Pressing Play (Again)

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A 2021 cinema research project looking at the return of exhibition after Lockdown

TullStories

CONTEXT AND METHODOLOGY

In March 2020, during one of my many periods of not knowing how to process the pandemic and Lockdown, nor how the future might look for exhibition, I undertook the research project PRESSING PLAY.

The project was modest, not commissioned or funded, and delivered independently. Instead of adding to the terrific work being done to survey the public in the Arts & Culture sector, it was specifically created for cinema exhibitors, complementing the ongoing and far-reaching work being done to analyse audiences.

PRESSING PLAY encouraged exhibitors to ask themselves difficult questions at a difficult time.

The resulting report was enlightening. Having discussed the areas of operations, programming and communications it provided a snapshot of how exhibitors were facing the situation they found themselves in - and how they were planning to respond to it.

The results can be found at https://www.jonnytull.co.uk/pressing-play-an-independent-cinema-sector-survey/.

With the advent of the second major Lockdown in January 2021, the introduction of the mass vaccination programme and subsequent 'roadmap to recovery' the time felt right to return to Pressing Play.

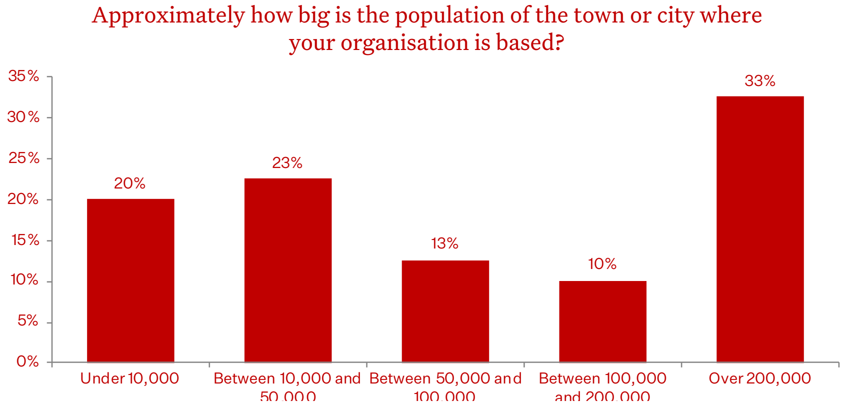
This was a time when the sector was still unsure about its future and was rapidly experiencing major changes. But this time we could perhaps also see a possible conclusion to the pandemic.

PRESSING PLAY (AGAIN) was launched in early February 2021 and remained open until April 2021. In total, the survey received 80 responses.

As well as providing an update to the first iteration of the survey, the ambition of this edition was to look into the impact of the changes happening to film distribution. This was a largely conceptual issue in spring 2020, but in 2021 it is part of our sector's day-to-day reality.

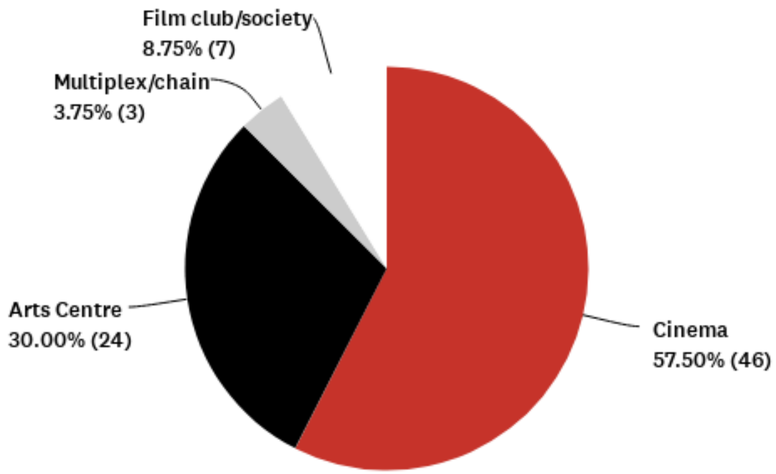
The size of conurbations represented in responses ranged from towns with under 10,000 residents to cities of over 200,000.

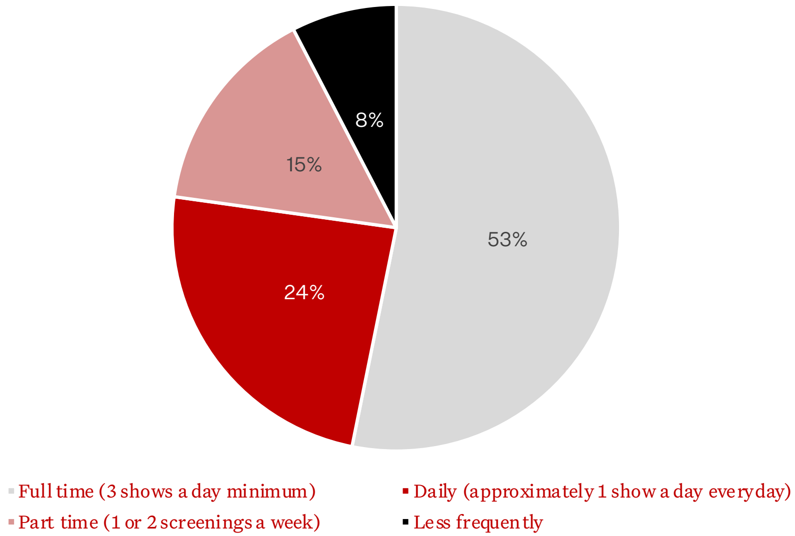
79% of respondents represented areas with over 10,000 residents.



The survey was completed by representatives of 46 cinemas, 24 arts centres, 3 multiplexes/chains and 7 film clubs/societies.

The **number of screenings** offered by respondents spanned a broad spectrum, but 77% of the organisations represented screened films every day.





The **number of screens** each organisation programmed ranged from 1 to 5+.

No. of screens	%	Responses
1	58%	46
2	19%	15
3 - 5	18%	14
More than 5	6%	5

Pressing Play (Again) covered the areas of:

- How we feel future attendance by different audiences may be impacted by COVID-19.
- Specific barriers to attendance cinemas might face.
- The nature of the messages that cinemas will adopt to encourage audiences back into their screens.
- How exhibitors personally feel about attending events.
- And what type of activity may be presented as part of reopening strategies.

This update of the survey also asked questions about the impact of new release models, whether new streaming services were threatening to theatrical exhibition and which roles or departments within organisations may prove to be the most important to responding to the pandemic over the coming year.

I hope this document proves an interesting and valuable read.

Thanks to the many colleagues who supported this project during 2020 and 2021.

Jonny Tull
May 2021

SELECTED HEADLINE FINDINGS

Over 50% of respondents are confident about returning to their own social lives.

Impact on audiences

73%

of us have confidence that audiences will return to cinemas.

Just 3%

of respondents are 'very worried' about whether audiences will return.

Less respondents in 2021 are anxious about the speed that audiences will return to our venues than in 2020: 40%, compared to 63% a year ago.

48%

of respondents anticipate a major impact on cinema attendance by customers aged 65+, compared to 60% a year ago.

We remain less anxious about the impact of the pandemic on cinema attendance by younger adults and families, compared to other age groups.

Communications

Fear of infection remains the most significant expected barrier to attendance.

60% of respondents understand that changes to customer viewing habits may be a barrier to attendance.

71% of respondents will lead with a variation of ‘Our venue is clean and safe’ as a key reopening message, 64% with a message about shared experience, and 50% with one revolving around cinema offering an immersive escape.

Lack of relevant content to screen is a concern for 45% of respondents.

Coming back

The sector is eager to reopen its doors quickly.

Almost two thirds of exhibitors don’t intend to create a ‘moment’ around reopening.

52% of exhibitors surveyed are concerned about how customer viewing habits have changed.

The need for audience safety remains paramount, but the value of the cinema experience and our venues’ role in our communities is vital.

Only one third of exhibitors do not feel threatened by new models of film release.

Our programmes may become more specialist or event based in the months ahead.

SECTION 1: THE IMPACT ON OURSELVES, AND ON OUR AUDIENCES

1.1 How do you personally feel about attending events?

Over 50% of respondents are confident about returning to their own social lives.

Comparing responses between 2020 and 2021 has shown that respondents are more relaxed about returning to their social lives.

The survey asked exhibitors how wary they would be to attend public events when restrictions lift, rating themselves on a scale out of ten.

53% of all respondents rated themselves as under 5/10 on the ‘anxiety scale’. This was a rise of 20%.

20% of responses moved from the top half (more anxious) of the table to the bottom half between the two years.

Rating out of 10	% of 2020 respondents	% of 2021 respondents	+ /-
0 - 2.4	16%	36%	+20%
2.5 – 4.9	17%	17%	-
5 - 7.4	45%	36%	-9%
7.5 +	22%	11%	-11%

1.2 How will the pause on operations impact our communities?

We are unsure about how quickly our communities will return.

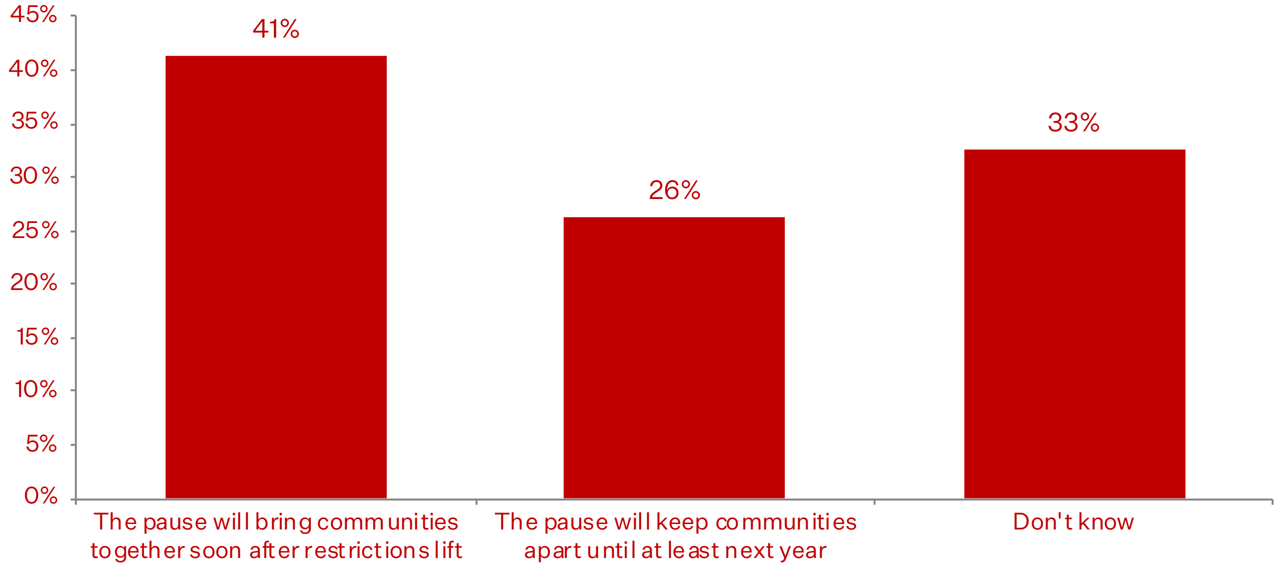
When asked if the pause will see audiences quickly reunite or remain divided for a while, 41% of respondents predicted that we would come back together soon.

59% were sceptical about, or can't predict, the speed in which we will return to our social lives.

This is a reduction from the 2020 results, in which 66% of respondents were less hopeful for a quick return to normal.

At that time 34% of respondents selected 'don't know' and 32% predicted that we would remain apart until the following year.

Impact of the pause on cinema operations

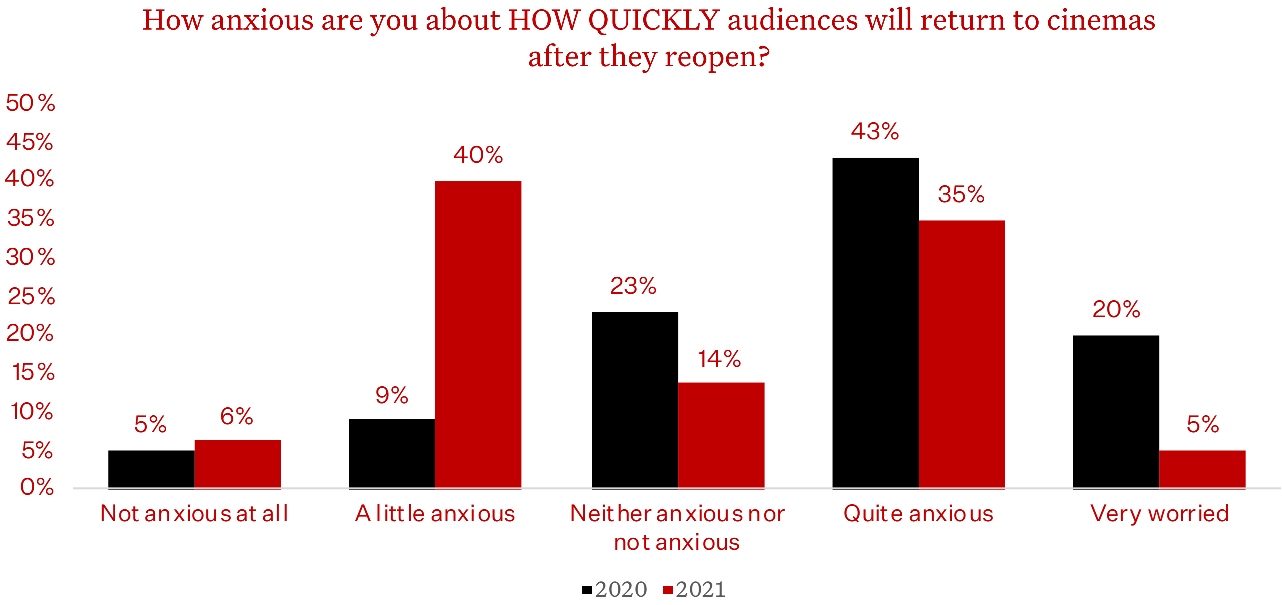


1.3 When will our audiences return?

40% of respondents are particularly anxious about the speed that audiences will return to our venues, compared to 63% in 2020.

The biggest reduction in this question was in the number of responses in the **very worried** grading. This reduced from 20% of respondents in 2020 to 5%.

The peak in responses to this question is now **a little anxious**, which has risen to 40% of respondents from 9% in 2020.



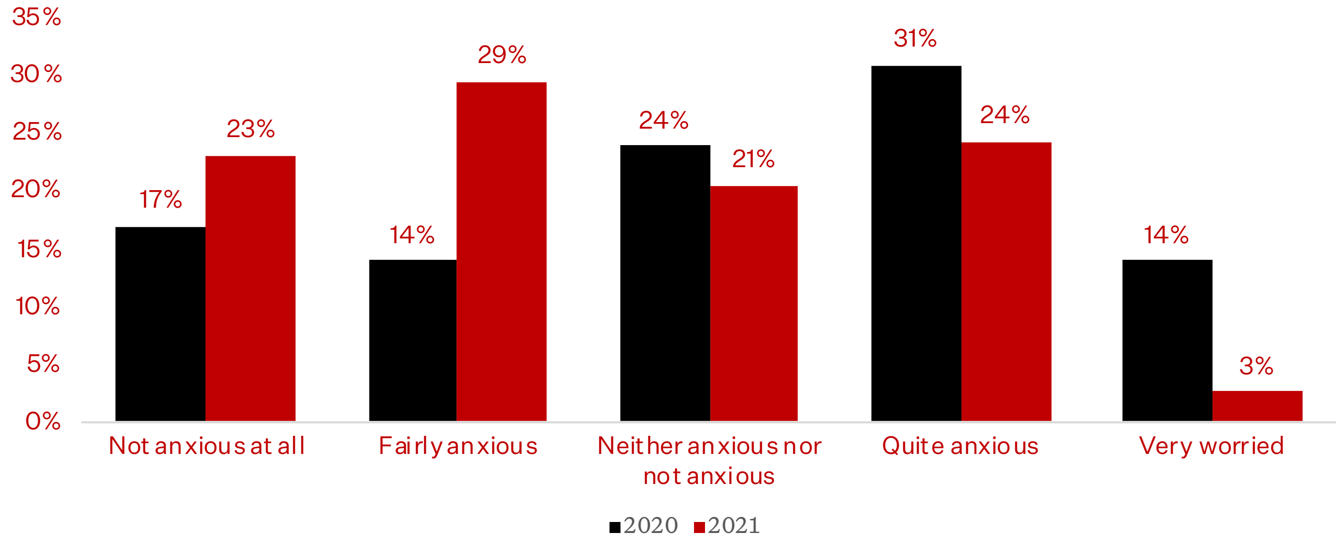
1.4 Will our audiences return at all?

73% of us are moderately or very confident that audiences will return.

Confidence has risen since 2020.

Just 3% of us are now very worried that we have lost our customers for ever. 27% of exhibitors remain quite or very concerned.

How anxious are you about WHETHER audiences will return to cinemas after the pandemic?



82%

of exhibitors surveyed anticipate that the impact of the pandemic on family audiences will be less than 25%.

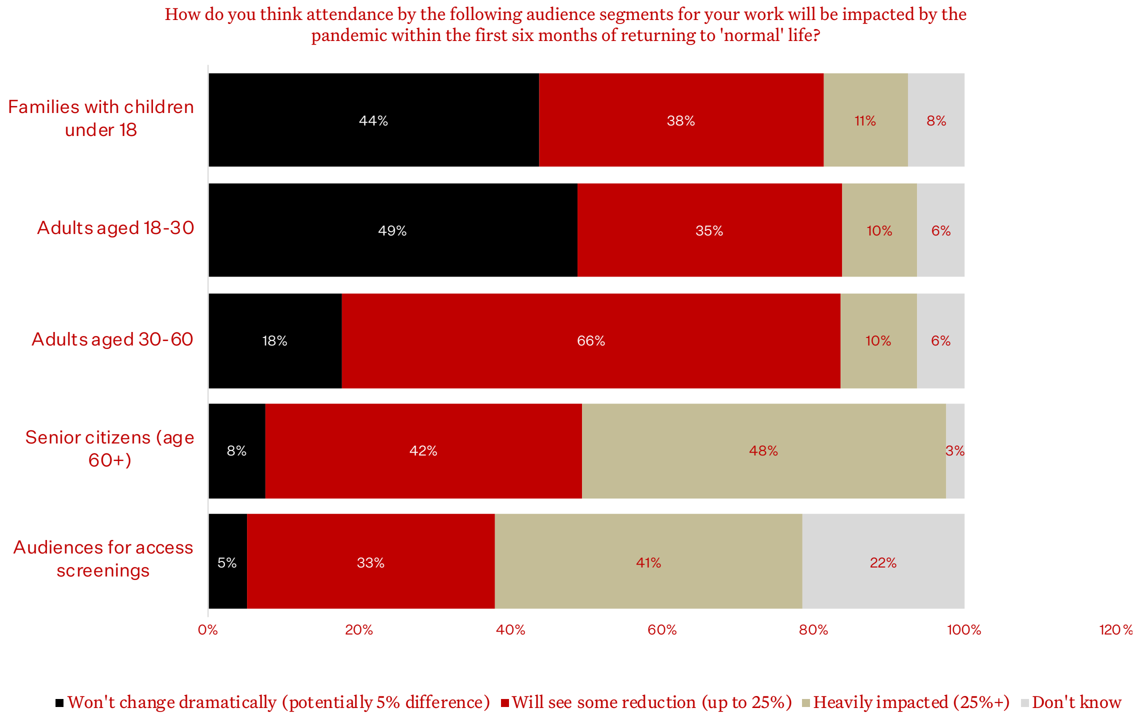
SECTION 2: OUR AUDIENCES AND OUR COMMUNICATIONS

2.1 Predicted impact on audience segments within the first six months of resuming screenings

We remain less anxious about the impact on attendance by younger adults and families, just as we were a year ago.

48% of respondents to Pressing Play (Again) believe that attendance by **senior citizens** (aged 60+) will be greatly affected (over 25% reduction in attendance). This is a reduction from 60% in 2020.

82% of respondents expect the **family** audience to be less impacted (up to 25% reduction), and 44% of all respondents anticipate a reduction of 5% or less to attendance from this group.



Young adults aged up to 30 remain the segment perceived to be the least impacted, with 84% of respondents foreseeing a reduction in attendance of 25% or under. 49% of respondents expect a reduction in attendance of 5% or less.

41% of exhibitors foresee a large impact on **audiences for access programmes**.

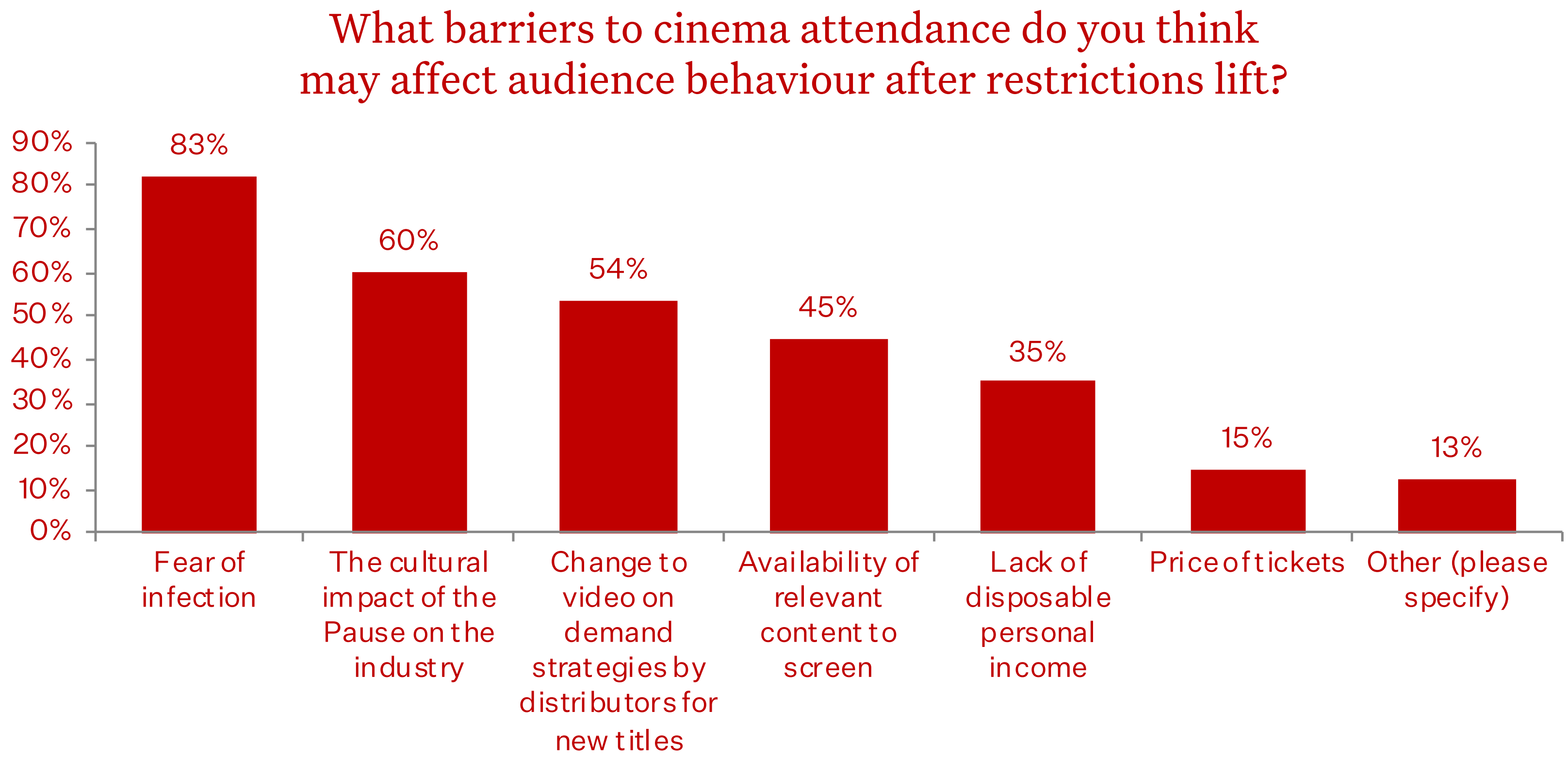
It is this segment which has the greatest uncertainty, with 22% of respondents unsure of the potential impact of the pandemic on attendance.

The levels of predicted impact for each segment are outlined in this table.

Answer choices	Won't change dramatically (potentially 5% reduction)	Will see some reduction (up to 25%)	Heavily impacted (25%+ reduction)	Don't know
Families with children under 18	44%	38%	11%	8%
Adults aged 18-30	49%	35%	10%	6%
Adults aged 30-60	18%	66%	10%	6%
Senior citizens (age 60+)	8%	42%	48%	3%
Audiences for access screenings	5%	33%	41%	22%

2.2 Barriers to attendance

Fear of infection remains the most significant perceived barrier to attendance.



83% of respondents selected **fear of infection** as a barrier to audiences returning to cinema screens. This was a reduction from 2020, where it was selected by 93% of respondents.

We have learned a lot over the last 12 months about where the exhibition sector may be headed, compared to the largely blank canvas we faced on spring 2020.

This includes subjects such as how long films may be exclusive to cinemas, the increase in streaming service subscriptions, and the advent of major studio films debuting online.

It is therefore of little surprise that both the **cultural impact of the pause** and **changes to VOD strategies** remain of concern to many exhibitors. The former is now seemingly a more quantifiable concept for the sector, with more respondents selecting it in this survey than in the previous (rising from 50% to 60%). **Changes to VOD strategies** saw a small reduction, dropping from 54% to 48%.

We saw an increase in concerns about the **availability of relevant content** (45%). This is a significant rise of 12%. This may suggest that exhibitors feel that it is clear that changes by distributors to VOD strategies has had an impact on the number of films they are able to screen.

Price of tickets as a barrier remains of the same degree of concern. It was selected by 15% of respondents, compared to 13% in 2020.

Of the additional responses given under **other**, vaccine passports and the restrictive nature of restrictions were mentioned by a small number of respondents.

50%

of respondents' marketing messages will evolve around the immersive experience of watching films in a cinema space.

2.3 Encouraging audiences back to cinemas – what are our most powerful messages?

The need to convey audience safety protocols remains paramount, but the value of the cinema experience and our venues' role in the community are also vital.

The most important messages selected by exhibitors to incorporate into reopening communications are:

Our venue is clean and safe - selected by 71% of respondents (58% in 2020).

You can enjoy a shared experience again - selected by 64% of respondents (49% in 2020).

Cinema offers an immersive escape was selected by 50% of respondents (not included as an option in 2020).

We are a hub of the local community - selected by 43% of respondents (47% in 2020).

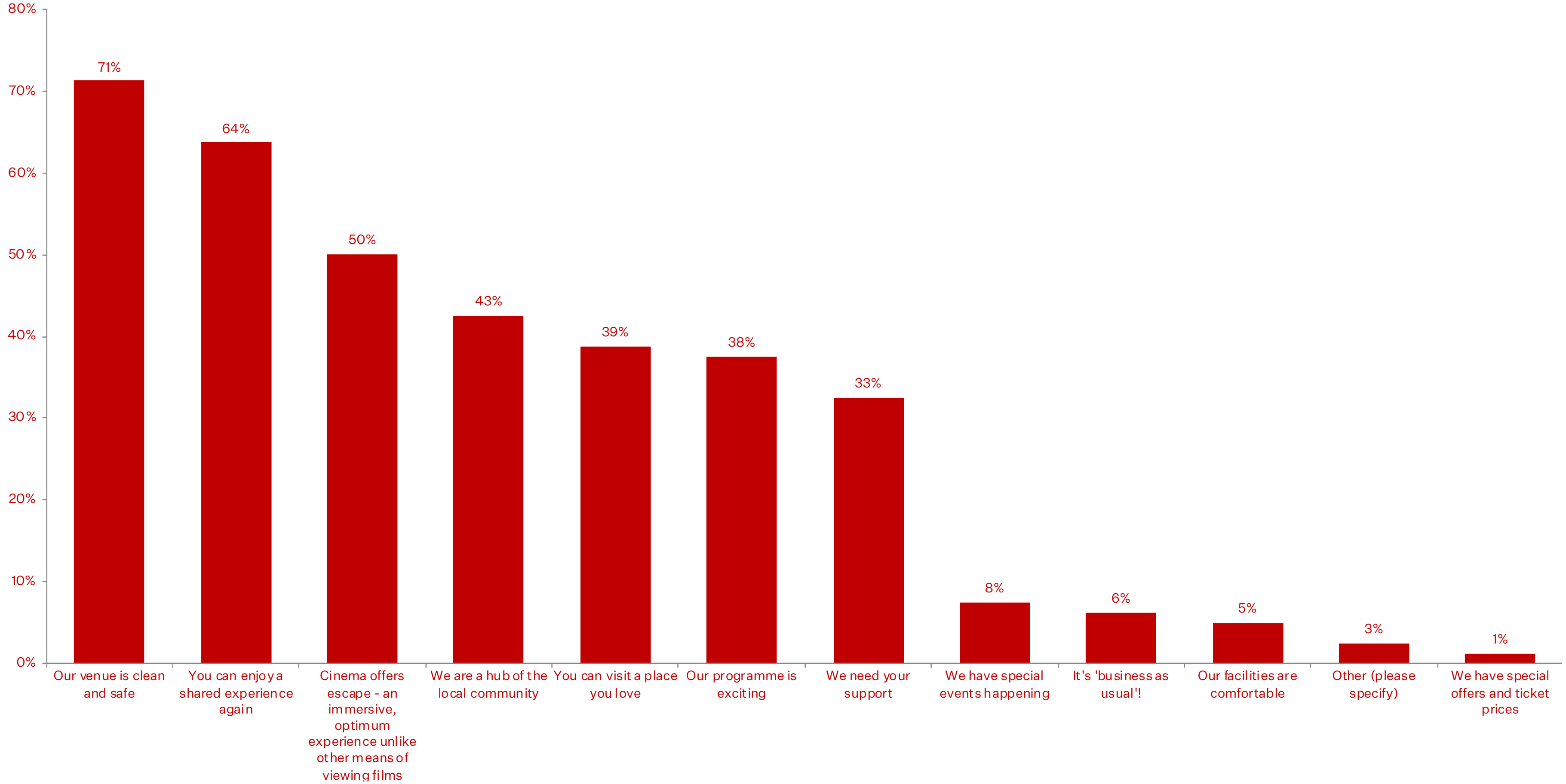
You can visit a place you love was selected by 39% of respondents (31% in 2020).

Our programme is exciting saw an increase from 29% in 2020 to 38% in 2021.

Overall, we can see an increase in messaging about comfort, programming, coming back together and the audiences' fondness for our spaces.

	2021	2020	+/-
Our venue is clean and safe	71%	58%	+13%
You can enjoy a shared experience again	64%	49%	+15%
Cinema offers escape - an immersive, optimum experience unlike other means of viewing films	50%	N/A	-
We are a hub of the local community	43%	47%	-4%
You can visit a place you love	39%	31%	+8%
Our programme is exciting	38%	29%	+9%
We need your support	33%	41%	-8%
We have special events happening	8%	6%	+2%
It's 'business as usual'!	6%	8%	-2%
Our facilities are comfortable	5%	4%	+1%
Other (please specify)	3%	2%	+1%
We have special offers and ticket prices	1%	2%	-1%

If you were to choose a message to encourage audiences to attend cinemas after the pause, what would it be?



64%

of respondents do not have plans to create a ‘moment’ around reopening.

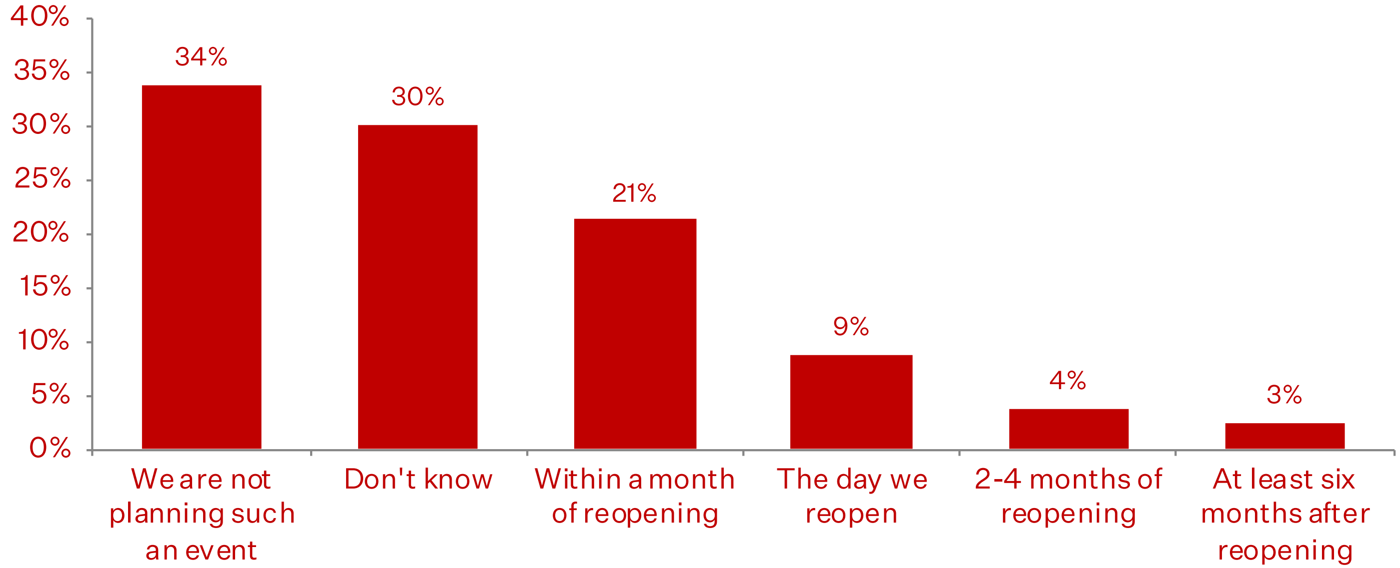
SECTION 3: RETURNING

3.1 Reopening events

Almost two thirds of exhibitors don't have plans to create a 'moment' around reopening.

64% of respondents do not plan to create special events or happenings around their reopening. This is a major change to results from 2020, where 72% of respondents **were** planning an event to mark cinemas reopening.

If you are considering holding a special event when you reopen, when will that be?

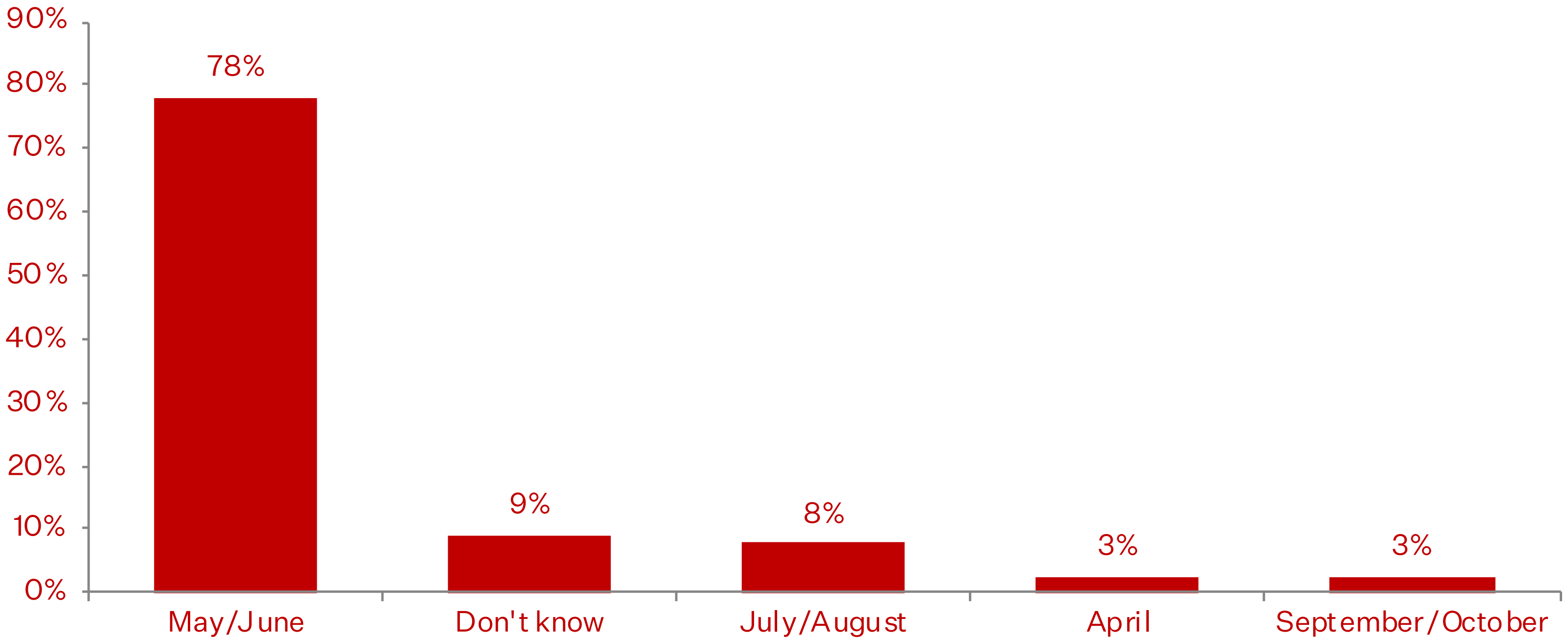


3.2 When venues will reopen

The sector is eager to reopen its doors quickly.

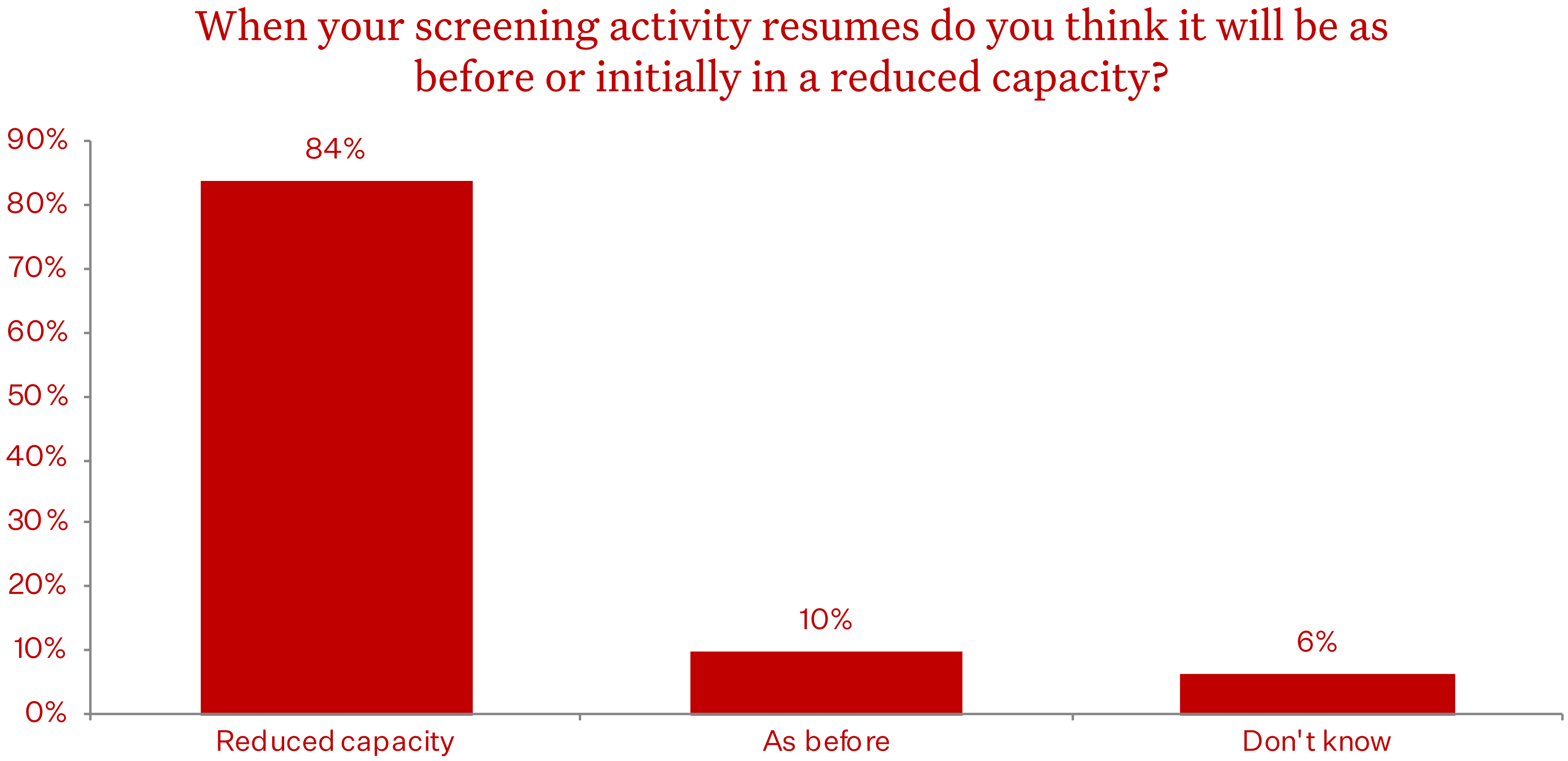
The survey found that over three quarters of respondents were looking to reopen/resume activity in the immediate days and weeks of being able to do so.

When do you expect to reopen your venue(s), subject to being able to?



3.3 Reopening and scale of programme

The majority of respondents expected their re-opening programming to be smaller in scale to pre-pandemic levels.



3.4 Key roles

51% of respondents value front of house, programming and marketing as equally important at this time.

The survey asked how respondents rated the potential importance of customer facing teams in the months ahead.

Of those respondents who chose to select rankings for the areas of programming, marketing and front of house, there was a very slight skew towards programming.

However, more than 50% of respondents agreed that all three departments/areas of work would be equally important to their organisation's return to business.

	1st	2nd	3rd	4th
Programming	31%	40%	9%	5%
Marketing / Audience Development	12%	31%	38%	7%
Front of House / Customer Service	14%	19%	33%	21%
All equally critical	51%	0%	3%	27%

SECTION 4: STREAMING + THEATRICAL OR STREAMING V THEATRICAL?

4.1 Will streaming replace the theatrical experience?

52% of exhibitors are particularly concerned about how consumer viewing habits may change.

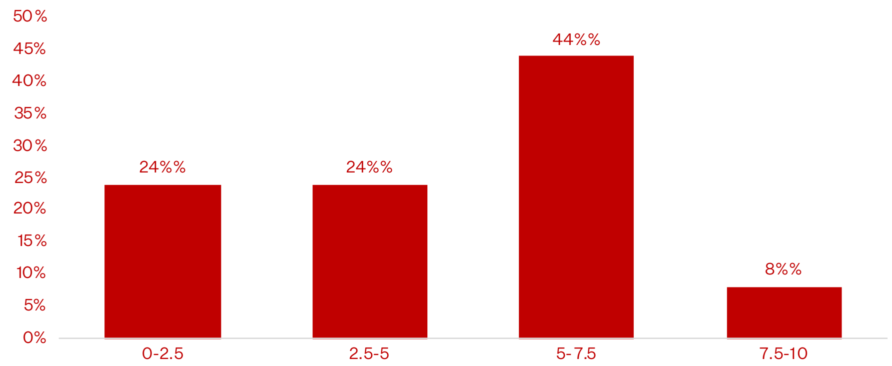
Throughout Lockdown online engagement such as creating watch parties or online watch lists for audiences have provided the opportunity for exhibitors to maintain a regular connection to their customers.

Some exhibitors have relayed that this activity (perhaps also including in some cases virtual theatrical) is a means to maintain that connection, but would complement it, rather than replacing in-cinema activity.

Ideally, online events and presentations will open access to films to the audiences who remain unable to visit our physical spaces.

The fast-track of the change to the theatrical screening window and the huge industry investment being made on streaming platforms has led to uncertainty about the future of exhibition amongst some respondents.

How anxious are you that audiences will replace trips to the cinema with watching films at home (out of 10)



Whilst 48% of respondents placed themselves in the lower end of the ‘anxiety scale’, 52% of exhibitors showed real concern about these developments.

34%

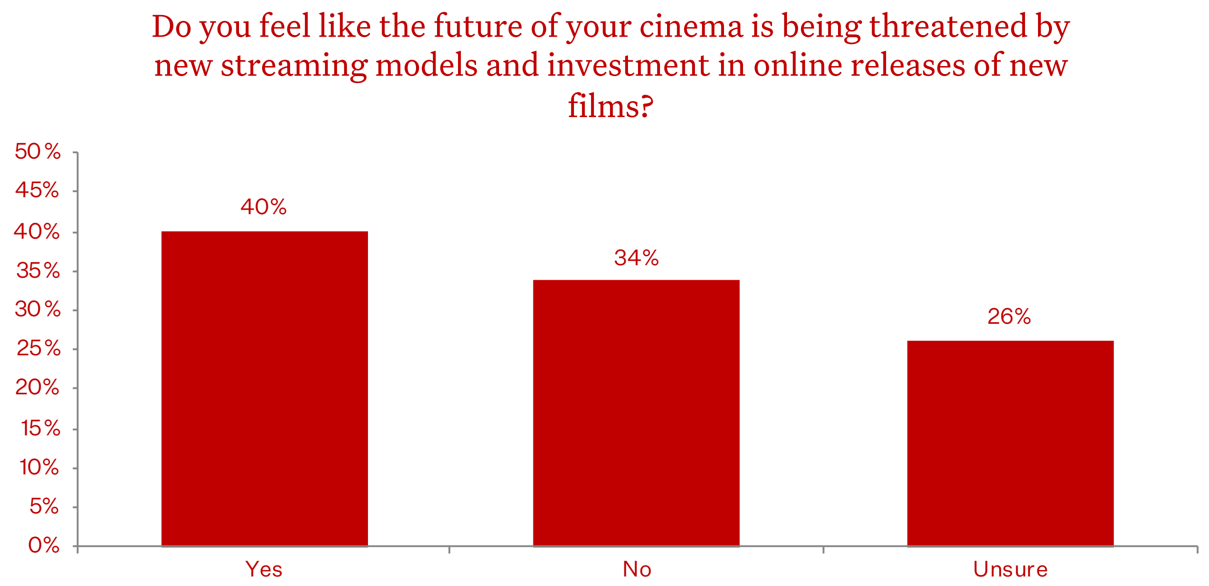
of respondents do not feel that their venues are threatened by new models of film releases.

4.2 Do exhibitors feel threatened by new models of release?

Only one third of respondents do not feel that their venues are threatened by new release models.

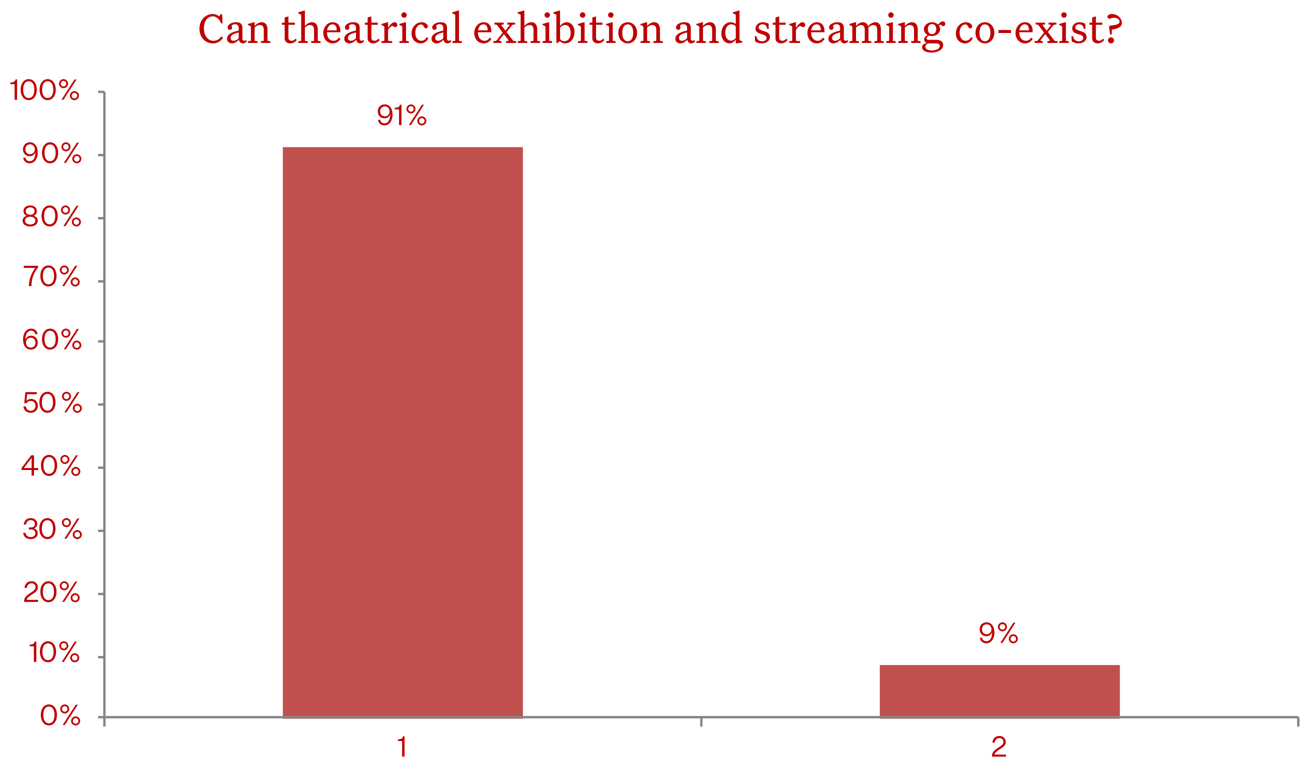
The concern about the impact of new models of release is also represented in the responses to this question.

40% of respondents stated their discomfort about how the rise of streaming services may impact their organisations and the work that they do.



4.3 Can theatrical exhibition and streaming co-exist?

Whereas there is uncertainty and caution about how the cinema experience can operate alongside the in-home experience, respondents mostly believe that both models can (or must?) work in tandem.



4.4 New programming directions

We may see an increase in the programming of 'special' content.

New streaming strategies and audience attitudes may affect how we programme our venues in the months ahead.

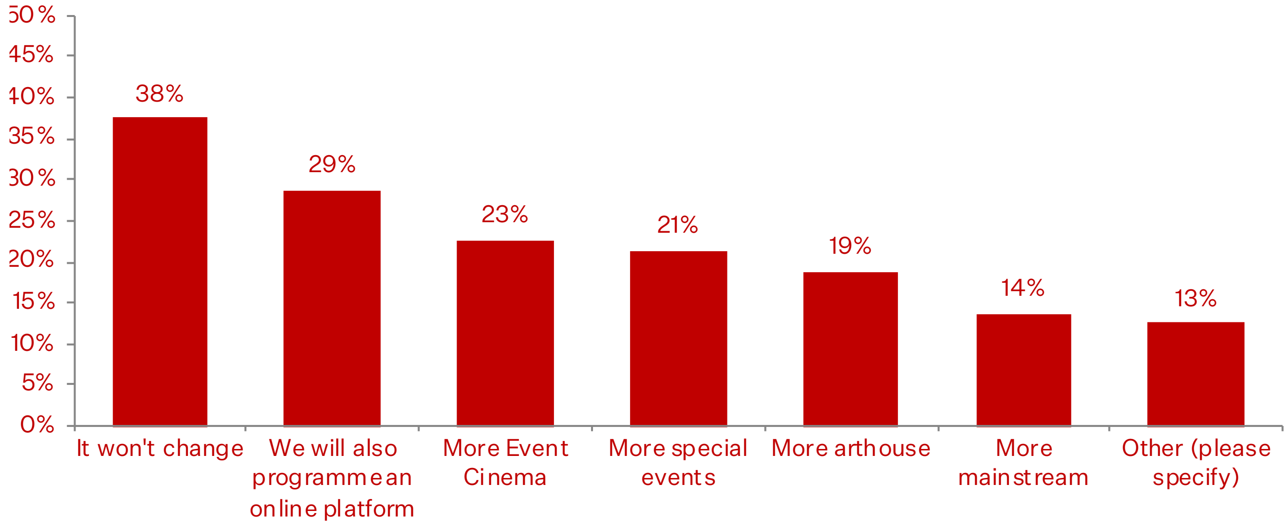
For 38% of respondents the shape of their programming would be no different to that of pre-pandemic times.

Almost 30% of respondents were now programming a virtual screen.

Thematically, increases in event cinema, specialised film and special events were the most obvious differences selected.

Only 14% of respondents expect to show more mainstream titles than previously.

How will your programming differ when you reopen, as opposed to how you programmed before the pandemic?



SECTION 5: ADDITIONAL COMMENTS

Habits are changing and have been changed. The sector looks to the future cautiously and curiously, and to those stakeholders and partners in distribution who may play roles in helping them – and the sector - recover.

Comments cantered mainly around areas of uncertainty, concern about audience willingness to return to cinemas, the need for innovation, and whether enough relevant content will be available to screen.

The fragility of the sector and the fundamental need for ongoing funding support.

> “The 10-year growth of independent cinemas is at its most fragile. No one solution will be the answer. It’s the goodwill of funding bodies and benefactors that will bolster the next couple of years of trading.”

“I am concerned that additional funding will stop or be reduced. I think we will be working with a blended model for at least the next year and expect it to take this long to bring audiences back - this is only if things carry on improving.”

“The Cultural Recovery Fund was intended to ease us back into working again, covering the budgeted year 2020-2021 but as that comes to an end we require more funding and a workable way through till audiences are back.”

Some exhibitors have questions and uncertainties about the ‘why’ and ‘how’ of cinema as we look forward.

“Interested to know how much film tastes have changed. Will certain genres be less desirable or more needed as essential escapism?”

Changes in methods of consumption were addressed directly, particularly on the impact to the eco-system of cinema.

> "I'm not particularly concerned about how the rise in streaming services will affect my venue specifically, but in how it affects the cinema industry as a whole - if something damages the big chains, that can have a knock-on effect on the rest of us."

> "Very worried about the release schedule and also the shift of titles to online releases."

The pandemic, for some, has shown the value of our communities to us, and of our organisations to them.

> "Cinema will come back for those cinemas that are part of their communities, program for their audiences, and make the whole event of going to the cinema an experience. The cinemas that engage with their audiences will not just survive but thrive. The cinema that purely relied on tentpoles and theatrical windows will have a tougher time."

The need for innovation was mentioned.

> "The future is indie cinema which focuses on alternative / innovative programming."

> "It feels like there could be an amazing opportunity with the wealth of content, but cinemas will need to be really agile and the linear programming they're used will have to change. I can see hybrid programming models with 1-, 3- and 7-day releasing dependent on potential audience / window to streaming. Unfortunately, not many cinemas are cut out for this approach."

Access to content and the structure of terms is a major concern for exhibitors and for some, the only route to survival.

“Independent cinemas will eventually become more popular, but it is crucial that the distribution fee will be much lower, especially in the first year.”

“A major part of reopening (again!) is going to be the availability of content and the cost of the content which is available.”

“Being able to achieve flexible deals on films - I hope we can move away from blockbusters demanding a large number of screenings in small venues as we need to keep out programme interesting and dynamic and offer choice to tempt audiences back.”

“I really hope the larger studios and distributors consider smaller independent cinemas with theatrical releases in the future. Kinder terms of booking, especially if those titles end up on streaming platforms even quicker, would be greatly appreciated.”

“I'd like to see the major studios offer better terms and be less restrictive when it comes to the traditional 'all shows' bookings, and work with individual programmers/venues to get the best out of each situation!”

“Cinemas don't just need new content; they need exclusive content with a window that makes it worth prioritising seeing it at a cinema.”

“Distributors need to become more flexible with making their back catalogue available to cinemas.”

For some, the pandemic represents a forcing of the hand.

“If the kids' films are all on streaming platforms at reasonable cost with no theatrical window this will impact our weekend/holiday audiences and we might have to shift more towards the mature audiences who are currently catered for in the evenings and school term-time matinees.”

The impact of the pandemic is also still around us and affecting our positivity and planning.

“Our cinema offer will move to 5 days a week Wed-Sun for at least 10 months when we reopen.”

“It still all feels very uncertain and we will be feeling our way, maintaining social distancing, and monitoring audience comfort.”

“We only have 70 seats, so our biggest problem is social distancing. While restrictions are in place we simply can’t afford to be open.”

“I think it will take audiences a while to fully trust going out into larger audiences again. If mask wearing is mandatory then I think this may mean more people stay at home.”

“As a traditional 'Film Society/Club', we are concerned that our faithful membership, which also encourages 'guests', will have melted away and it will be difficult to re-invigorate/get new members.”

“What will stop us reopening is social distancing. In a 68-seat theatre, reduced audience numbers make screenings unviable.”

Jonny Tull
Tull Stories
May 2021

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About Jonny Tull

Jonny Tull is a cinema and arts consultant working in film distribution and exhibition.

Following a successful career in programming and marketing for independent cinema, Jonny now works with filmmakers, cinemas, festivals and distributors to help bring their projects to the world.

In 2020 Jonny was the recipient of a prestigious John Brabourne Award from the Film & TV Charity, and alongside his work in exhibition and distribution he is an Advisor on the British Film Institute's Film Audience Network's Advice scheme, Chair of the Board of Trustees at Queen's Hall in Hexham, Northumberland, and teaches on the Film Studies MA at Newcastle University.

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Image: Film and TV Charity.

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