



Cinemas - UK - January 2021

Report Price: £2195 | \$2995 | €2600

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This report looks at the following areas:

- The impact of COVID-19 on the cinemas market and consumer behaviour
- Market size and forecast of the cinema market
- Innovations of companies operating in the cinema market, including new launches and partnerships between streamers and exhibitors
- The frequency of cinema visiting, the genres of films consumers watch, and consumer attitudes to different cinema spaces and returning to the cinema

50% of all consumers who have visited the cinema in the last 12 months say they would rather stream or rent new releases at home than watch them at the cinema. The stay-at-home conditions were near perfect for streaming services to capitalise on and they have enjoyed stellar growth in 2020. Cinemas will be competing as the optimum place to see films as studios weigh up the trade-off from building their subscriber bases versus prioritising cinematic releases.

On average, six in 10 consumers have felt some degree of discomfort with the concept of visiting the cinema from June through to November in 2020 as a result of COVID-19. When cinemas were allowed to open after the initial lockdown, attendances were down drastically due to a reduction in prime blockbuster releases and continuing consumer reticence to go to cinemas. COVID-19's impact will mean that until a vaccine is deployed and delayed big film releases finally bring back audiences in big numbers, attendances will remain modest even when cinemas are allowed to operate.

Due to cinema closures, studios have been putting films out online first, such as *Mulan*. This has proved profitable for streaming services. Longer term we may see a reduction in the theatrical window of exclusivity for cinemas, meaning films debut both online and in cinemas, making the latter's job to convince people to come and experience films there first that much harder.

Whilst streaming poses a short-term threat to cinemas as consumers watch major releases online, longer term streaming can act as a trailer for the



"2020 has been a fallow year for cinemas, with enforced closures of venues and delayed blockbuster content seeing attendances down by three quarters compared to 2019. Streaming video services have benefitted from debuting content as studios bypass cinematic releases completely."

- Joe Birch, Consumer Technology Analyst

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cinema industry as a whole. Consumers may increase their consumption of content via streaming services, and then turn into cinephiles who are more engaged with the medium of film. Cinemas will also look to diversify their content and further branch out into hosting more independent films, live streaming and communal events, drawing in a potentially more diverse audience.



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