminated between 14-28 February 2021

The data suggest that Group 1, which accounts for 53.8% of the production houses surveyed, produces less than 20 productions a year. This Group 1 majority might represent a threshold barrier in which companies that are physically similar in terms of crew size, production expertise, and equipment naturally compete for similar jobs from local businesses. Companies that operate at this production level might discover that efforts to

increase their clientele are negated due to an abundance of choices for similar production services. Further analysis with regard to the closed system of interaction will be discussed in the Exhibition of Productions section.

A rough parameter of activity signals that as few as 283 (mean) and as high as 400 (max) productions were completed in 2020. While these numbers might seem low, it is important to view these figures in context to the population of Brunei, which was estimated at around 471,103 as of July 2021. It is also important to note that more than 60 production companies are rumoured to operate in Brunei. Many of these production companies focus solely upon a wedding and corporate video.

Graph 1 suggests that inequalities can exist even in the extraordinary circumstances of the pandemic environment. Group 3, which accounts for 23.1% of production companies, engages in the greatest number of jobs - nearly half of the productions in Brunei. The dominant production levels of Group 3 do not ensure stability or continued operation, but it does suggest that higher levels of production might provide a competitive advantage over less active production houses. Keeping this in mind, if the COVID-19 travel restriction and border closure facilitated a closed system of interaction, it is possible that production companies in Groups 3 would benefit the most from a 'Brunei Bubble' that would completely eliminate external competition while continuing to exert domestic dominance.



Graph 1. Collective representation of production jobs (mean) by the group in 2020. Source: Online survey questionnaire disseminated between 14-28 February 2021

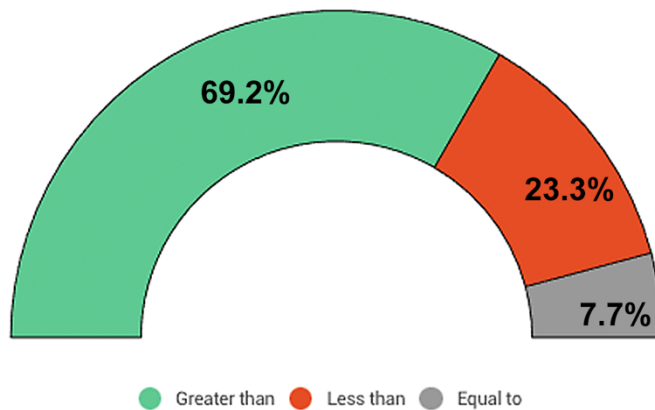
Question 2: How did the number of screen/video-based productions made by your company in 2020 differ from previous years?

This second question was a continuation of the first. The information gathered by this question could indicate a closed system of interaction due to the

environmental changes resulting from the pandemic. Participants were given three main options and asked to select the one that best represented any difference in production levels experienced in 2020. These three options were: Greater than, Less than, and Equal to; a fourth write-in option was also available for companies that were start-ups in 2020.

Data and Analysis: As indicated in Graph 2, 69.2% of Bruneian-based production houses experienced an increase in the number of jobs compared to previous years. These changes

might represent a systematic change from the Bruneian Screen Industry competing with external factors pre-pandemic towards a border-based closed system of interaction with domestic businesses due to COVID-19 restrictions.



Graph 2. Changes in production levels from 2019 to 2020. Source: Online survey questionnaire disseminated between 14-28 February 2021

Further analysis indicates production companies in Group 1 represented the only quantifiable divide between those that

gained and those that lost productions. That is, of the seven production companies in Group 1 only 4 (57.1%) experienced growth during the pandemic. As mentioned before, it is possible that the competition that exists between this particular group of production houses affects each other on a one-to-one basis. So, when one production house secures a job, it is at the loss of a fellow local production company. It is also possible that a fluctuation of production activity could be the result of such factors as reputation, price of production, specialised production skills, formal/informal partnerships and availability of work, to name but a few.

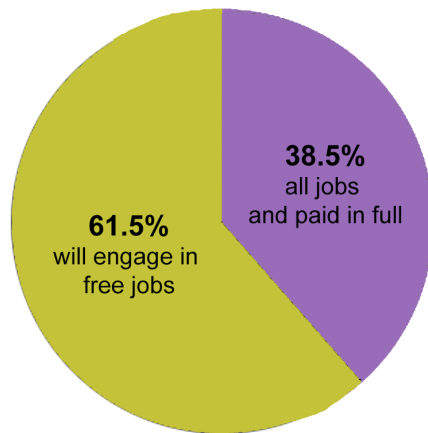
Economics of Production

The second section's questions investigated the economic interaction between the Bruneian production companies and local businesses. These questions aimed to explore concerns related to the practice of undercutting proposed budgets by the local production companies, the need for established pay rates for the local film industry professionals and the validity of a designated tiered pricing system. These concerns were all raised at the 'Unnamed Creative Talk'. They may represent a reaction by the established members of the Bruneian Screen Industry to control and take advantage of the changed social conditions resulting from the COVID-19 restrictions.

Question 3: What percentage of screen/video-based productions made by your company are 'paid' jobs?

The purpose of this question was to determine the degree by which production companies entered into money-based interactions with local businesses. Participants were provided with ten percentage ranges that best represented the portion of their paid versus non-paid

production work. For the purpose of this question, participants were informed that a ‘paid’ job represented interaction in which money is exchanged for a production service. This question forced participants to make a clear division between paid work and unpaid work without consideration for in-kind contributions, pro-bono, formal or informal partnership or reputation building exercises. Creating this division was to determine how unpaid work could be used as a competitive business strategy within the Brunei Screen Industry and investigate the justifiable establishment of a tiered payment system.



Graph 3. Percentage of production companies engaged in free jobs versus jobs paid in full in 2020. Source: Online survey questionnaire disseminated between 14-28 February 2021

Data and Analysis:

As Graph 3 indicates, 61.5% of production companies surveyed willingly produced content for free during the COVID-19 pandemic leaving only 5 production companies (38.5%) that only engaged in 100% paid work. Further data analysis indicates that three individual production companies, one from each group, actively

engaged in free work on 50% of their productions. That is, half of all jobs taken by these three production companies in 2020 did not result in payment. It is possible that the three production companies strategically engaged in free work to prevent rival production companies from working. Similarly, the producers may have identified pro-bono productions as a means to strengthen the relationships with local businesses, valuing social system interaction above minimal capital gains. For example, it is possible that a production company from Group 1 may provide free content to a client of a production house in Group 3 with the eventual goal of securing future paid jobs.

It is beyond the scope of this paper to investigate the economic worth of ‘free’ work and its long-term effectiveness in Brunei. However, the concerns raised by established production companies regarding the undercutting or availability of free production services are valid, especially in a closed system of interaction. As social systems are based upon attitudes and perceptions, the self-relegation of a majority of Bruneian production houses to free-of-charge work does little to inspire the business community to change existing prejudices regarding the quality of local productions.

Question 4: Number of productions that were ‘friendly or discounted pricing’?

This question sought to understand local clients’ perceived value of the production companies. Similar to Question 3, 10 percentage ranges were provided to participants. A

clarification that ‘friendly or discounted pricing’ represented projects produced at less than what the production company would consider the regional or international market rate.

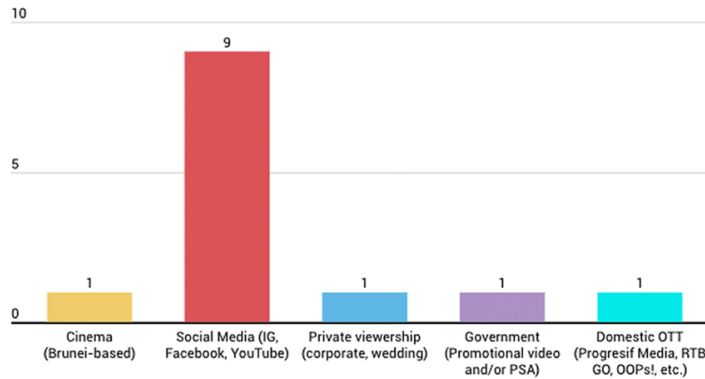
Data and Analysis: All production houses surveyed reportedly gave their customers a discount, and there seemed to be no correlation between the percentage of paid jobs and the percentage of discounted pricing. Simply put, discounts are a part of the Bruneian Screen Industry and, therefore, used strategically to out-bid competitors for jobs. It is, however, possible that the ‘Unnamed Creative Talk’ proposed introduction of a rate card system could be seen as a means of neutralising this business strategy; a development that would favour the more established production houses’ hegemony over the production codes of practice in Brunei. As discounted pricing existed prior to the pandemic it is not uniquely the result of a closed system of interaction. It does, however, provide some evidence of the fluid nature of the Bruneian social system-based relationship between local businesses and domestic production companies. Discounted pricing is a negotiation tool that can reaffirm important social bonds within a local community. Unlike free-of-charge work, minimal or symbolic payments, though well under the market rate, are emblematic of appreciation, thus a positive starting point for future interaction.

Exhibition of Productions

The third section of the survey was devoted to identifying how the interaction between production companies and local businesses would be exhibited. No distinction was made regarding the budget, scale or type of productions, only the platforms by which an audience would view them. Unlike previous sections, three questions would be utilised to gather information. The three questions would require participants to select and rank nine distribution platforms currently available in Brunei. If a platform was not explicitly named, participants could write down other exhibition platforms as necessary.

Question 5-7: What is your top / second / third distribution/exhibition platform for screen/video-based productions?

Data and Analysis: As demonstrated in Graph 4, the majority of production houses (9) identified Social Media as their primary exhibition platform (69.2%). The remaining four production houses selected Domestic OTT, Government Public Service Announcements, Private viewership, and Domestic cinema.



Graph 4. Primary exhibition platform with corresponding production company numbers in 2020.

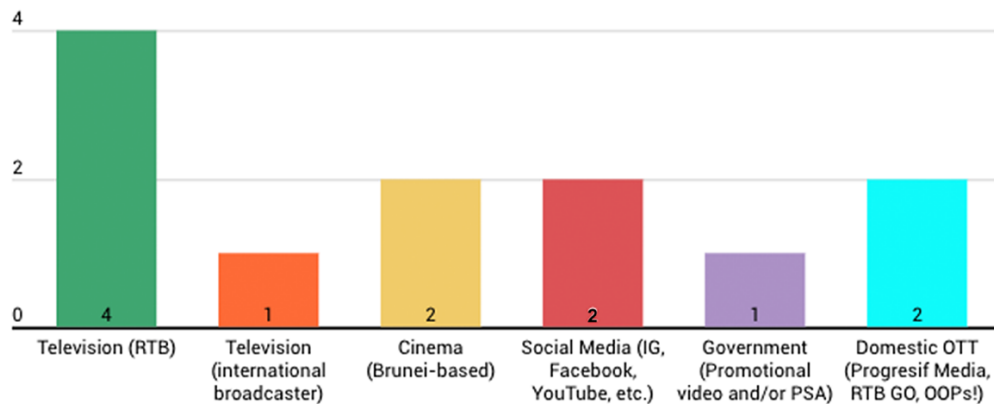
Source: Online survey questionnaire disseminated between 14-28 February 2021

The prevalence of social media as the top exhibition platform might indicate the emergence of a COVID-19 trend among local businesses. That is, as the pandemic forced more Bruneians to consume domestically, business owners may have opted for social marketing as opposed to more traditional forms of advertising in Brunei. Additional data suggests this correlation as 7 out of the 9 production companies listed social media as the top distribution platform also indicated their production levels in 2020 were greater than the previous year. This increase in production levels could be part of a causal chain in which a domestically-bound Bruneian population typically travels to nearby Malaysia to shop must now spend money locally.

This situation would contribute to the close system interaction between the Bruneian Screen Industry and the local businesses as companies hired production houses to fulfil their new social marketing needs. If this is the case, an association may be made between the demand for content specific to Instagram, Facebook and Tik Tok and the number of production companies creating this type of content. The client's chosen exhibition platform might also influence competition, especially in a closed system of interaction. Though there was no specific mention of exhibition platforms in the Unnamed Creative Talk, the rise and expressed opposition to new competitors such as the Gig-lancers can be attributed to local businesses utilising social media platforms to reach their target audience. More professional platforms such as cinema, broadcast television and select OTTs to have certain gatekeeping measures connected to technology that considerably limit the penetration of the Gig-lancers.

The second most used distribution platform presented substantial diversification of productions. As indicated in Graph 5, 4 or 30.8% of the production houses identified Radio Television Brunei (RTB) as their exhibitor. From these four production houses, there was an even split between Group 1 and Group 2. Social Media, which dominated as

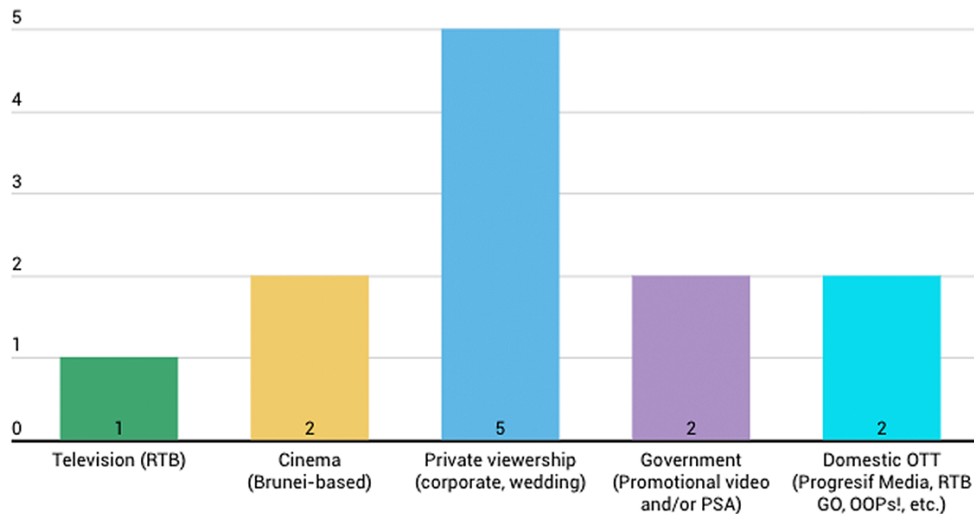
the first choice of the exhibition, tied with Domestic OTT and Domestic Cinema at 15.4%, respectively. Other production companies individually selected Government Public Service Announcements and International Television as their second most commonly used exhibition platform. For the purpose of this paper, International Television is viewed as a secondary market and therefore still part of the closed system of interaction due to the proximity of production and lack of external funding.



Graph 5. Second most used exhibition platform with corresponding production company numbers in 2020.

Source: Online survey questionnaire disseminated between 14-28 February 2021

The appearance of Radio Television Brunei as the second most commonly used exhibition platform might have some connection to the COVID-19 pandemic. As RTB is the only national channel available in Brunei, it would seem reasonable to believe it was, at one time, the preferred choice for advertising by local businesses. However, the production costs associated with an exhibition on RTB could also have limited the number of businesses that could afford its services. Suppose the pandemic was a catalyst for the adoption of social marketing as the new preferred choice of the exhibition. In that case, it could also cause a disruption for the older, most established production companies who used technology and industry knowledge to monopolise the RTB exhibition market. So, it is possible the nomination of RTB as the second most used platform represents more of an artifact of pre-COVID production practices than a viable platform for exhibition.



Graph 6. Third most used exhibition platform with corresponding production company numbers in 2020.

Source: Online survey questionnaire disseminated between 14-28 February 2021

Data and Analysis: As indicated in Graph 6, most of the production houses (5) identified Private Viewership, which includes wedding videos and corporate videos, as their primary exhibition platform (38.5%). Interestingly, only participants in Group 1 and Group 3 selected this choice as production houses in Group 2 ranked Domestic OTT, Domestic Cinema and Government Public Service Announcements as their third most commonly used exhibition platform. The sudden appearance and domination of Private Viewership are most likely not connected to COVID-19 as there is a large wedding video market prevalent in Brunei, and it is exclusively serviced by small production companies that have not been included in this study. So, the data here does not necessarily represent predation of this niche market by larger production companies as a means of survival during the pandemic; rather, it might be indicative of a large and robust private video economy.

Economic Impact

The final section of the survey focused on employment and local productions' economic footprint. The questions in this section addressed issues related to the monetary impact of the Bruneian Screen Industry and the contributions it has made in terms of economic spending in other local sectors and of addressing issues of unemployment. Both issues have relevance when considering the benefits of a closed system of interaction and its impact upon Brunei as a whole.

Question 8: How many staff members/crew does your company typically employ on a production?

This question was used to gather data concerning the size of the screen industry workforce. Participants were instructed to include both permanent employees and freelancers before selecting a number between 1-9 staff members/crew. Productions that typically employ 10 or more individuals on a shoot were grouped into a single category.

Data and Analysis: All of the production companies registered employment of at least three crew or staff, with 8 of the 13 (61.5%) companies identifying as having seven or more employees per production. Additionally, production companies that engaged in less production in 2020 averaged six employees per production, while production companies that engaged in more production averaged 7.1 employees. No single group demonstrated a characteristic of more or fewer employees, which is surprising given the volume of content Group 3 produces. However, two companies from Group 3 (66.6%) employed ten or more people on productions, so it is possible that the production companies that make more productions have larger crews. To better break down the data, employment will be examined according to specific exhibition platforms.

Social Media: The average employment size of production companies that identified social media as their primary platform was 7. This number dropped to 6.7% when all production companies that produced content for social media were averaged together.

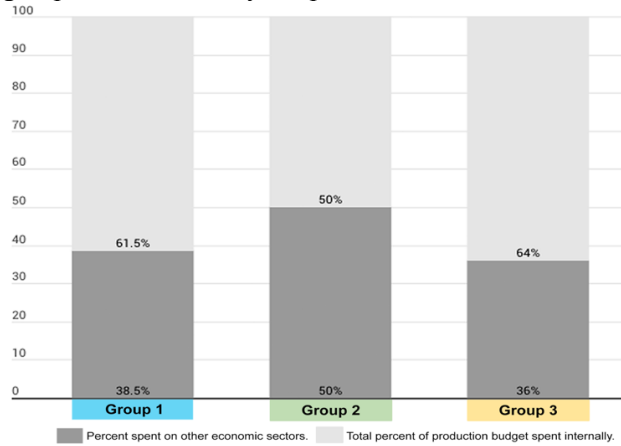
Domestic Cinema: All companies that produced content for exhibition in Brunei's six movie theatres employed 10 and above staff and crew. This is most likely due to the demands of theatrical production both in terms of technology and physical crew size. Due to the increased number of productions in Brunei during the COVID-19 pandemic, there was also a growth of jobs in the screen industry. The existence of a closed system of interaction meant a greater interchange between the business community and the local production houses. The decision by the business owners to incorporate Social Marketing into their advertising campaigns also meant more start-up production companies could find production work. Though, as mentioned previously, this gateway production genre also presents the most potential competition and, therefore the greatest risk of non-establishment.

Question 9: What percentage of your typical screen/video-based production budget is spent on other businesses?

The information from this question is relevant when mapping the economic contributions, the Bruneian Screen Industry makes to other local business sectors. Participants were instructed to view 'other businesses' as any business entity, production-based or non-production-based; the production company exchanged money for goods/services connected to the typical screen/video-based production. This production expenditure was

viewed as a positive benefit of the COVID-19 regulations as it solidified the Bruneian Screen Industry as a contributor to the overall economic system of Brunei.

Data and Analysis: The 13 production companies averaged to spend 40% of their production budgets on other businesses in Brunei. The average of the three independent groups, as indicated by Graph 7, is as follows:



Graph 7. The average production budget spent by Bruneian production companies in 2020.

Source: Online survey questionnaire disseminated between 14-28 February 2021

Average Spend Group 1: 35%

Average Spend Group 2: 50%

Average Spend Group 3: 36%

The closed system of interaction imposed by the COVID-19 travel restrictions placed the Bruneian Screen Industry in a position to stimulate the domestic economy. For example, 11 out of the 13 (84.6%) production companies indicated that they spend at least 30% of their budgets in other local business sectors. Similarly, 8 out of the 13 (61.5%) production companies responded that they spend at least 40% of their budgets in other local business sectors, while 5 out of the 13 (38.5%) production companies specified that 50% of their production budgets was spent in other local business sectors.

Conclusion

In August 2021, the 'Brunei Bubble' popped as local transmissions of COVID-19 steadily grew throughout the population. The Brunei Screen Industry was immediately impacted. The closed system of interaction collapsed as mandatory quarantine orders and work-from-home mandates greatly influenced 'regular' life in Brunei. It is unlikely another

closed system of interaction will develop unless outstanding circumstances similar to the pre-August 2021 COVID-19 restrictions resume.

This paper was a 'snap-shot' of the Bruneian Screen Industry and only captured a brief moment of what can be seen as the motion pictures of a developing screen industry. As of the writing of this paper, many new and exciting opportunities have arisen from the recent, more limiting COVID-19 lockdown. OTT services from Progresif Media, RTB GO and the YouTube-based OOPs! have generated more interest from local audiences. Similarly, AITI has completed and launched a second Pitch to Produce initiative aimed at generating more Bruneian screen content. The goal of these 'snap shots' is to freeze frame and take note of the developments of the Bruneian Screen Industry, providing analysis and insight into this exciting and burgeoning sector of the Bruneian economy.

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