



BACK TO THE THEATRE

An Ormax Media Report on
the expected theatre-going
behaviour in India during
COVID-19





RESEARCH DESIGN



1,000 regular theater-goers (15+ yrs.), with demographic proportion as per 2019 BO footfalls



Methodology: Online survey
conducted in May 2020



Hindi, Tamil & Telugu audience across
58 cities & towns in India



EXECUTIVE SUMMARY



1. Audience have given whole-hearted endorsement to the theatrical experience, with 82% missing going to the theatres a lot during the lockdown
2. A dominant section of audience believe that they will go back to the theatres within 2-3 weeks of them re-opening. However, social distancing and sanitization precautions taken by theatres will play a crucial role in their decision to visit
3. Contrary to a perception being built in the trade and the media, high consumption of films on TV and OTT has not reduced the audience attraction for the theatrical experience
4. 69% audience said they will visit theatres not just for big-scale films but for medium and small films too



EXECUTIVE SUMMARY



5. Economic considerations don't emerge as a major factor in the decision to revisit theatres. Audience would rather have theatres keep the ticket price unchanged and spend money on implementing safety measures, than offer discounting to boost footfalls
6. F&B consumption at the theatres is likely to be impacted by about 60% during the period of COVID-19
7. The national chains score high on audience trust to effectively implement safety measures. However, chains with limited geographical presence, and single screens, are seen to lack this credibility
8. Communication of safety measures undertaken by theatres will be a crucial factor to persuade audience to visit theatres when they re-open



REPORT SECTIONS



Ready

- Audience sentiment about visiting theatres when they re-open

Welcome Back

- Expectations and change in behaviour at the theatres

Good Newwz

- Audience trust in various exhibitor brands in effectively implementing safety measures

Housefull

- Consumption of films on television and OTT platforms during the lockdown



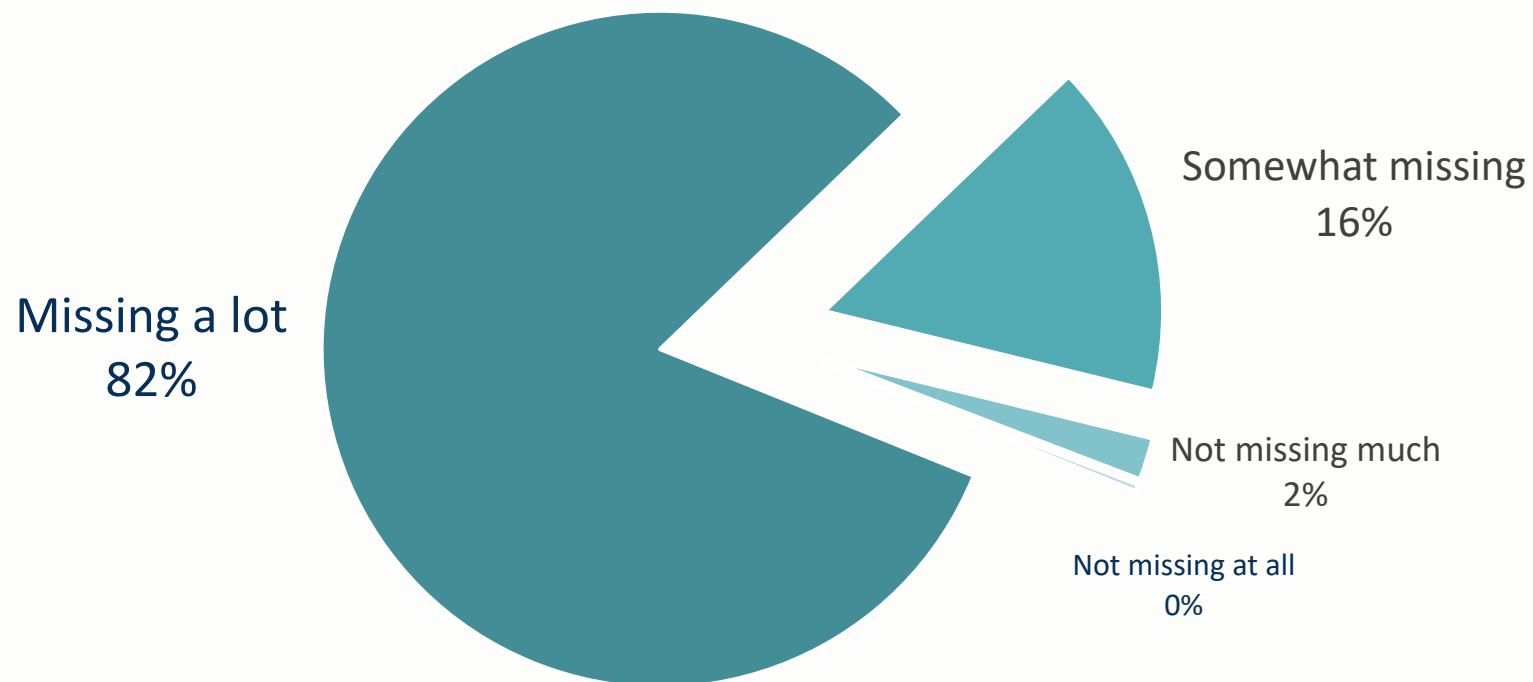
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Ready



MISSING THEATRES DURING COVID-19

Audience sentiment about theatres being closed during the lockdown

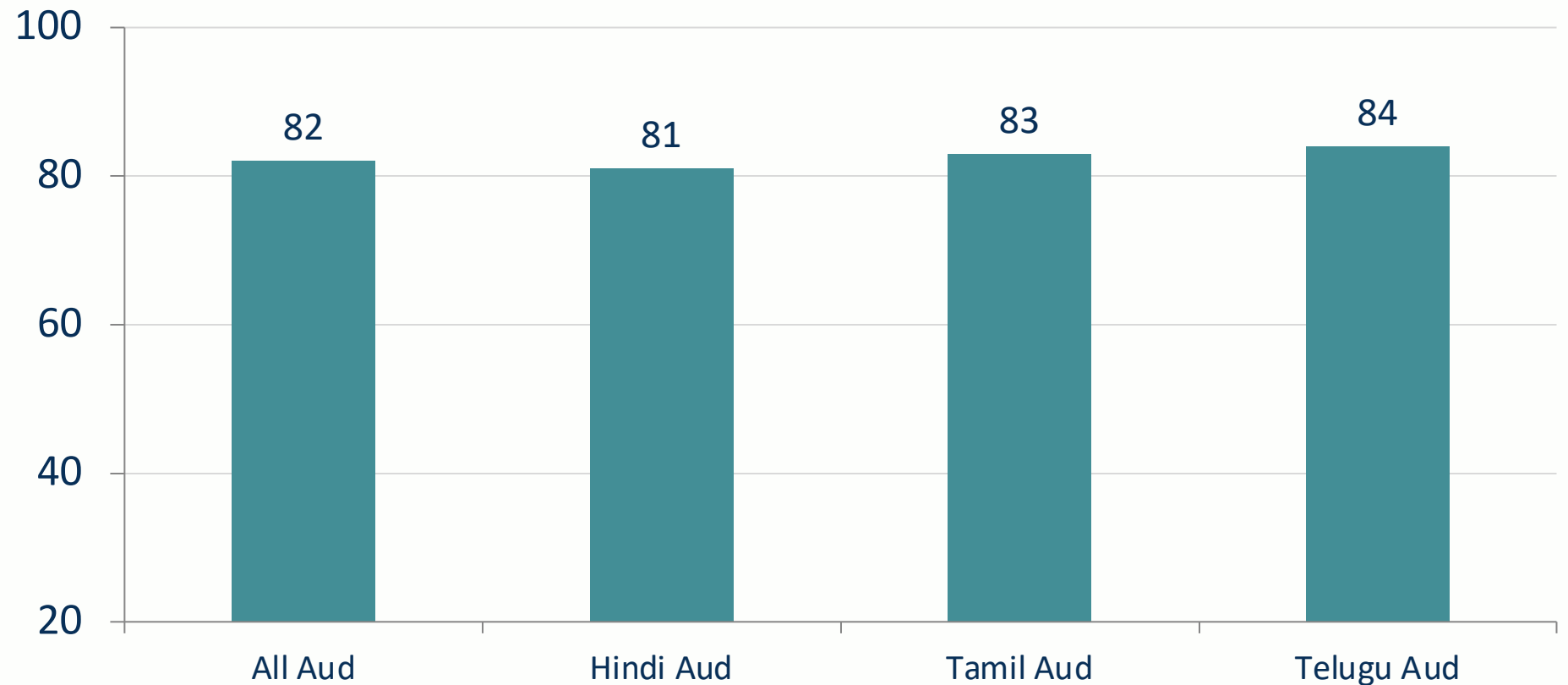


In a decisive endorsement of the big-screen experience, a staggering 82% audience said they are missing theatres a lot during the lockdown.



MISSING THEATRES A LOT

% by Industry

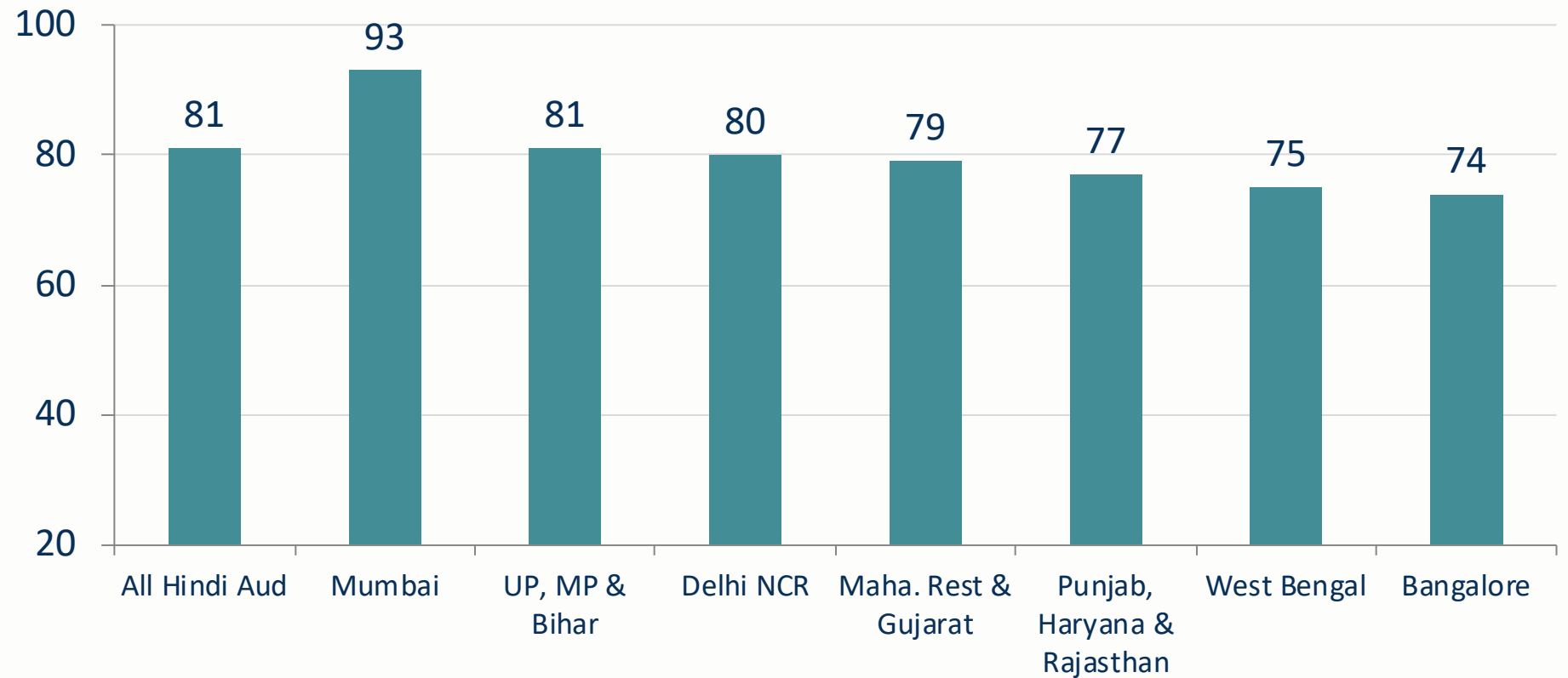


Audience across the three industries are equally emphatic about their sentiment about missing the theatrical experience.



MISSING THEATRES A LOT

% by Market within the Hindi Audience



While all markets respond positively, Mumbai shows an exceptional pro-theatre sentiment, with 93% audience saying they are missing theatres a lot during the lockdown.



TIMING OF DECISION TO REVISIT THEATRES



As soon as theatres re-open



Will wait for 2-3 weeks and then decide



Will wait for 1-2 months and then decide



Will not go to theatres for at least six months

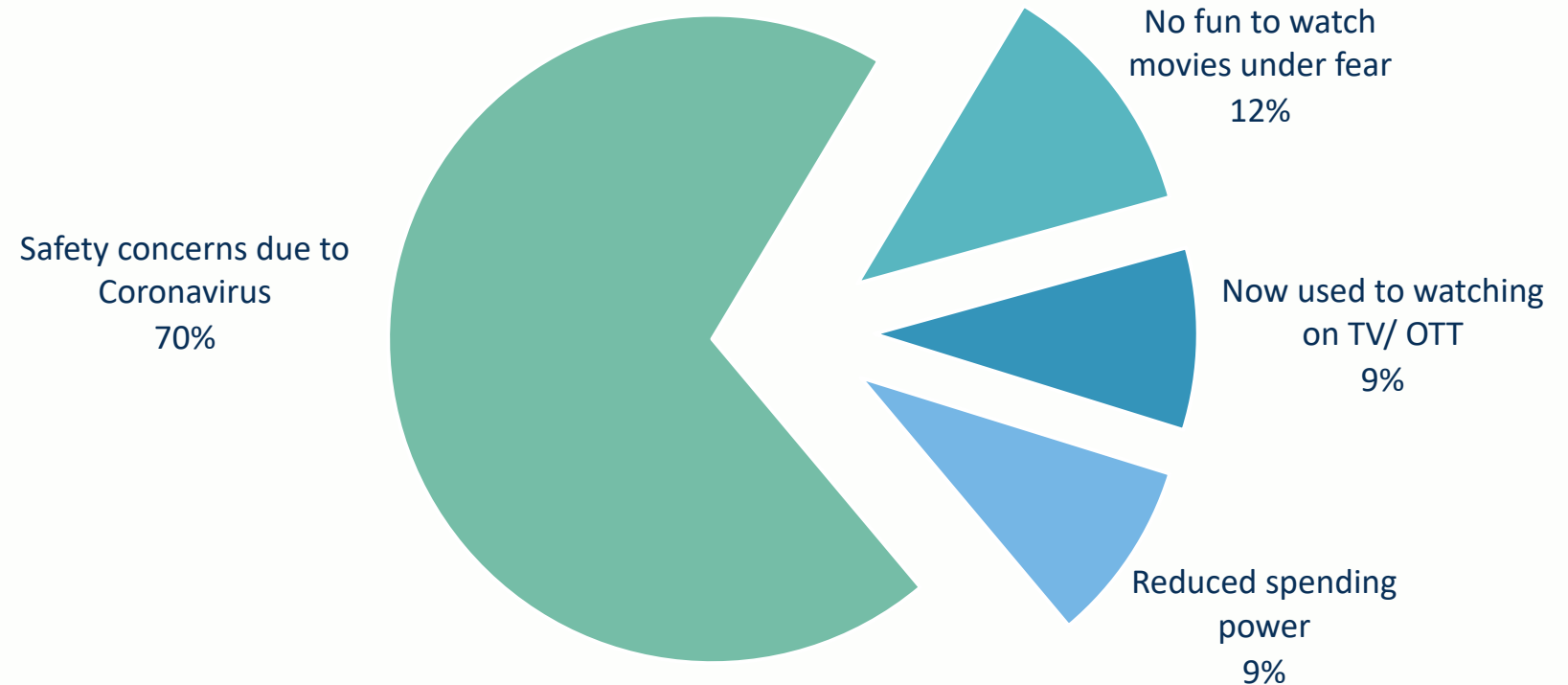


Almost 1 out of 2 regular theatre-goers said they will decide on revisiting 2-3 weeks after theatres re-open, making this the dominant sentiment regarding the timing to revisit.



BARRIERS TO REVISIT IMMEDIATELY

Base: Audience who said they will wait for at least a month (25%)

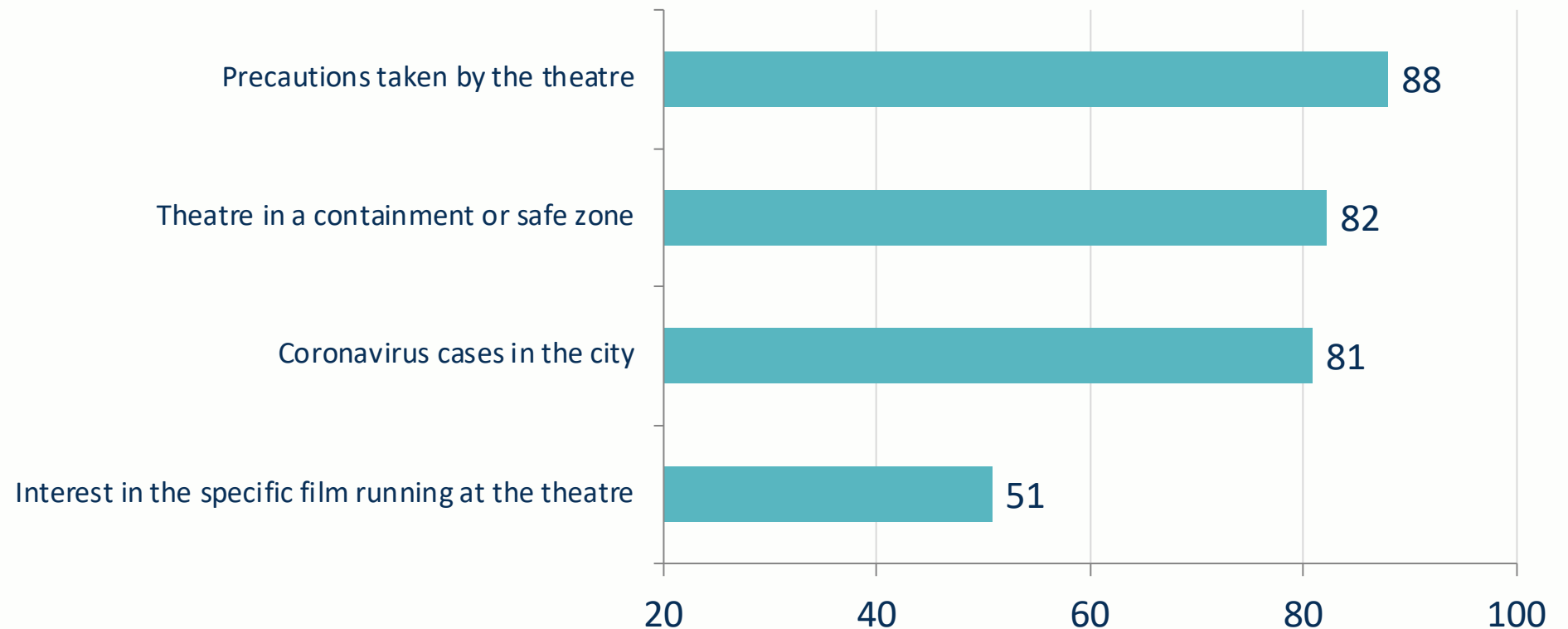


Concern for safety emerges as the primary barrier. Only 9% of this base (<3% of the universe) selected movie consumption on TV or OTT as a barrier, indicating limited impact on long-term habit change.



FACTORS IMPACTING DECISION TO VISIT

% Importance



Theatre-specific measures and the local COVID-19 situation will drive the decision to go to movie theatres more than the content itself. Hence, effective communication by theatre chains becomes pivotal to win the audience's confidence.



FILM TYPE PREFERENCE

What kind of films will the audience be open to visiting theatres for?

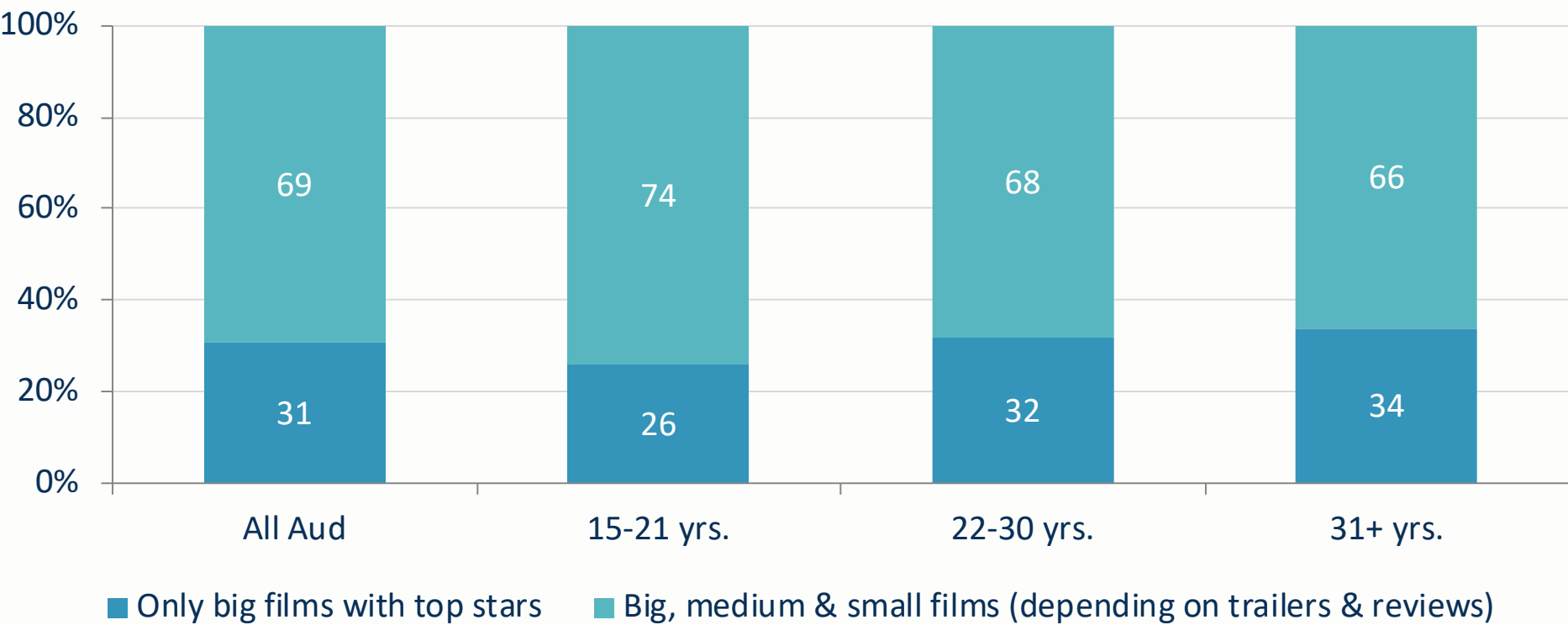


Contrary to the emerging media & trade perception, that medium or small films may now have to look at a direct OTT release, more than 2/3rd audience are open to watch films of different starcast levels and scale in the theatres once they re-open.



FILM TYPE PREFERENCE

by Age



The younger audience are more amiable towards watching medium and small films compared to the older audience. However, even in the oldest segment, preference for all kind of films dominates.



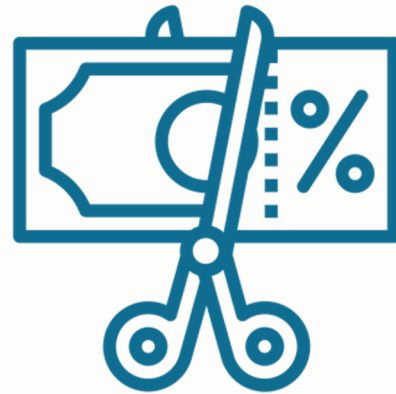
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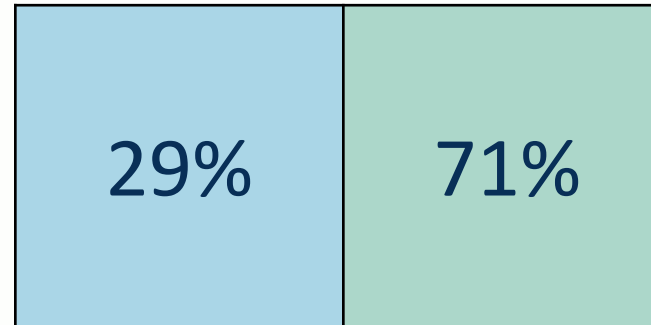


TICKET PRICE vs. SAFETY TRADE-OFF

What should do the theatres focus more on?



Reduce the ticket price to encourage people to come back to theatres



Keep the ticket price the same but spend money on safety measures

Audience would rather have theatres focus on spending on ensuring audience safety, than dole out ticket price discounts. Theatres communicating measures taken to ensure audience safety will be an important factor that determines footfalls in COVID-19 times.



SAFETY MEASURES AT THEATRES

Perceived Importance (%)



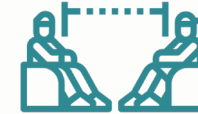
Sanitisation after
each show: **86**



Clean & well-
maintained
washrooms: **86**



Hygiene of the
theatre staff: **85**



Social distancing
in the lobby: **85**



Making masks
compulsory: **85**



Easy access to
hand sanitizers: **84**



Compulsory
gloves for staff: **80**



Providing masks
at the entrance: **80**



Time gap
between shows: **77**



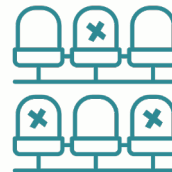
Limited people
allowed in the
washroom: **76**



Temperature
checks: **75**



No human
contact at food
stalls: **74**



Alternate/ 50%
seating: **71**



No human
contact at ticket
counter: **68**



No cash
transactions: **50**

High importance of almost all safety measures suggests that these measures are being perceived as a collective, and not as individual aspects, by the audience.



EXPECTED IN-THEATRE F&B CONSUMPTION



Same as before

25%



Less than before

48%



Will not buy at all

27%

While there is positive sentiment associated with going back to theatres to watch movies subject to safety measures, F&B consumption does not get audience endorsement. 60%+ drop in F&B sales per footfall can be estimated till concerns related to COVID-19 remain.



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BRAND TRUST SCORE: MULTIPLEX CHAINS

% audience who trust the chain to implement adequate safety measures

Scores for each chain reported on the base of markets it has presence in



87



80



62



51



31



27



25



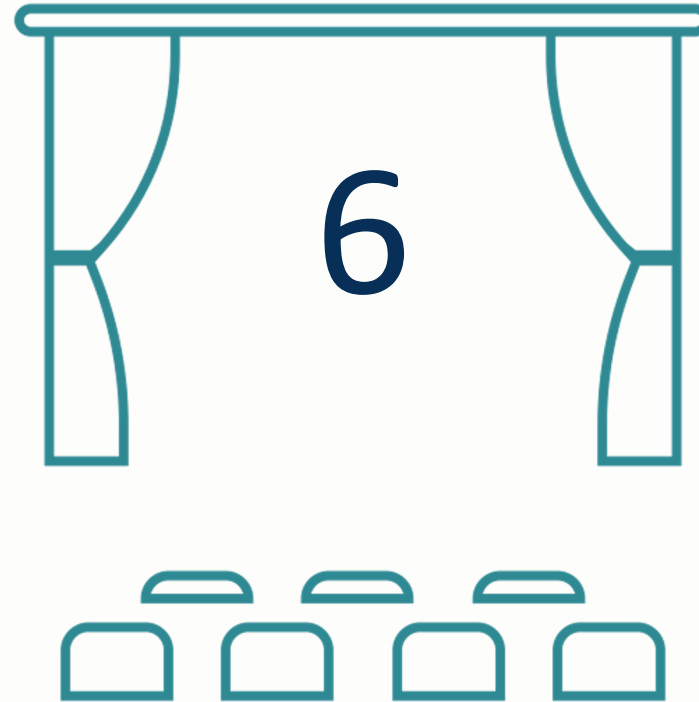
19

National chains score high on trust when compared to chains with limited geographical presence.



BRAND TRUST SCORE: SINGLE SCREEN CINEMAS

% audience who trust single screen cinemas in their city to implement adequate safety measures



Though higher in the Tamil & Telugu audience (19), there is significant trust deficit in single screen cinemas' ability to action measures to prevent the spread of COVID-19 at the theatre. This perception can limit the footfalls at single screen cinemas in the immediate future.

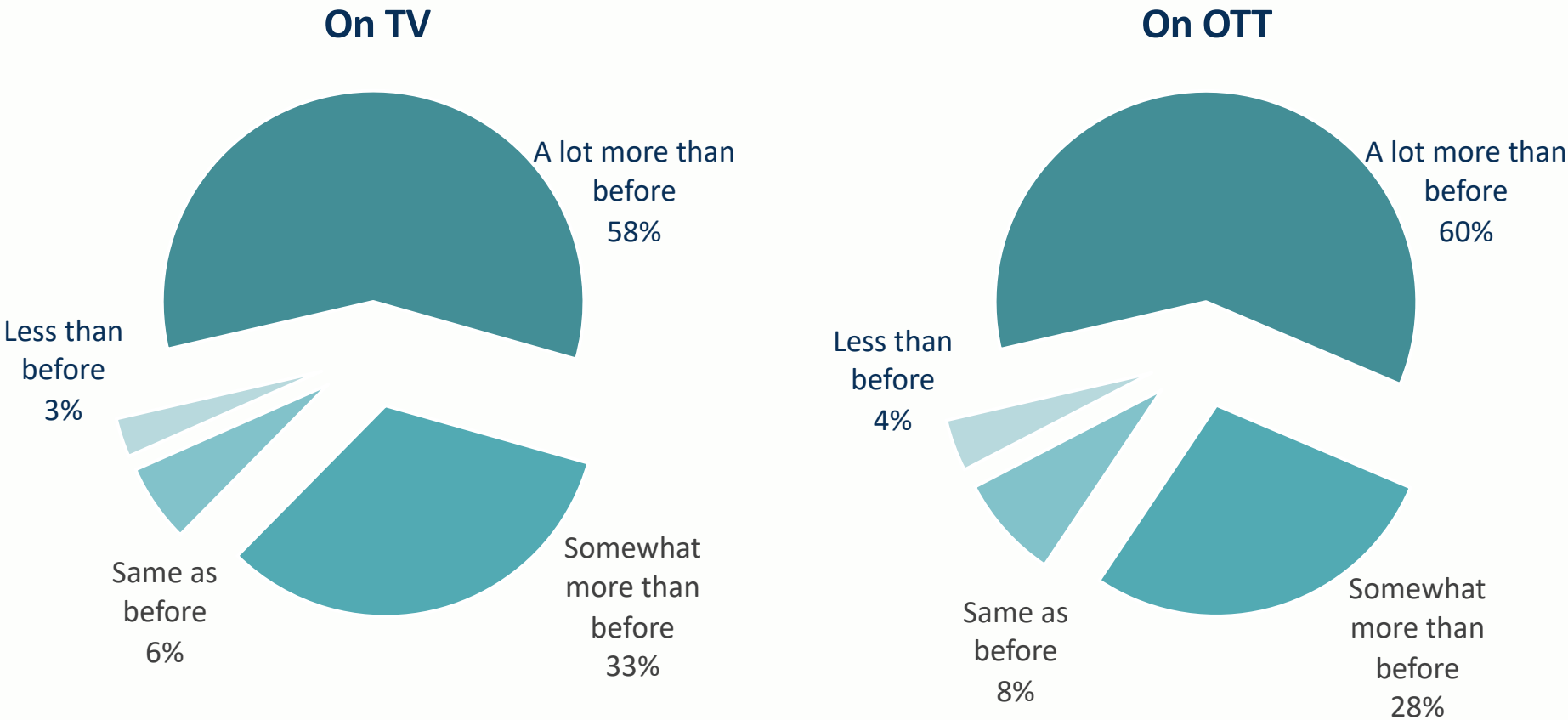


BACK TO THE THEATRE

Housefull



INCREASE IN AT-HOME FILM CONSUMPTION DURING THE LOCKDOWN
















As well known by now, there has been significant increase in film consumption at home, both on television and on OTT platforms.



PREFERRED TV NETWORKS FOR FILMS

Preference for network channels clubbed under the main channel















| Hindi Films | Hollywood Films | Tamil Films | Telugu Films |
|--|---|---|---|
|  STAR GOLD 40% |  HBO 37% |  GTV KTV 49% |  mao 63% |
|  SONY MAX 27% |  STAR MOVIES 30% |  விஜய் 42% |  GEMINI 19% |
|  ZEE CINEMA 22% |  MOVIES NOW 20% |  ZEE தமிழ் 9% |  ZEE తెలుగు 15% |
| |  SONY PIX 9% | | |



PREFERRED OTT PLATFORMS FOR FILMS



| Hindi Films | Hollywood Films | Tamil Films | Telugu Films |
|---|---|---|---|
|  37% | NETFLIX 69% |  44% |  55% |
|  28% |  14% |  31% |  16% |
| NETFLIX 25% |  13% |  11% |  12% |
|  4% | | NETFLIX 9% |  5% |



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