



# Cinema First Entertainment and Attitudes tracker

## Wave 11 report



UK & Ireland

Fielded Between 18<sup>th</sup> – 24<sup>th</sup> October 2021

# Research Methodology



Countries



Fielded Between 18<sup>th</sup> – 24<sup>th</sup>  
October 2021



Sample

Our sample is weighted by age and gender to reflect key audiences in their correct representation

		Male	Female
UK	Teens (13-17)	85	85
	Young Adults (18-24)	85	85
	Established Adults (25-34)	85	85
	Mid-life Adults (35-54)	85	85
	Older Adults (55-74)	80	80
	Parents (with kids 4-12)	80	80
		500	500
<b>UK TOTAL</b>		<b>1000</b>	
Republic of Ireland	Teens (13-17)	15	15
	Young Adults (18-24)	25	25
	Established Adults (25-34)	20	20
	Mid-life Adults (35-54)	20	20
	Older Adults (55-74)	15	15
	Parents (with kids 4-12)	30	30
		125	125
<b>Republic of Ireland TOTAL</b>		<b>250</b>	



A 15-20 Minute Survey on in-home entertainment and Cinema sentiment during COVID-19 lockdown



Device Agnostic



Respondents to have attended the Cinema at least twice in the last 12 months before lockdown

P12M



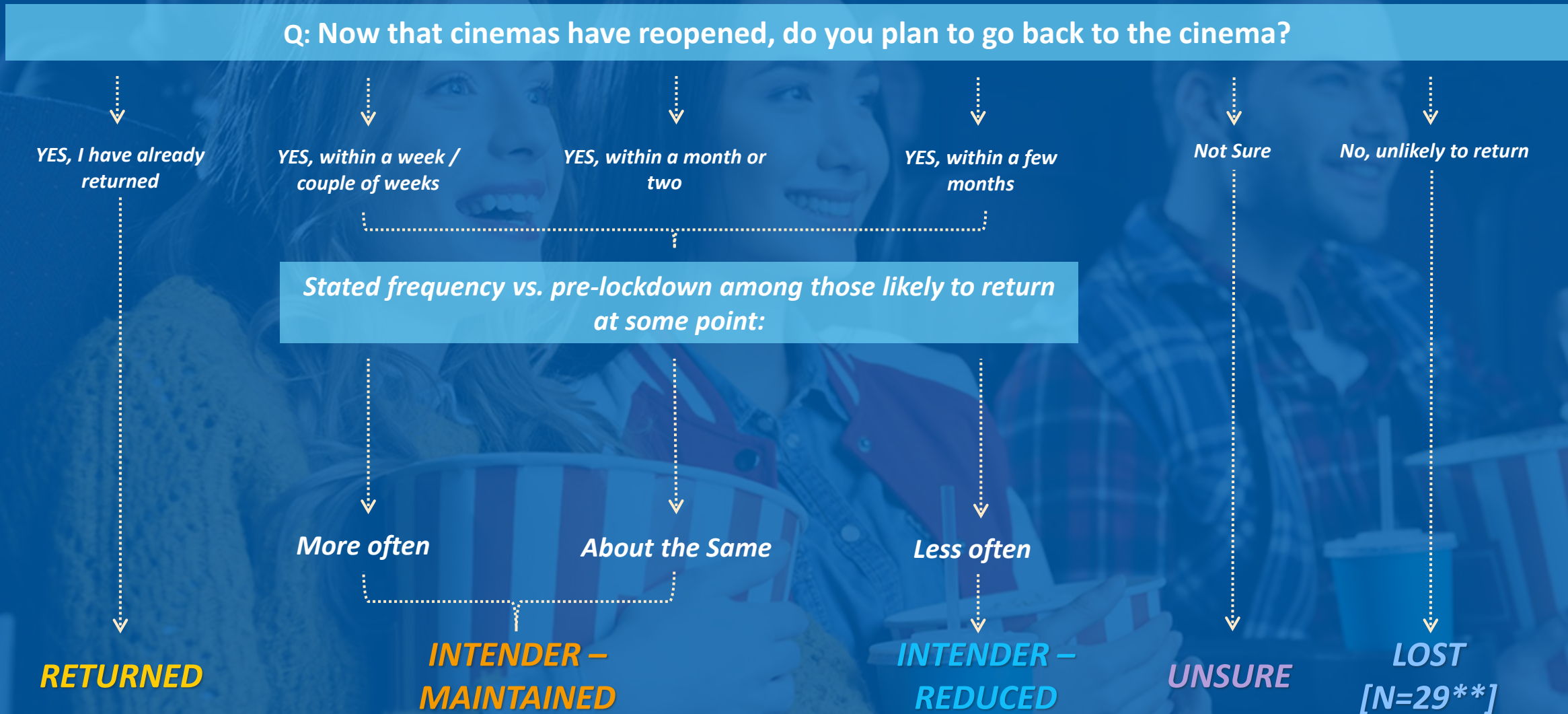
# UK News Headlines



The period between Wave 10 and Wave 11 saw the release of James Bond: No Time To Die, the biggest tentpole release exclusive to theatres since the start of the pandemic. Social distancing measures in cinemas have been relaxed in all UK regions, while mask-wearing is still mandatory in Scotland and Wales.



# Introduced in Wave 10, we have segmented our potential cinemagoers to get a better understanding of drivers and barriers to return





A group of people are shown in a cinema setting, smiling and looking towards the right. They are holding red and white striped popcorn buckets and blue cups with straws. The background is dark, suggesting a movie theater.

**1. Executive Summary**

**2. Current audience landscape**

**3. Barriers towards Returning**

**4. Audience Segmentation**

**5. Returned to cinemas**

**6. Appendix**

# Rates of return continue to increase significantly with an additional 13% of audiences returning to the cinema for the first time to see No Time To Die

1

43% of our audience have returned to the cinema, with a third returning for the first time to see No Time To Die

2

Despite the relaxation of restrictions and increased risk of crowds, 97% of those who returned for the first time to see Bond were satisfied with the health and safety precautions in place and would recommend a trip to the cinema to others

3

Despite a significant increase in rates of return, 23% of our total audience remain unsure as to when they'll return to the cinema. This includes a higher proportion of 55+, females in particular- the only audience to see no increase in the level of return vs Wave 10

4

55+ females display a 10pp decrease in their perception of cinemas as safe. 46% are also unable to name any newly releasing titles, indicating a potential weakness in the upcoming slate to cater for this audience

5

Among the 23% that state that they are unlikely to return as often as before the pandemic, this is primarily due to safety concerns around crowding and the lack of masks

6

Financial concerns, driven by rising living costs, now forms one of the primary considerations among those who have not yet returned, with 24% stating this a reason. This is ahead of changes in living / working arrangements (22%), prioritising changes in personal life (20%) and concerns over the relaxation of COVID-19 restrictions (19%)

7

76% of our audience who have not yet returned agree that COVID-19 is the main reason. Of this group, 68% still feel that some type of social distancing between seats is essential to make them more confident in returning



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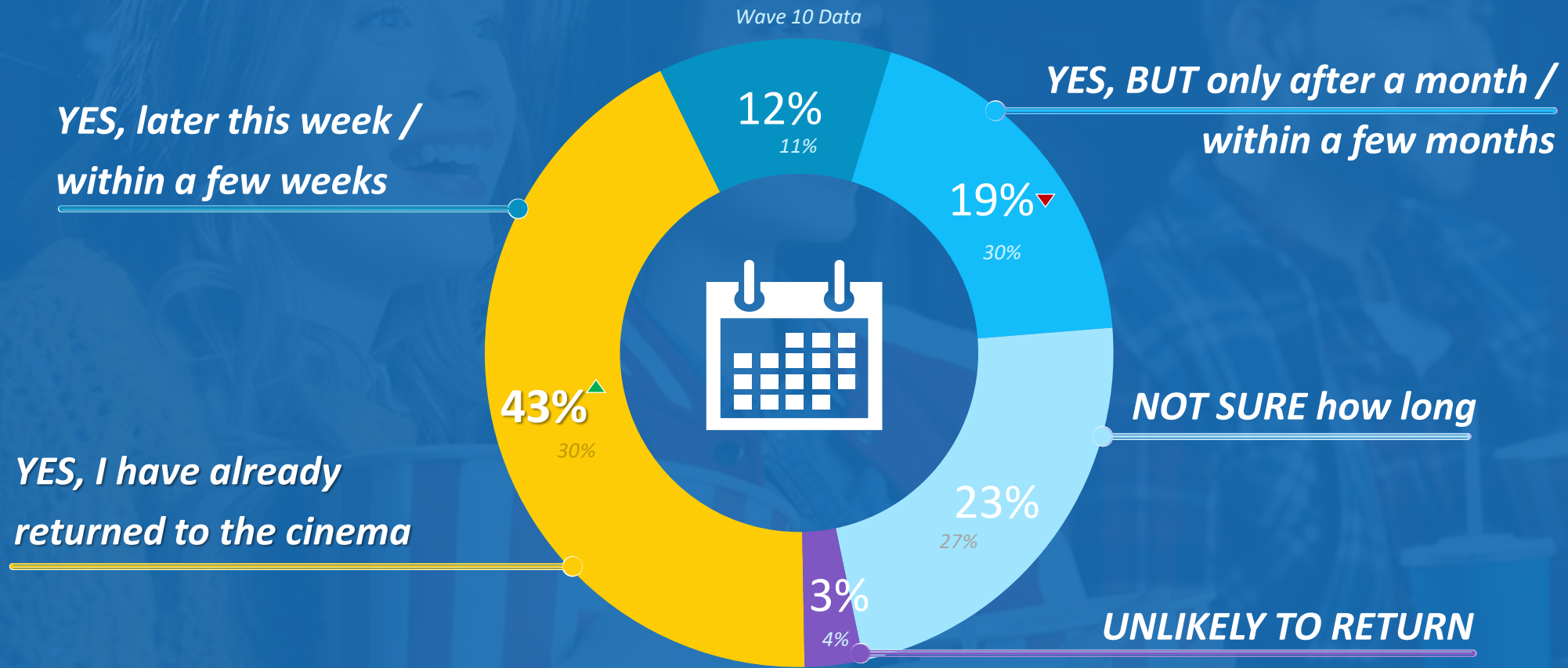
**5. Returned to cinemas**

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# The number returning to cinemas has continued to increase significantly. Despite a slight reduction, the number of those stating that they are unsure or unlikely to return continues to hold at around 1 in 3

Q: Once cinemas are allowed to reopen, do you plan to go back to the cinema?

★ Q: Now that cinemas have reopened, do you plan to go back to the cinema?

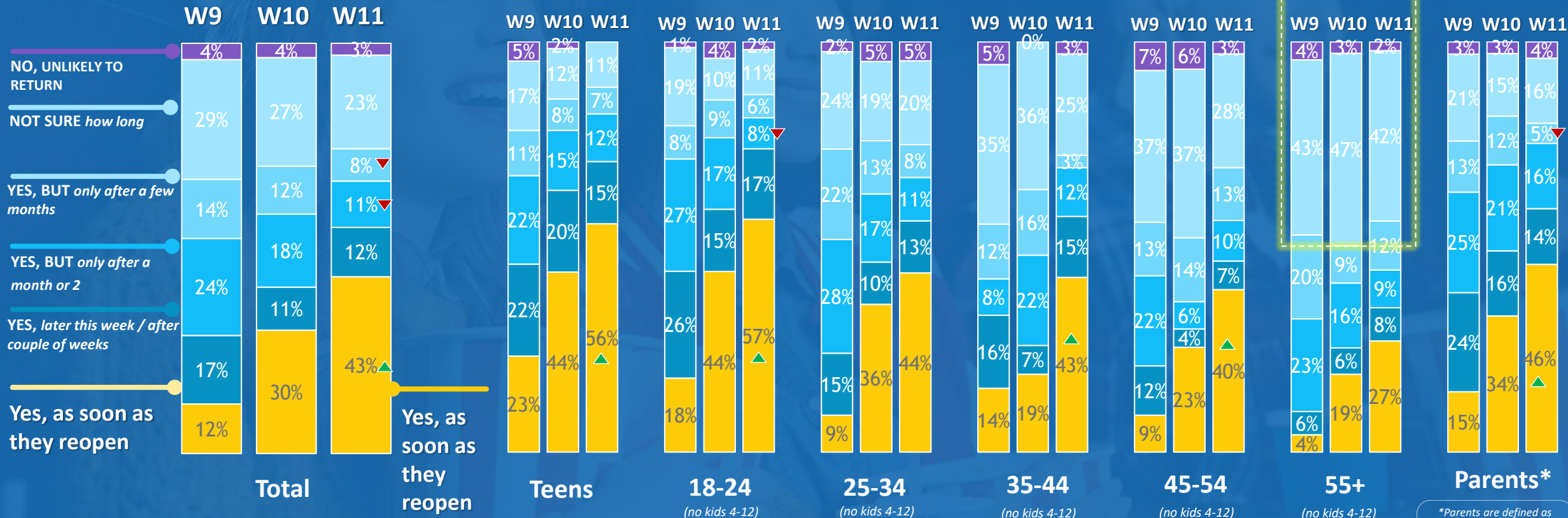




# All audiences see increased levels of return. However levels of uncertainty continue to remain relatively stable among the 55+ group

Q: Once cinemas are allowed to reopen, do you plan to go back to the cinema?

Q: Now that cinemas have reopened, do you plan to go back to the cinema?



Total audience, Teens, 18-24, 25-34, 35-54, 55+ Parents,

Wave 9 Base (N=1021,156, 164,167,187,162,185) / Wave 10 Base (N=1022,171,174,174,170,161,172)/Wave 11 Base (N=998,171,161,150,170,166,180)

Significant against Wave 10 at 95% Confidence ▲ ▼

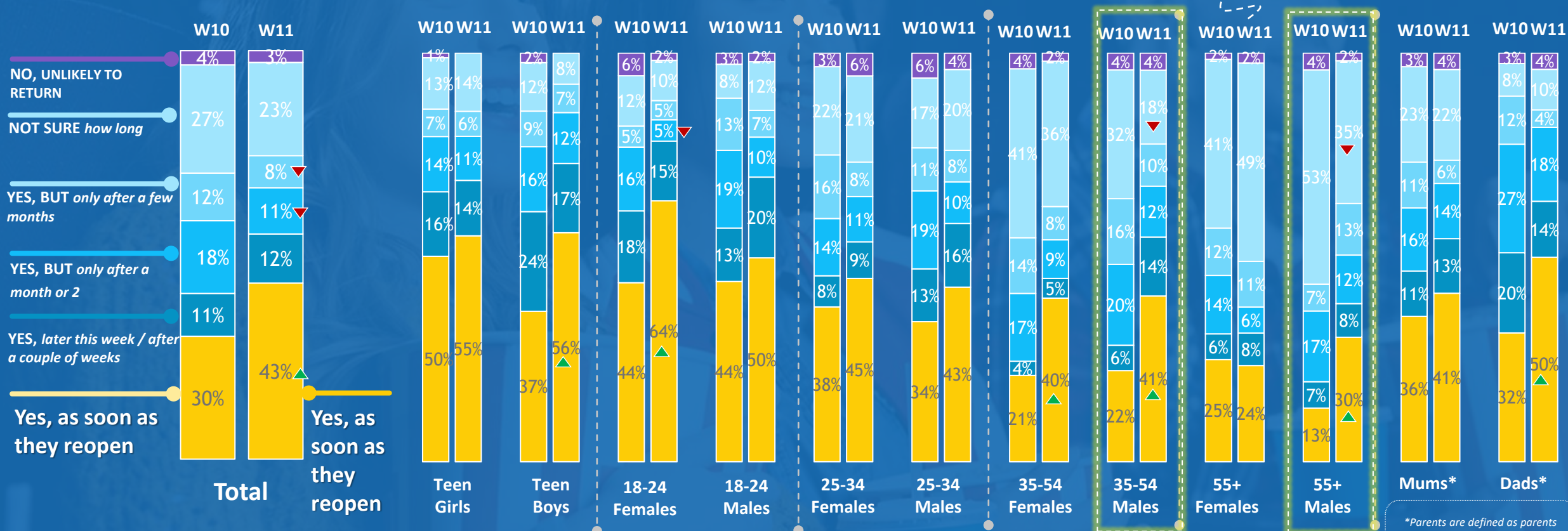
\*Parents are defined as parents of children aged 4-12 and are evaluated as an exclusive group to the rest of the sample

# Older males generally display more confidence in returning compared to females. Among younger groups, 18-24 females are the most likely to have returned

55+ males have significantly higher levels of general slate awareness vs WV 10 (64% vs 44%) In contrast 55+ females show no change in slate awareness, with 46% unable to name any upcoming titles – more than any other demographic. As the desire to see a new film is a consistently high driver for return, lack of comms regarding appealing films for this audience may be dampening eagerness

Q: Once cinemas are allowed to reopen, do you plan to go back to the cinema?

Q: Now that cinemas have reopened, do you plan to go back to the cinema?

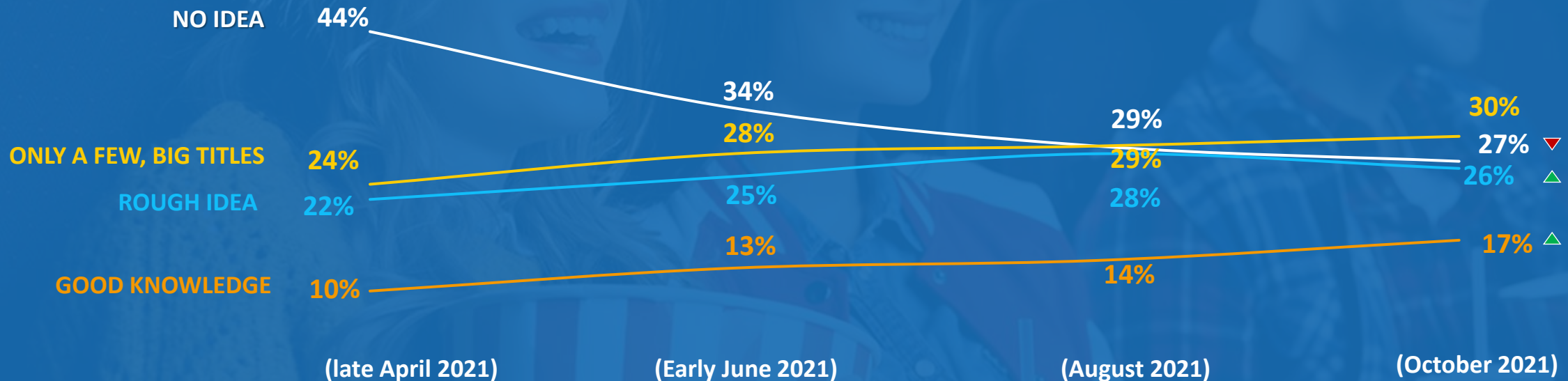


\*Parents are defined as parents of children aged 4-12 and are evaluated as an exclusive group to the rest of the sample



# Slate awareness has improved significantly since the start of the year, with the level of those unable to name any upcoming titles significantly reduced

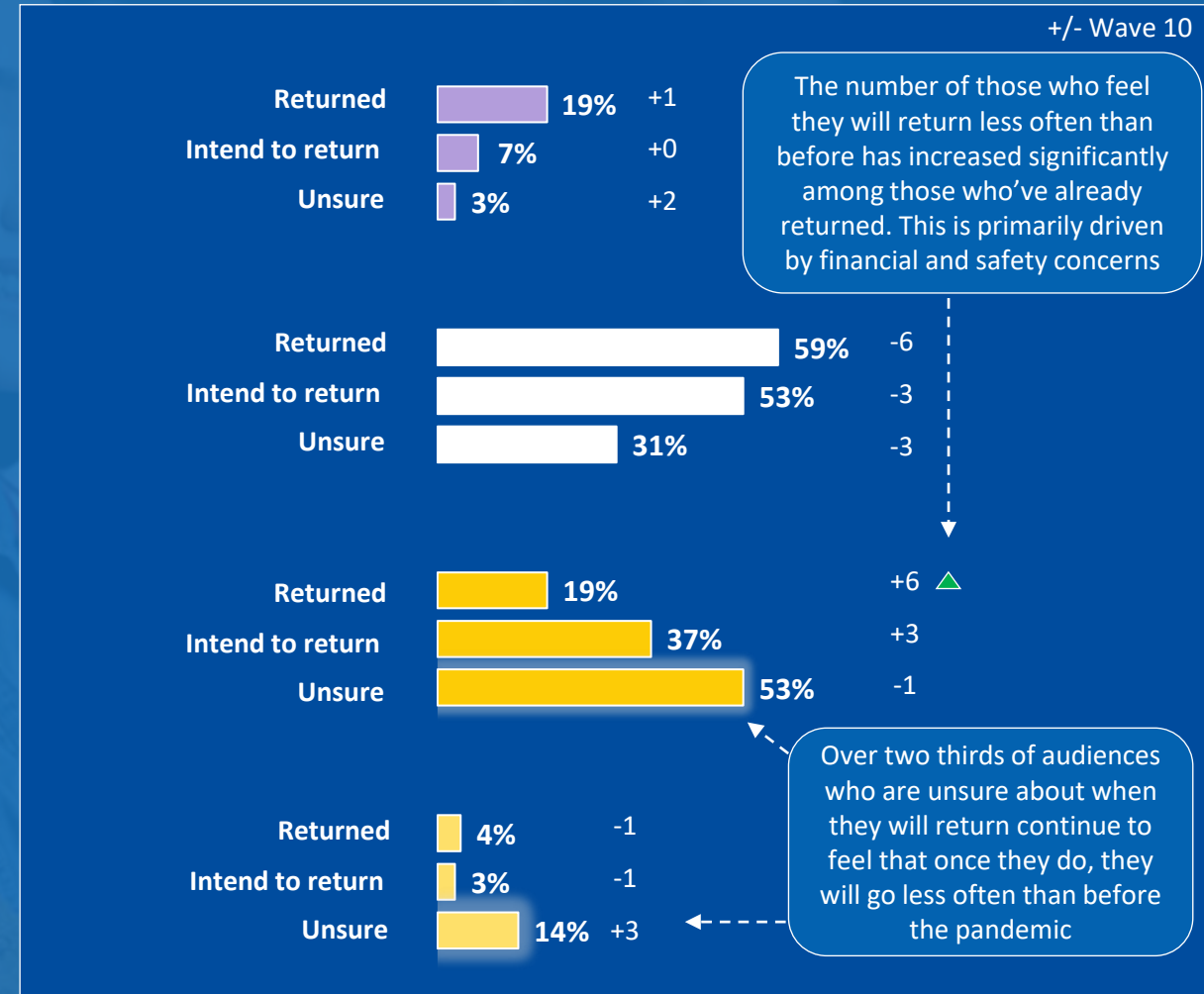
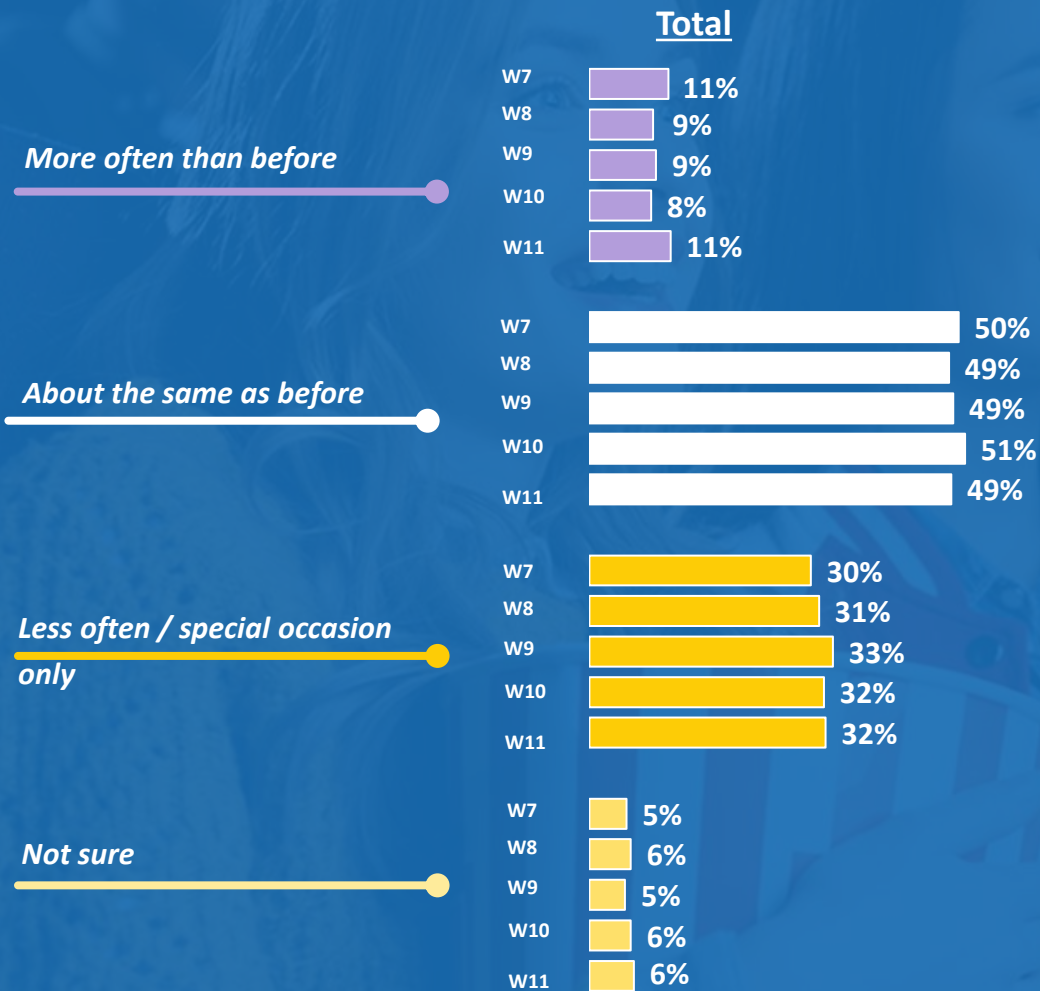
★ Q: How much do you know about films which might be released in cinemas this year?



69% of respondents in Ireland state they have at least some knowledge of upcoming titles, a significant increase from Wave 10 (41%)

# Post-Pandemic attendance frequency remains stable, with around half stating they want to get back to normal

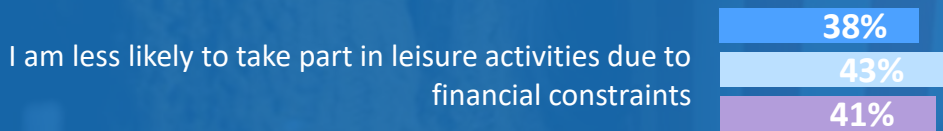
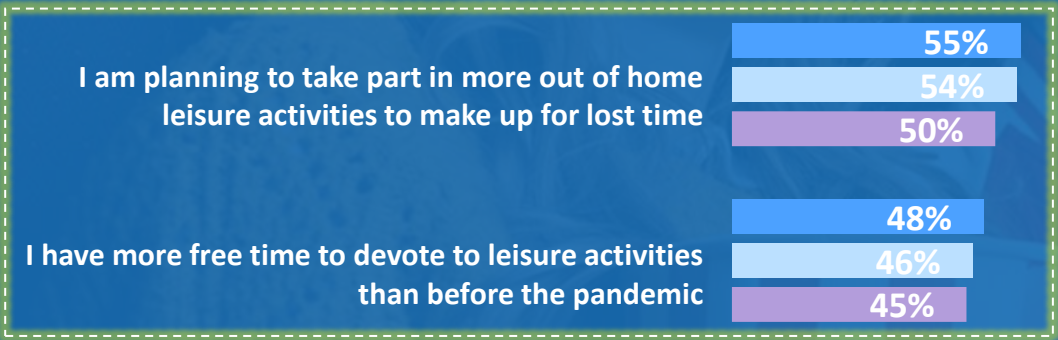
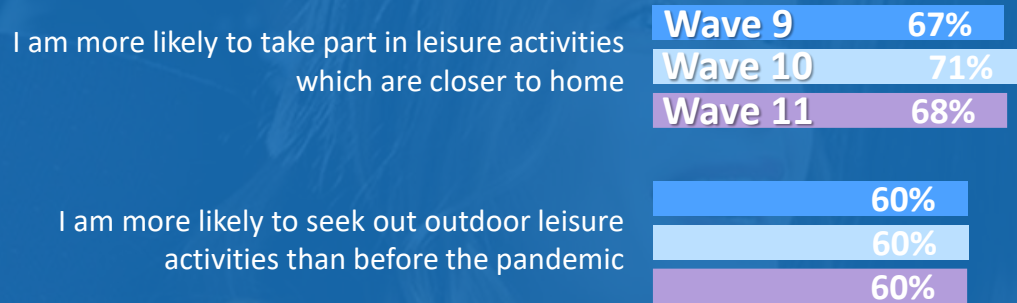
Stated frequency vs. pre-lockdown among those likely to return at some point:



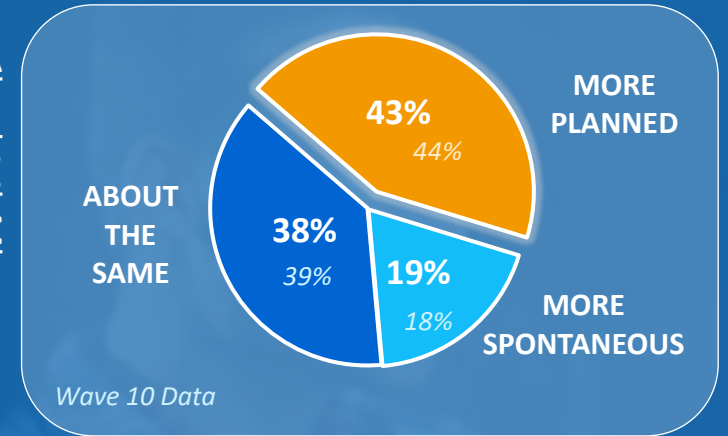


Although the desire to seek out outdoor leisure activities remains stable, we see an indication that audiences are starting to re-evaluate the level of time they have to devote to this

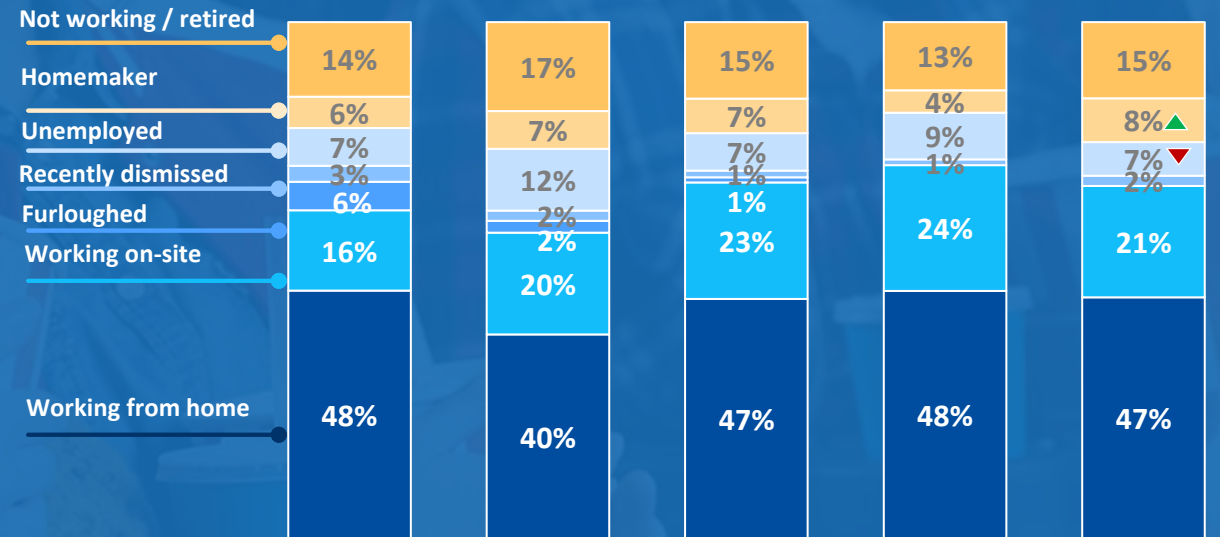
### ATTITUDES TOWARDS LEISURE VS. BEFORE THE PANDEMIC



### FUTURE CINEMA TRIPS VS. BEFORE THE PANDEMIC



### WORK STATUS



A group of people are shown in a cinema setting, smiling and looking towards the right. They are holding red and white striped popcorn buckets and blue cups with straws. The background is dark, suggesting a movie theater.

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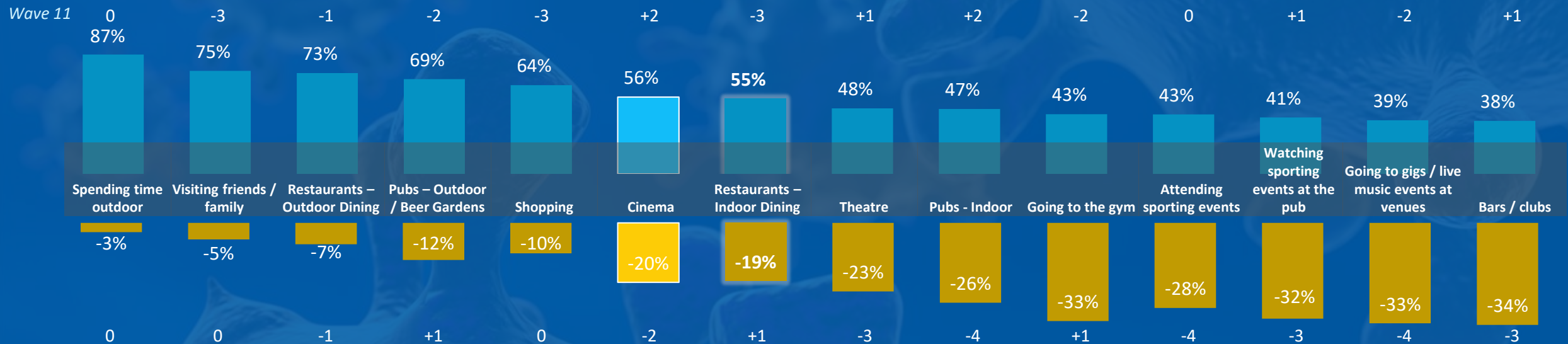


# Perceptions of cinema safety remain stable, with cinemas ranked as the safest indoor entertainment activity



Q: How safe do you feel these Out of Home leisure activities will be once they are allowed to reopen? 10p scale: 1-4 = unsafe, 7-10 = safe

SAFE



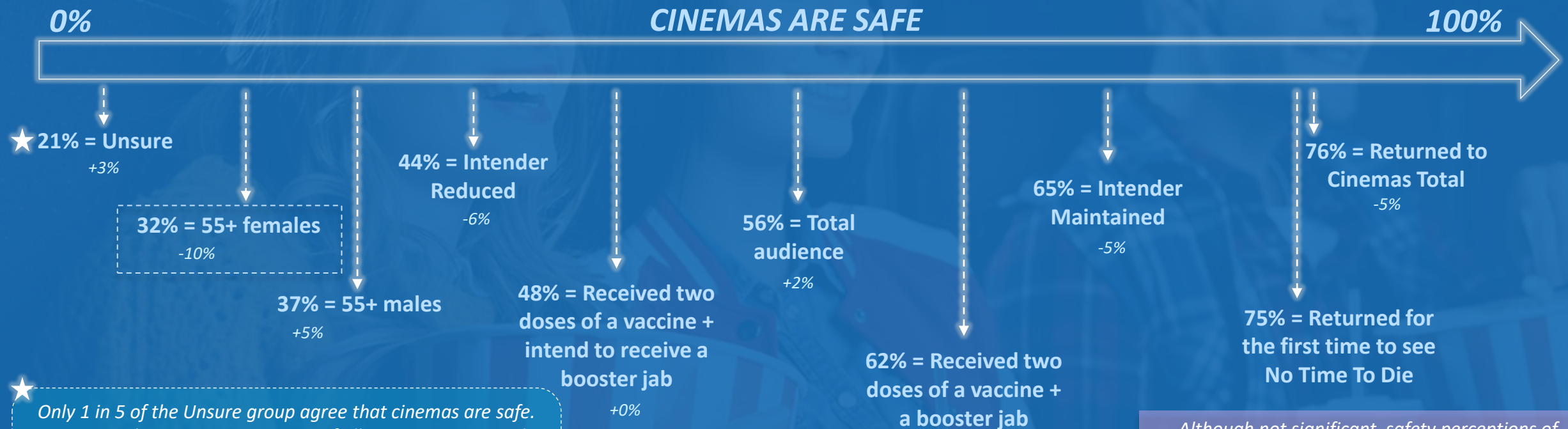
CODED spontaneous reasons for not being safe	
ENCLOSED ENVIRONMENT / LACK OF VENTILATION / CROWDED INDOOR AREA	63%
DISTRUST OF OTHER PEOPLE BEING HYGIENIC / FOLLOWING RULES / WEARING MASK	24%
UNSAFE UNTIL VACCINATED / GOVERNMENT SAYS IT'S SAFE	3%

UNSAFE

# Within audiences, 55+ females have seen the largest decline in the perception of cinemas as safe, in line with their relatively slower rate of return

★ Q: How safe do you feel these Out of Home leisure activities will be once they are allowed to reopen? **CINEMA**  
10p scale: 7-10 = safe

+/- vs. WV 10



★ Only 1 in 5 of the Unsure group agree that cinemas are safe. However this group are cautious of all OOH activities, and cinema still ranks higher than Theatre (18%), going to the gym (17%) and attending concerts/gigs (13%). Dining in restaurants is slightly higher, at 29%

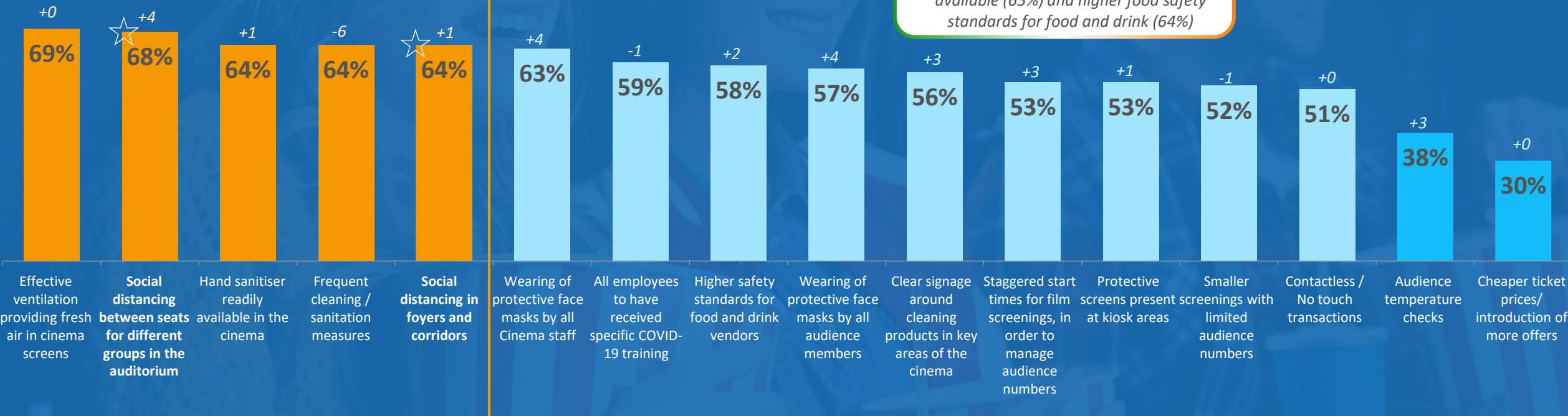
Although not significant, safety perceptions of cinemas among those who have Returned have declined from 81% in Wave 10 to 76%. The decline is also driven by 55+ females, who are more likely to be concerned about lack of social distancing and mask-wearing by audiences.



# Among those who have not returned yet due to fears around COVID-19, social distancing is still felt to be an essential factor, with spacing among seats in the auditorium particularly important

★ Q: You mentioned Coronavirus will impact your decision to return to the cinema. Which measures can cinemas take which would give you confidence to go back? – HAVE NOT YET RETURNED TO THE CINEMA DUE TO CONCERNS AROUND COVID-19

## SELECTED AS ESSENTIAL



# Financial concerns are a consistent barrier across audiences, and now rank alongside concerns regarding further relaxation of restrictions among those for whom COVID is the main reason to delay a return



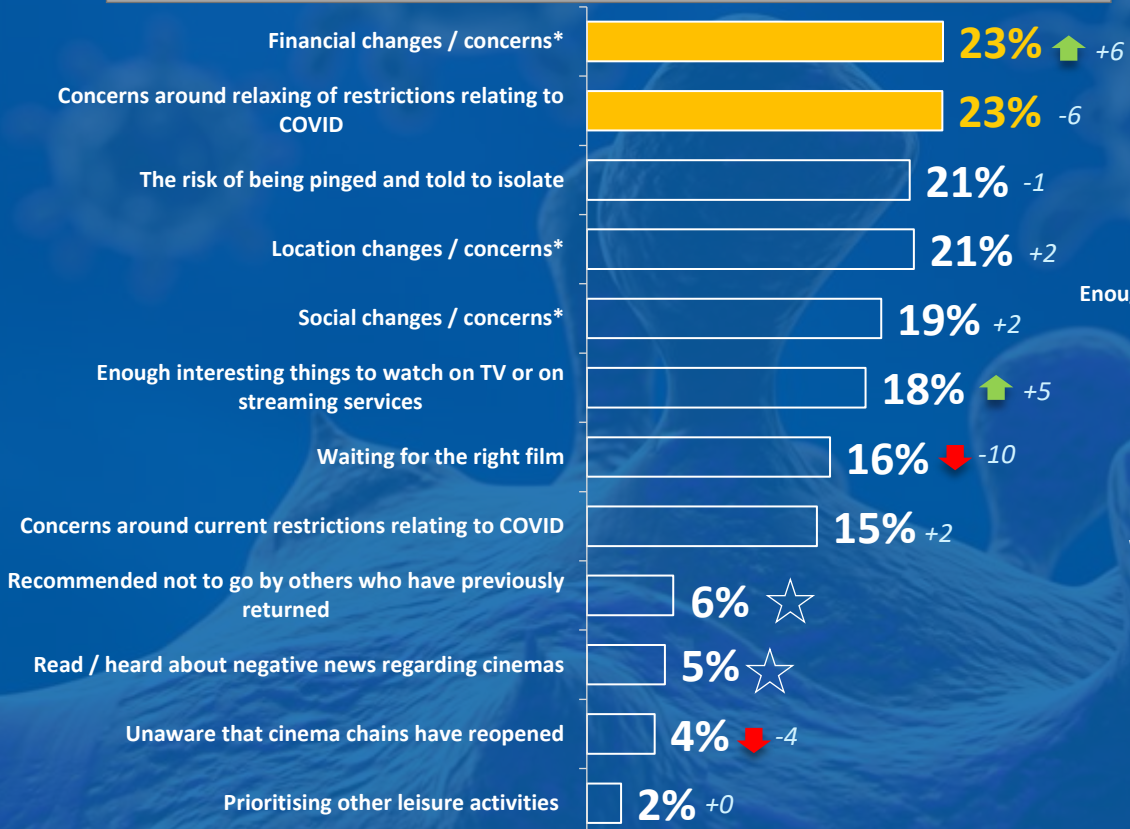
+/- vs. W10

Coronavirus is the key reason you've not returned to the cinema yet:

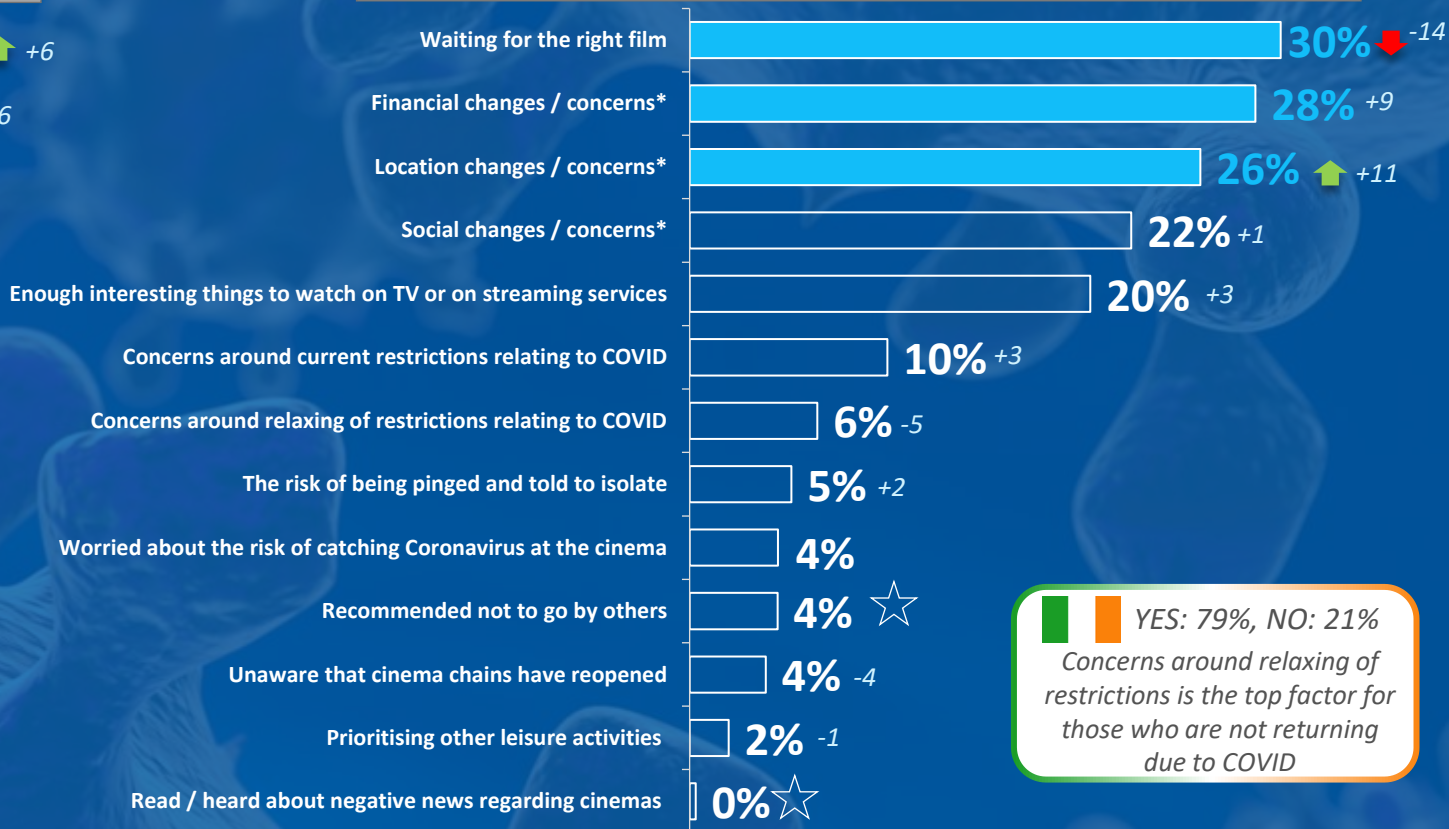
75% YES

25% NO

Q: Aside from the Coronavirus, are there any other reasons influencing your decision not to return straightaway?



Q: Please select the main reasons that are applicable as to why you have not already visited the cinema:



■ YES: 79%, ■ NO: 21%  
 Concerns around relaxing of restrictions is the top factor for those who are not returning due to COVID



# The increase in living costs are the main driver behind rising financial concerns, with changes in personal and professional lives also impacting our audiences' ability to return



+/- vs. WV 10

Coronavirus is the key reason you've not returned to the cinema yet:

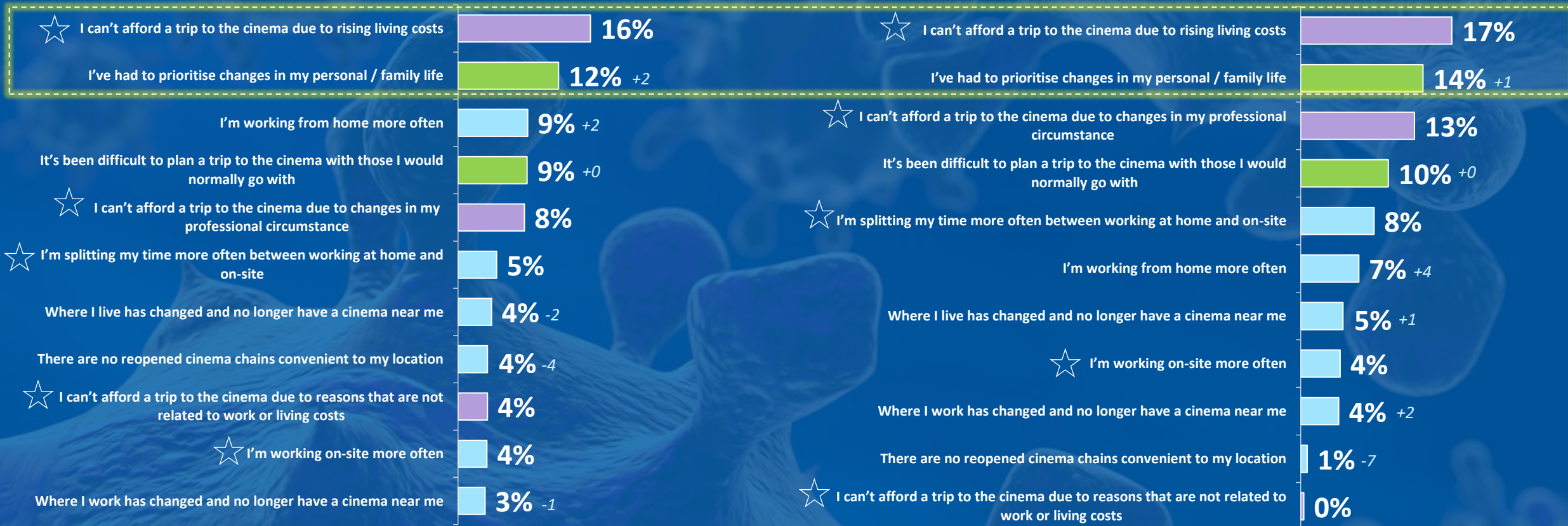
75% YES

FINANCIAL

SOCIAL

LOCATION

25% NO



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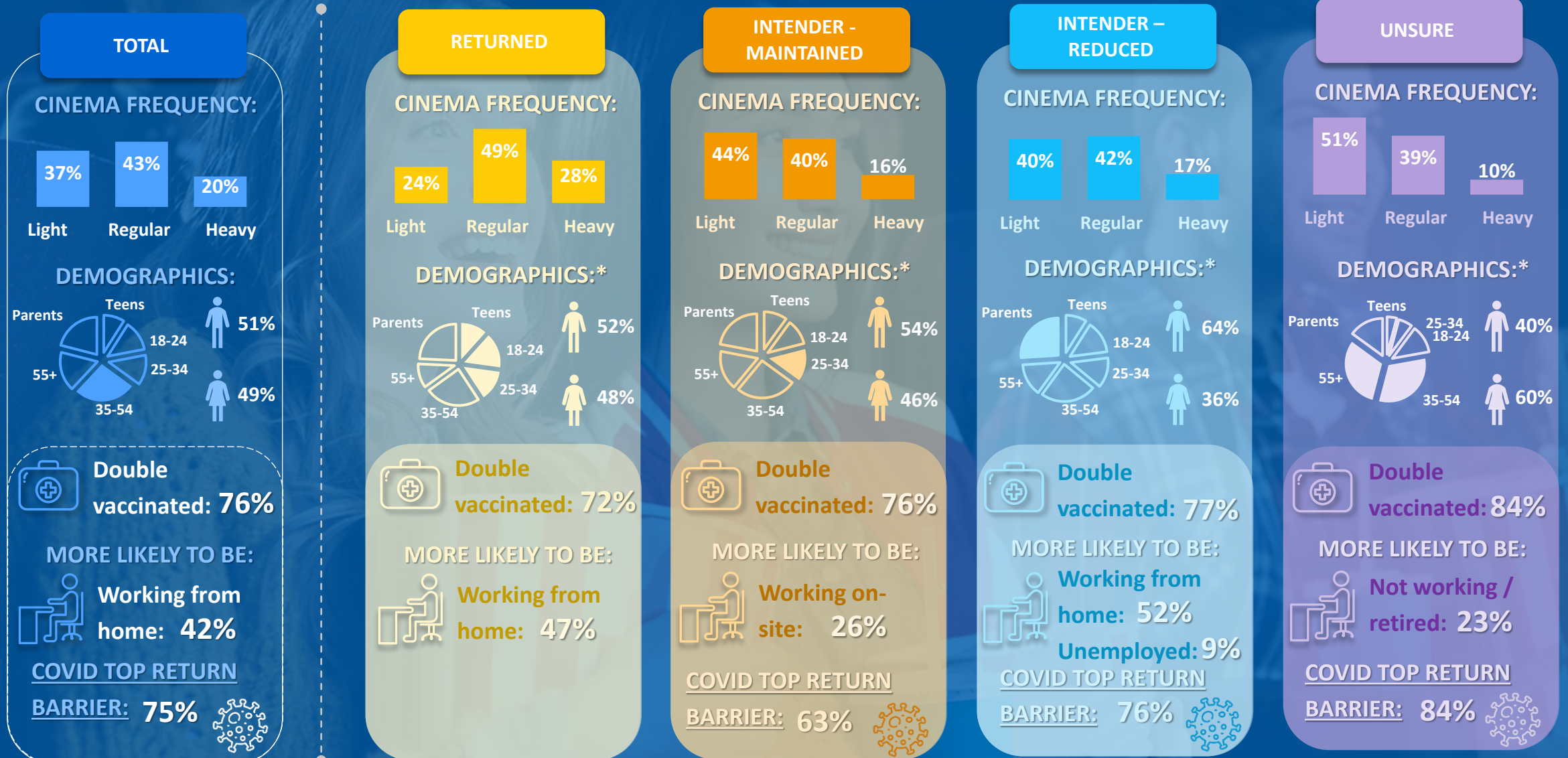
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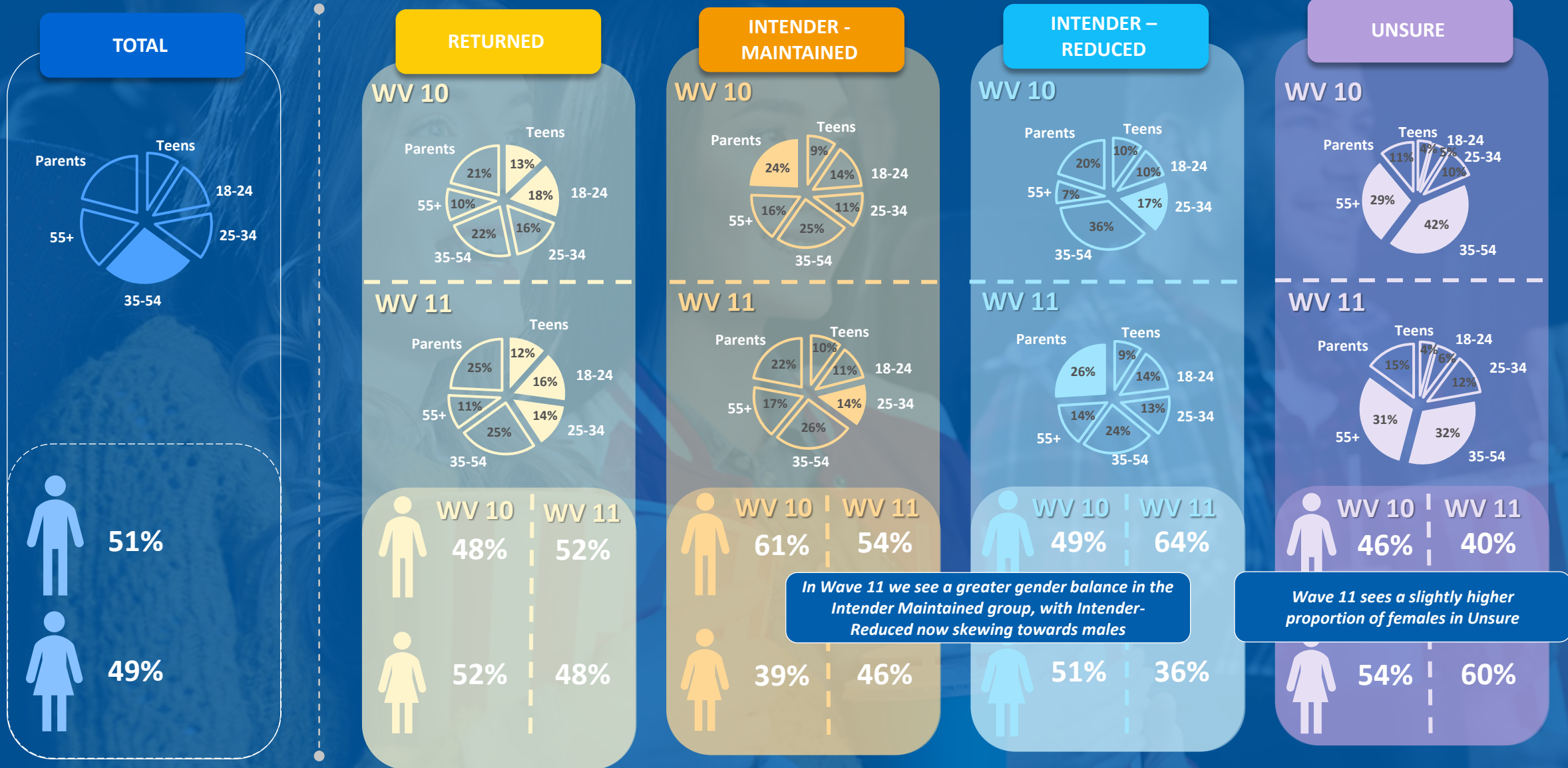


# Audience Segment Demographics | Wave 11



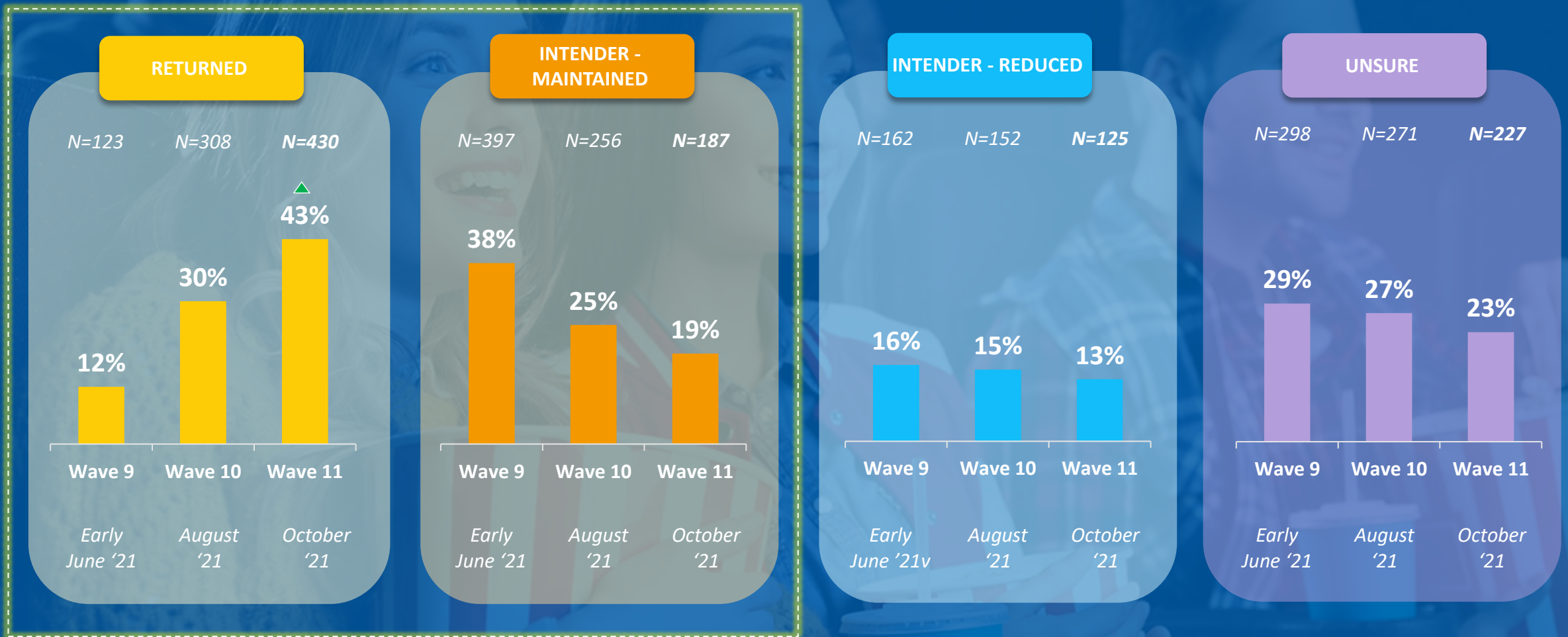
\*Base: Blocked segment means this audience has the highest proportion of this age group vs other cohorts.  
Cinema Frequency is determined by normal cinema-going attendance in a year pre-pandemic. Light = 2-3 times a year, Regular = 4-8, Heavy = 9-12+

This wave sees a growth in confidence from 25-34s, as they increasingly move from the Intender-Reduced group to Intender-Maintained. The Unsure group continue to display the largest proportion of 55+, with an increased female skew overall





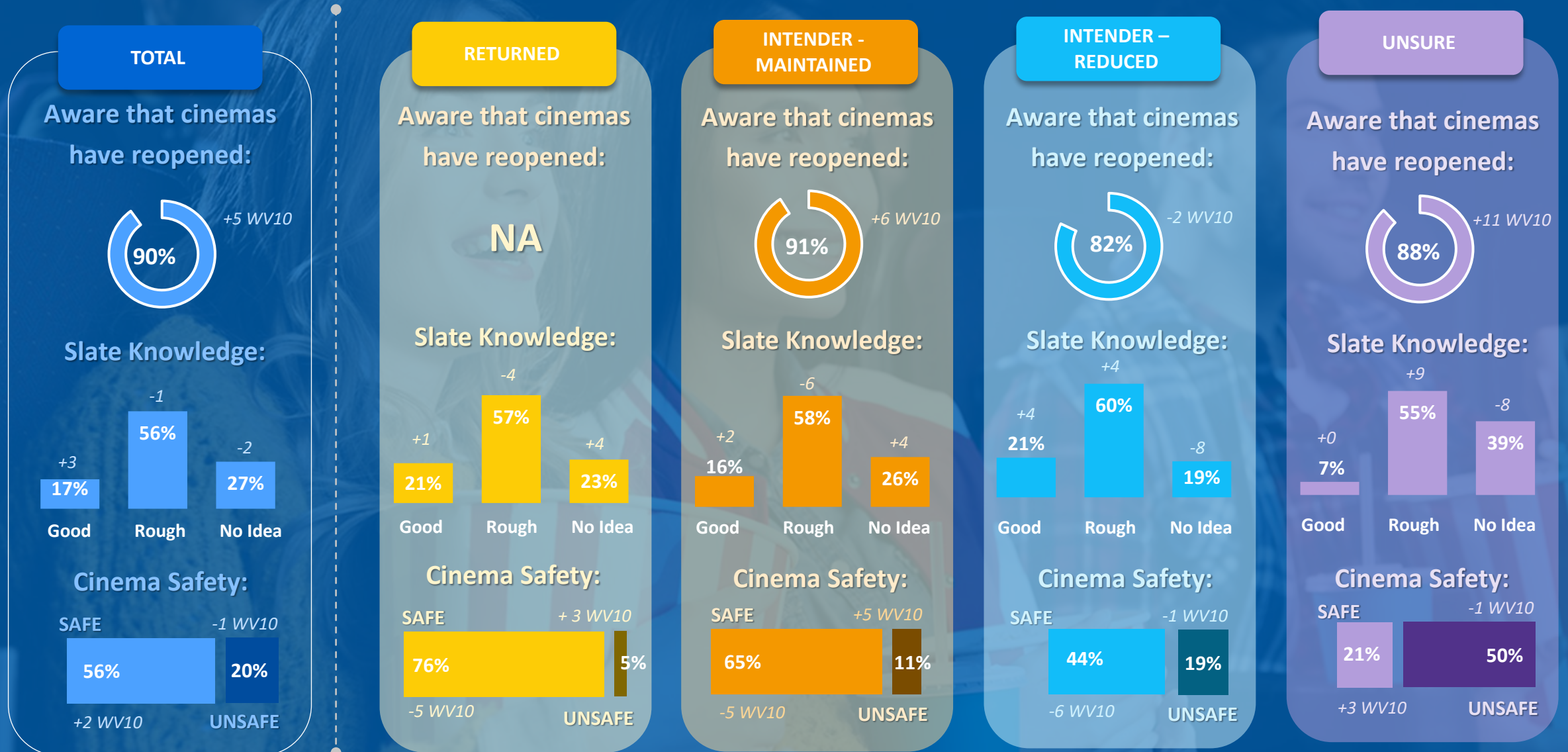
# Although growth in the Returned group is fueled by some conversion from all segments, this continues to be driven primarily by Intender-Maintained



Base: Total Audience WV9, WV10, WV11 (N= 1021, 1022, 998)

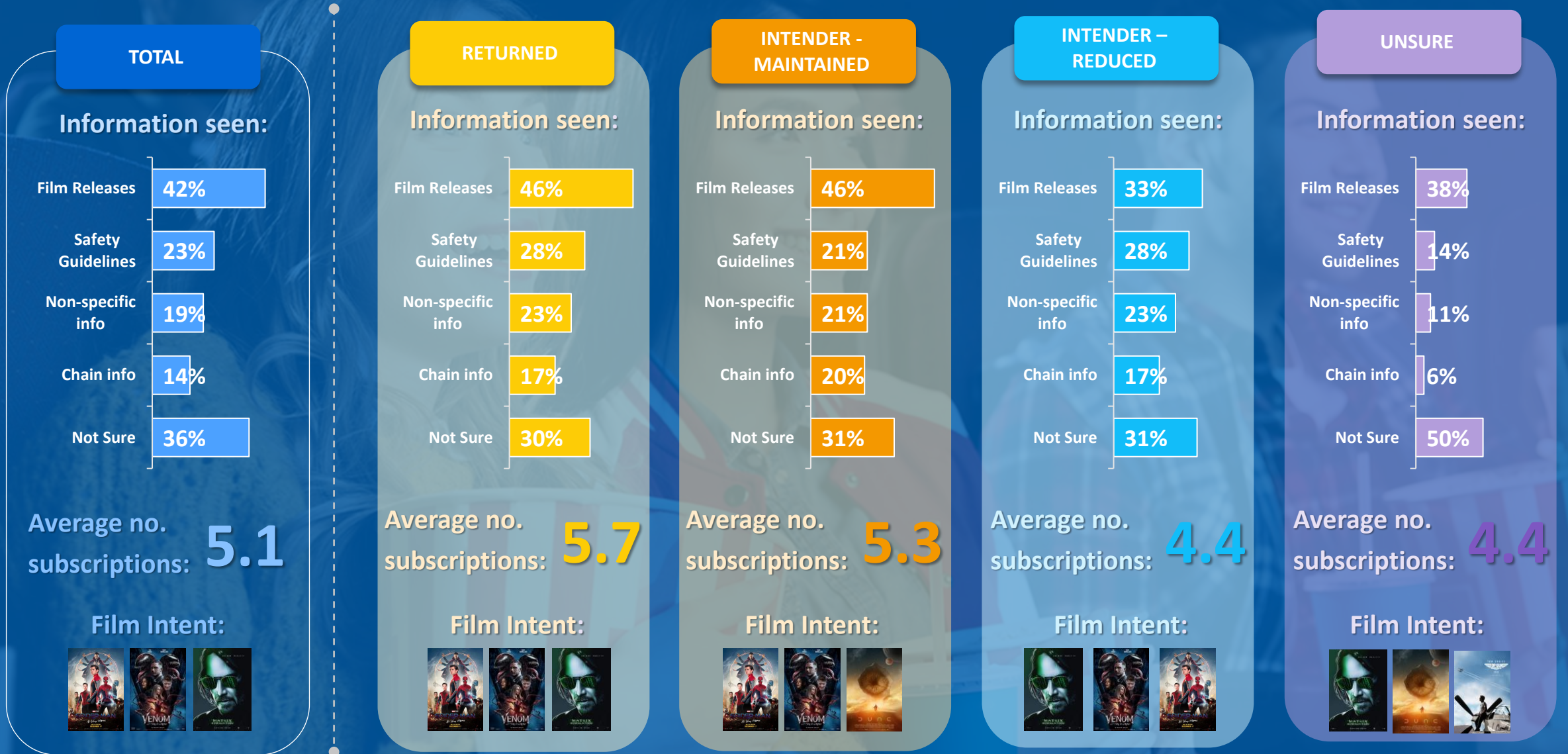
Significant against Wave 10 at 95% Confidence ▲▼

# Slate awareness has notably improved among the Intender-Reduced and Unsure group, however we see a slight reduction in perceptions of cinema safety across all other segments



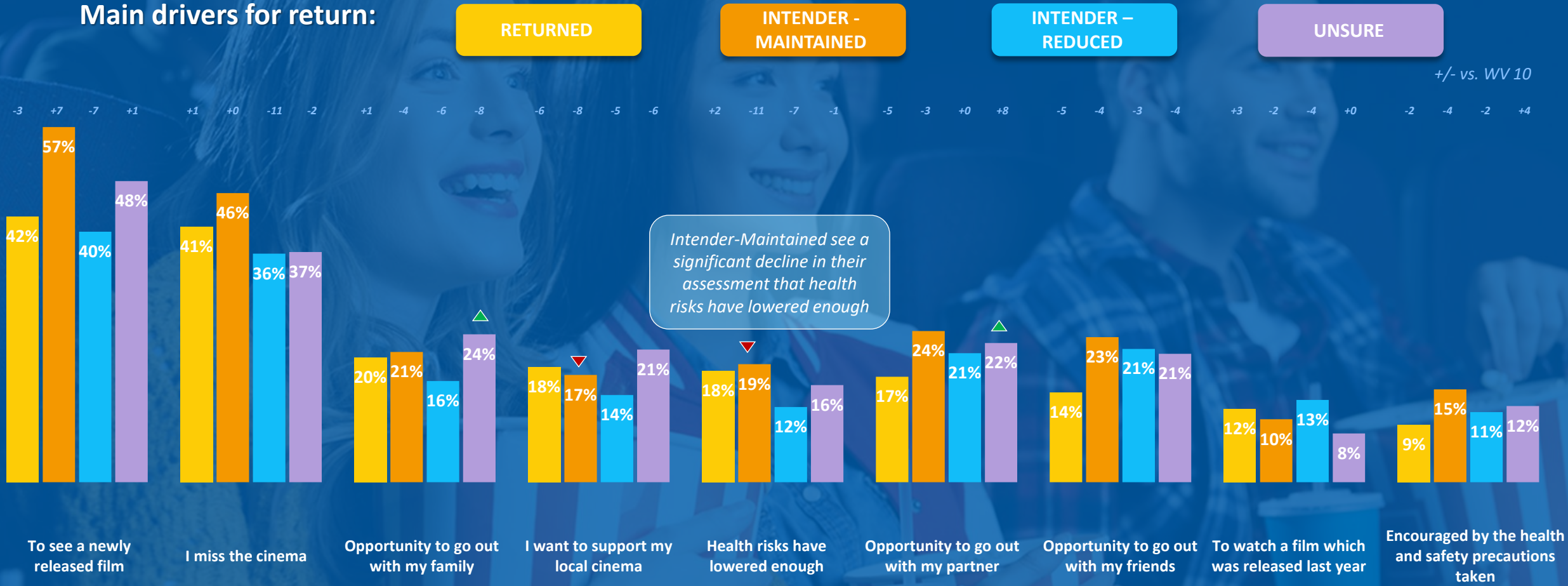


# Returned and Intender-Maintained are the highest content seekers, while Unsure group are least likely to have heard any information from cinemas



# The desire to see a new film and cinema as a missed activity remain the top drivers for return across segments, most noticeably among Intender-Maintained. The chance to socialise with family or a partner has grown significantly as a key driver among the Unsure

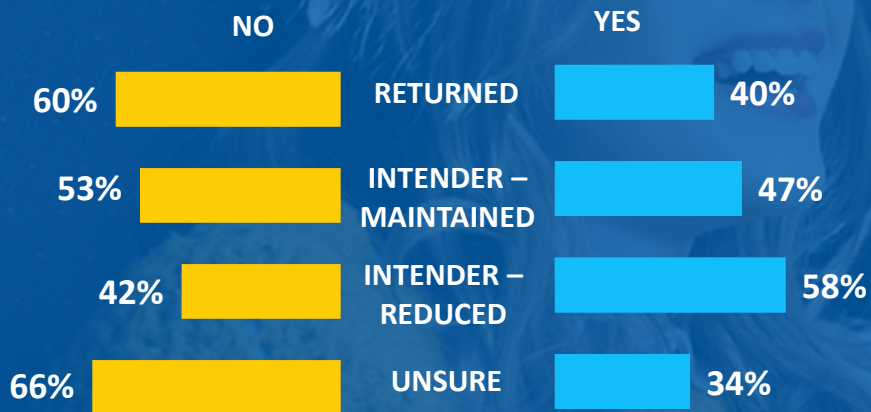
## Main drivers for return:





# In terms of alternative cinema events, concerts generate the most interest - with Intender Maintained showing most interest across the board

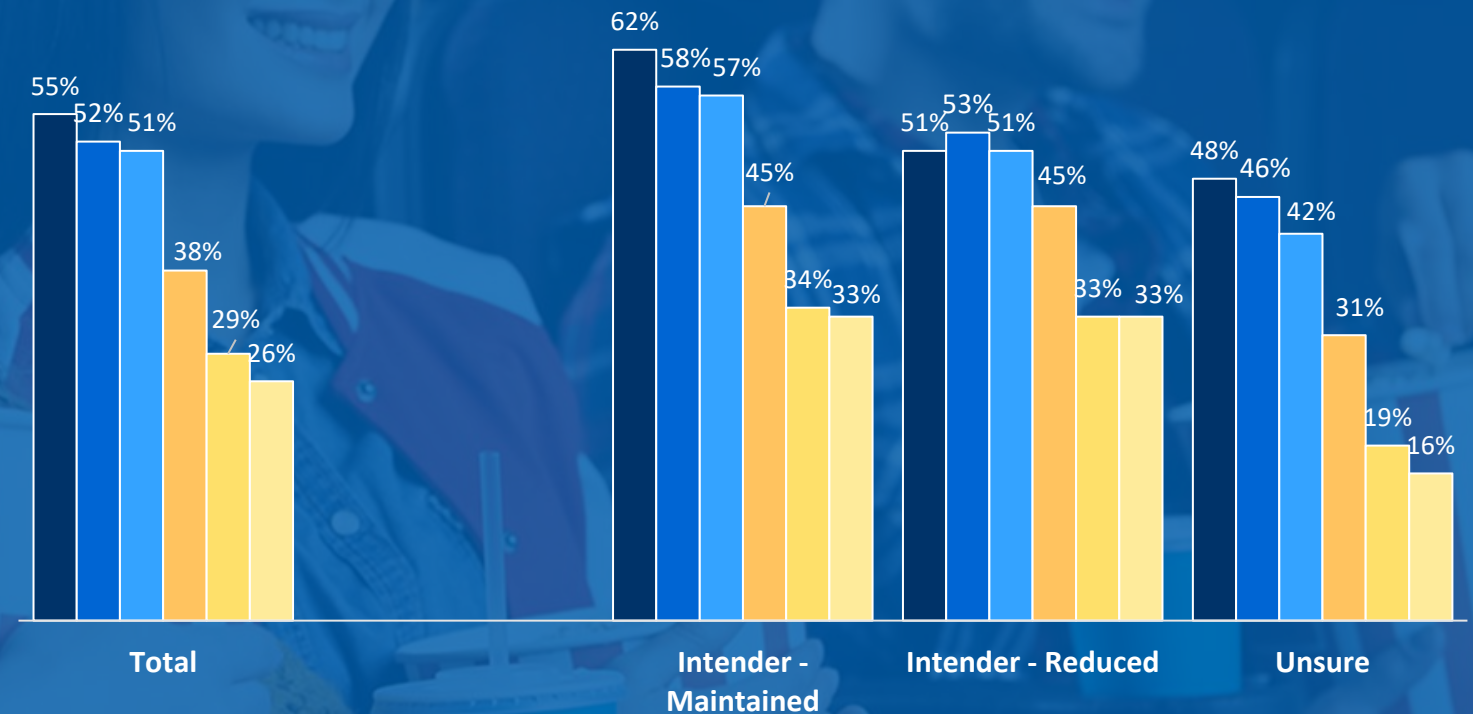
Q. Did you go to any of the below non-film event screenings at the cinema prior to the pandemic?\*



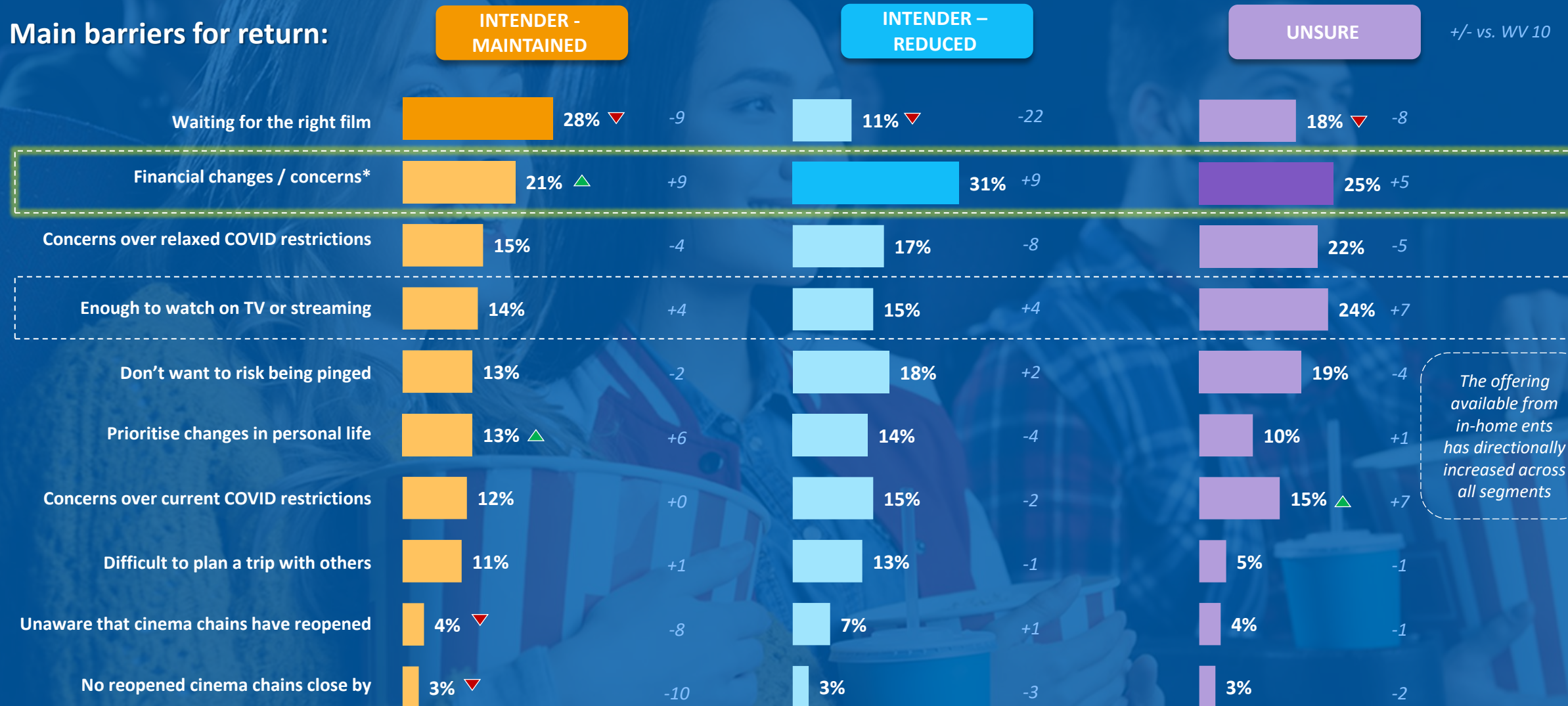
The Intender groups tend to have the highest penetration of Event cinema attendance prior to the pandemic. Top event screenings across all audiences were Concerts and Theatre performances. The Unsure group under-index on attendance for all event screening types, reflecting this segments' skew towards light cinema goers.

Q. How interested are you in watching the following non-film event screenings at the cinema in the near future?

Concerts Theatre Documentaries Exhibition / Gallery Tours Ballet / Dance Opera



Post the release of No Time To Die, we see a significant decline in the importance of waiting for the right film as top barrier for return across all segments. Concerns over relaxed COVID restrictions also weaken, with changes in financial situation now a universal concern





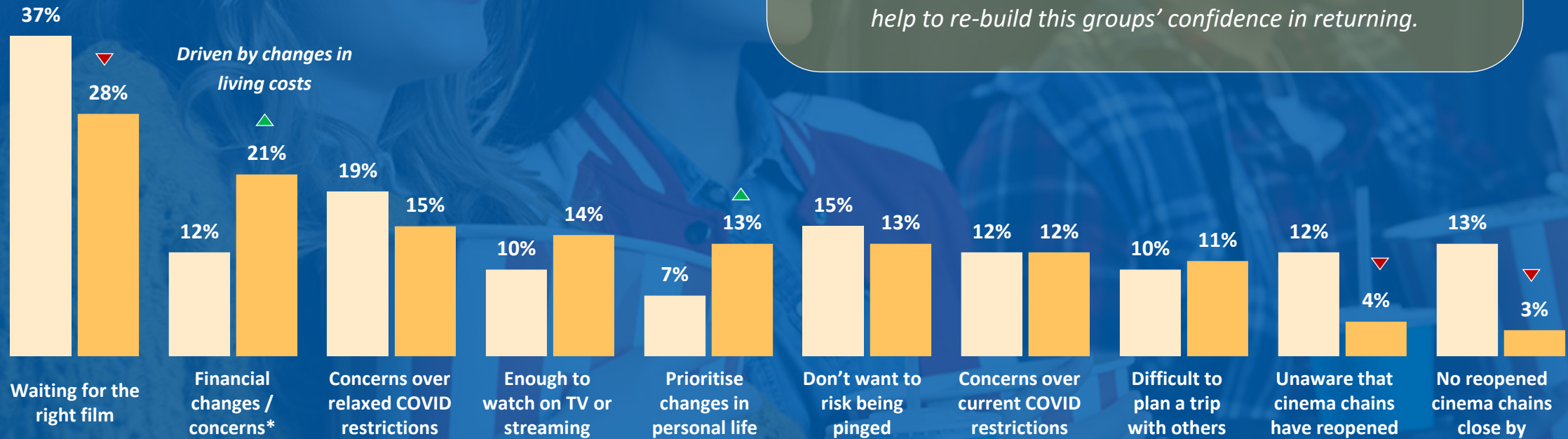
# Although still keen to return for the right film, we see indications that our remaining Intender-Maintained group are facing increasing pressure from external factors such as finance or personal circumstance

## Main barriers for return:

**INTENDER - MAINTAINED**

*Logistical barriers regarding cinema awareness and proximity have reduced significantly for this group. However financial concerns driven by rising living costs indicate similar issues facing those in the Intender-Reduced group in Wave 10. Increased contentment with in-home content offering indicates a growing need to stimulate this groups' eagerness to return. Increased awareness of ticket promotions and alternative showtimes may help to re-build this groups' confidence in returning.*

**WAVE 10**   **WAVE 11**



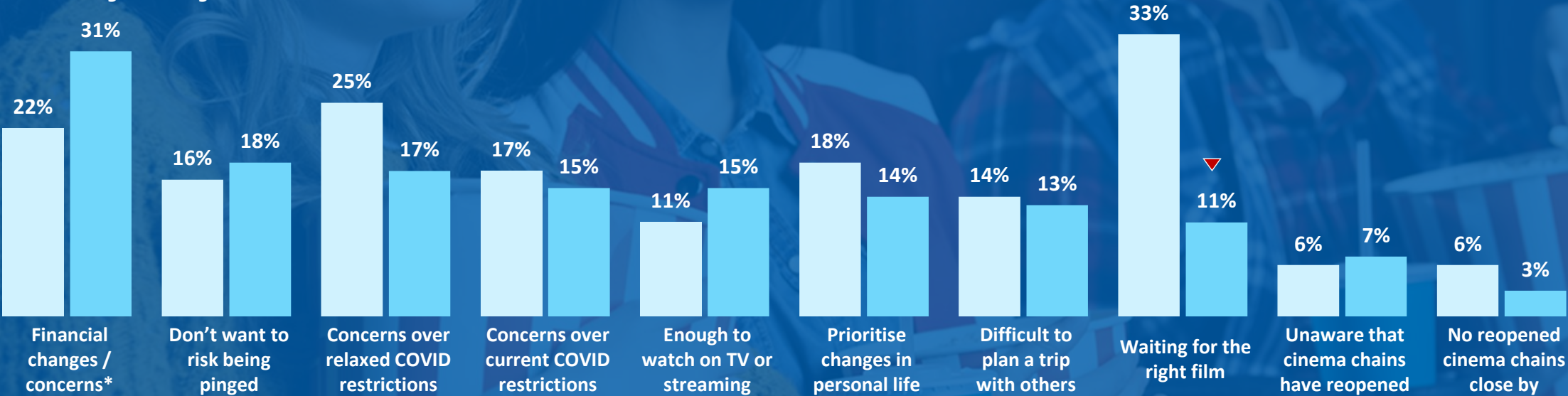
# Intenders-Reduced see the greatest decline in their need for the right film to inspire a trip to the cinema. As seen in Wave 10, this group are the most likely to be burdened by financial constraints

Main barriers for return:

INTENDER – REDUCED

WAVE 10 WAVE 11

*Uplift driven by changes in living costs*





# The Unsure group continue to over-index regarding concerns around COVID as key barriers for return, both in terms of their safety within cinemas but also the perception that any restrictions in place may negatively impact their experience

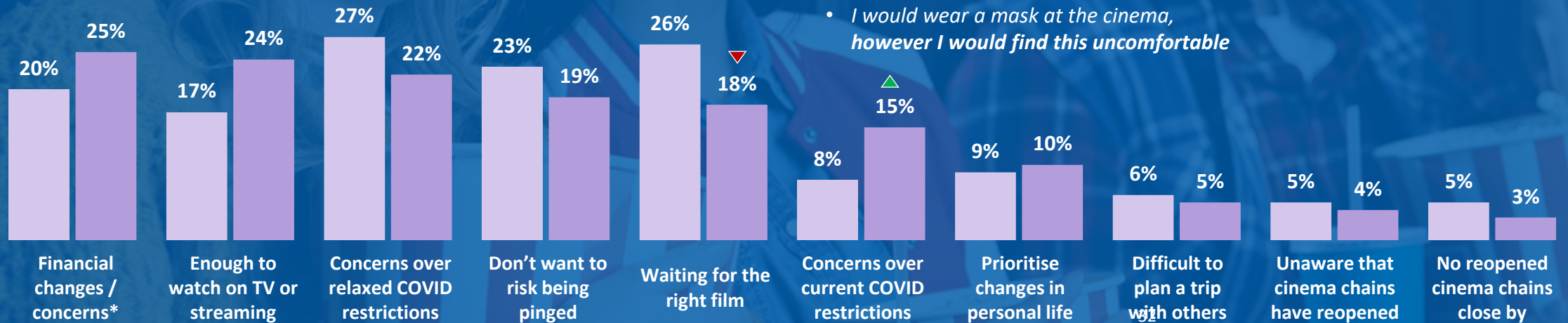
## Main barriers for return:

UNSURE

*The perceived need to wear a mask is seen as the top barrier in terms of concerns regarding current COVID regulations compromising enjoyment of their trip to the cinema. Although mask-wearing is not mandatory in England, awareness of this may not necessarily reassure this group given their concerns about COVID-19. This audience may prefer to wait until they can safely resume a normal cinema-going experience.*

WAVE 10 WAVE 11

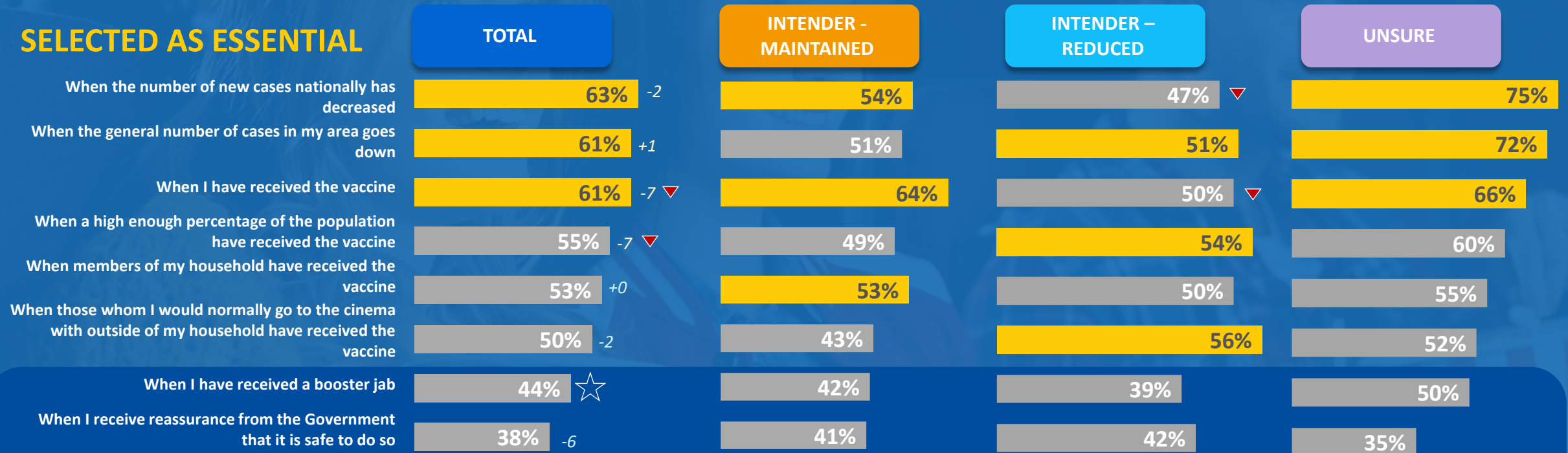
*Uplift driven by changes in living costs*



- I understand restrictions are needed, but **they make me feel tense**. I prefer then to spend my time at home
- I would wear a mask at the cinema, **however I would find this uncomfortable**

# In line with rising vaccination levels, the need for a vaccine has declined significantly at a total level. Progress on both a national and local level remain key factors of reassurance among the Unsure

★ Q: You mentioned Coronavirus will impact your decision to return to the cinema, how would you rate these Public Health factors in terms of making you feel confident to return?



*As well as over-indexing as Essential, the Unsure group are the most likely to rate receiving a booster jab as 'Nice To Have' (37%). Both Intender groups however over-index for this having little impact in their decision to return to the cinema.*



For those who are primarily delaying a trip to the cinema due to concerns around COVID-19, top measures which they expect to see implemented in cinemas continue to display a high level of consistency. Social distancing in the auditorium ranks highly across all groups

Safety measures in cinemas:

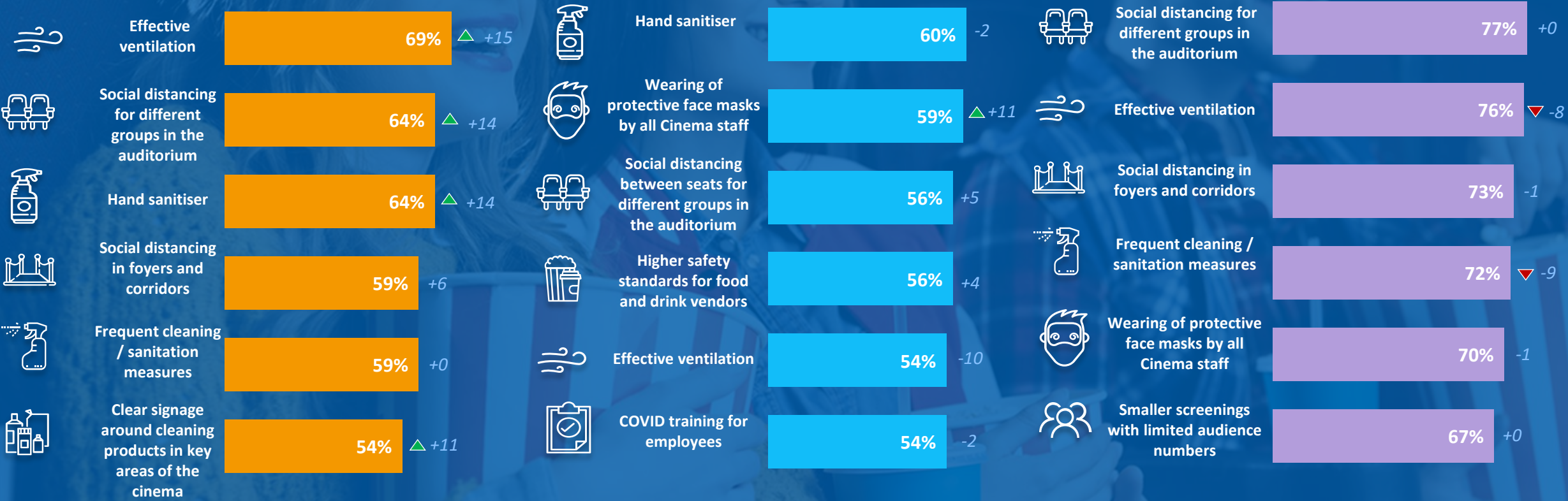
INTENDER - MAINTAINED

INTENDER - REDUCED

UNSURE

+/- vs. WV 10

TOP ESSENTIAL MEASURES AMONG THOSE CONCERNED PRIMARILY ABOUT COVID-19



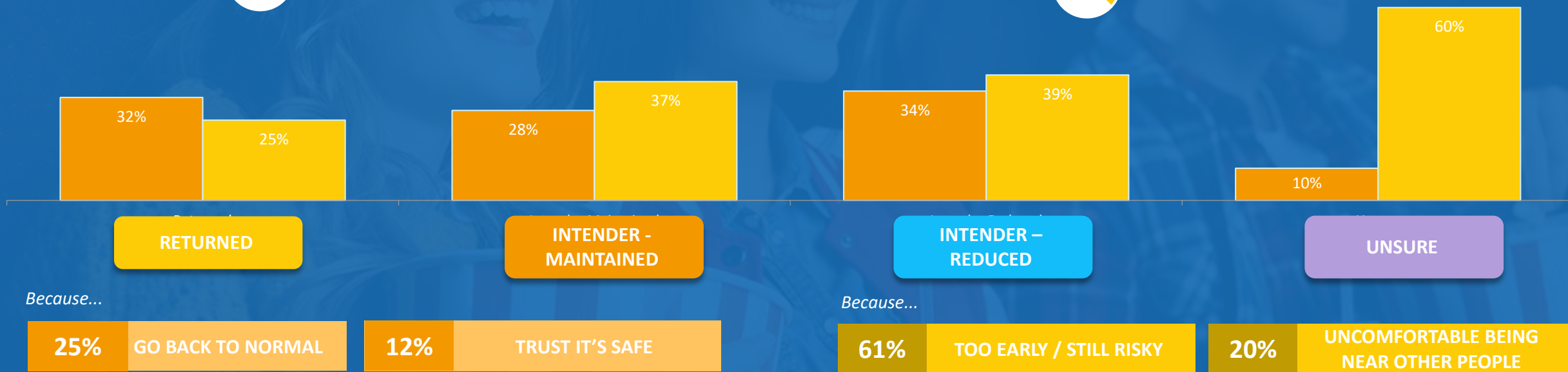
# Sentiment on relaxed social distancing remains stable at a total level. In line with their older skew and greater concerns with cinema safety, the Unsure group overwhelmingly state that they would be less likely to return if social distancing was not in place



★ Q: Please select which of the following statements most closely reflects how this change might affect your willingness to return to the cinema:

## RELAXED SOCIAL DISTANCING RULES IN CINEMAS:

Only 17% of ROI audiences state that relaxing social distancing measures in cinemas would make them LESS likely to return, with 37% saying it won't make a difference



When asked, 9% of this group stated that they didn't know or when unsure as to why they felt they would be more likely to return if social distancing were relaxed

Base: Returned, Intender Maintained, Intender Reduced, Unsure (N=430,187,125,227)



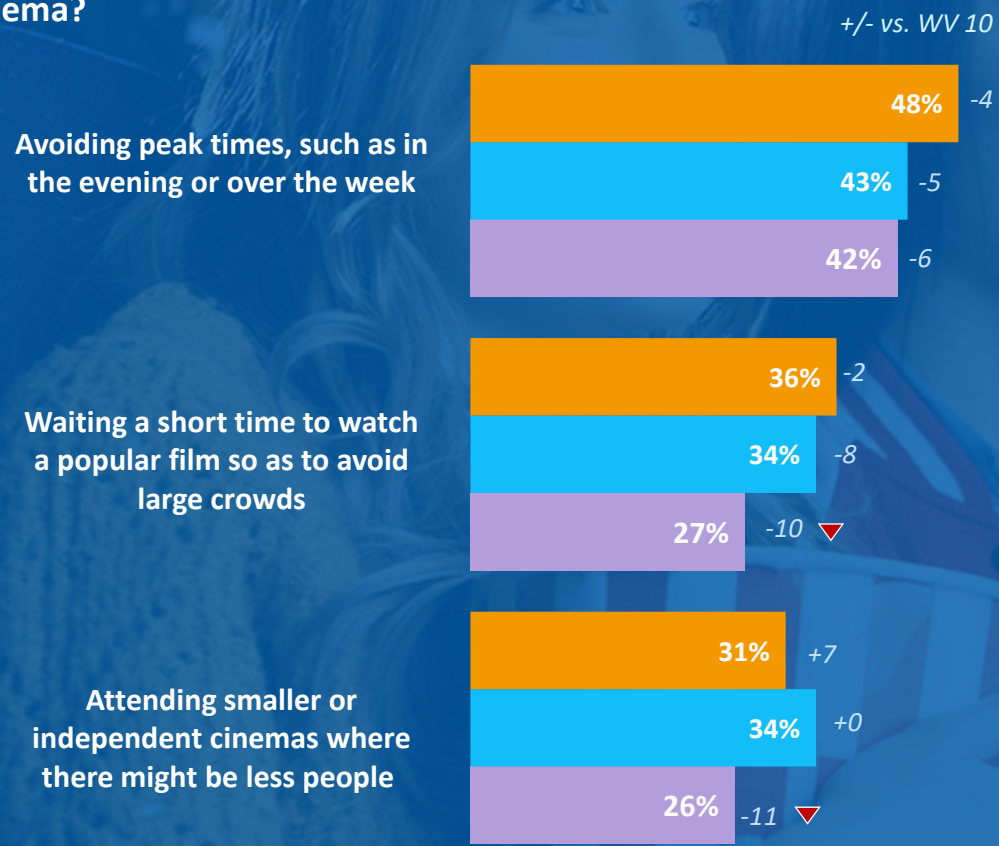
# Avoiding peak times when visiting the cinema continues to be the top option for restoring confidence to return across segments. For those who have not already seen Dune and Venom: Let There be Carnage, The Matrix Resurrections and Spiderman: No Way Home emerge as the next titles most likely to prompt a return visit

Q: Which of the below options would give you more confidence in returning to the cinema?

**INTENDER - MAINTAINED**

**INTENDER - REDUCED**

**UNSURE**



Top Spontaneous Awareness >4%

- Dune
- Venom: Let There Be Carnage
- Eternals
- Halloween Kills
- The Addams Family 2
- Spiderman: No Way Home

- Dune
- Venom: Let There Be Carnage
- Batman
- The Matrix: Resurrections
- Spiderman: No Way Home
- Halloween Kills

- Dune
- Venom: Let There Be Carnage
- Batman
- The Addams Family 2

Watch in cinemas, in order of top intent:

- Spiderman: No Way Home
- Venom: Let There Be Carnage
- Dune
- The Matrix: Resurrections
- Top Gun Maverick
- Halloween Kills

- The Matrix: Resurrections
- Venom: Let There Be Carnage
- Spiderman: No Way Home
- Dune
- Top Gun
- The Boss Baby 2

- The Matrix: Resurrections
- Dune
- Top Gun
- Spiderman: No Way Home
- Eternals
- Venom: Let There Be Carnage

# We see that each of our potential returning segments have distinctive characteristics and barriers, therefore could benefit from distinctive comms



## Findings:

## Opportunity:

### INTENDER - MAINTAINED

- This group has seen the highest level of conversion into Returned since Wave 10, with a higher proportion of 25-34s and females seen in Wave 11.
- Although the need for an appealing slate continues to rank more highly vs. other segments, this has declined significantly since the previous wave. Growing financial concerns and changes in personal life are increasingly prompting a shift in priorities, mirroring the barriers of the Intender-Reduced group.

- Increasing upcoming slate awareness is key for this group as a means of stimulating excitement and countering increased contentment with in-home ents.
- Growing financial concerns could generate a conversion towards Intender-Reduced, communications regarding ticket promotions could help off-set these worries

### INTENDER - REDUCED

- Intenders-Reduced have seen the least reduction from Wave 10 to Wave 11. However we see a larger proportion of males and parents vs the previous wave.
- This group has seen the largest decline in their need for an appealing slate. Building on findings from Wave 10 this group continue to face challenges from external factors such as the rise of living costs and over-index for this as a barrier vs other segments.
- Although slightly reduced since Wave 10, health concerns remain a barrier with this group hesitant to risk being pinged and told to isolate.

- This group are facing clear financial pressures and could benefit from continued communications around ticket promotions / group offers.
- Increasing upcoming slate awareness can help to reignite this audiences' interest in upcoming films, reminding of the unique value of cinema

### UNSURE

- Although continuing to skew older, this group now includes a larger proportion of females.
- Wave 11 sees a significant increase in the level of interest of cinema as a social experience among this group.
- However despite increased slate awareness, the desire to wait for the film has also declined as a barrier. Concerns regarding COVID safety, as well as the perception that those restrictions necessary would also compromise the experience continue to encourage a delay in return.

- Clear information regarding the safety precautions in place may help assuage those concerned that restrictions would impact their visit
- Emphasising a trip to the cinema as an opportunity to socialise may help to persuade this group, with communications around group offers and low-capacity screenings helping to offset safety concerns



A group of people are shown in a cinema setting, smiling and looking towards the right. They are holding popcorn buckets and drinks. The scene is dimly lit, typical of a movie theater.

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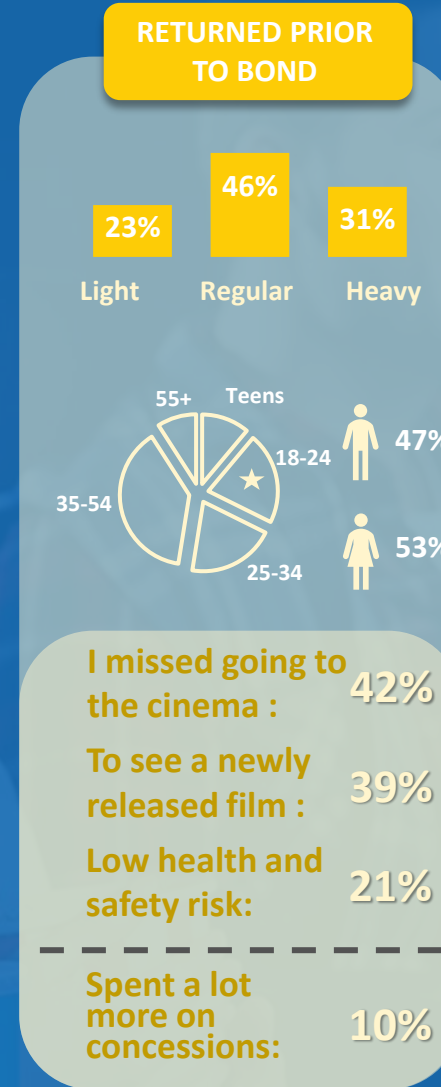
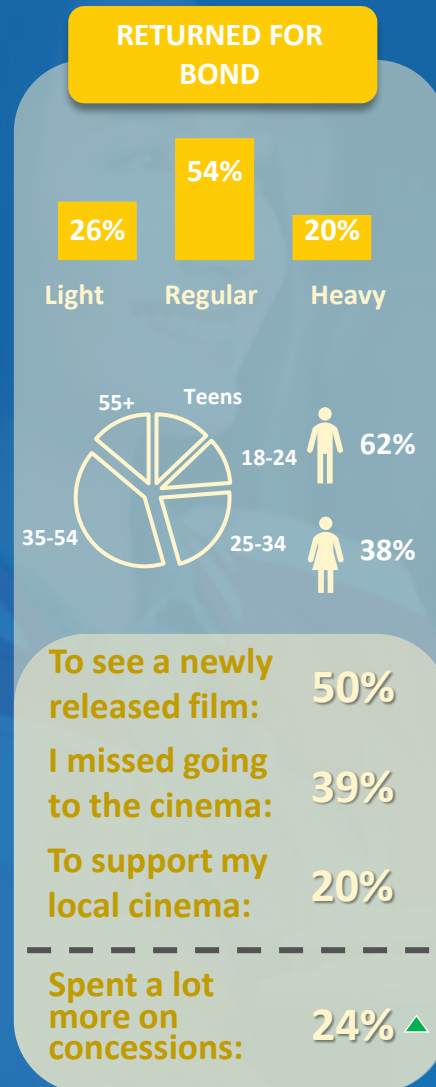
The 13% point increase in returners was driven by Bond - tending to be less heavy cinema goers, they also saw it as an event, treating themselves to concessions

43% Returned



30% came back for the first time to see **NO TIME TO DIE** (13% of total sample)

**NO TIME TO DIE** 007<sup>th</sup>



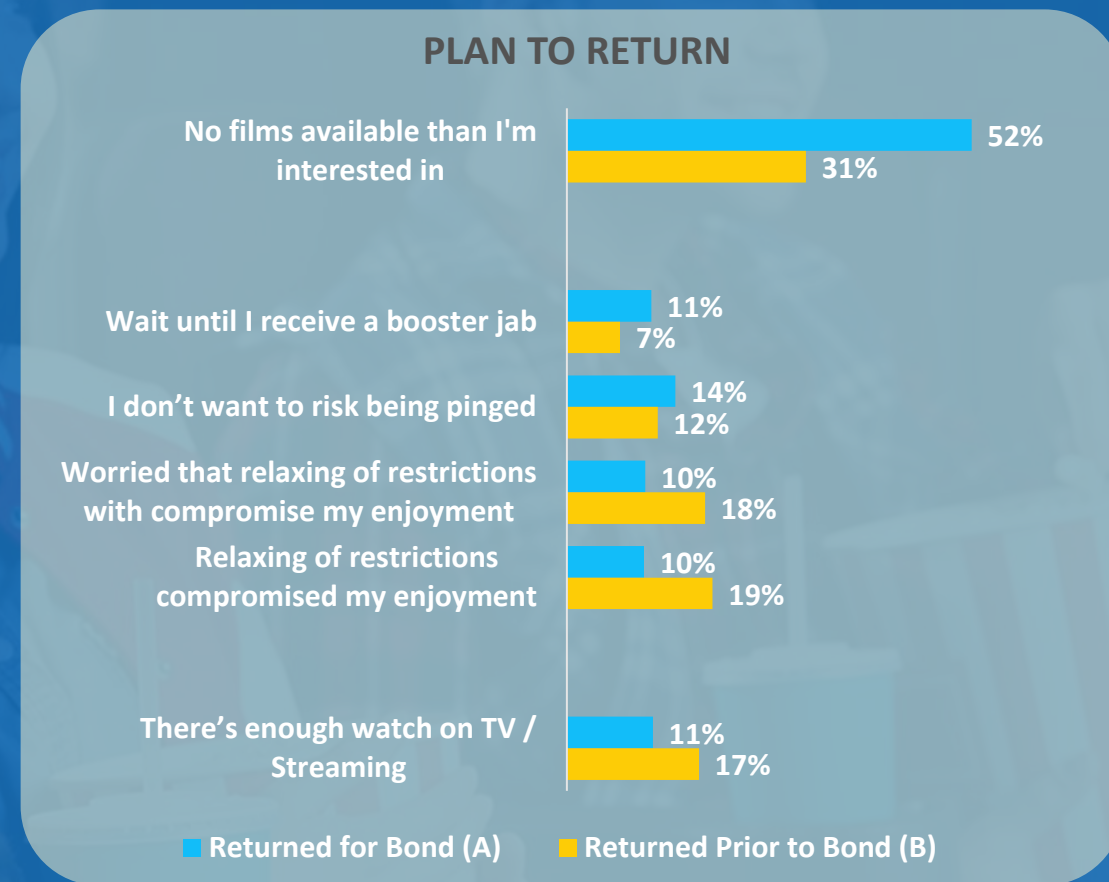
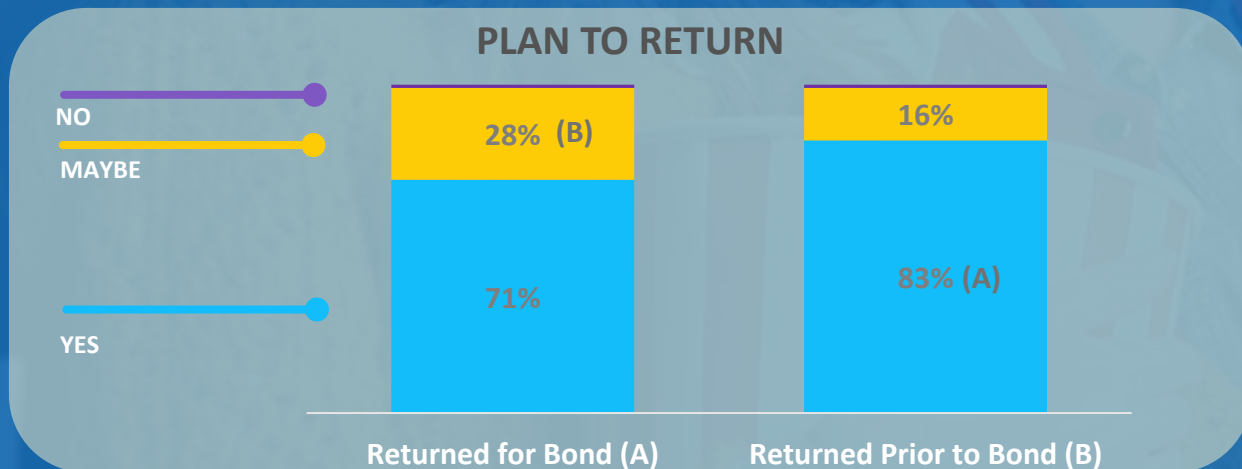
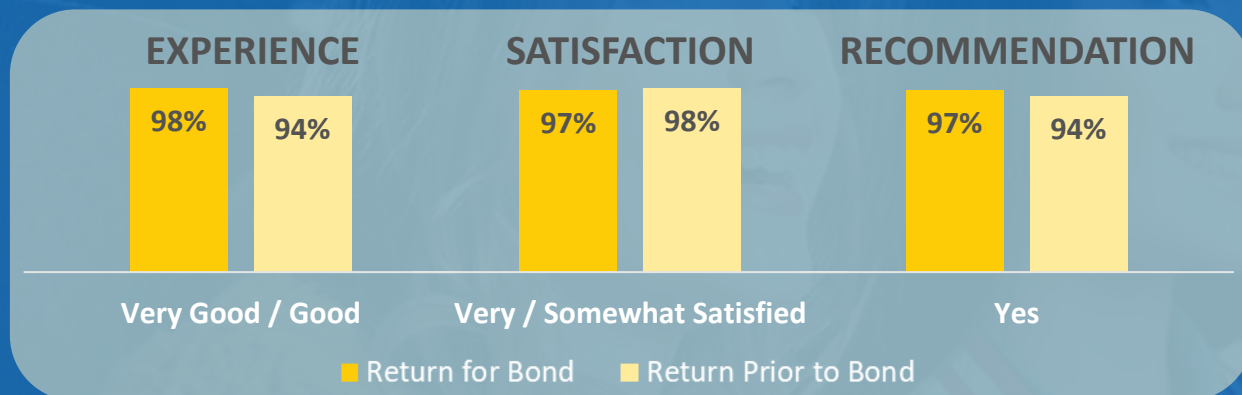
★ Those who had returned prior to Bond contains a significantly higher proportion of 18-24s



# New returners were satisfied with their experience. While they are a little unsure as to when they might return to the cinema - indications are that it's slate related rather than because of COVID

Q: Do you plan to go to the cinema in the near future?

Q: You mentioned that you are less sure about or unlikely to return to the cinema again. What are the main reasons influencing your decision?



Base: Those who returned for Bond (N=130) Those who had returned prior to Bond (N=301)

Base: Those who returned for Bond and will 'maybe' return (N=37) Those who had returned prior to Bond and will 'maybe' return (N=50)

# 77% of those who've returned plan to continue going to the cinema at the same rate or more often than before the pandemic

43% of respondents state they have returned to the cinema since reopening on May 17th

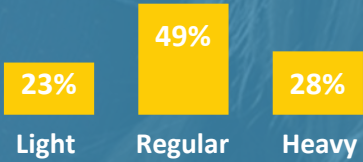
Stated future frequency vs. pre-lockdown among those who've returned:



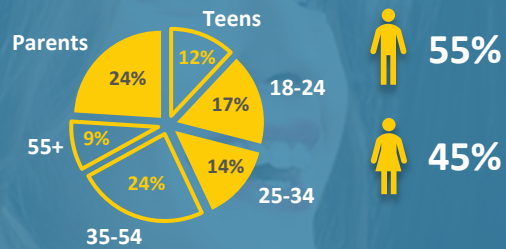


The Returned Maintained group skew towards parents and younger audiences. A third have already been to the cinema 3 or more times. Returned Reduced skew towards females and older audiences. Two thirds have only been to the cinema once since they reopened, with a third of this group brought back by Bond

**RETURNED - MAINTAINED**



**DEMOGRAPHICS:**



**Number of cinema trips:**

Once	40%
Twice	28%
Three +	32%

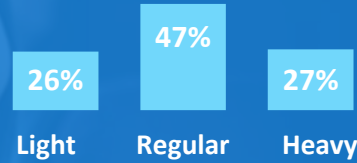
Returned for the first time to see **No Time To Die: 29%**

Future cinema visits likely to be more planned vs. pre-pandemic: 30%

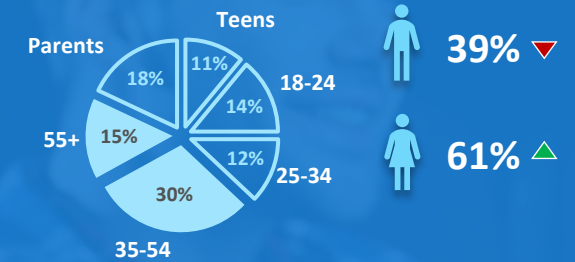
**Top Intent :**



**RETURNED - REDUCED**



**DEMOGRAPHICS:**



**Number of cinema trips:**

Once	59% ▲
Twice	26%
Three +	15% ▼

Returned for the first time to see **No Time To Die: 35%**

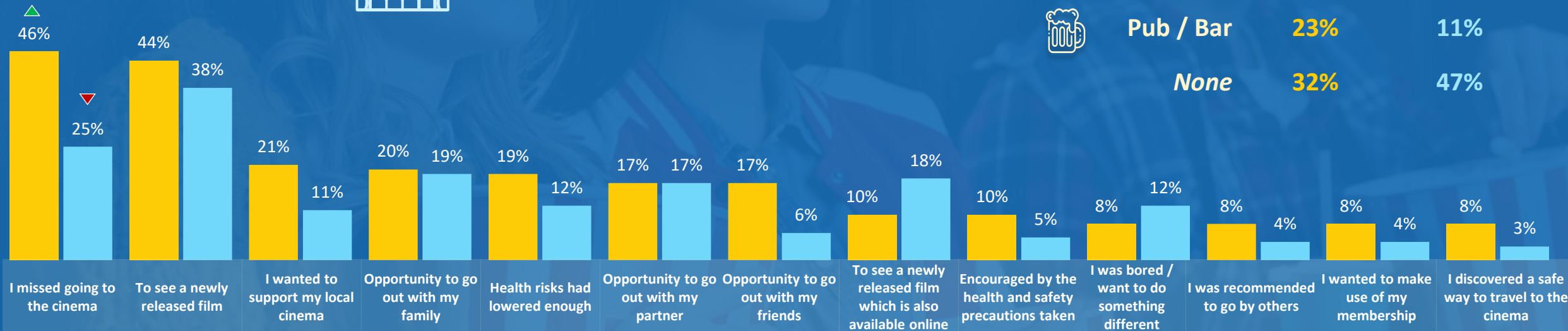
Future cinema visits likely to be more planned vs. pre-pandemic: 49%▲

**Top Intent :**



# Reflecting their slightly higher proportion of Light cinemagoers, the Returned Reduced group are less likely to rank the cinematic experience as a primary reason for return. Once they go, they are also less likely to visit surrounding venues

## REASONS FOR RETURNING:



## ALSO VISITED OTHER VENUES AT TIME OF VISIT:

	RETURNED - MAINTAINED	RETURNED - REDUCED
--	-----------------------	--------------------

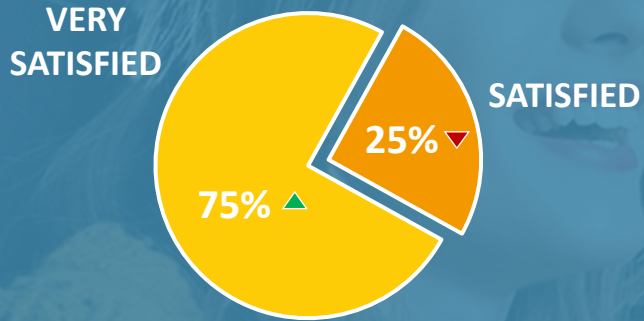
	Shopping	37%	29%
	Restaurant	33%	29%
	Café	26% ▲	8% ▼
	Pub / Bar	23%	11%
	None	32%	47%

The number of ROI respondents who state that they have returned to cinemas since they reopened on June 7<sup>th</sup> has **doubled to 45%**. 52% missed the cinema experience, with 40% wanting to support their local cinema and 33% coming to see a newly release film



Satisfaction rates are universally positive among the Returned Maintained group. Although still mainly positive, significantly lower satisfaction among the Returned Reduced is driven by safety concerns, primarily the desire for increased social distancing and use of masks

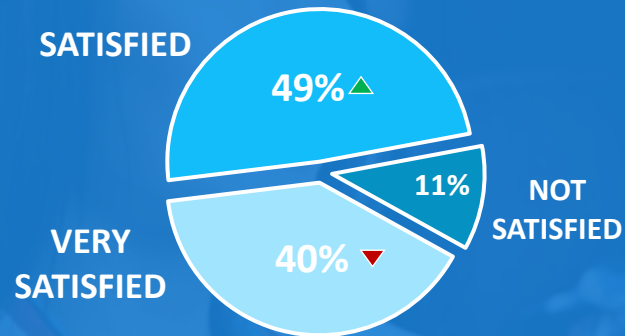
**RETURNED - MAINTAINED**



**98% RATED THEIR EXPERIENCE AS GOOD / VERY GOOD**

**▲ 99% WOULD RECOMMEND OTHERS TO RETURN TO THE CINEMA AS WELL**

**RETURNED - REDUCED**



**88% RATED THEIR EXPERIENCE AS GOOD / VERY GOOD**

**▼ 84% WOULD RECOMMEND OTHERS TO RETURN TO THE CINEMA AS WELL**

*There were too many people at the screening*

*Too many people too close and not wearing masks*

*Lack of spacing between groups*

*Cinemas now seat people together and there is no social distancing*

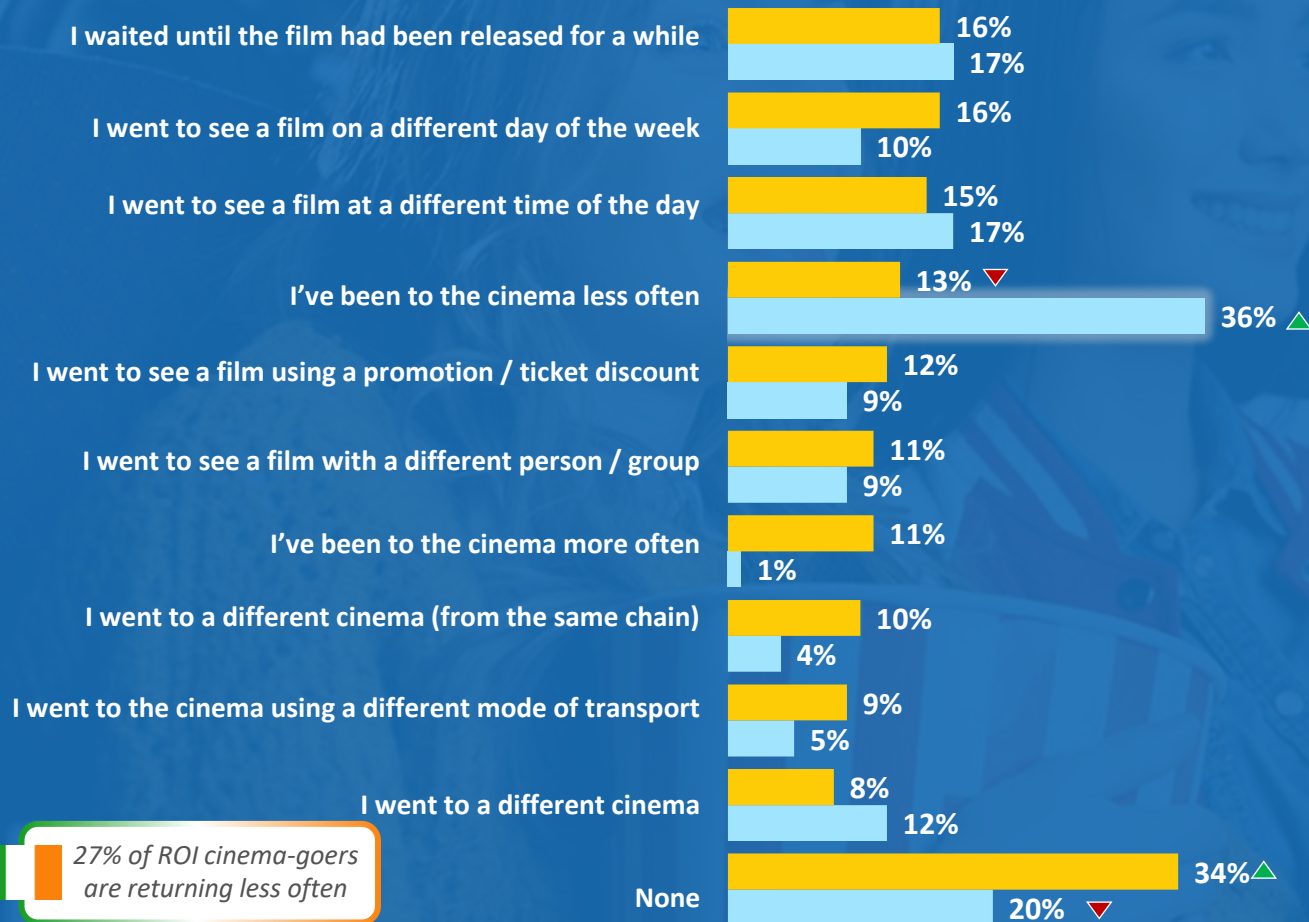
**SUGGESTED IMPROVEMENTS:**

- 41% More spacing / social distancing**
- 27% Need for masks**

*Satisfaction rate amongst those who have returned in ROI remains strong at 99%, with a significantly higher 97% (vs. 75 wv10) recommending to others*

For Returned Maintained, the increased need for forward planning and desire to avoid crowds encourages pre-booking and weekday showtimes. In line with their stated reduced frequency, Returned Reduced are already experiencing a notable drop in their normal rate of return, with safety concerns a key factor

★ CINEMA BEHAVIOUR vs. PRE-PANDEMIC:



27% of ROI cinema-goers are returning less often

- RETURNED - MAINTAINED**
- We planned our visit and booked in advance and took our own snacks
  - I planned to see a film and booked for an early afternoon showing instead of the evening showing because I knew it would be busier in the evening.
  - Different time of day and a much more controlled and organised experience
  - Chose a week day rather than an evening or weekend day to reduce the risk of it being too crowded
  - We had planned it for a while and booked tickets so it was organised beforehand
  - It was more planned with my friends and we made sure we prebooked before arriving

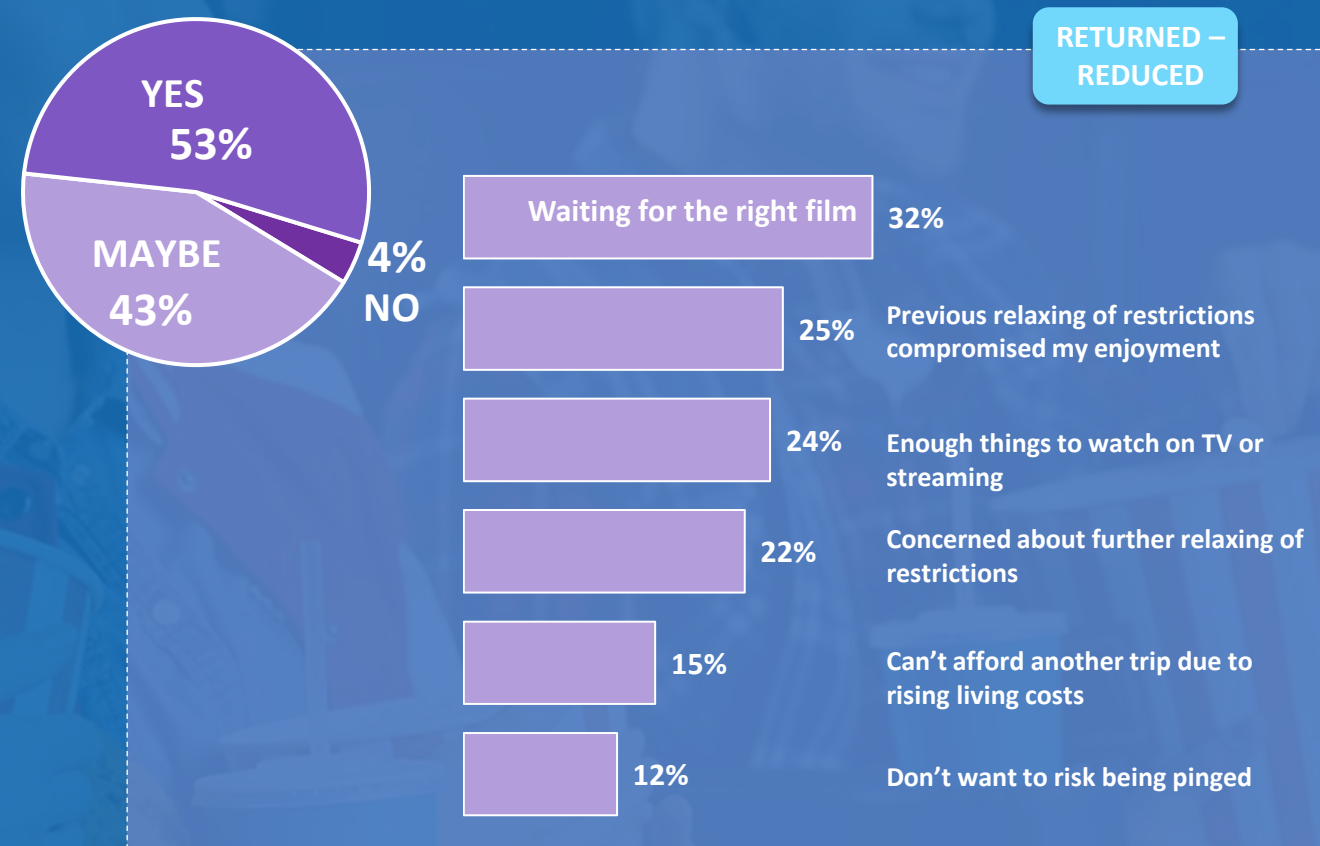
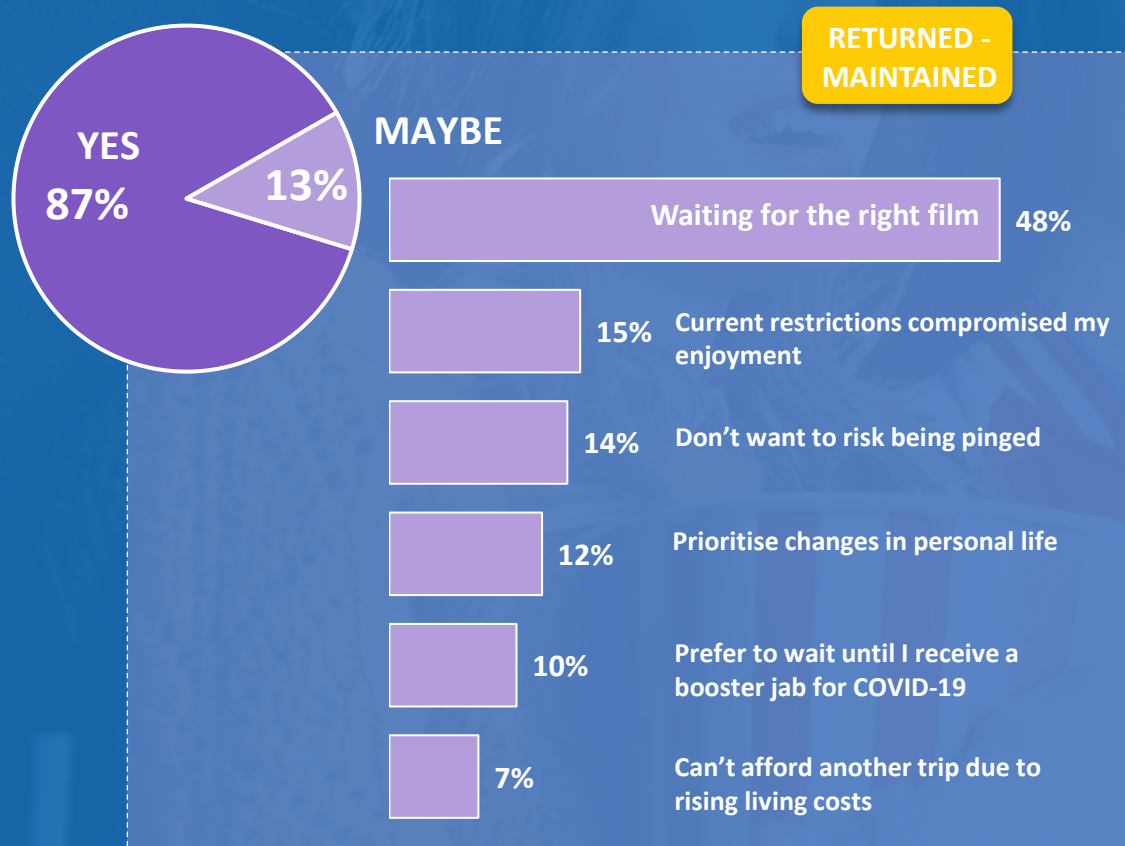
- RETURNED - REDUCED**
- Too many people mingling not wearing masks and without covid passports to get in no-one knows who has been jabbed and who hasn't
  - Waited until been out 2 weeks so not as crowded & on a week-day
  - I don't think it is safe enough to go out and socialise
  - Not 100% confident of spending too much time in an enclosed space with others
  - Still cautious about touching things ..and any crowd of people ..whereas before no need to worry
  - I thought that by waiting for a while after the film was released then the cinema would be less full



# Appealing titles are the top driver for encouraging a repeat visit. Concerns over the relaxed restrictions encourage a larger proportion of Returned Reduced to delay another visit in the near future, with the potential to favour in-home ents until they feel more confident

★ Q: Do you plan to go back to the cinema in the near future?

★ Q: You mentioned that you are less sure about or unlikely to return to the cinema again. What are the main reasons influencing your decision?



Base: Total Audience who have returned to the cinema N= 330/ 97

Significant against Wave 10 at 95% Confidence ▲▼

A group of people are shown in a cinema setting, smiling and looking towards the right. They are holding red and white striped popcorn buckets and blue cups with straws. The background is dark, suggesting a movie theater.

**1. Executive Summary**

**2. Current audience landscape**

**3. Barriers towards Returning**

**4. Audience Segmentation**

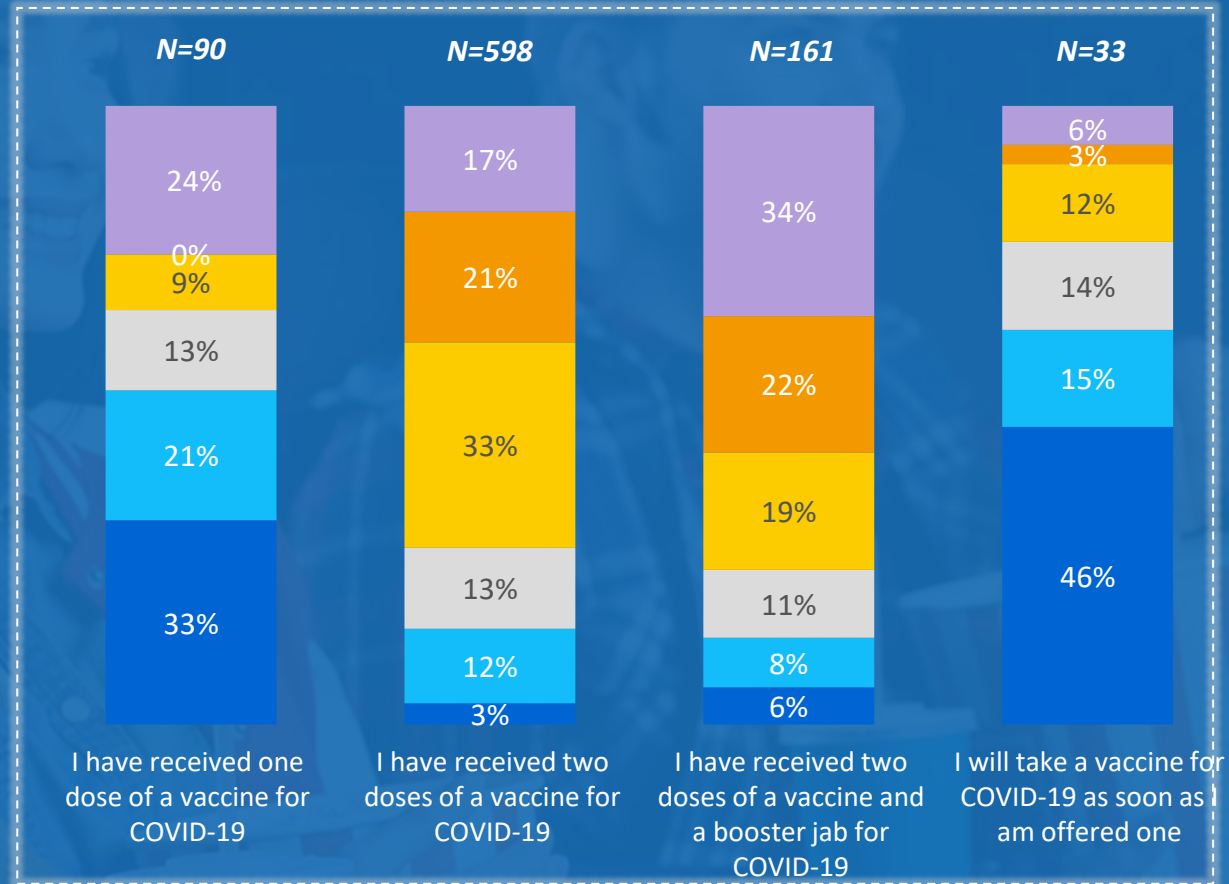
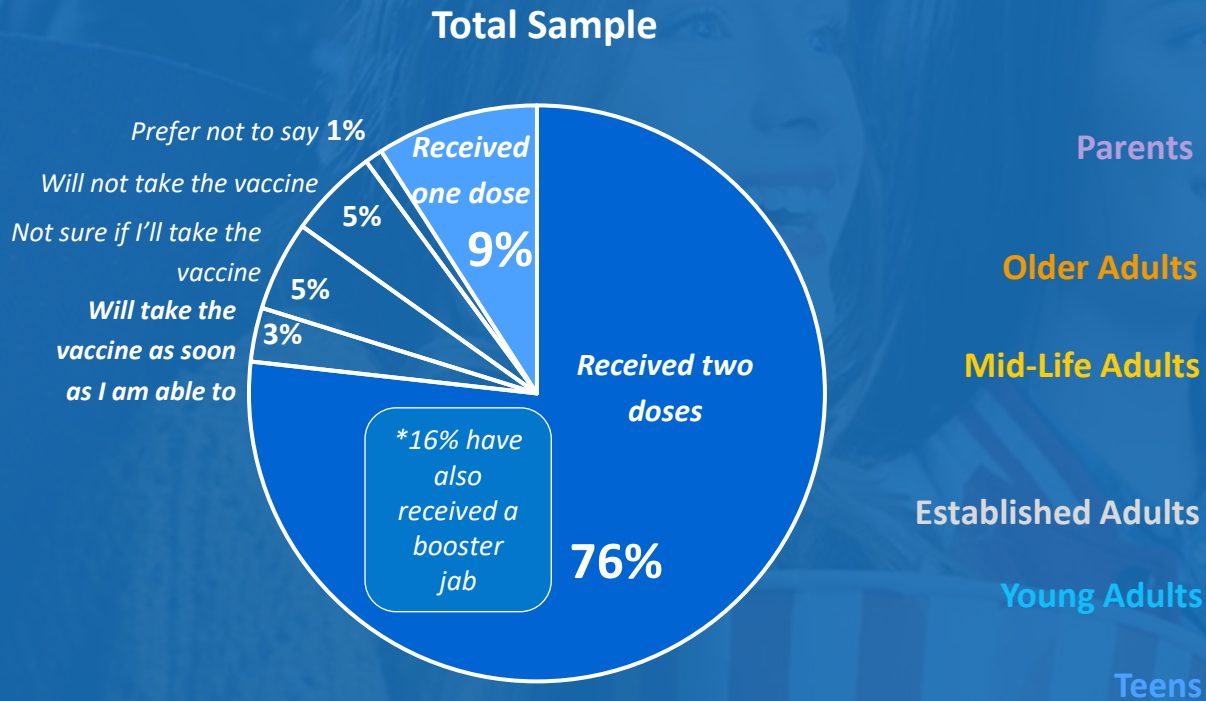
**5. Returned to cinemas**

**6. Appendix**



# The majority of our sample has now received both doses of the vaccine\*

Q: Please choose one option below that you feel best describes your current status:



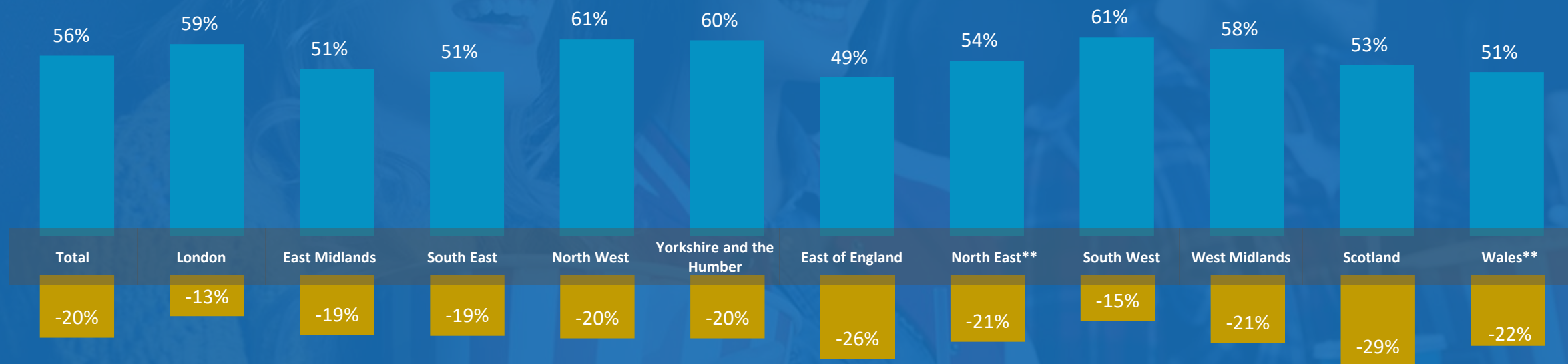
\*slightly lower % of those receiving two doses of the vaccine vs national statistics (79% received 2 doses, 89% received at least one dose) source: [coronavirus.data.gov.uk/details/vaccinations](https://coronavirus.data.gov.uk/details/vaccinations) – updated 29<sup>th</sup> Oct

# Cinema safety perceptions have also increased across England, particularly in the East, South and London



Q: How safe do you feel these Out of Home leisure activities will be once they are allowed to reopen? 10p scale: 1-4 = unsafe, 7-10 = safe

## CINEMAS ARE SAFE



Base: Total Audience (N= 998)

\*\*Caution low base

## CINEMAS ARE UNSAFE



# Despite somewhat lower slate awareness, those in England continue to display the highest rate of return compared to other UK regions. Ireland sees a strong rate of return, buoyed by improved slate awareness and safety perceptions



Aware that cinemas have reopened:

England	Scotland	Wales	Ireland
91%	84%	85%	82%

Slate Knowledge:

Good / Some

England	Scotland	Wales	Ireland
68%	80%	84% ▲	69% ▲
32%	20%	16% ▼	31% ▼

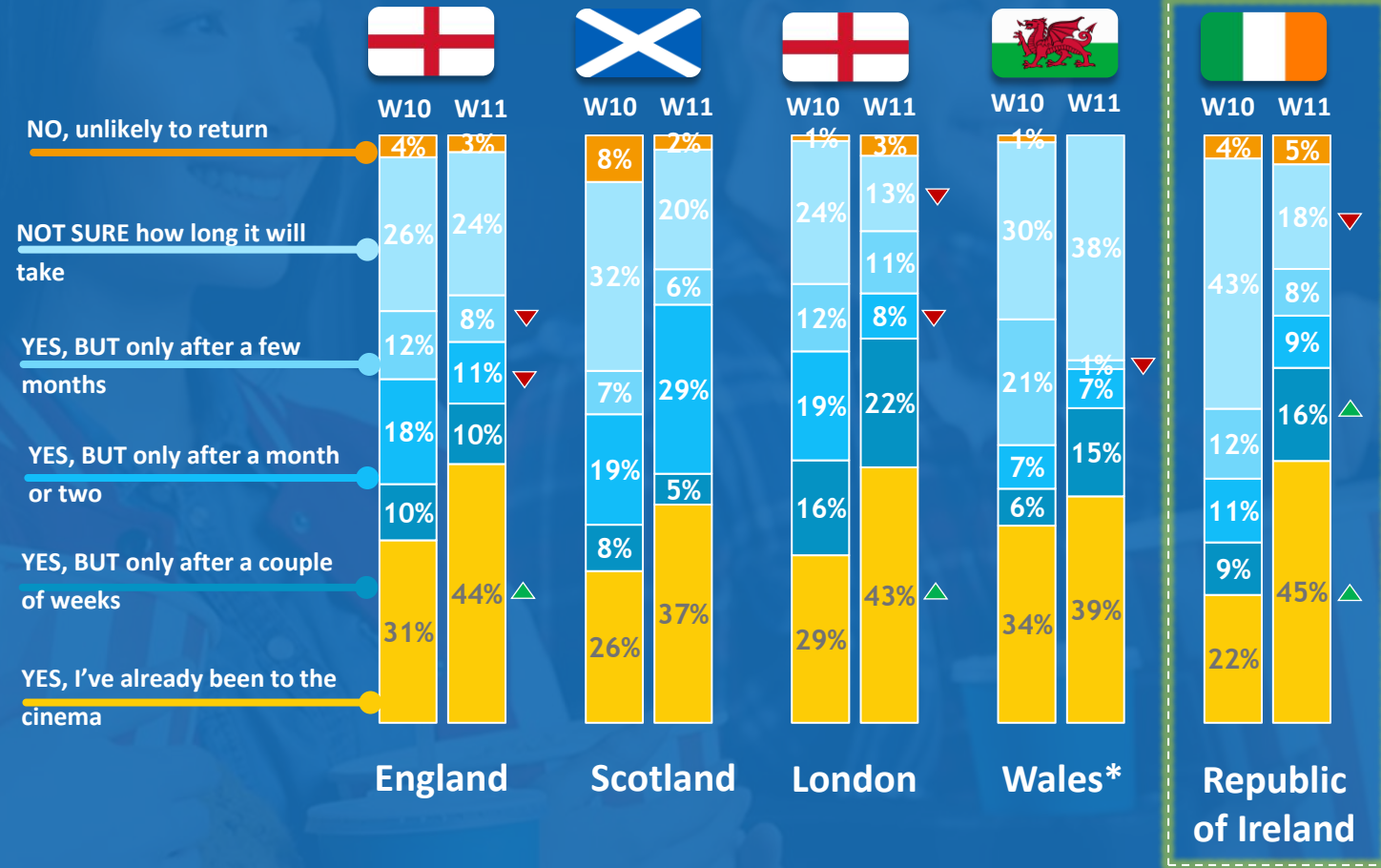
Low

Cinema Safety:

Safe

England	Scotland	Wales	Ireland
56%	53%	51%	68% ▲
20%	29%	22%	19% ▼

Unsafe

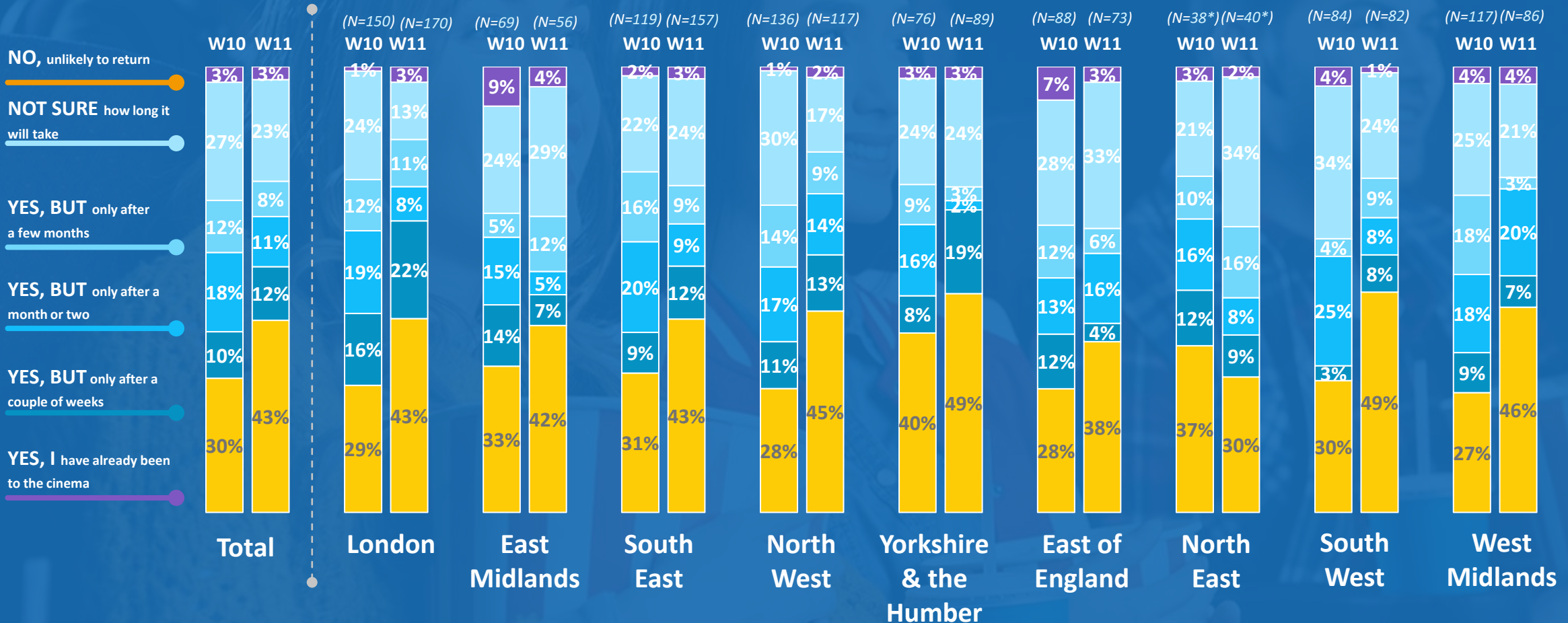


Base: Wave 10 : England, Scotland, London, Wales, Republic of Ireland (N= 727, 79, 150, \*\*44,260) / Wave 11 : England, Scotland, London, Wales, Republic of Ireland (N= 700, 63, 170, \*\*42, 254)

Significant against Wave 10 at 95% Confidence ▲ ▼

\*\* Caution: Low base size (<50)

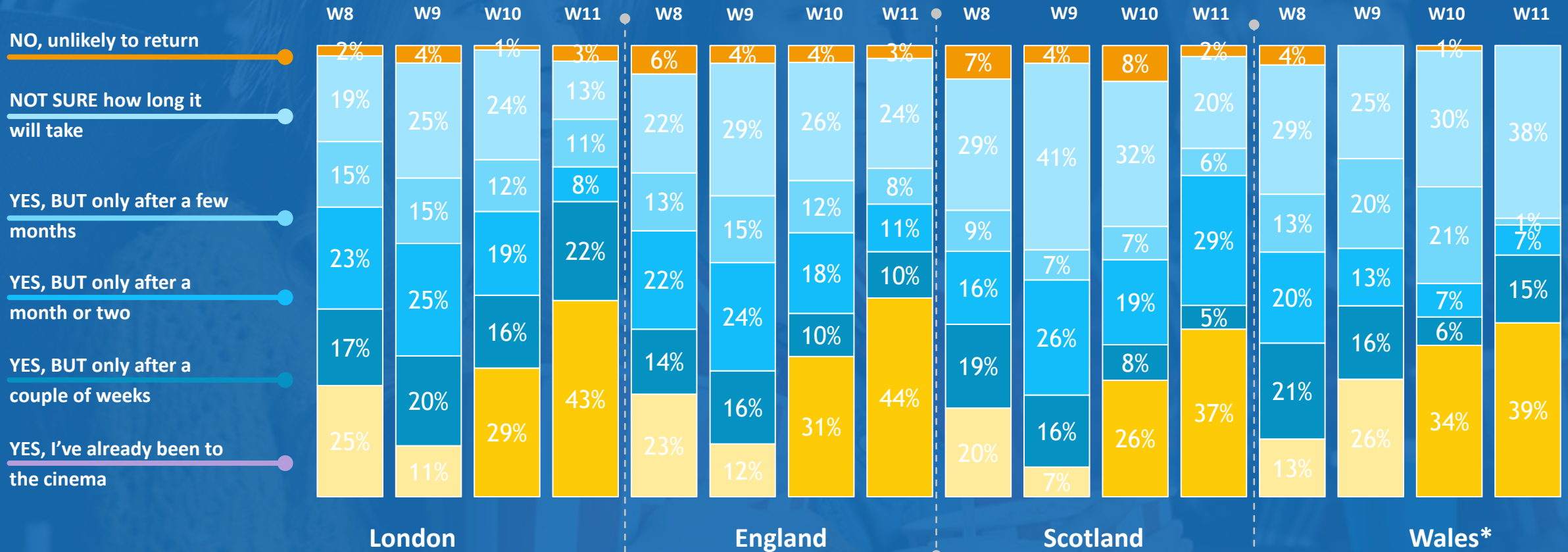
# All regions bar the North East see increased numbers of returning cinemagoers. Growing levels of uncertainty are notable in the Eastern regions





# Increased levels of cinema return are also seen in Scotland and Wales

Q: Now that cinemas have reopened, do you plan to go back to the cinema?



\* Caution: Low base size (<50)

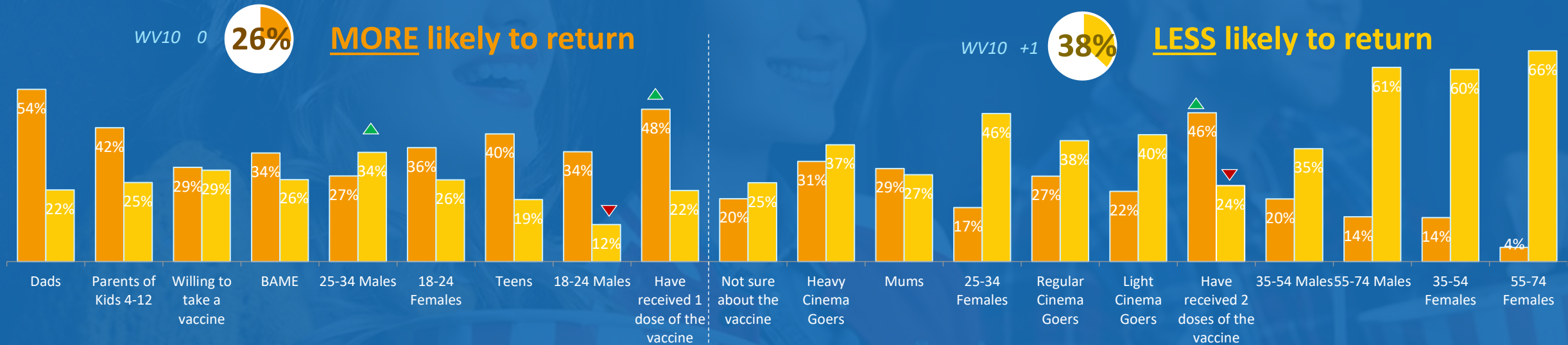
Base: Those living in London (N=170) England (N=700) Scotland (N=63) Wales (N=42\*) \*\*very low base

# Sentiment around the relaxing of social distancing in cinemas remains largely unchanged overall. Those who have received both doses of the vaccine see an increase in confidence in returning if social distancing rules were relaxed



★ Q: Please select which of the following statements most closely reflects how this change might affect your willingness to return to the cinema:

## RELAXED SOCIAL DISTANCING RULES IN CINEMAS:



Base: Dads, Parents of Kids 4-12, Willing to take a vaccine, 25-34 Males, 18-24 Females, Teen, 18-24 Males, Not sure about the vaccine, Have received 1 dose of the vaccine, Heavy Cinema Goers, Mums, 25-34 Females, Regular Cinema Foresight Cinema Foresave received 2 doses of the vaccine, 35-54 Males, 55-74 Males, 35-54 Females, 55-74 Females

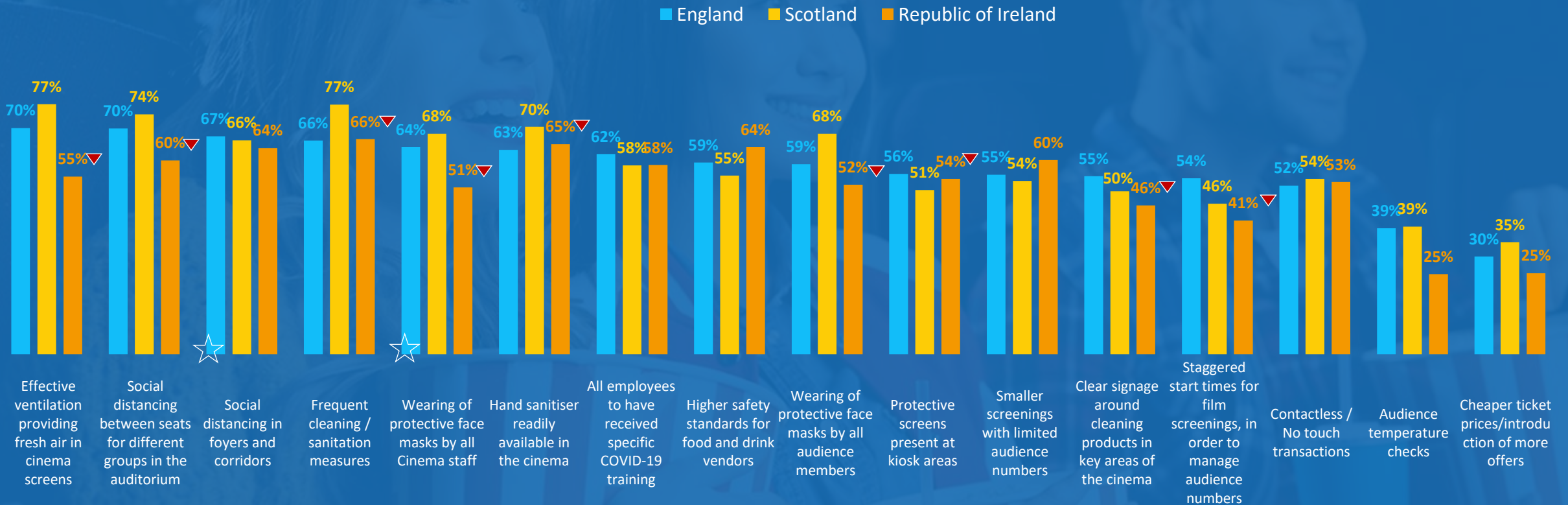
(N=84,180,50,127,69,83,171,78,121,56,233,96,81,394,371,147,82,86,88,80)

Significant against Wave 10 at 95% Confidence ▲ ▼



# The ranking of safety measures as essential has softened generally in ROI. Frequent cleaning measures are now the top concern, followed by available hand sanitiser and higher food and safety standards.

## SELECTED AS ESSENTIAL



\*\*Base size for Wales is too low to include

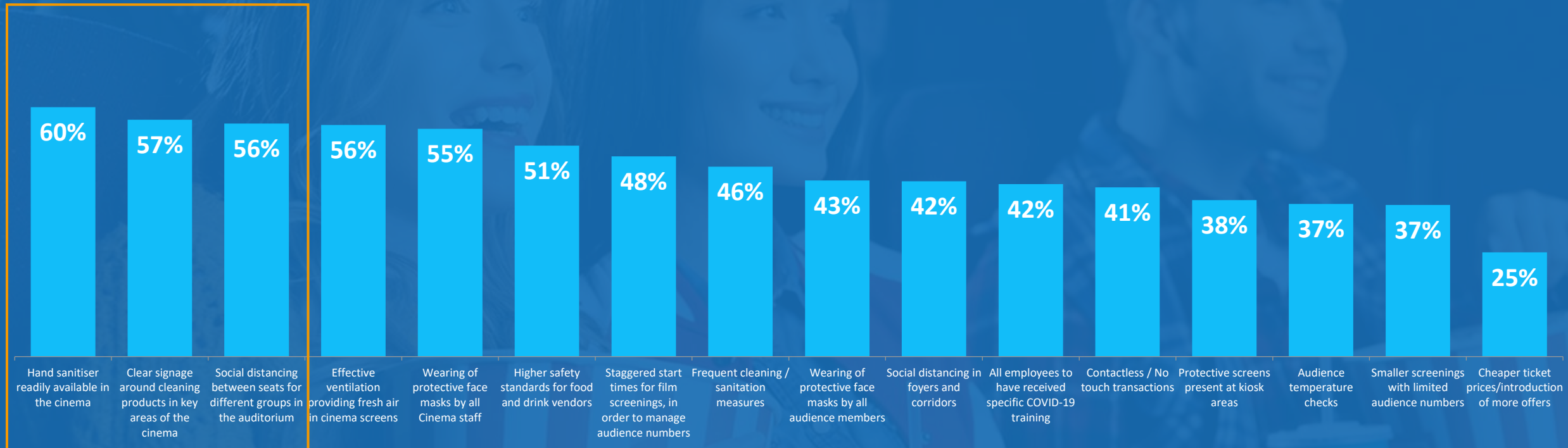
Base: Total Audience hesitating to return asap because of COVID-19 concerns England / Scotland /ROI (N=304, \*\*31, 111))

Significant against Wave 10 at 95% Confidence ▲ ▼

\*\* Caution: Low base size (<50)

☆ New answer options added for Wave 10  
 ★ Question wording updated for Wave 7

# Hand sanitiser, clear signage and social distancing in the auditorium are key measures in London. London notable under-indexes on rating all measures as essential vs. England

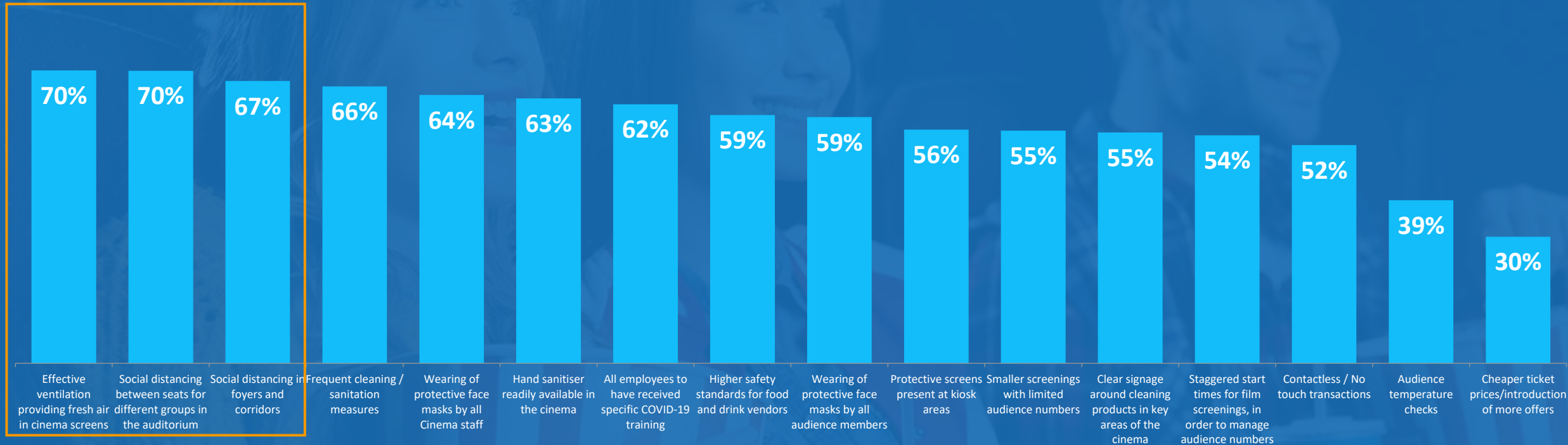


**Main implementations required for audiences to feel safe to return to the cinema in London**

**THIS IS LESS ESSENTIAL**



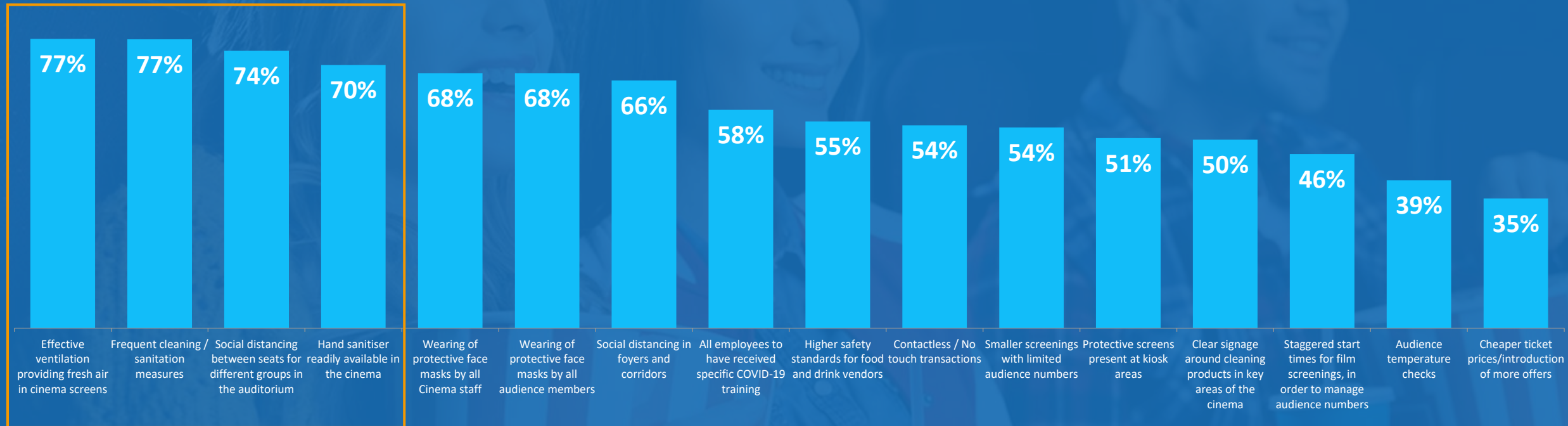
# Proof of social distancing and effective ventilation are top priorities across England



*Main implementations required for audiences to feel safe to return to the cinema in England*

**THIS IS LESS ESSENTIAL**

# Sanitisation measures and effective ventilation are the top concerns in Scotland



**Main implementations required for audiences to feel safe to return to the cinema in Scotland**

**THIS IS LESS ESSENTIAL**

Caution: Low base size (<50)





# Thank you

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