

Culture Restart Cinema Tracker

Key findings

Wave 1: 17 April – 16 May 2021

Survey overview

The **Culture Restart Cinema Tracker** is designed to give independent cinemas a way to check in with their audiences throughout the reopening process, understand sentiment and build a national benchmark.

Cinemas are provided with individual links to send out to their email database or post on social media, and have access to results in real time.

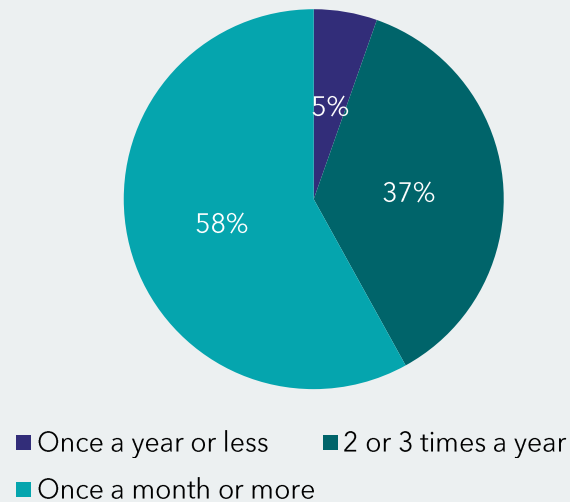
The survey was developed in collaboration with the Independent Cinema Office. It is part of the **Culture Restart Toolkit**, delivered by the Insights Alliance – Indigo Ltd, Baker Richards and One Further.

Respondent profile

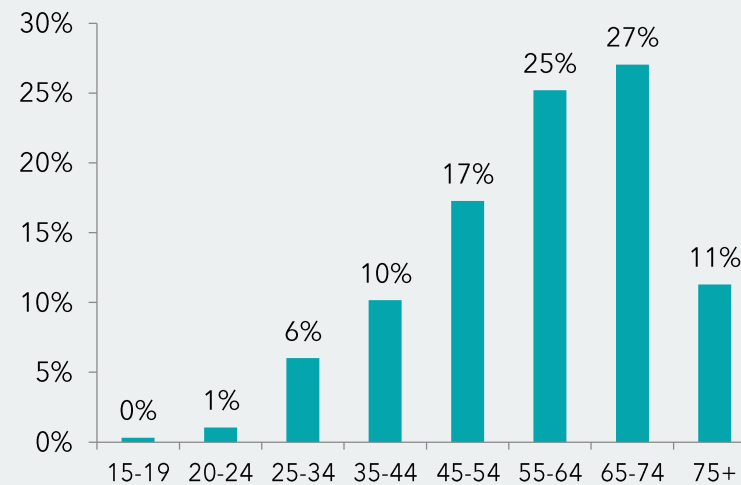
16 independent cinemas sent out the survey via email and social media

5,371 previously frequent cinema goers responded during Wave 1

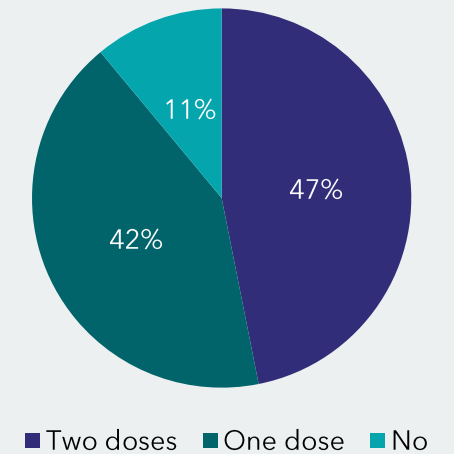
Cinema attendance pre-Covid



Respondent age



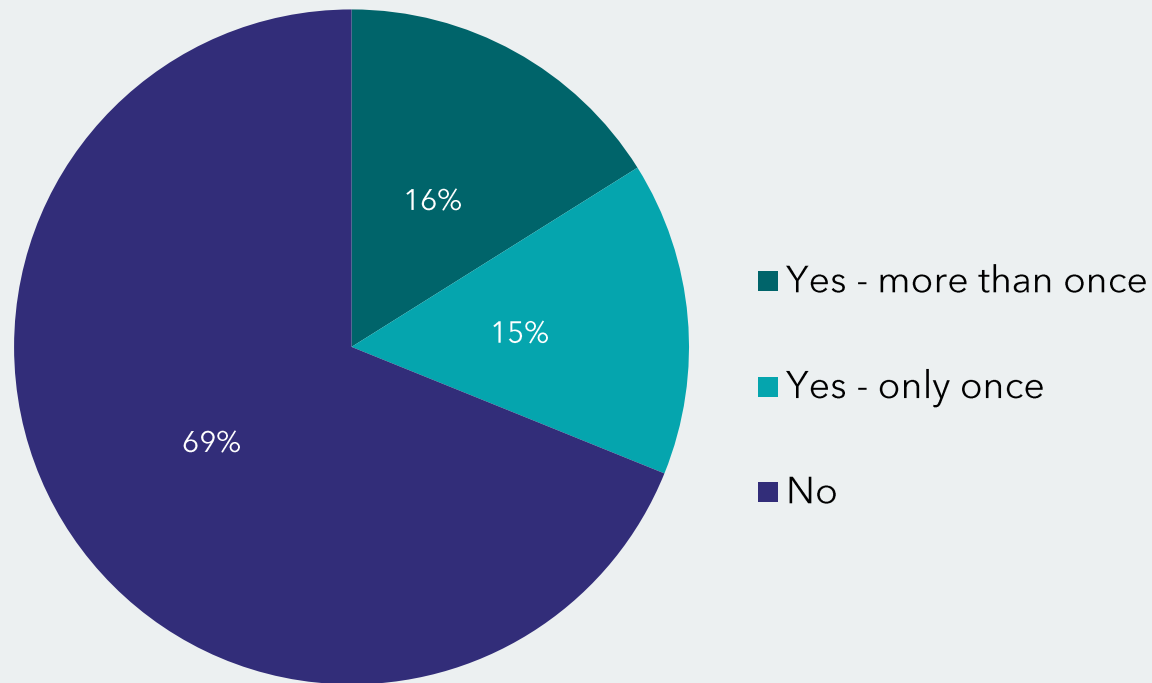
Vaccination status



KEY FINDING

Less than a third of independent cinema attendees went to the cinema in the period when they were open between lockdowns in 2020.

Q: Did you go to the cinema when they were able to reopen after the first lockdown in 2020?



Key figures:

69% of respondents did not go to the cinema in the period that they were able to reopen in 2020.

A small group of **16%** attended the cinema more than once in that period.

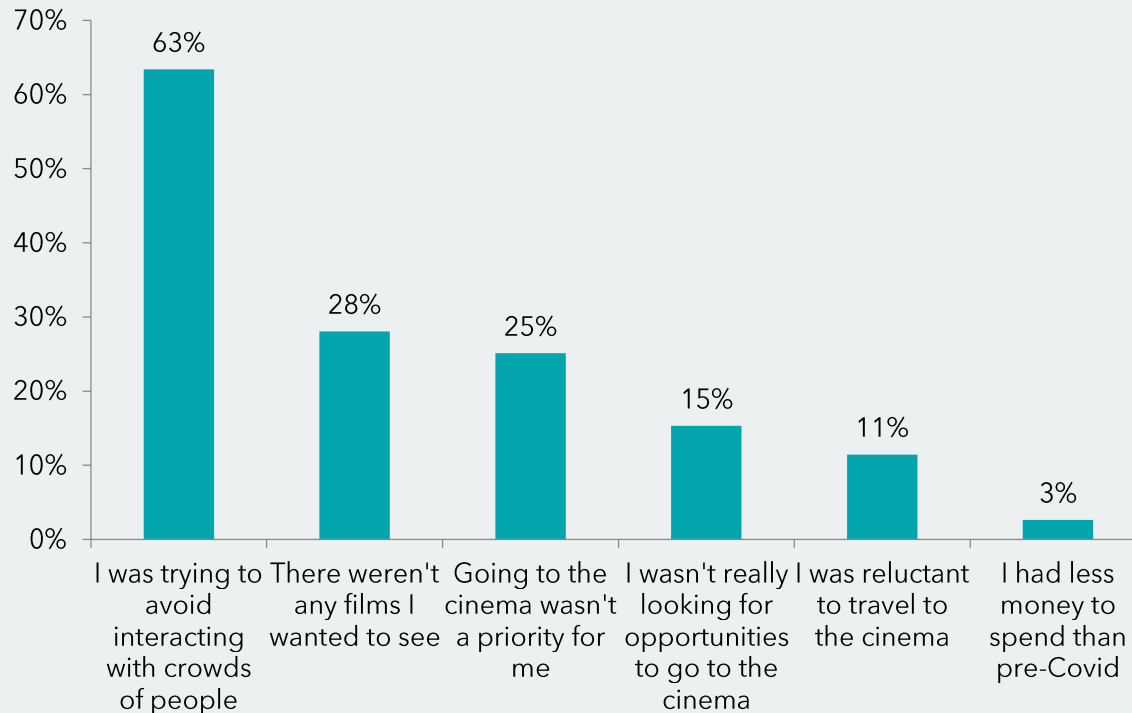
ICO overview:

Cinemas were able to reopen in July, which is traditionally a slow period for independent cinemas, as warmer weather and an absence of films aimed at their audience can lead to a downturn.

This meant reopening at this time was especially challenging, yet many independent cinemas were achieving sell-out shows in late August and September (albeit at reduced capacities), with films such as *Rocks* and *Saint Maud* proving successful.

Q: Why is that?

[Questions asked to those who did not return]



Key figures:

The majority of respondents (**63%**) said they did not attend because they were trying to avoid interacting with crowds of people.

However, significant numbers also said that there wasn't anything they wanted to see (**28%**) or that going to the cinema wasn't a priority at that time (**25%**).

ICO overview:

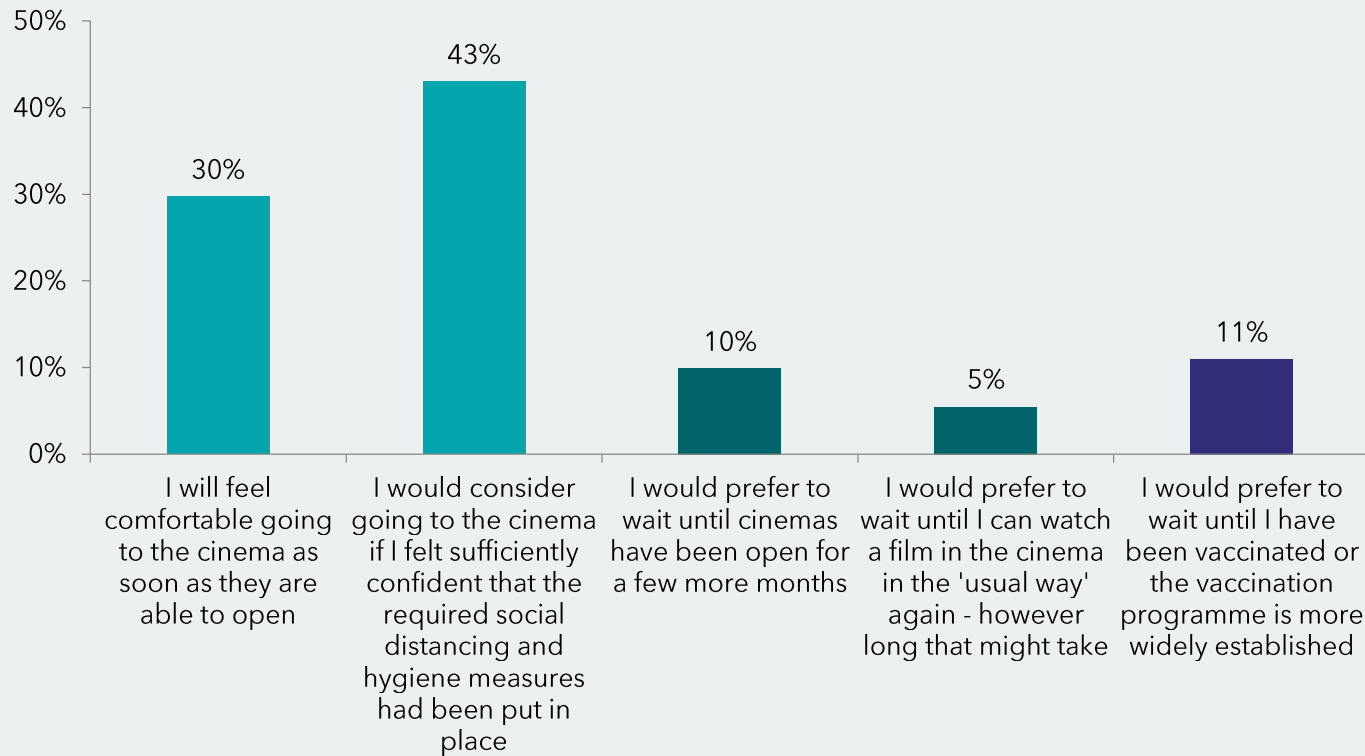
Most of the studios held back their releases whilst cinemas were operating at reduced capacity and waited for the results of *Tenet*, which was seen as a key film to bring mass audiences back to the cinema. This all contributed to a wider narrative that there were no films worth seeing, a narrative that hit commercial cinemas especially badly.

Independent cinemas were able to show a broad range of films and their audiences mostly continued to look beyond blockbusters for the greater depth and variety on offer at independent cinemas. So the evidence here shows that the view that there were few films worth watching is held by a small proportion of the independent cinema audience.

KEY FINDING

The **majority** of independent cinema goers say they are **ready to return** and over two thirds are planning to book within the next 3 months.

Q: Which of the following statements best fits how you're currently feeling about coming back to the cinema?



Key figures:

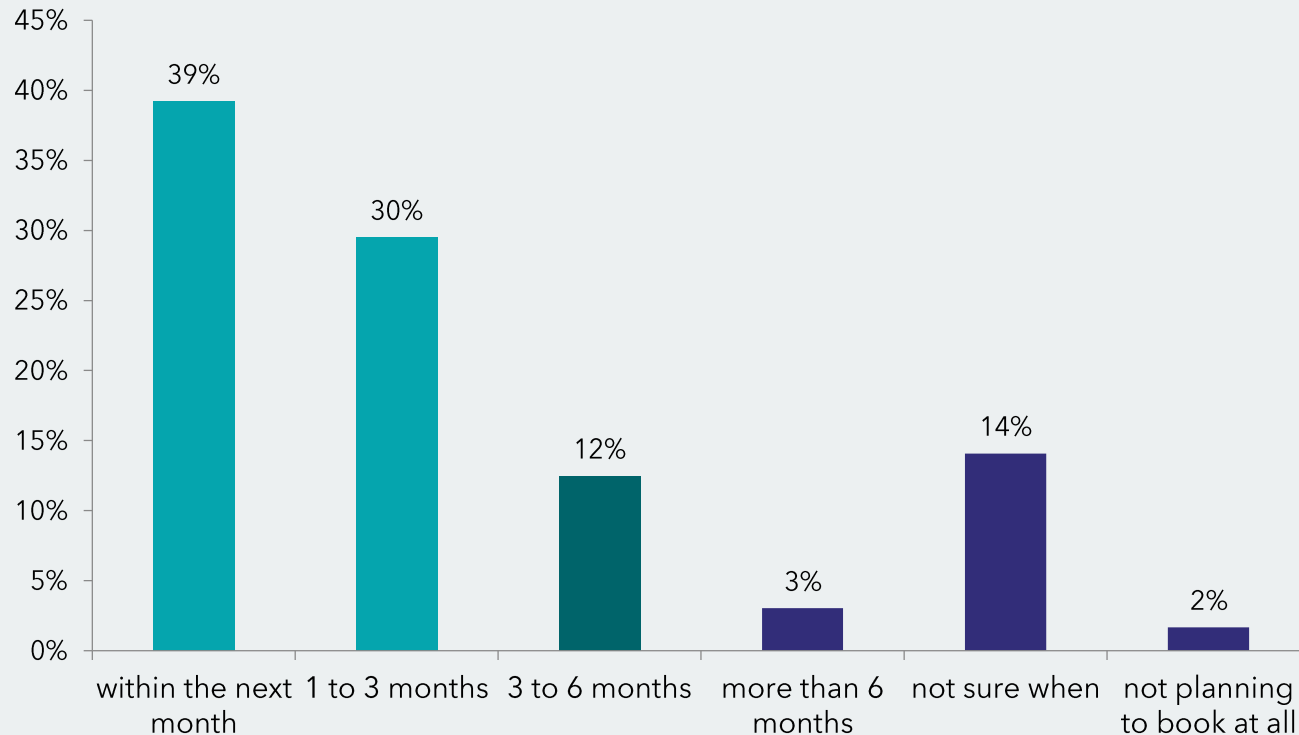
3 in 4 respondents said they will feel comfortable returning to cinemas as soon as they are able to reopen, if they are happy with the Covid safety measures in place.

1 in 4 respondents said they wanted to wait for cinemas to be open for a few more months, for restrictions to be fully eased, to receive a vaccine themselves or for the time when the vaccination programme to be more widely established.

ICO overview:

A cautious return to cinema-going was understandable, although many customers reported feeling safe in cinemas thanks to the high standard of protective measures taken. There has not been a single Covid case linked to cinemas in the UK.

Q: If you had to say now when you think you'll be ready to BOOK cinema tickets, which option would you choose?



Key figures:

Almost **70%** of respondents said they would be ready to book cinema tickets within the next 3 months – with **39%** saying they'll be ready to book within the next month.

However, almost **20%** said they won't be ready to be for more than 6 months, not at all or they're not sure when.

ICO overview:

The roll out of the vaccination programme combined with a strong slate of films bodes very well for cinemas over the next few months.

Anticipated films that have been held back, such as *Another Round*, *The Father* and *Candyman*, offer independent cinemas high quality films throughout the summer period.

KEY FINDING

Independent cinema goers are **confident** that their cinemas will keep them safe – but **certain measures remain essential** to their return.

Q: How confident do you feel that the cinema who sent you this survey will have the appropriate measures in place for the following?



Key figures:

Independent cinema goers have **high levels of confidence** that the cinemas they attend would have appropriate measures in place for their safety.

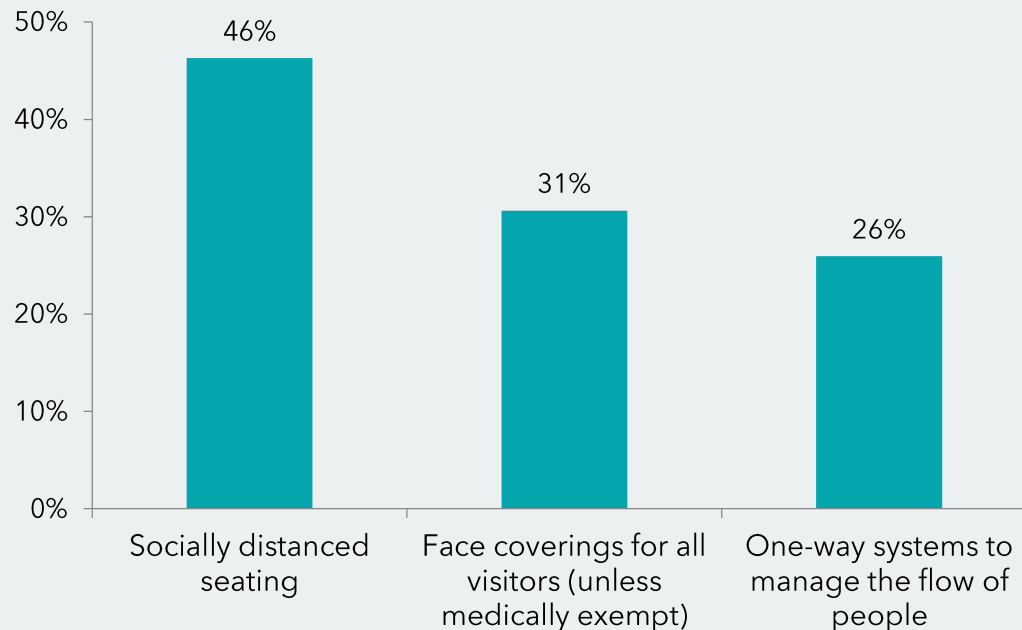
ICO overview:

Independent cinemas did a great deal of work to put in appropriate safety measures during the first lockdown, which included improving ventilation systems, designing one-way routes around the buildings, bringing in PPE for staff, encouraging mask-wearing at all times and ensuring social distancing was enforced in the auditoriums.

This experience has given customers greater confidence to attend independent cinemas who have demonstrated they are putting audience and staff safety first.

Q: How do you feel about the following measures being implemented or considered at cinemas or other cultural venues?

Top 3 measures rated: 'This would be essential for me'



Key figures:

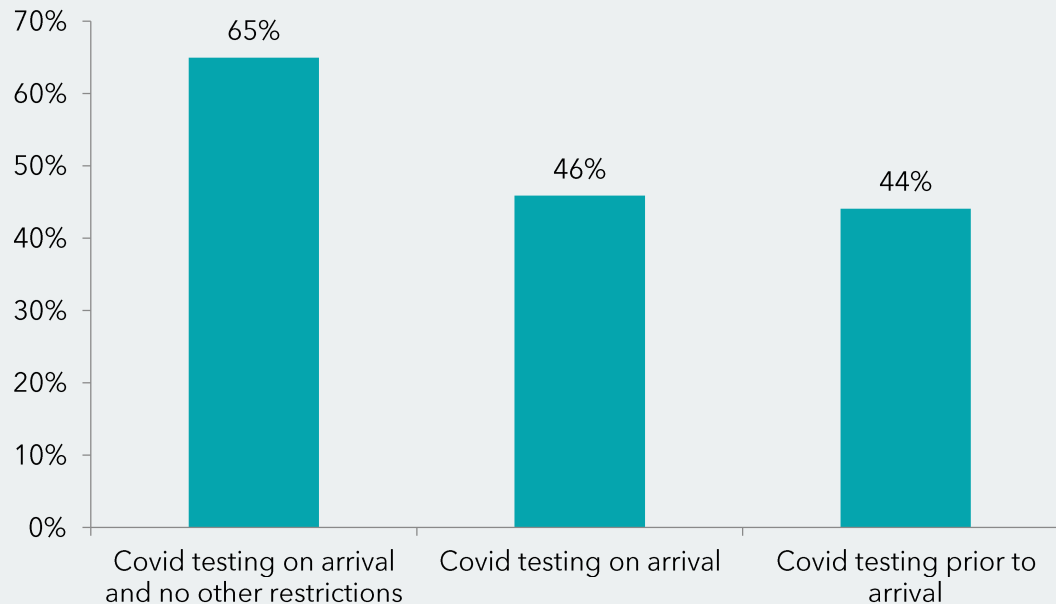
Nearly half (**46%**) of respondents said that socially distanced seating was 'essential' to their return. Just under a third also expect face masks (**31%**) and one-way systems (**26%**).

ICO overview:

Cinemas have an advantage over other entertainment venues as they can control where people sit in auditoriums to ensure the safest environment for everyone.

Q: How do you feel about the following measures being implemented or considered at cinemas or other cultural venues?

Top 3 measures rated: 'I feel uncomfortable about this'



Key figures:

The majority (**65%**) of respondents were not comfortable with the idea of there being no restrictions in place subject to a Covid test.

Significant numbers were uncomfortable with any testing.

ICO overview:

Even if the requirement for social distancing is removed in June, many cinema operators will choose to retain an element of distancing and current safety measures for some time to ensure customers feel safe in their buildings.

GET INVOLVED

The survey will continue to track cinema attendee sentiment in the coming weeks.

If you are an independent cinema, find out more and sign up to take part:

indigo-ltd.com/cinema

PARTICIPATING CINEMAS

Backyard Cinema
Barbican
Bertha DocHouse
Buxton Film
C Fylm (Creative Kernow)
Chelmsford City Theatres
Ciné Lumière/Institut français du Royaume-Uni
Curzon Cinemas
Depot cinema
Dulverton Town (Community) Hall
Dunlop Community Cinema
Hebden Bridge Picture House
Jennifer G. Robinson
kinokulture
Light House
Little Wing Film Festival
Lucem House Community Cinema Plus+
Luxe Cinema Wisbech

Memo Arts Centre
Mockingbird Cinema
Nightflix
Northampton Filmhouse
Plymouth Arts Cinema
Pontardawe Arts Centre
QUAD, Derby
Regal Film Society Minehead
Regent Centre (Christchurch) Ltd
Robert Burns Centre Film Theatre
Rusthall Community Cinema
Saffron Screen
Screen St Ives
Stroud & District Film Society
The Courtyard Arts Centre
The Magic Lantern Cinema
Theatr Colwyn
Totnes Cinema CIC
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