INTO FILM
YOUNG AUDIENCES
LITERATURE REVIEW

PREPARED FOR

BY

STEPHEN FOLLOWS

AND

LIORA MICHLIN

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Private and not for distribution

Contents

EXECUTIVE SUMMARY

According to the Europa Cinemas Innovation survey[19], young audience development is the top priority of exhibitors, and "loss of youth" is the most common factor identified as a strong/serious threat for European films.

It should be noted that there has been no comparable change in young people's engagement with other major arts[17]. This trend is related to the cinema itself.

Therefore, it is imperative to understand the drivers and decision-making processes of current young people, and how generational trends are impacting on traditional cinema.

Youth cinema attendance

- **Ever fewer young people are visiting UK cinemas.** Between 2011 and 2017, UK cinema admissions were close to static (a 0.6% decline) whereas admissions from 15- to 24-year-olds fell by 20.6%.
- **Young audiences are a key demographic for cinemas.** 15- to 24-year-olds make up a larger proportion of cinema audiences than any other age group – in 2017 they made up 28% of admissions in the UK, despite being only 12% of the population.
- **Young audiences are vital to the health of the industry**. Beyond just being the largest segment, young people are especially over-represented during opening weekends and opening week, and once engaged with film tend to be very active in all aspects of it.

Drivers of cinema attendance

- **Going to the cinema is a movie-driven decision**. Young people decide to go to the cinema when there is a specific film they're excited about and want to see in the best format/as early as possible.
- **Cinema attendance is centred around the social experience**. Fewer than 1% of teenagers say they go to the cinema alone.
- **Young people go soon after release and enjoy the hype**. Teenagers are especially overrepresented in the opening weekend and first week of a film being on. 19% go during opening weekend, and 48% go within a week of the film opening.
- **Trips to the cinema are usually part of wider outings**. Approximately 48% of 15- to 24-year-olds do another activity before or after going to the cinema.

Barriers to cinema attendance

- **Cost is a major barrier to cinema attendance**. 52% of teenagers said their main reason for not going to the cinema more regularly is that it is too expensive. Even after planning a visit, nearly 20% of 15- to 25-year-olds gave price as the reason they did not go in the end. As cost limits the number of cinema visits, this may drive the movie-driven nature of cinema trips as young people are forced to pick specific films to see on the big screen.

- **The cinema experience is failing to appeal to young people**. Although the majority of young people tend to think favourably of the cinema, there are several aspects that are failing to appeal to the changing needs and values of emerging generations.
- **Going to the cinema takes a lot of effort and planning**. Young audiences were more likely than other age groups to give “relaxation” and “socialising” as reasons to watch films online or on television, suggesting that this represents a shift in the perception of cinema going specific to this age group.
- **Piracy is devaluing movie content from a young age**. 50% of young people admit to downloading/streaming films because “cinema tickets, VOD and DVD are expensive and they can’t afford them for all the films they want to see”, and more than 40% download films weekly.
- **The risk of a vicious cycle of decline**. Older teenagers especially state that not having friends available to go with them is a key factor holding them back from more frequent cinema visits. This means that a prolonged decline in young audiences will likely have a snowball effect; once some teenagers stop going to the cinema, even more will follow as they will have fewer people to go with.

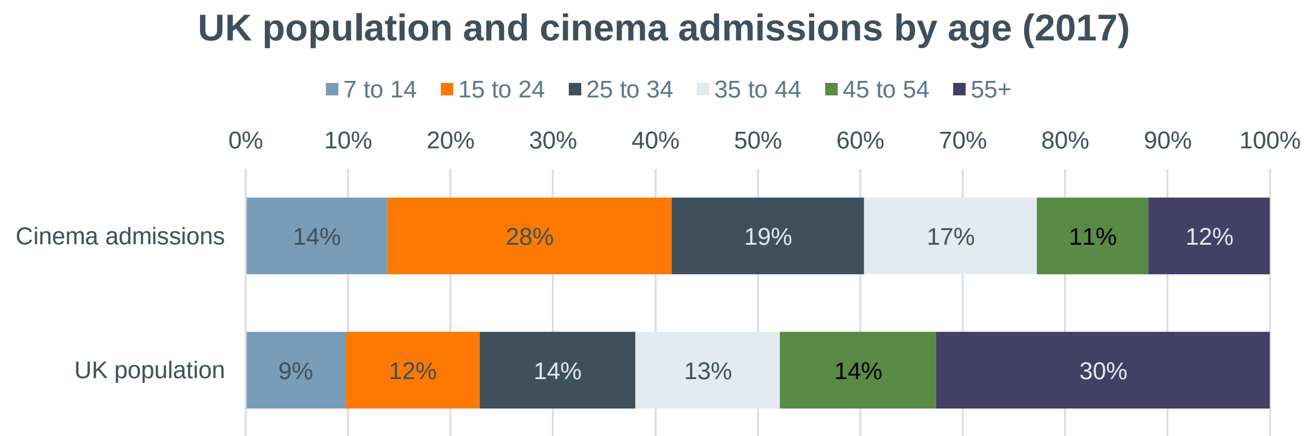
Understanding young audiences

- **Technology dependent, with a high bar for user experience**. The digital landscape has changed dramatically over the last few decades, yet the emerging generation of teenagers has grown up with this technology and therefore has a different relationship to it.
- **Social media is integral to technology**. Two thirds of Gen Zs like seeing content from brands on social media. Deviating from millennials’ preferences to get their information from brand websites, Gen Z actually prefer to get it from social media.
- **Video consumption is huge, but this goes beyond films**. Video is the preferred form of social content, and emerging generations’ consumption is massive. 40% of Gen Z digital time is spent watching videos, compared to 33% for millennials. In a typical day, the average Gen Z watches 68 videos on at least five different platforms.

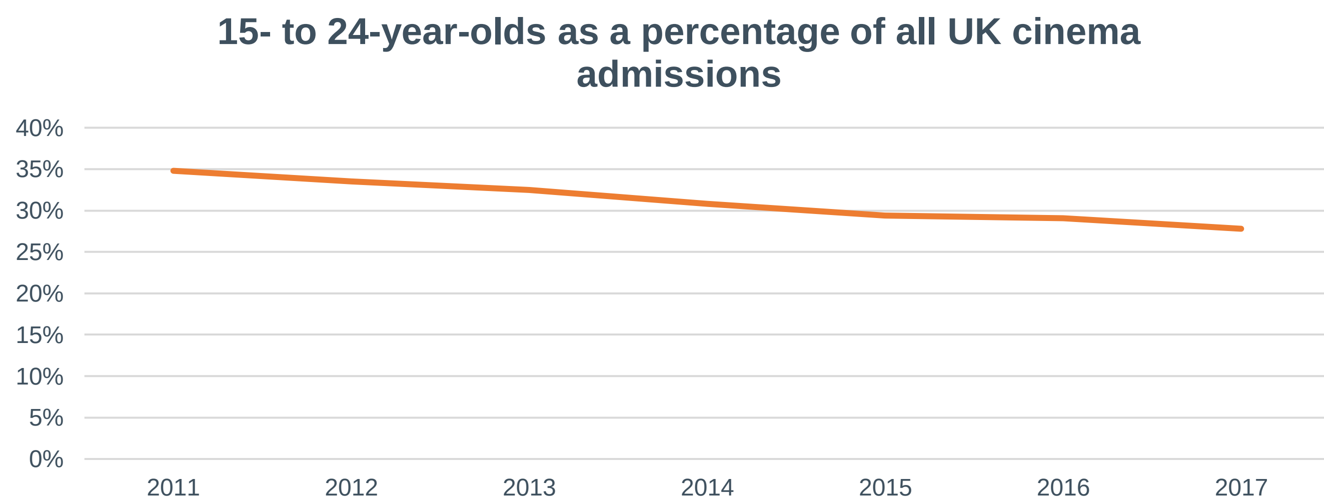
YOUTH CINEMA ATTENDANCE

Ever fewer young people are visiting UK cinemas

Young audiences are a key demographic for cinemas. 15- to 24-year-olds make up a larger proportion of cinema audiences than any other age group – in 2017 they made up 28% of admissions in the UK[8], despite being only 12% of the population[34].



Between 2011 and 2017, UK cinema admissions were close to static (a 0.6% decline) whereas admissions from 15- to 24-year-olds fell by 20.6%*.



Furthermore, this data is based on surveys conducted at screenings of the largest films each year – this is skewed towards the film preferences of teenagers and young adults, who have a stronger preference for big budget films[20]. Therefore, this is likely an overrepresentation of this demographic in wider cinema audiences.

* There has been a reduction in the population of this age group, however the reduction in their cinema admissions is bigger. The reduction in population of 15- to 24-year-olds was 4% over the same period[34].
Admissions were calculated by multiplying the percentage admissions of 15- to 24-year-olds by the total admissions that year, for which both figures are reported by the BFI Statistical Yearbook.

This is even more concerning when we consider that a key driver for young people's cinema attendance is whether their friends go – as we will discuss in more detail later, the top reason given for cinema attendance by teenagers is that their friends are going, and a major reason given for not going to the cinema more often is a lack of people to go with. The implication of this is that the decline is likely to snowball: as some teens go less, their friends will follow in greater numbers.

Another concerning element of this decline is the evidence that engagement in the arts as a child is a key determinant of engagement as an adult[11]. Furthermore, in qualitative interviews with avid cinema goers, it was found that childhood cinema attendance was a key part of their cinema habit formation[42].

This is significant, as it is frequent movie goers that make up the majority of admissions. According to the MPAA market statistics, individuals who go the cinema at least once a month make up 49% of total ticket sales, despite being only 12% of the population[31].

This means that a decline in youth attendance now will likely lead to a decline in future audiences overall, and the most significant type of moviegoer too. Young people are also overrepresented during key periods such as the opening weekend, which often determines the length of a run of a film[30].

Declines in this demographic are therefore likely to have further knock-on effects on the industry.

DRIVERS OF CINEMA ATTENDANCE

Going to the cinema is a movie-driven decision

Young people's attitudes to the cinema can swing from positive to negative depending on the specific decision the question relates to.

- When asked how they prefer to *watch films*, cinema comes out top.
- When asked how they prefer to *spend their time/money*, cinema fares less well.

In terms of actual film-viewing, teenagers watch the majority of their films on-demand (e.g. Netflix, NowTV). Cinema is the least frequent way of watching films, and most go to the cinema only every couple of months or a few times a year[13].

Young people decide to go to the cinema when there is a specific film they're excited about and want to see in the best format/as early as possible. 50% of young people plan their visit knowing in advance the movie they want to see[43].

Given that the cinema is their favourite way to watch films, it may be simply that the cost is limiting the decision process to be movie-driven, as the number of trips to the cinema is limited.

The most common reasons given by young people for wanting to go to the cinema were "really wanted to see the film" and "specifically wanted to see the film in the theatre"[2], or "to watch the latest releases"[23].

Cinema attendance is centred around the social experience

Fewer than 1% of teenagers say they go to the cinema alone[43]. They primarily go with friends, especially as they get into their late teens, while family film watching is usually on a TV[23]. Young audiences are also more likely than other adults to value the social experience of watching with others[7].

While the main reason for going to the cinema for young people is usually because there is a film they want to see, second to this is if a friend/family member suggests it[13]. When teenagers are asked which factors could increase their cinema attendance, ticket discounts tend to come first, but next is if their friends were more interested[13].

When asked which benefits would cause them to go the cinema more, teenagers chose those that encouraged group trips. This included "bring a friend for free", "group discount", and "multi-buy discount"[23].

Nevertheless, socialising with friends was given as a reason to go the cinema by only 19% of teens[23]. We can interpret this seemingly contradictory finding to mean that while the social aspect of the cinema can be fulfilled by many other activities (including watching films at home), it is still an essential part of the cinema experience.

In other words, socialising is necessary though not sufficient for teens' cinema going.

The consequence of this is that the decline in young people will likely have a snowball effect; once some teenagers stop going to the cinema, even more will follow as they will have fewer people to go with.

Young people go soon after release and enjoy the hype

Teenagers are especially overrepresented in the opening weekend and first week of a film being on. 19% go during opening weekend, and 48% go within a week of the film opening[18].

This is illustrative of another key motivator for attending the cinema for young people: being a part of the 'hype' and the conversation. 52% of young people agree with "I love the hype that surrounds big film releases", and 40% agree with "I feel left out if my friends are talking about a film I haven't seen"[18].

Trips to the cinema are usually part of wider outings

Going to the cinema is usually a larger event than just watching a film, and is usually pursued on the weekend or during vacations/school holidays[43].

Especially for 15- to 17-year-olds, trips to the cinema are usually combined with other activities. Approximately 48% of 15- to 17-year-olds do another activity before or after going to the cinema. This is lower for 18- to 25-year-olds (29%) and 12- to 14-year-olds (22%).

The top five activities surrounding a cinema trip are going to a fast food restaurant (especially for 12- to 17-year-olds), going to a restaurant (especially for 18- to 25-year-olds), shopping, going to a bar or visiting friends at home[43].

BARRIERS TO CINEMA ATTENDANCE

Cost is a major barrier to cinema attendance

There is a significant body of evidence to suggest that young people regard the cost of cinema attendance as too high.

52% of teenagers said their main reason for not going to the cinema more regularly is that it is too expensive – with no difference between younger and older teens[23].

Even after planning a visit, nearly 20% of 15- to 25-year-olds gave price as the reason they did not go in the end[43]. Young people are more likely than other age groups to give cost as a reason to watch a film on TV or online[39].

The frequency of cinema visits is strongly influenced by teenagers' budgets for free time activities. Out of those with a free-time budget of less than £30 a month, only 58% visit the cinema at least once a month. This rises to 73% for those with a budget of £30-100, and 80% for those with a budget of over £100[43].

Assuming that the needs for leisure activity are the same amongst all these teenagers, this is strong evidence that reducing price would increase the frequency of visits. 44% of 15- to 17-year-olds and 38% of 12- to 14-year-olds have a free-time budget of under £30 a month[43].

The impact of cost perception is most clear when comparing the answers to the following questions[23]:

- When asked "If you had £10 to spend on anything you wanted, which of these would you be most likely to spend it on?", attending the cinema was ranked third, after gaming and buying clothes.
- However, when asked to rank activities in order of "How you would most like to spend your time if you had the choice?", cinema came eighth, below watching films at home.

This is a significant finding, as 64% of these same teenagers voted cinema as their favourite way to watch films, yet when asked how they prefer to spend their time, they chose to watch films at home.

Cost may influence the ranking of cinema in free-time activities, as the only other costly activity above cinema was shopping, and in general teenagers preferred less expensive/free activities.

This may be one of the reasons why going to the cinema is movie-driven. If the number of cinema trips is limited by cost, teenagers will save the trips only for 'worthy' films.

It should be noted that the price barrier is not specific to the younger audiences, though of course they tend to particularly cash poor. 16- to 30-year-olds are actually less likely than the average adult to consider price a barrier to cinema going[7]. Therefore, price alone cannot explain the decline in young audiences specifically.

The cinema experience is failing to appeal to young people

Although the majority of young people tend to think favourably of the cinema, there are several aspects that are failing to appeal to the changing needs and values of emerging generations. This is especially true for the older teens and young adults[43].

One research project defined young people's leisure time needs and ranked them in order of importance[43]. The study found that cinema better meets certain leisure time needs than any other activity: entertainment, immersion into another world, reward, and relaxation.

Nonetheless, there are several ways in which the cinema experience is failing to appeal to young people and their leisure needs. The researchers tested several possible interventions to target the unmet needs, which are summarised below[43].

- **Tailored offers.** The research suggested increasing digital access to the cinema and introducing promotions and discounts aimed directly at teenagers. The highest ranked intervention of any is movie ticket "bundles", where the price of the ticket is combined with food/drinks. The key here is discounts offered according to the teen's lifestyle and interests.
- **Providing digital planning tools.** An app is also a good channel to fulfil some of the other interventions tested that proved popular with young people, such as a time-planning tool that allows you to view the actual start and end time of movies.
- **Personalising the experience.** One of the top-rated interventions was providing film recommendations and updates based on films previously seen/rated.
- **Communicating via appropriate digital channels.** More modern methods of communication and marketing are recommended. For example, updates through chat apps such as WhatsApp instead of email, as well as film marketing via social apps that this demographic is already using. One of the recommended suggestions from this research was to allow a social way of rating movies seen in the cinema in order to share experience with others.
- **Enhancing immersion**. Something appreciated by young people is the immersive experience of the cinema. This has been misunderstood by exhibitors in the past, due to the tech dependency and shorter attention spans of younger generations. For example, the recent controversial attempts to introduce phone-friendly screenings in a cinema were met with quite a lot of disdain from young people[*]. Part of enhancing immersion is maximising the comfort and technological experience to compete with increasingly improved technologies at home, though knowledge about other possible interventions to combat this is lacking. Some options that tested positively were themed event nights and the possibility to rent a "private cinema".
- **Expanding the experience**. Young people are driven by the need for memorable/unique experiences. In fact, a key development point for cinemas would be to make the experience larger. For example, providing somewhere to hang out before/after or providing wifi/charging ports outside of the screens.

[*] BBC News. (2016). *Should you be allowed to use a phone in the cinema?* Retrieved from https://www.bbc.co.uk/news/magazine-36059244

Going to the cinema takes a lot of effort and planning

Young people view cinema going as something that is a big effort and requires a lot of planning, and this is especially true for older teens as they increasingly plan their own trips with friends rather than going with family.

Older teenagers especially feel that being too busy and not having friends available to go with them are key factors holding them back from going to the cinema more[23].

As the cinema is seen as something that requires a lot of effort, it is more likely to be considered as an option when young people are deciding between other "out of home" activities, rather than other forms of film viewing which are easier, cheaper and can be done from home. When young people were asked to list their top leisure time activities, cinema was not even in the top ten, though watching films at home was fourth. However, when asked to list their top "out of home" activities, cinema was fourth[43].

Young audiences were more likely than other age groups to give "relaxation" and "socialising" as reasons to watch films online or on TV[39], suggesting that this represents a shift in the perception of cinema going specific to this age group.

Piracy is devaluing movie content from a young age

50% of young people admit to downloading/streaming films because "cinema tickets, VOD and DVD are expensive and they can't afford them for all the films they want to see", and more than 40% download films weekly[20].

Research into piracy demonstrates that parents' attitudes can dictate those of their children[37]. There has been a lot of debate surrounding the threat of piracy to the cinema industry, which is beyond the scope of this literature review. However, this does suggest a potential intervention in terms of establishing the formation of cinema-going habits would be to combat piracy attitudes in parents/children.

UNDERSTANDING YOUNG AUDIENCES

So far we have covered what young people think about cinema going, but to understand how some of these opinions have been formed, it is helpful to look at what makes this generation different from past generations.

Technology dependent, with a high bar for user experience

The digital landscape has changed dramatically over the last few decades, yet the emerging generation of teenagers has grown up with this technology and therefore has a different relationship to it.

A key point is that most Gen Zs (74%) do *not* feel that they need to take a digital detox[5]. Spending time online is their primary free time activity[26], and is an important part of their connection with the world. One in five Gen Zs could only comfortably go less than an hour without accessing the internet[47]. Of all the devices available to them, it is mobile phones that are by far the most preferred[26].

The rapid shift in available technology has also created a high bar for how young people expect to receive information/content as well as engage with products/services.

Nearly half of Gen Z would stop using a website if it didn't anticipate what they needed, liked or wanted[47]. Two thirds say they will not use an app or website that is too slow to load[26]. Gen Z is 25% more likely than Boomers and Gen X to choose a digital world where websites or apps can predict and provide what users need at all times[47].

Social media is integral to technology

Access to social media is the primary reason Gen Z are so dependent on their smartphones. It is an integral part of their lives and how they stay connected to the world.

The main use of social media is content consumption rather than sharing[45]. Two thirds of Gen Zs like seeing content from brands on social media. Deviating from millennials' preferences to get their information from brand websites, Gen Z actually prefer to get it from social media and over two-thirds of Gen Zs have purchased a product after seeing it advertised on social media[5].

Gen Z are expecting advertising to be highly personalised and entertaining, and part of a content stream they already consume on digital channels they already use. Originality is a key part of this - Gen Z do not like repetitive ads. 79% say they are more likely to share branded content if they think it's unique or interesting[5]. Nearly half say repetitive ads annoy them, and 1 in 3 say they will tune them out completely[45]. Customisation towards different channels is also important, as nearly 60% of Gen Zers don't like seeing the same content across multiple social media platforms[5].

The main platforms Gen Z use are YouTube, Facebook, Instagram and Snapchat and this is also where they now expect to see their advertising. When asked the main places they notice advertising they said YouTube (44%), Facebook (33%) and Instagram (30%)[5].

When asked about the best ways companies can reach them on social media they said[5]:

- Show relevant content (45%)
- Send greats deals (36%)
- Create interesting content on their favourite platforms (31%)
- Create content worth reposting (29%)
- Respond to posts/comments directly (28%)

Video consumption is huge, but this goes beyond films

Video is the preferred form of social content, and emerging generations' consumption is massive. 40% of Gen Z digital time is spent watching videos, compared to 33% for millennials[45].

This is a generation said to have the shortest attention span ever – just eight seconds compared to millennials' twelve seconds. They consider this as a kind of filter rather than deficiency – they have an unparalleled amount of content to choose from, and in order to commit to something longform they need a good reason[5].

In a typical day, the average Gen Z watches 68 videos on at least five different platforms. There's also a strong preference for short videos. 86% say the videos they watch are shorter than ten minutes, and 55% say they are shorter than five minutes. They also say they are much more likely to watch a video if it is short.

Online video consumption far exceeds film and TV consumption. 57% of video time per day is spent on social apps (31% YouTube, 26% other social platforms). That works out as 3.8x the time spent watching linear TV and 2.5x the time watching streaming services. Millennials are similar, though slightly less extreme, and spend 45% of their time spent per day watching videos on social channels, though this still exceeds the time spent watching TV and streaming.[45]

Despite this huge video consumption, younger adults (16- to 25-year-olds) consume the lowest number of films compared to other age groups. 48% are 'light' film consumers, who watch fewer than 5 films per month; 30% are 'medium' film consumers, who watch 6-10 films each month; and only 22% are 'heavy' film consumers, who watch more than 11 films per month[20].

Nonetheless, those that are film fans tend to be overrepresented in places such as film festivals and film clubs. 16- to 25-year-olds are the most involved in film festivals and clubs - 37% of them attend festivals compared to 28% of all other demographics, and 21% are members of film clubs versus 17% more generally[20].

Young adults are also the most connected to digital sources for film information. 92% watch trailers online (vs. 81% on average), 81% access specialized film databases such as IMDb (vs. 67%), 75% of them say they visit specific film websites (vs. 69% on average), 74% follow films on social networks (vs. 60%), 72% follow film blogs (vs. 62%), and 60% use film fan social networks (vs. 49%)[20].

CONCLUSION

The existing research further reinforces key points identified in our survey of 11- to 15-year-olds. Across these age groups, young people seem to have similar values and attitudes towards to the cinema.

Cinema is a social experience

Young people want to go to the cinema in social groups, especially with friends. Friends not wanting to go is a top barrier to attendance, and friends spurring on trips is a strong driver. Strategies to engage young people there need to facilitate group outings. This will perhaps also have knock-on effects by reducing the effort to organise trips to the cinema. The cinema is perceived as difficult to organise compared to competing activities.

Cinema is valued as a way to watch films

When young people are asked how they prefer to watch films, they choose cinema. Despite the decline in attendance of this age group, it's important to remember that this is the most frequent arts activity for young people, and is a valued excursion and facility.

The frequency cinema is attended doesn't reflect its value

However, they value the cinema as a low-frequency activity. The same group of young people that chose cinema as their preferred way to watch films, ranked watching films at home above the cinema as their preferred way to spend their time. This imbalance of preference is strongly reflected in our new research into 11- to 15-year-olds. These is a prime opportunity to focus on removing the barriers to repeated cinema visits, and to build the habit and perception of cinema as a more regular activity.

Price is a big barrier for young people

The cost of cinema emerges as the strongest barrier to cinema attendance. However, from our own research we know that offers alone aren't identified as a motivating factor to get up and go to the cinema. Reducing the price of group cinema trips, repeated trips, and the larger cinema-outing (e.g. pairing with restaurants/other activities performed with cinema) is a priority.

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