

Reopening Cinemas

The Independent Way

The Independent Cinema Office is the UK's national body that supports independent cinemas, film festivals and exhibitors of all forms. Our mission is to develop an open, challenging and thriving film sector. We want everyone to have access to cinema that nourishes the soul and changes lives.

We conducted a survey to help us create a picture of the independent sector's views on industry proposals for reopening cinemas.

41%
CANNOT
OPEN

41% of venues do not think they will be able to reopen with social distancing measures

50%
LOSS IN
CAPACITY

50% loss of seating capacity, screenings, concession sales, and other losses

SEPTEMBER
OPENING
EARLIEST

the majority of venues think they won't be able to open until September

20%
INCREASED
COSTS

venues think there will be an increased cost of 20% to put in place H&S & social distancing measures

Our Summary

The headlines

Despite government suggestion that cinemas could reopen in July, many smaller independent venues are reluctant to open, citing safety of staff and audiences as the main concerns.

They feel pressure from the commercial sector and the industry as a whole to open when it is not actually financially viable, practical or even safe to do so.

Given that a significant element of cinema experience is the collective experience of watching a film together and the sustainability of operating budgets rely on crowded auditoriums for many it does not seem realistic to expect that this be able to happen again before at least September 2020.

This feeling is exacerbated by the demographic for independent film audiences skewing older and therefore the most at risk from the virus, this is also true for volunteers without whom many providers would not be able to run.

While 59% said they could enforce socially distancing 41% did not think they could enforce these measures in their venues and therefore would be unable to open. The practicalities of the venue and the need for large audience numbers to remain financially viable are the two reasons cited for this.

While some think they may open in July or August, more think September, and a significant number don't expect to reopen until next year.

Most predict at least a 50% loss of seating capacity, number of screenings, concession sales and advertising revenue among other losses.

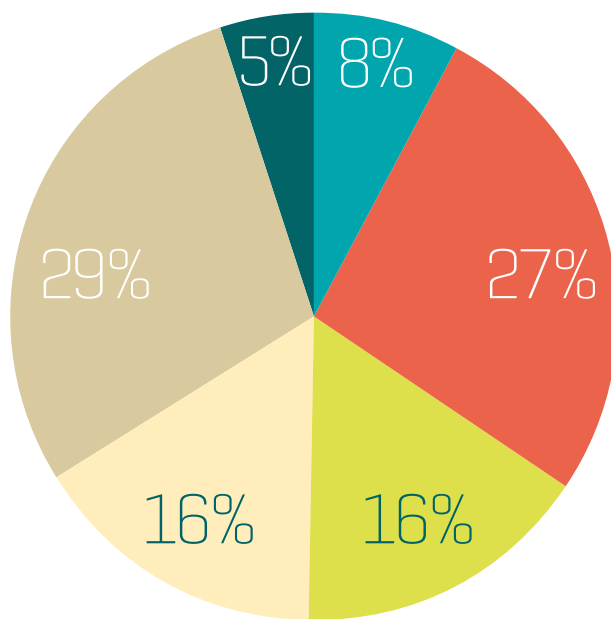
Most venues feel they would only survive a maximum of 3 months with these measures in place.

There is a huge amount of uncertainty around reopening from the independent exhibitors, from Health and Safety, cost of PPE measures, audience willingness to return, availability of content. Many operators find it very hard to see the way forward.

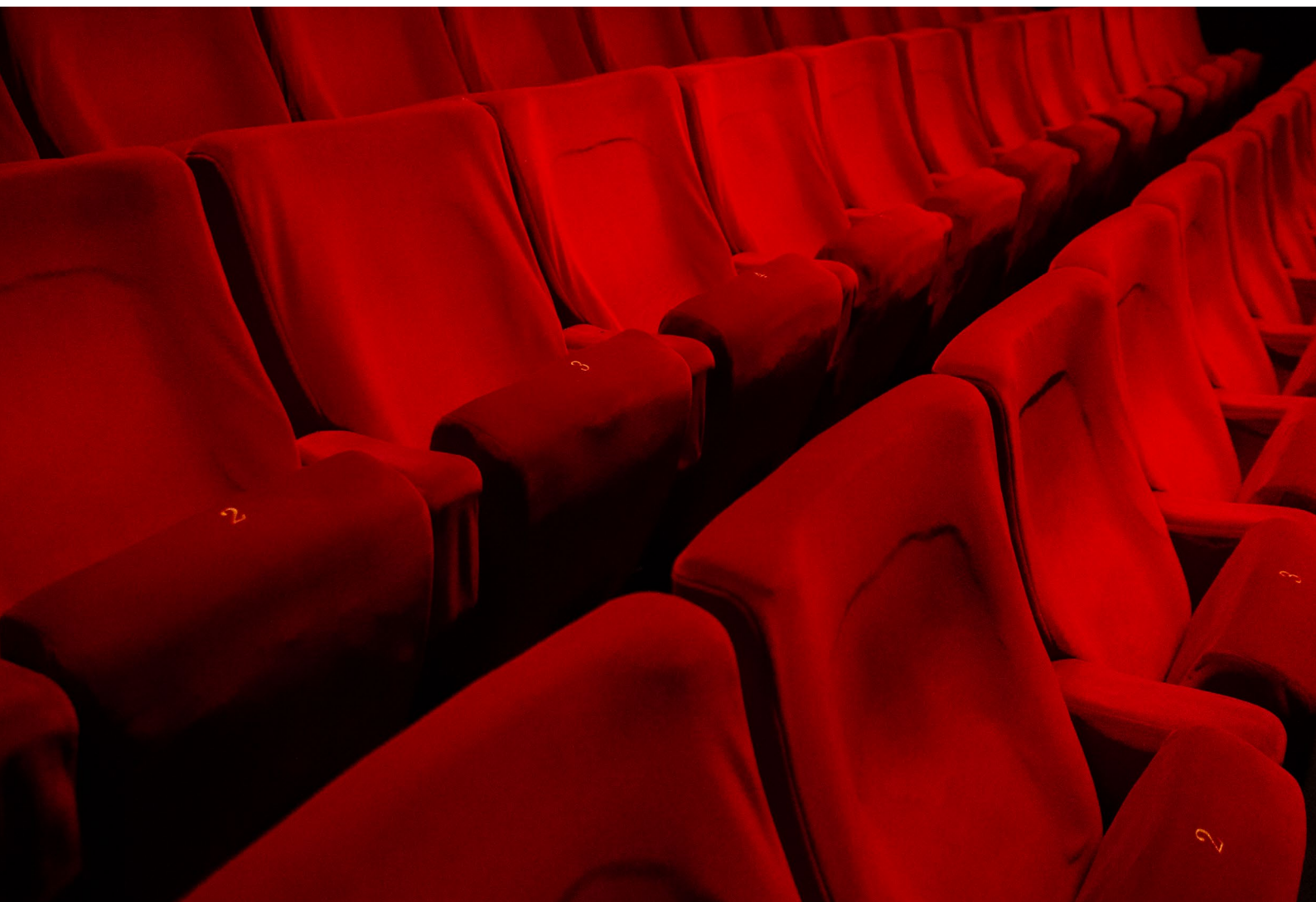
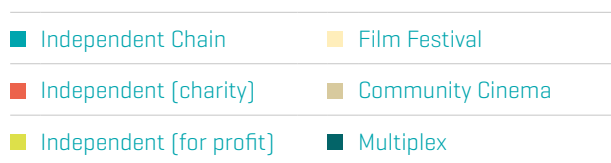
We will use the responses from this survey to advocate for a reopening strategy for the independent sector that makes the right decisions at the right time, for the safety of staff and audiences. We will lobby for financial support for cinemas whilst they are closed, and for support to open safely and sustainability.

The Survey

Who we surveyed

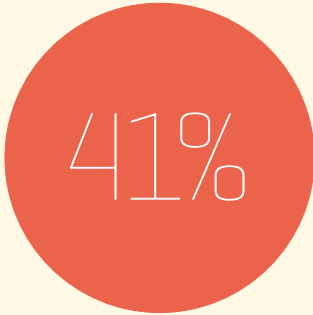


Good response from CEOs, Directors and Managers from a wide range of venues, with various audience capacities from large to small.



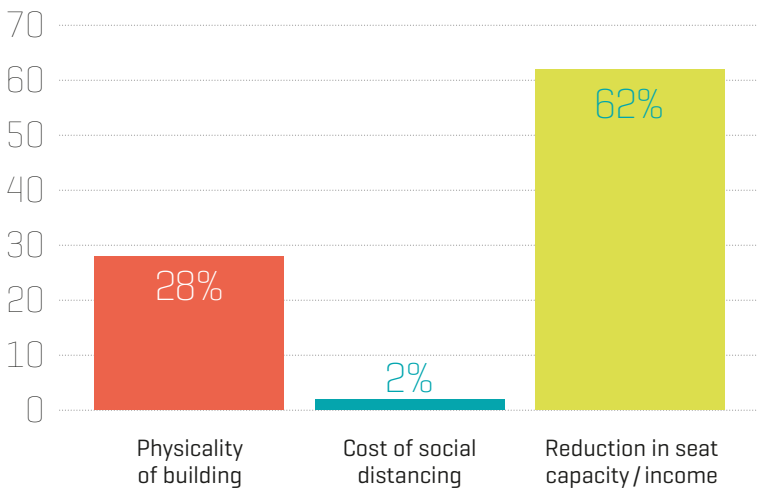
The Question of Reopening Venues

We asked venues if they will be able to open using social distancing measures.



said they **will not** be able to open with social distancing measures.

Why can they not reopen with social distancing measures?

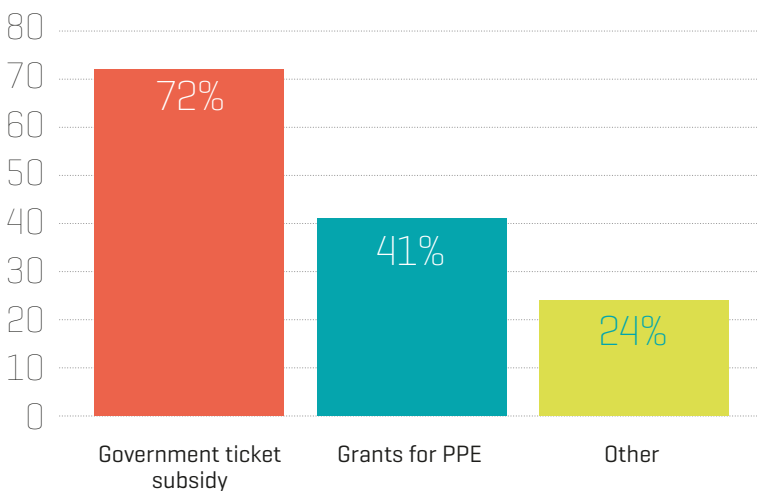


Concerns over health & safety

Respondents also identified continued concerns over health and safety of audiences and staff, even with social distancing measures in place.

“In the current climate it is not a responsible thing to do, either for the safety of public or staff. The potential damage to our brand within our community makes it an unwise and irresponsible action for the foreseeable future.”

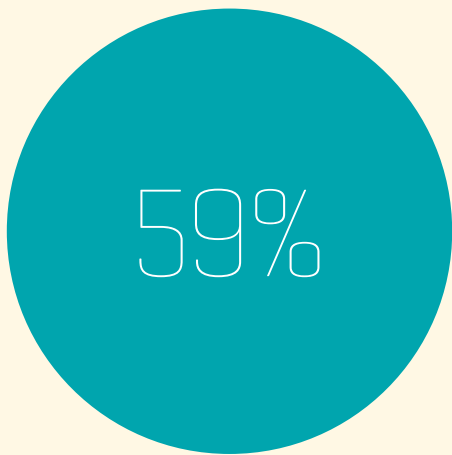
Are there support measures that would enable venues to open with social distancing measures in place?



Other support

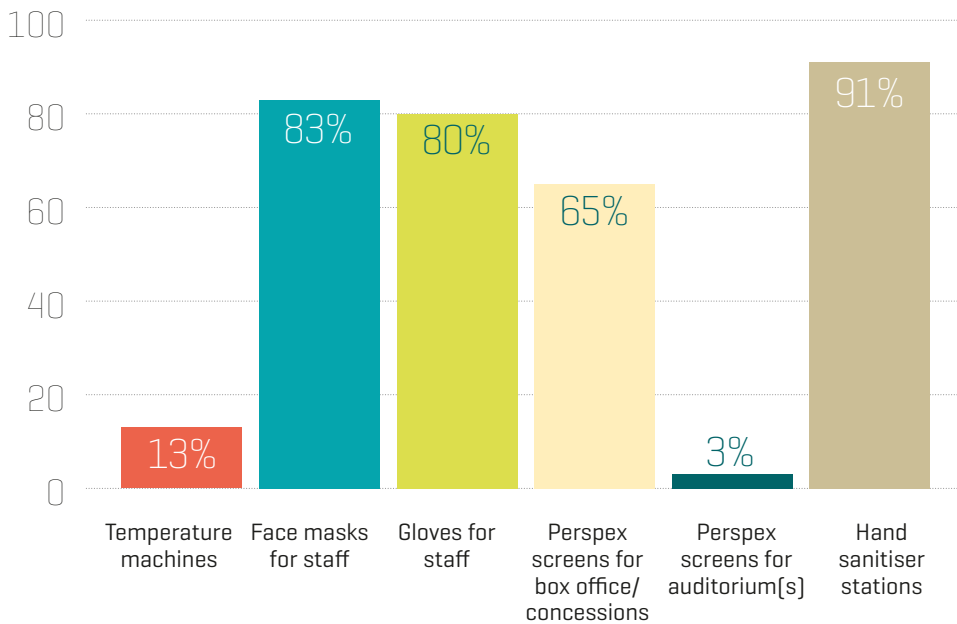
Respondents also suggested: reduced terms or no Minimum Guarantees (MGs) from distributors; and government support for cinemas to remain closed until it was proven safe for them to reopen.

“I don’t think social distancing in cinemas will work. The best way to keep people safe is to remain closed during COVID-19. The film exhibition sector must receive continued financial support so it can press pause for as long as is needed.”



said they **would** be able to open with social distancing measures in place.

We asked those 59% what PPE they were planning to put in place



Other health & safety measures

Respondents also highlighted other health and safety measures they were considering:

- > Signage, floor markings and one-way systems
- > Regular deep cleaning
- > No cash sales
- > No physical tickets
- > No fresh popcorn
- > Facemasks for customers

20%
INCREASED
COST

The majority of respondents thought the increased cost of implementing Health & Safety measures e.g. additional staffing, PPE, additional cleaning etc. would be 20%.

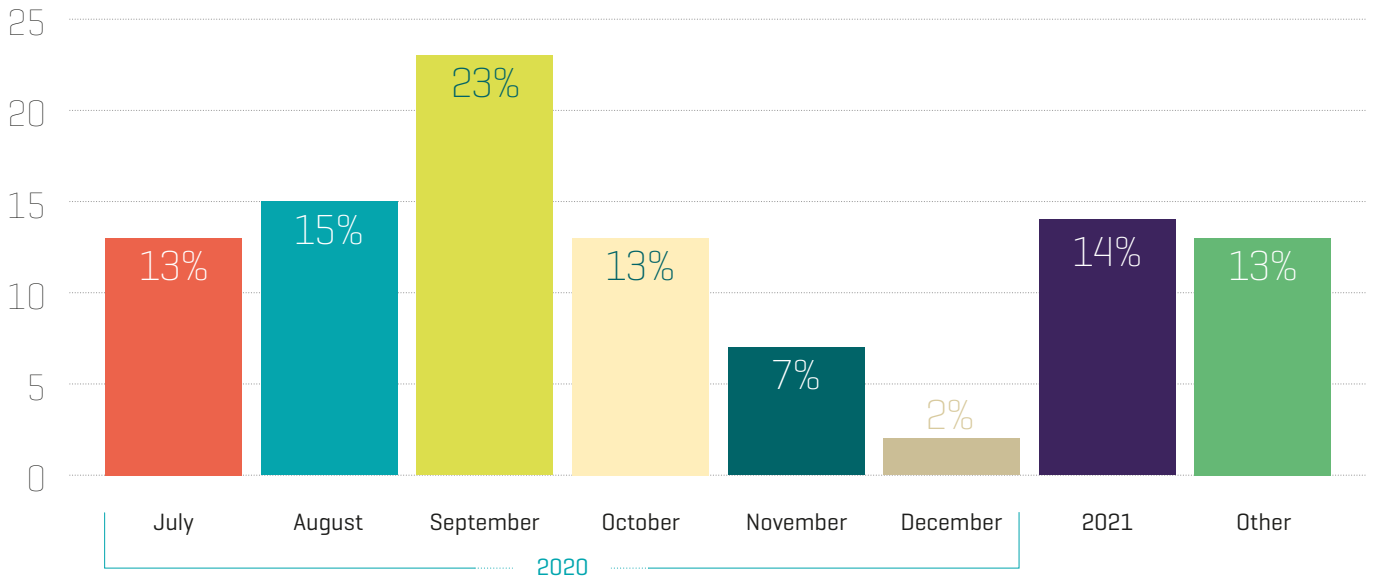
50%
LOSS IN
CAPACITY

The majority predict a 50% loss in seating capacity, number of screenings, concession sales and advertising revenue among other losses.

3 MONTHS
MAXIMUM
SURVIVAL

Most venues feel they would only survive a maximum of 3 months with social distancing measures on place.

When do you expect to reopen?



While some venues think they may open in July or August, the majority of respondents expect to reopen in September, and a significant number don't expect to reopen until next year. Some respondents think they will not reopen until it is safe to do so without social distancing.

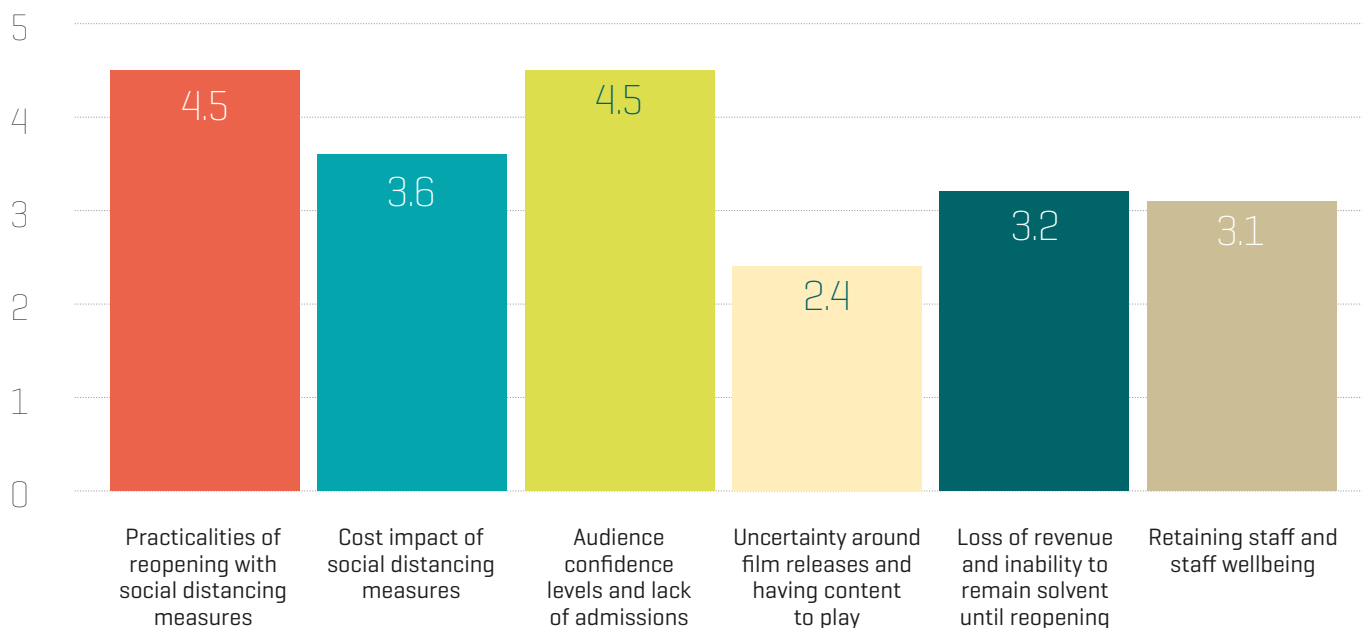
What support would be most useful?

We asked respondents to prioritise the following (shown as scores)



Venues main concerns for the coming months

We asked respondents to prioritise the following (shown as scores)



Other main concerns highlighted



“Audience confidence for our elderly demographic is going to be extremely challenging to regain. I fear that it would be better for our long term sustainability if we were to remain dark and furloughed until the need for social distancing is no longer required.”

“As a small community cinema run largely with the support of volunteers we have to put the welfare of all those involved first. Social distancing will be difficult to achieve and is unlikely to provide confidence for staff volunteers and audiences to return in the short term.”

“As an industry, we should be allowed to prioritise the health of our staff and audiences. Cinemas are built upon their relationships with audiences and audience trust will be broken if we re-open too soon and put them at risk.”

“Cinemas should be asking for support to remain closed and keep on staff rather than rush to reopen and create health risks which in the long term would be more damaging. Stay closed, stay safe, stay solvent.”

“I think the pressures on staff are already immense and that with all the huge efforts that are going to be required upon reopening, this shouldn't be lost sight of”

“The cinema depends on providing a positive guest experience. I'm worried that the new normal jeopardises the ability of people to enjoy the cinema again ... film will not be the same without the social contact of meeting friends before the movie. This is why I think the struggle is to sustain the cinema in the intermediate term.”