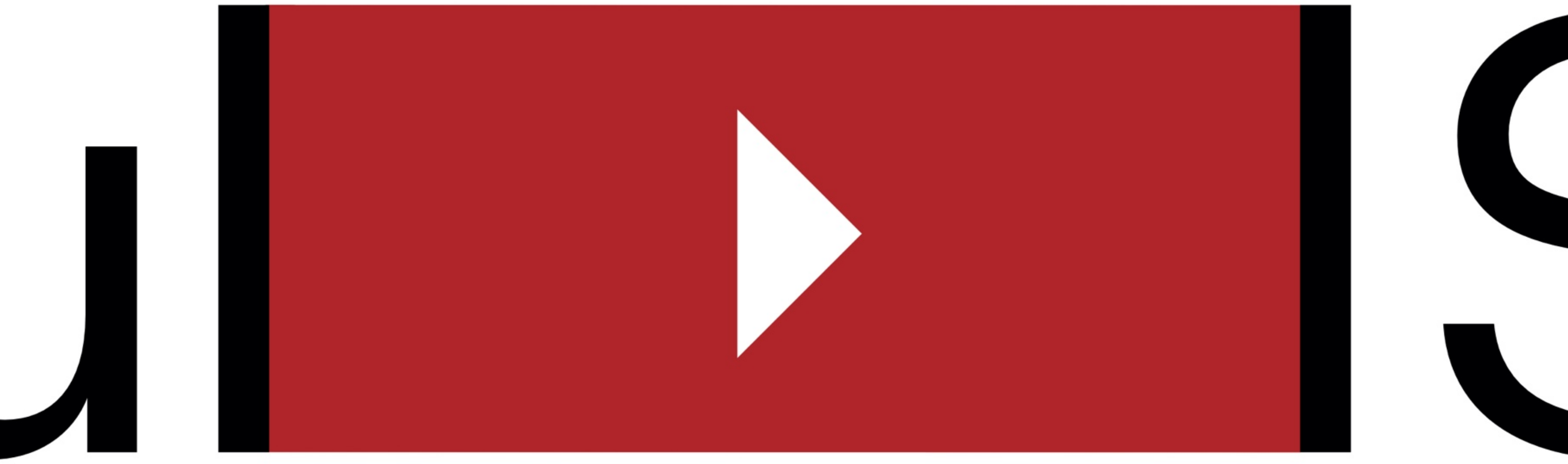
Pressing Play



A cinema research project analysing
how exhibitors may be considering a return
to operations following Lockdown.
April—May 2020

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Tull Stories

Context and methodology

When the UK went into Lockdown In March, I was reeling in shock. Over two days I had dozens of film bookings postponed or cancelled, and the exhibition projects that I was working on were all suddenly on pause.

I felt that I had to try and process this situation in some way and to look ahead to consider how we in exhibition might begin to talk to our customers and encourage them back to cinemas after this enforced intermission.

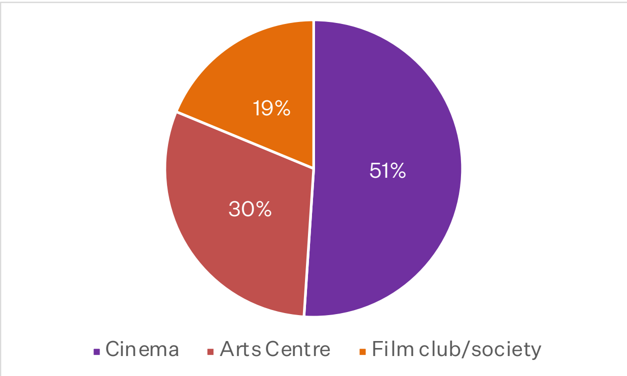
It became very clear very quickly that it would be relevant and helpful to talk to my peers and colleagues in exhibition about their own plans, anxieties and expectations, so I created **Pressing Play**, a snapshot survey which aimed to take the pulse of the current situation we're in, specifically by asking exhibitors to consider venue closures and life on the other side of Lockdown.

Based on the number of people working in programming roles or similar and who may not have been furloughed the target sample of respondents was set at 100.

This felt realistic and meant that the sample would still maintain as minimal a margin of error as possible. It also meant that I could access input from a broad mix of venues working across the sector, hearing from cinemas, arts centres and film societies.

In all, there were responses from 97 exhibitors.

It was completed by representatives of 49 cinemas, 29 arts centres and 18 Film clubs/societies.



The size of conurbations represented scaled from those with under 10,000 residents to those with over 200,000 residents.

The number of screens each organisation programmed ranged from 1 to more than 5.

The questions asked in Pressing Play revolved around the areas of:

- Our own fears about attending events.

- How we feel future attendance by different audiences may be impacted by COVID-19.

- Specific barriers to attendance we might want to consider.

- The nature of the messages we may use with our audiences to encourage them back into our cinemas.

- And what type of activity we may present as part of our reopening strategies.

The survey ran from Wednesday 1st April until Tuesday 19th May 2020.

Written within responses is a note of uncertainty, but as time and responses have moved on we can see that confidence is returning to the sector.

I have endeavoured to include clear distinctions between earlier responses to the survey (1st – 20th April) and later responses (from 21st April) where particularly relevant.

Ultimately Pressing Play is an exercise in understanding and empathising with audiences - and one which I hope may help the sector find an easier route to returning and celebrating our artform with our customers.

Jonny Tull
May 2020

Selected headline findings

When audiences will return

63% of respondents are very worried about the speed that audiences will return to the cinema.

45% of us are particularly worried that audiences may not return to cinemas at all after restrictions lift.

Impact on particular audience segments

We are least anxious about the impact of COVID-19 on younger adults' and families' cinema attendance.

60% of respondents to Pressing Play believe that attendance by older audiences (aged 60+) will be greatly affected, with an over 25% reduction)

Barriers to attendance

93% of respondents are worried about the impact that fear of infection may have amongst audiences.

49% of exhibitors are worried about the impact of the pause in operations on audiences and the industry.

48% of respondents are anxious about the possible impact of new VOD practices and strategies.

33% of exhibitors are anxious about what will be available to screen when cinemas reopen.

Messaging

Exhibitors' outgoing communications on reopening will be made up of an offer of safety, togetherness, a request for support and patronage, and exciting programming.

58% of respondents will lead with 'Our venue is clean and safe' as a key reopening message.

Reopening activity

72% of venues want to mark reopening with a special event or activity.

33% of organisations will launch new pricing initiatives and **32%** will offer free tickets.

88% of exhibitors who completed the survey since mid-April are expecting to open with restrictions on operations in place. **12%** don't know. None were expecting to open without limitations.

Online engagement

58% of exhibitors who have completed Pressing Play have not undertaken any online activity with audiences.

22% will continue to offer activity online when their venues reopen.

SECTION 1
THE IMPACT ON OURSELVES AND OUR AUDIENCES

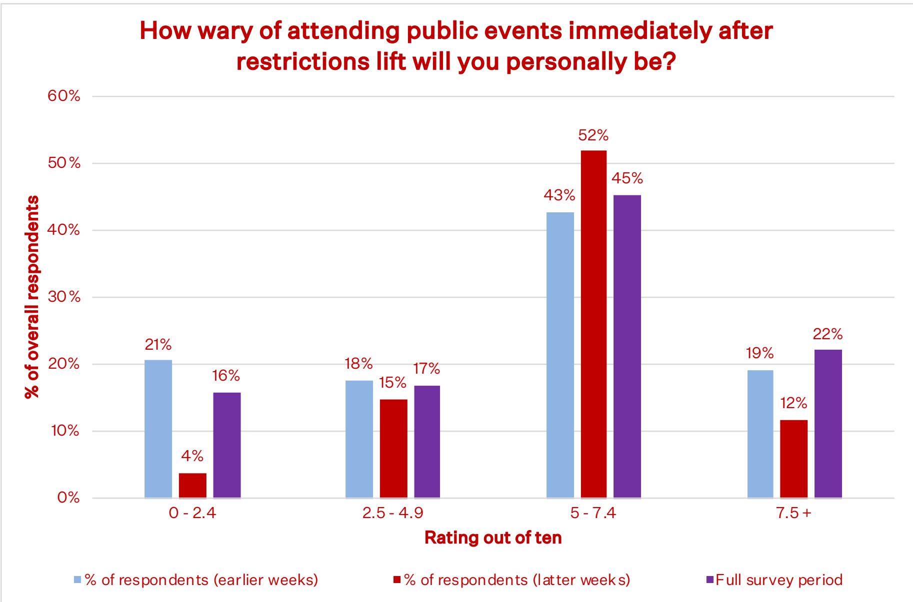
1.1 How do you feel about attending events?

The starting point for how to understand the current situation and react accordingly to it is by asking how we feel about the current situation and how we may ourselves react once Lockdown restrictions ease.

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

Over two thirds of us are anxious about returning to our social lives.

Rating out of 10	% of respondents
0 - 2.4	16%
2.5 – 4.9	17%
5 - 7.4	45%
7.5 +	22%



67% of all respondents rated themselves as over 5/10 on the 'anxiety scale'.

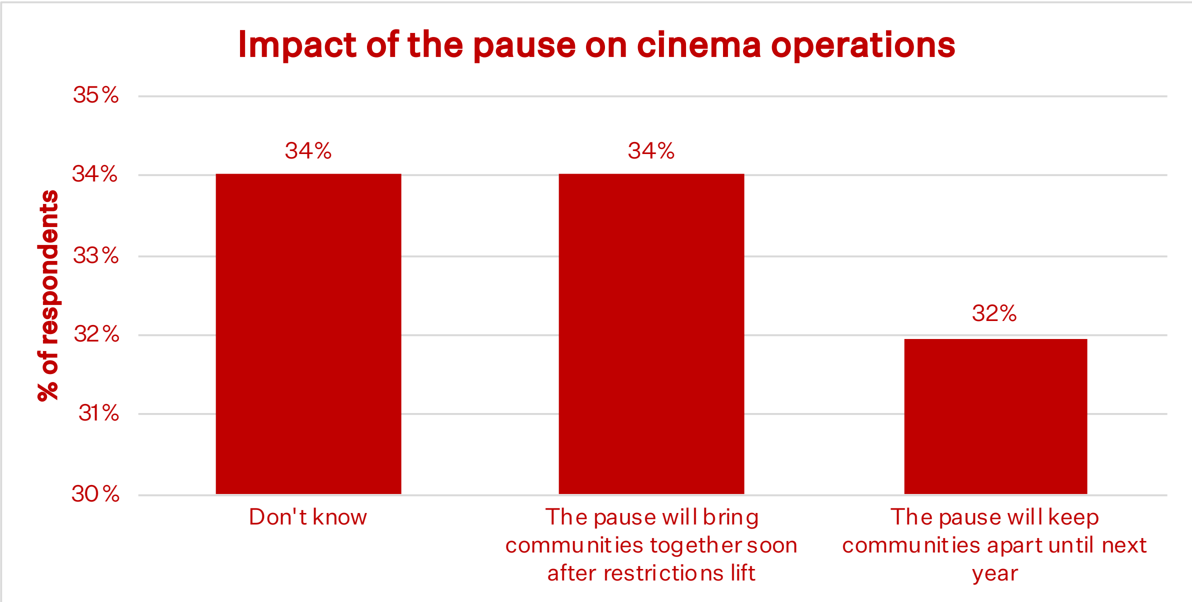
Early responses vs later responses

Comparing early responses to later responses, in the first three weeks of the survey 39% of respondents rated themselves as under 5/10.

This reduced to 19% of all responses after Tuesday 21st April.

1.2 How will the pause on operations impact our communities?

When asked if the pause will unite or divide audiences, a fairly even split in answers suggests that our future is unknown.



Our responses have evolved as we have developed more understanding of the situation.

Up until Monday 20th April, the statement '**The pause will bring communities together soon after restrictions lift'** was selected by 39% of respondents. It was selected by 25% of respondents after this date.

'The pause will keep communities apart until next year' was selected by 44% of later respondents as opposed to 27% in the first half of the survey period.

Answer choices	Early responses	Later responses
The pause will bring communities together soon after restrictions lift	39%	25%
The pause will keep communities apart until next year	27%	44%
Don't know	34%	31%

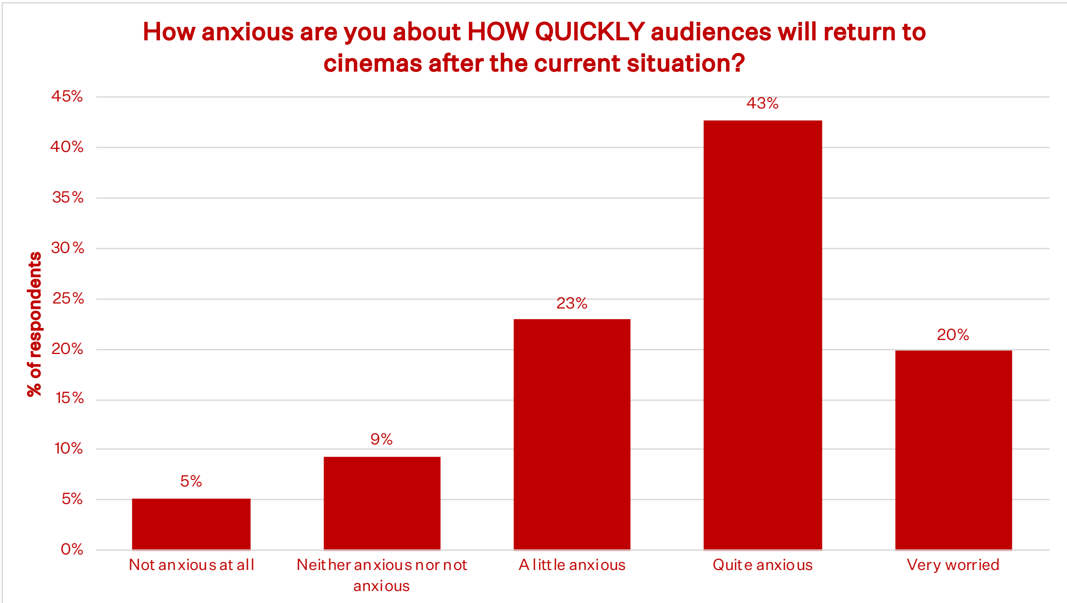
Whilst expectation of a longer period of time before we come back together has grown, around a third of us ‘don’t know’, with this selection remaining largely unchanged throughout the period of the survey.

1.3 When will our audiences return?

63% of respondents are quite anxious or very worried about the speed that audiences will return to cinemas.

However, only 20% of respondents classed themselves as **very worried**.

In later responses (from 21st April), as understanding of our complex situation has grown, **very worried** was selected by 31% of all responses.

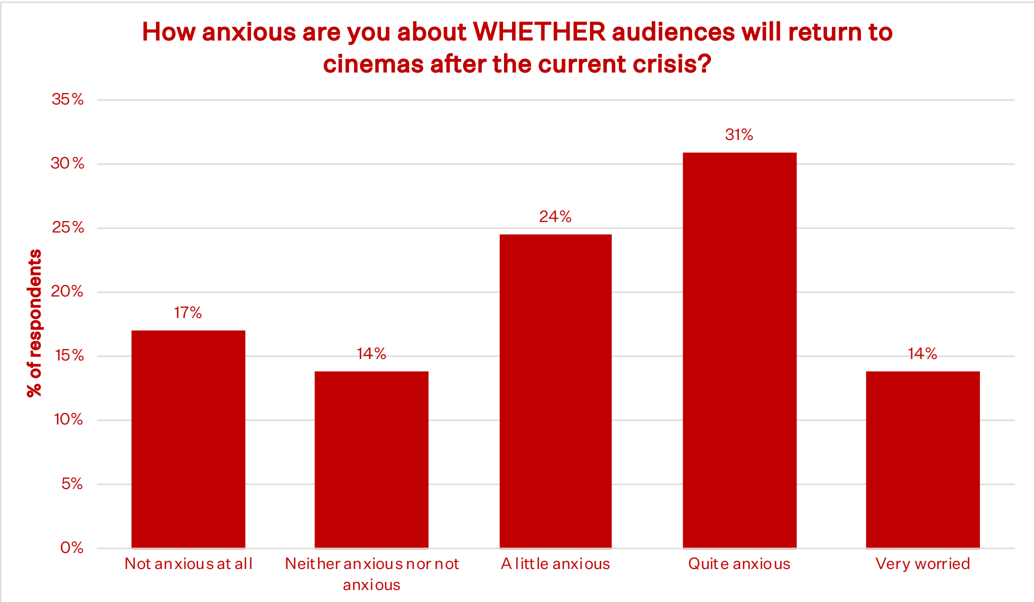


1.4 Will our audiences return at all?

45% of us are particularly worried that audiences may not return to cinemas at all after restrictions lift.

62% of respondents completing the survey following Monday 20th April rated themselves as **quite anxious** or **very worried** about this.

This was an increase from 37% of responses, as recorded in the first three weeks of the survey.



SECTION 2
OUR AUDIENCES AND OUR COMMUNICATIONS

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

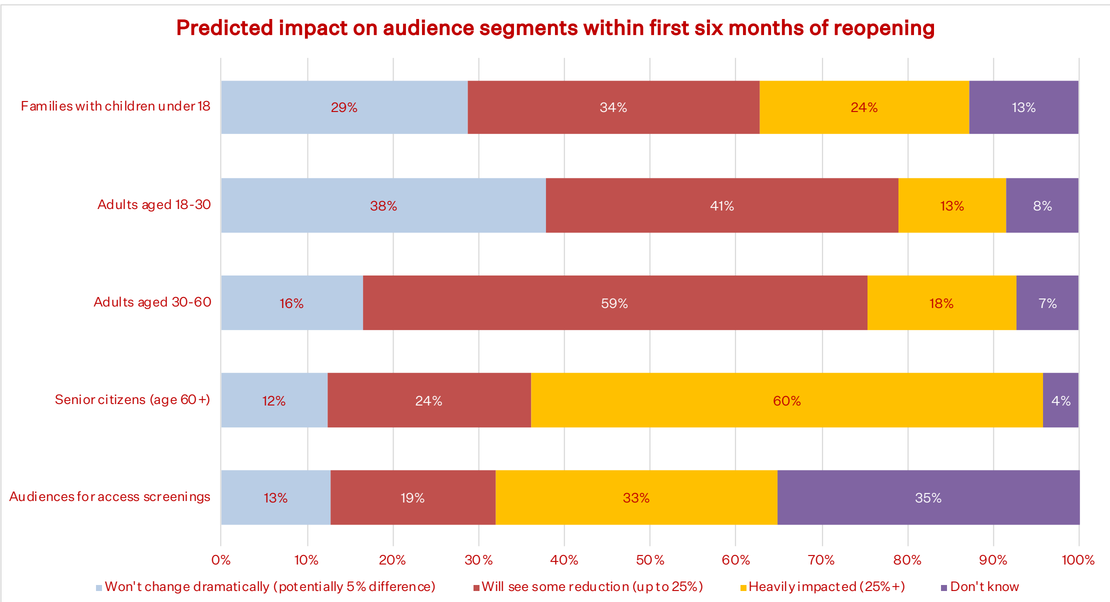
We are less anxious about the impact on younger adults' and families' cinema attendance.

60% of respondents to Pressing Play believe that attendance by **senior citizens** (aged 60+) will be greatly affected (over 25% reduction in attendance).

63% of respondents expect the **family** audience to be less impacted (up to 25% reduction).

Young adults aged up to 30 are the segment perceived to be the least impacted, with 79% of respondents expecting a reduction in attendance of 25% or under.

35% of exhibitors are uncertain about the effect of the pandemic on **audiences for access programmes**.



The levels of predicted impact for each segment are outlined in this table, with the highest percentages indicated.

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	29%	34%	24%	13%
Adults aged 18-30	38%	41%	13%	8%
Adults aged 30-60	16%	59%	18%	7%
Senior citizens (age 60+)	12%	24%	60%	4%
Audiences for access screenings	13%	19%	33%	35%

2.2 Changes to our expectations over time

Our concern is growing for the impact of the pause on all audience segments as time moves on.

Over the lifetime of the survey, our expectations of the impact on audiences changed. Between the first three weeks of the survey (1st - 20th April) and later weeks (21st April onwards) the following occurred:

Exhibitors are now predicting a greater impact on attendance by families
The percentage of respondents anticipating a reduction of more than 25% on future attendance by families rose from 15% to 45%.

Respondents became more certain about the impact on younger adults
The percentage of respondents predicting a minimal impact on attendance by younger adults remained virtually the same, but the amount of people selecting 'don't know' lessened, with a 15% increase to those expecting an impact of over 25% on attendance.

A greater percentage of respondents anticipated a bigger impact on adults aged 30-60
The percentage of respondents predicting a lower impact on attendance from adults aged 30-60 remained virtually identical to earlier responses to the survey.

However, the percentage of respondents selecting 'don't know' reduced, and there was a 15% increase in those predicting a greater than 25% effect on attendance for this audience segment.

Respondents became more aware of the potential impact on senior citizens
78% of later respondents predicted that senior citizens' attendance would be reduced by more than 25% (up from 50% of earlier responses).

A greater percentage of people predicted a greater impact on audiences for access programmes
44% of later respondents predicted that audiences for access programme attendance would be reduced by over 25%, compared to 27% in the survey's opening weeks.

The percentage of respondents selecting 'won't change dramatically' for audiences for access programmes reduced from 18% to just 3% of respondents.

The percentage of exhibitors choosing ‘don’t know’ in relation to the effect on audiences for access programmes remained identical across the earlier and later weeks of the survey.

2.3 Barriers to attendance

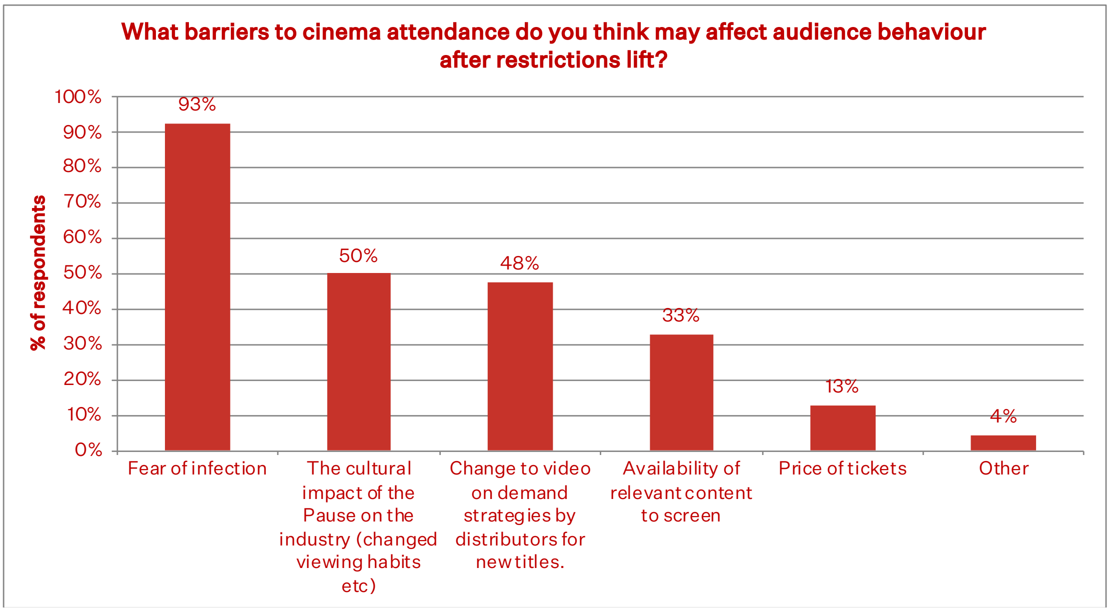
As well as the threat of COVID-19, exhibitors are also aware of the potential impact of the break in service.

When asked about potential barriers to attendance exhibitors **prioritised fear of infection**, with 93% of respondents selecting this and placing it as the greatest obstacle.

Aside from the risk presented by possible infection, the **cultural impact of the pause** (50%) and **change to VOD strategies** (48%) represent major hurdles to overcome for many exhibitors.

In addition 33% of respondents were worried about the **availability of relevant content** - what we may have available to screen in our cinemas.

Of the responses supplied under **other**, lack of disposable income for audiences and the speed with which we may need to mobilise and reopen our venues were mentioned.



2.4 Encouraging audiences back to cinemas – what will our most powerful messages be?

Togetherness, safety, the value of our spaces within our communities and our vulnerability will form the backbone of our messaging.

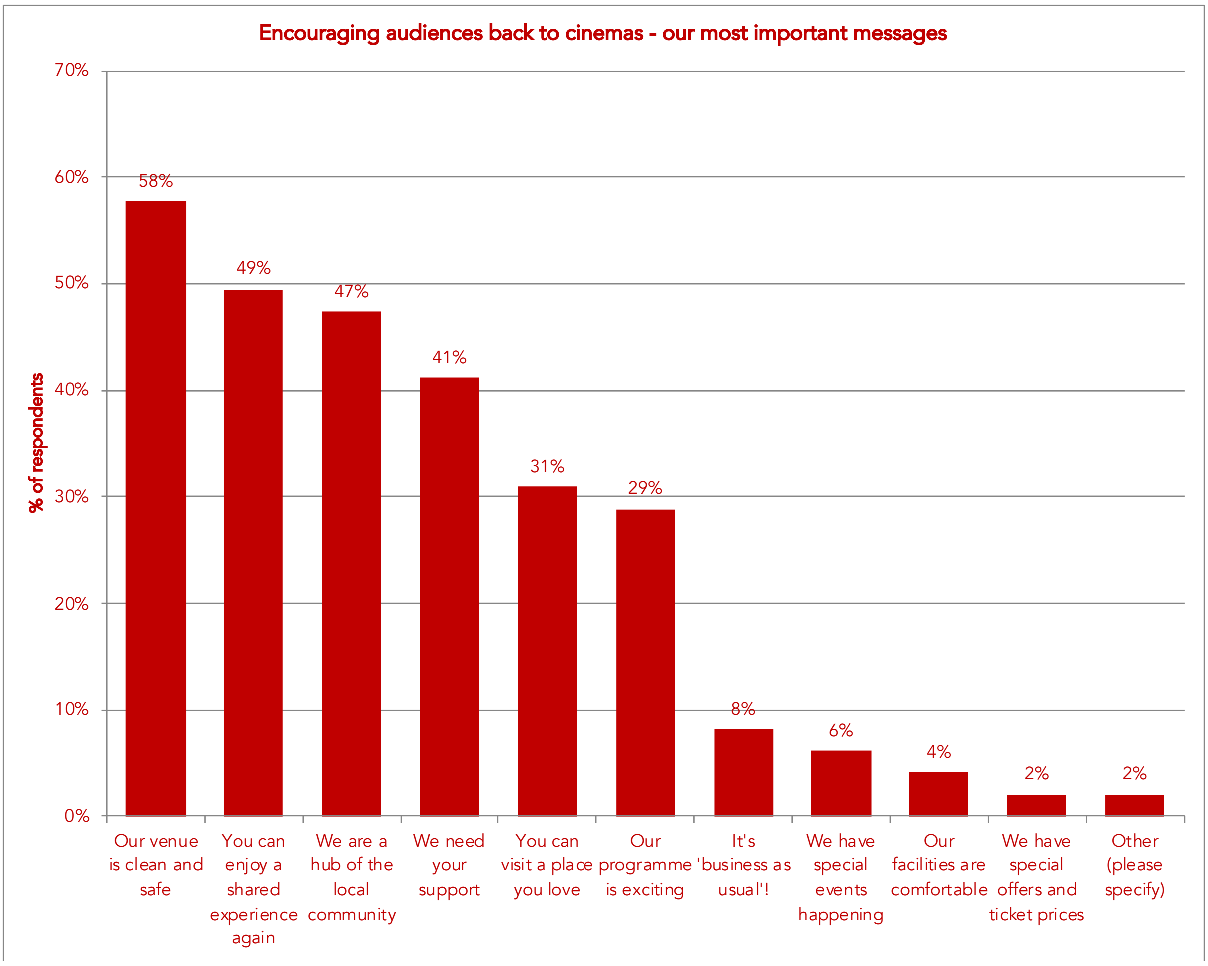
The four most important messages selected by exhibitors to incorporate into reopening communications have emerged as:

Our venue is clean and safe (selected by 58% of respondents).

You can enjoy a shared experience again (selected by 49% of respondents).'

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

We need your support (selected by 41% of respondents).



2.5 How time has affected our choices

Safety has become of paramount importance in recent weeks.

Over the lifetime of the survey and our understanding of the impacts of COVID-19 grew, exhibitors' choices have altered.

Between the first three weeks of the survey and later weeks the percentage of respondents selecting **our venue is clean and safe** almost doubled, rising from 45% to 84%.

Programme (34% to 19%) and requests for support (45% to 31%) became of less relevance.

The desire to lead with messaging that reflected a 'return to normal' and to 'come back' (**You can enjoy a shared experience again**) diminished.

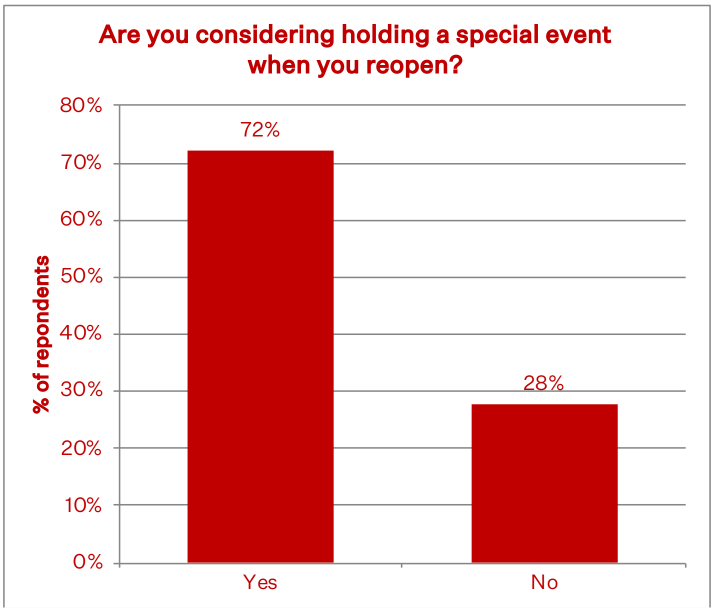
The value of offering a comfortable experience was selected by a greater percentage of respondents (**our facilities are comfortable**), rising from 2% to 9%.

Answer Choices	Early responses	Later responses	Difference
Our venue is clean and safe	45%	84%	+39%
Our facilities are comfortable	2%	9%	+8%
We have special offers and ticket prices	2%	3%	+2%
Other (please specify)	2%	3%	+2%
We have special events happening	8%	3%	-5%
We are a hub of the local community	50%	44%	-6%
You can enjoy a shared experience again	52%	44%	-8%
It's 'business as usual'!	11%	3%	-8%
You can visit a place you love	34%	22%	-13%
We need your support	45%	31%	-14%
Our programme is exciting	34%	19%	-16%

SECTION 3
RETURNING

3.1 Reopening events

Over two thirds of exhibitors want to make a special occasion of our return to business.



We want our audiences to feel close to us.

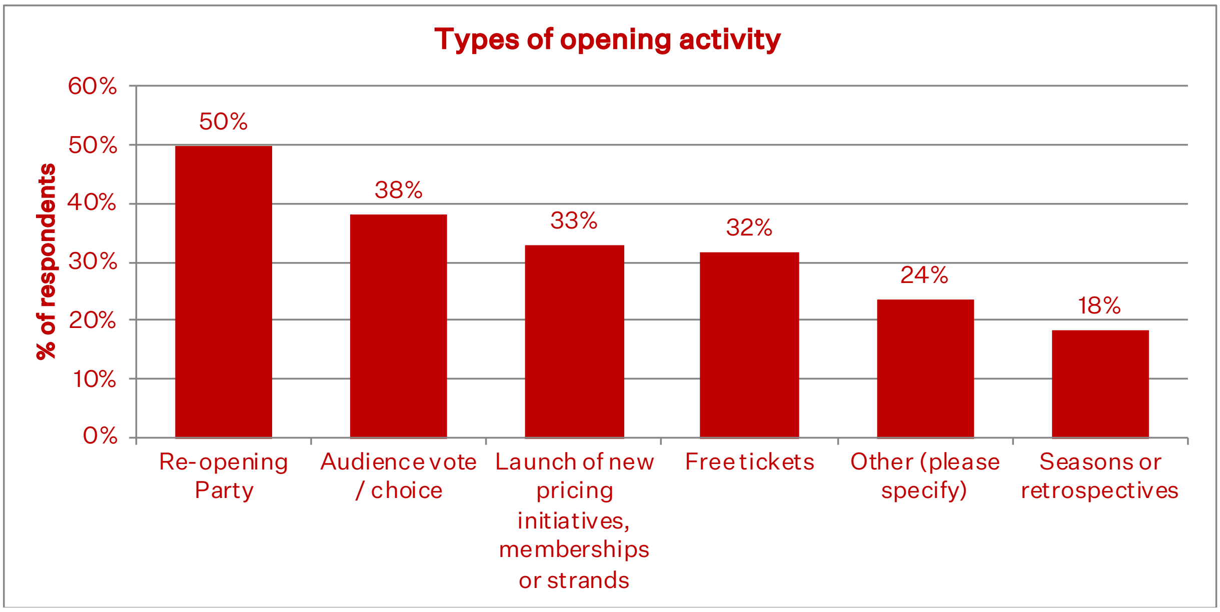
Exhibitors want our reopening activities to unite the audience and our organisations.

This underlines the answers selected by respondents in the messaging section of this survey (page 18).

The top two methods selected were **Re-opening party** and **audience vote/choice**.

We want to make our activities accessible via price too, with **launch of new pricing initiatives** and **free tickets** each selected by a third of respondents.

We want to be together again and make our spaces as accessible as possible.



3.2 How time has affected our choices

We want to get our doors open, and we want to earn.

Over the lifetime of the survey and our understanding of the impact of COVID-19 has grown, our selections have changed.

Answer choices	Early responses	Later responses	Difference
Launch of new pricing initiatives, memberships or strands	23%	54%	+31%
Seasons or retrospectives	15%	25%	+10%
Other (please specify)	25%	21%	-4%
Audience vote / choice	40%	33%	-7%
Free tickets	37%	21%	-16%
Re-opening Party	58%	33%	-24%

(Under responses submitted under 'Other' no united themes emerged, beyond some respondents suggesting that it was too soon to make plans).

In later responses, a greater percentage of exhibitors recognised that price may be a barrier to attendance for audiences returning to our venues, selecting **launch of new pricing initiatives** (54%) and **free tickets** (21%). However, there was a move away from offering free tickets between the first weeks and later weeks of the survey.

A higher percentage of respondents selected **seasons or retrospectives** as potential initiatives in later weeks, increasing in popularity from 15% to 25%.

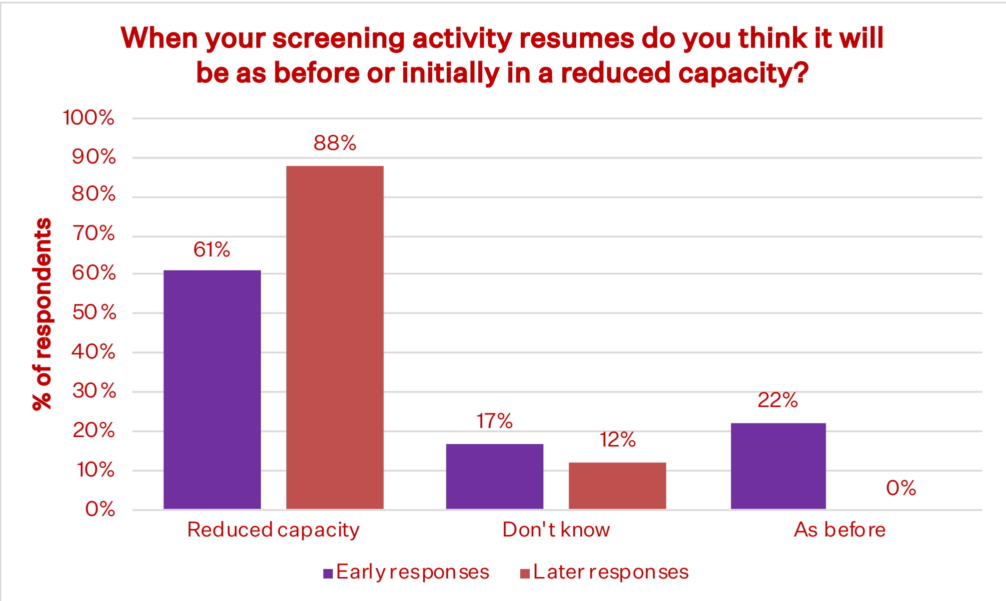
Less exhibitors selected '**Re-opening party'** in later weeks (decrease from 58% to 33%).

3.3 Reopening and seating capacity

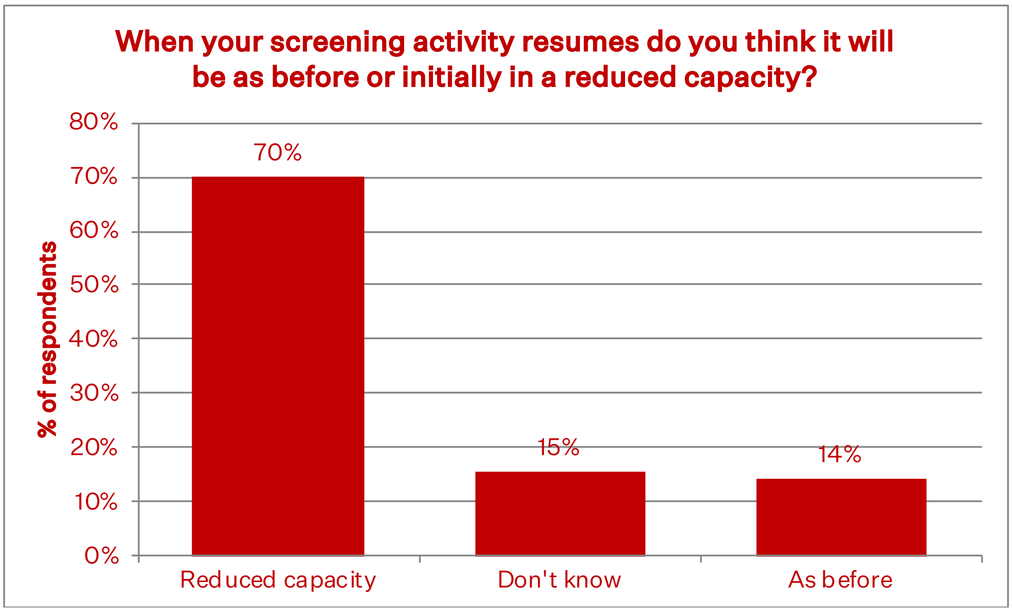
When Pressing Play was first launched it was unclear as to how limited seating capacities in our cinemas may need to be upon reopening.

Responses therefore differed between the earlier and later weeks of the survey as exhibitors started to consider how social distancing may impact their operations.

Here we see how greatly.



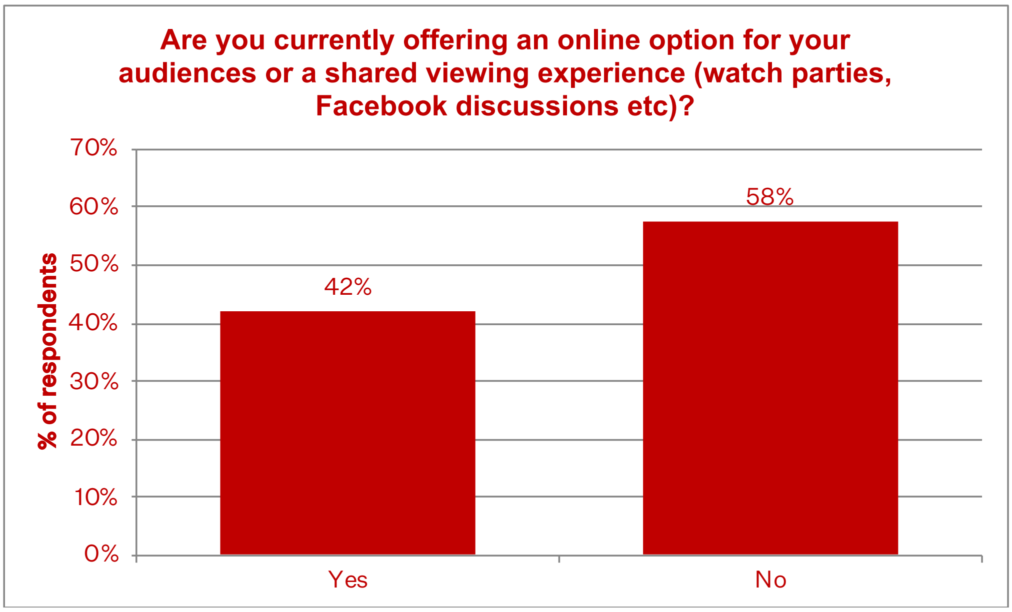
Here is the overall response over the survey's entire lifetime.



3.4 Online Activity

Throughout lockdown online engagement such as watch parties or creating online watch lists have provided the opportunity for exhibitors to maintain a valuable connection to their audiences, preserving public profile and visibility and the opportunity to curate content.

Almost 60% of exhibitors who have completed Pressing Play have not undertaken any online activity with audiences.



Of those exhibitors that have engaged with audiences online in this fashion, 61% of respondents were creating **watchlists** or undertaking **watch parties**, 14% were holding a regular online **quiz** and 22% were **recirculating signup offers from streaming services** such as BFI Player or MUBI.

3.5 Will this activity continue?

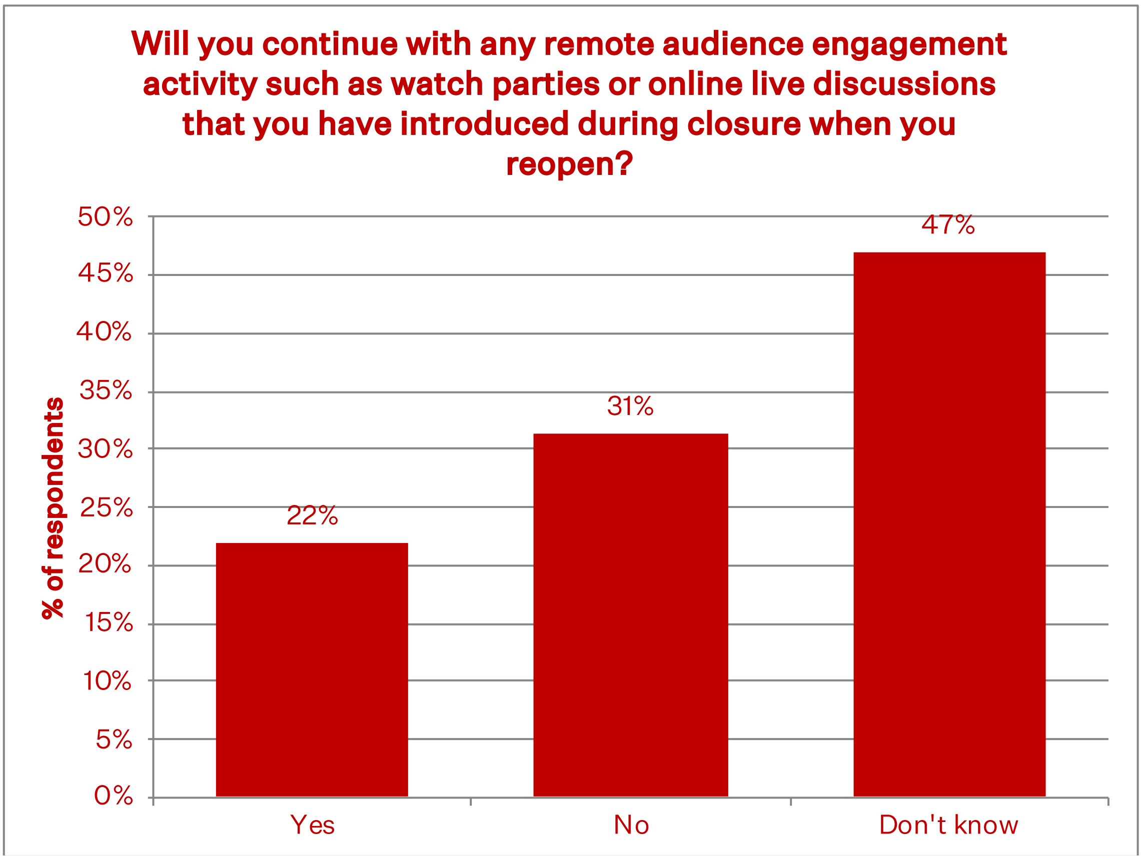
Only 22% of exhibitors will continue to present activity online in the way that they are now.

Of the exhibitors currently running online activity, 45% of respondents will continue to incorporate it into their activity post-Lockdown. 20% of respondents have said that they will not.

This split of responses does not greatly change through the lifetime of the survey.

Of ALL respondents to Pressing Play, 47% are unsure as to whether they will offer online activity of this type after Lockdown or not.

Only 22% of the exhibitors surveyed state that they will continue to engage with audiences in this way.



SECTION 4
Additional comments

Respondents' further comments revolved mainly around three areas of concern:

1) **Safety of customers and staff / impact of social distancing.**

   "Safety of staff and Customer will be most important."

   "I think we've all learned new social distancing and that won't go away quickly so naturally people will be wary of big public gatherings initially."

   "Social distancing and thus reduced capacity will hit income for commercial film hugely."

   "We have a loyal following and feel that it is natural for our audience to want to feel that their personal safety is not at risk or compromised by attending public gatherings."

   "[We must] cater for safety of both staff and customer."

2) **Availability of relevant content to screen / impact of VOD strategies on customer viewing habits.**

   "The big concern is a change in viewing habits. All these free/cheap signups to streaming services will do significant damage to the cinema industry."

   "I have a big concern about what, if anything, will be available to book once we can reopen - particularly if cinemas in the US are still closed. We will need some high-profile releases to tempt audiences back in significant numbers."

   "As a venue that has limited success with arthouse, doc and archive/classic the moving of tentpole releases is a worry."

   "I think the move to online streaming by the film industry is going to be very damaging to cinemas, habits will change in the same way as online shopping has killed the high street."

   "Am wary that senior audiences that traditionally kept away from streaming content will have now discovered the positive aspects and will choose to stay at home for high quality arts cinema choices."

3) **Uncertainty about whether venues can survive the crisis.**

“Concerned about the effect on our Arts Venue which has a wider role and could suffer.”

“I think it's going to hit our core audience (older people) the most.”

“I'm slightly worried about how long the period of re-adjustment will last.”

“Plenty of businesses might not survive giving rise to new buildings to convert.”

Although exhibitors are looking to the future too:

“It would be beneficial if we could get a body behind cinema exhibition to help promote reopening.”

“I think it will take some time for things to return to 'normal' but at some stage I think it will happen.”

“Our audience is clamouring to get back in.”

Section 5
Film clubs, cinemas and arts centres

With respondents to Pressing Play representing different types of organisations across the exhibition spectrum, answers to the survey differed slightly across film clubs/societies, cinemas and arts centres.

Cinemas are most likely to offer some kind of online activity for their customers during closure.

47% of respondents from cinemas stated that they were presenting activity online, whilst 38% of respondents from arts centres and 33% of film clubs/societies said that they were doing so.

The idea of re-opening with a special event or activity is equally popular across every type of organisation.

Cinemas	69%
Arts Centres	72%
Film clubs/societies	78%

Cinemas and arts centres are more anxious about the speed of audiences returning.

Whilst cinemas (67%) and arts centres (76%) are anticipating a slow return of audiences, only 18% or respondents from film clubs/societies stated that they were particularly worried about this.

Beyond concerns about fear of infection being a barrier, each type of exhibitor has particular worries.

Whilst 46% of responses from cinemas cited **availability of content** as a major concern, just 25% of arts centres and 11% of film clubs/societies did so.

A higher percentage of respondents representing arts centres (61%) and film clubs/societies (56%) thought the **cultural impact of the pause** would be a major hurdle. Responses from cinemas totalled 44%.

The impact of **new VOD strategies** was of greater concern to those representing arts centres (selected by 54% of respondents) and film clubs/societies (50%) than to those representing cinemas (42%).

Answer choices	Cinemas	Arts Centres	Film clubs/societies
Fear of infection	92%	93%	94%
Cultural impact of the pause	44%	61%	56%
Availability of content	46%	25%	11%
Impact of new VOD strategies	42%	54%	50%

Film clubs/societies are more inclined to include their programming as a leading message within their relaunch communications.

Alongside **Our venue is clean and safe** (67%) and **You can enjoy a shared experience again** (50%), 50% of respondents from film clubs/societies stated that they would lead with a variation on **our programme is exciting**.

For cinemas, the three most selected messages were **Our venue is clean and safe** (53%), **You can enjoy a shared experience again** (51%) and **We are a hub of the local community** (45%).

For arts centres the top three selections were **Our venue is clean and safe'** (62%), **We are a hub of the local community** (52%) and **We need your support** (52%).

Respondents from cinemas and film clubs/societies are more hopeful about the pause bringing audiences together than those representing arts centres.

Answer choices	Cinemas	Arts Centres	Film clubs/societies
It will bring us together	37%	24%	45%
It will keep us apart	35%	34%	22%
Don't know	28%	41%	33%

Almost one third of cinemas will continue presenting online activity when they reopen, but exhibitors are mostly uncertain about their value.

30% of respondents from cinemas said they would definitely continue to offer activity such as quizzes, watch parties or watch lists for audiences online as they have during closure. Only 11% of respondents representing arts centres and 17% of respondents from film clubs/societies suggested that they would do so.

37% of cinemas, 68% of arts centre and 39% of film clubs/societies are uncertain if they will or won't continue this activity.

Reduced screenings / capacity is of the greatest concern for cinemas.

82% of respondents from cinemas are expecting to open in a reduced capacity (arts centres 69%, film clubs/societies 44%).

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Appendix 1: About Jonny Tull

Jonny Tull is a cinema and arts consultant and works with venues and exhibitors around the UK to develop their businesses, programming and audiences.

He currently leads the Filmhouse Sunderland project and has worked with clients including Warwick Arts Centre, Square Chapel Arts Centre, Halifax and Jam Jar Cinema, Whitley Bay.

Jonny also provides film distribution support for filmmakers. Recently he has released the films HOME, CLIMBING BLIND, PUSH and PRISONERS OF THE MOON into UK cinemas.

Jonny is an Advisor on the British Film Institute's Film Audience Network Advice & Experience scheme and teaches on the Film Studies MA at Newcastle University.

He embarked on a freelance career after working at Newcastle's Tyneside Cinema for 22 years, where he held senior management roles in marketing and programming.

He is Chair of the Board of Trustees at the Queen's Hall Arts Centre, Hexham.