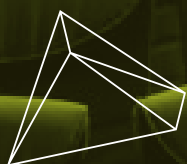


Insights:

REOPENING CINEMAS SAFELY AFTER LOCKDOWN



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LEISURE



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CINEMA, LIKE OTHER INDUSTRIES IN THE LEISURE AND HOSPITALITY SECTOR, HAS BEEN HIT HARD BY THE WORLDWIDE COVID-19 PANDEMIC LOCKDOWN, BUT MOVIE THEATRES ARE NOW SLOWLY BEGINNING TO REOPEN IN SOME COUNTRIES. IN THIS INSIGHT PAPER, OUR LEISURE DIRECTOR **DAVID WALLACE** LOOKS AT THE EFFECTS OF THE LOCKDOWN ON THE CINEMA INDUSTRY AND ON THE HEALTH SECURITY MEASURES WHICH ARE NEEDED TO ENSURE THAT MOVIEGOERS CAN FEEL CONFIDENT ABOUT RETURNING TO THEIR LOCAL CINEMAS.

The effect of lockdown on the cinema industry

For many cinema operators, the most challenging effect of cinemas being closed in response to the COVID-19 pandemic has been lack of cashflow. The companies which have deeper pockets have been better able to weather this but it has been a challenge for all cinema operators. Some marginal cinema locations will not reopen while social distancing requirements remain in place because low occupancy would remove their viability as a business.

In addition, a number of film studios have postponed cinema releases because of the lockdown – a process which actually started before cinemas were closed as the studios realised that fewer people were prepared to go to cinemas as the rate of COVID-19 virus transmission rose. The industry is now pinning its post-lockdown hopes on a couple of big upcoming movie releases, such as Christopher Nolan's *Tenet*, which will be a good test of how quickly cinema is likely to return to something like normality.

The big film studios and cinema operators usually operate on a mutual understanding which provides for what they call “a window” – a period in which new movies are released exclusively in cinemas before being made available in other formats (typically about 17 weeks, although it varies by country). This window is critical for the cinema industry in terms of attracting customers during this exclusive period.







THE PERIOD OF TIME BETWEEN SHOWINGS IS EXTENDED TO ALLOW FOR THOROUGH SANITISATION BEFORE THE NEXT AUDIENCE ARRIVES.

However, in response to the coronavirus pandemic, one of the large studios decided to release new films straight to other formats (streaming services and television) rather than postponing release, which has been viewed by some cinema operators as a dangerous precedent for their industry.

An interesting response in some countries, including Dubai and Germany, has been a rise in drive-in movie showings, where people stay in their cars – an easy way to avoid the risk of virus transmission. They have been very successful, but whether they become a permanent phenomenon when cinemas reopen (with their air conditioning, more sophisticated audiovisual technology and wider range of F&B options) remains to be seen.

Construction of new cinemas slowed or stopped in many places for a period of weeks or months, but many sites are now reopening and the projects are progressing again. Chapman Taylor has been working on the design and delivery of several new cinema developments across Saudi Arabia, for example, where sites have reopened after a few weeks of closure and construction is now back under way.

Meanwhile, cinemas in Dubai have opened up already, as have cinemas in many countries across Europe and Asia, as well as in a number of American states. We expect cinemas in Saudi Arabia to reopen from the end of June and in the UK from 4 July.

Reopening cinemas safely

Now that cinemas are beginning to reopen in many places around the world, it is crucial that potential moviegoers can have confidence in the provisions made by cinema operators for minimising the risk of virus transmission if they are to return to cinema theatres. We are seeing a number of common health security provisions being adopted by cinemas around the world which have already reopened, which can be divided into measures for the lobby and those for the theatres:

Lobby provisions

- Temperature checks at entrances.
- Points of sale are completely contactless, both for payment and for receiving tickets, food and drinks.
- Online ticket pre-ordering is encouraged as much as possible in several venues; physical ticket collection could also be reduced or removed in favour of mobile phone QR codes.
- Tickets limited to 30% of full occupancy numbers, as, for example, at the Reel Cinemas complex in The Dubai Mall.
- Film showings timed to prevent crowds building – easier with fewer new films being released.
- Hand sanitiser facilities at several key points, particularly at entrances / exits and near surfaces which might be touched more regularly.
- Some cinemas in the USA have taped off sections and seats.
- Automated / sensor-led doors, taps and toilets in restrooms.
- Keeping doors open as far as practicable to reduce the need to touch handles, panels etc.

In-theatre provisions

- The period of time between showings is extended to allow for thorough sanitisation before the next audience arrives.
- Every other seat, both side-to-side and front-to-rear, is left empty in a chequerboard fashion to allow for greater distancing.
- Shielded seating – for example, the installation of plexiglass shields between / around seats.
- Family units of up to four people can be allowed to sit together in Dubai, assuming they have isolated together.
- Luxury cinemas are often already configured in a manner which allows for sufficient social distancing, but waiter service will not be possible.
- Managed exit processes (perhaps by row) so that people leave theatres in a staggered manner to prevent crowding bottlenecks at doors.

GENERALLY, ALTHOUGH CINEMA HAS BEEN HIT HARD, WE EXPECT THE CINEMA INDUSTRY TO BOUNCE BACK QUITE STRONGLY.

Design implications

Most of the measures outlined above are short-to-medium-term management strategies and we are not anticipating long-term design implications as a result of the pandemic. Even if an effective vaccine for COVID-19 is never found, cinemas and other commercial sectors will eventually return to something like what was considered normal until the beginning of 2020.

However, it is possible that the Coronavirus pandemic has accelerated some design trends, such as automated ordering of tickets and food, online booking and the reduction or elimination of traditional long concession stands. We would expect this acceleration to feed through in terms of the design of new cinema buildings first before existing buildings start to reconfigure their layouts and processes.

Generally, although cinema has been hit hard, we expect the cinema industry to bounce back quite strongly, particularly because before the COVID-19 lockdown, cinema attendances were at record levels. Remember when everyone believed that video was going to kill cinema?

That did not happen, and for a number of reasons. Home entertainment was not a communal experience, it often involved interruptions and the audiovisual experience not as good. The resurgence of cinema over the last 25 years has proved that predictions of its decline should not be trusted. Cinema will always be popular and people will always want to go out, meet people and experience things – more so now, following months of lockdown, than ever before.

Chapman Taylor has designed and delivered many of the world's largest and most striking cinema projects. Our understanding of what adds value to the customer experience is essential in creating high-quality, efficient and exciting environments for people to enjoy. We strive to design the best cinematic experience available, combining state-of-the-art technology with simplified functionality to create maximum value for both clients and cinema-goers. This is why many of the best-known names in cinema choose to work with us again and again.



About the author

David joined Chapman Taylor's London studio as a Director in 2015 and leads our work in the leisure and hospitality sectors.

He has over 25 years' experience working internationally in the cinema sector, as well as the fast-moving Chinese hospitality market.

He has an established track-record and reputation for good design with an ability to deliver projects on time and to budget.



ELTHAM CINEMA IN ELTHAM HIGH STREET



CINEWORLD AT GLOUCESTER QUAYS

