



2023 CINEMAGOER UPDATE

The latest insight from our audience about the value of cinemagoing and the year ahead

THE LATEST FROM THE CURRENT CINEMAGOING AUDIENCE

We wanted to find out what recent cinemagoers valued about the experience, the role of cinema, content perceptions and their intentions for the year ahead



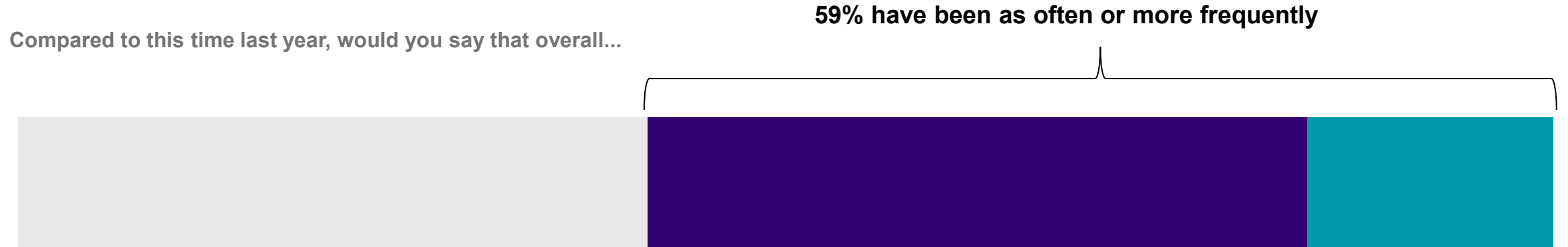
These latest findings are based on a 15-minute online survey answered by **3,164 GB cinemagoers aged 16-44** (visited in the last six months), representative in terms of age, gender, region, social grade and ethnicity.

Fieldwork was conducted between Monday 6th February and Monday 13th February 2023, with the survey independently run by our **research partners Old Salt**.



CINEMA IS STANDING STRONG DESPITE THE CHALLENGING ECONOMIC CLIMATE

Over seven in ten cinemagoers are intending on maintaining (or increasing) frequency of visits over the next six months



Intended frequency over the next 6 months

■ Visit less often ■ Visit as often ■ Visit more often



72% intend to visit the cinema as often or more



The ongoing cost of living crisis is of course putting a squeeze on entertainment spend.

3 in 5 say they now have less disposable income for entertainment

...however only 6% said they would stop going to the cinema altogether



Consumer spending still below inflation but cinema and travel outlays buck the trend

sky news

The value of spending continued to be below inflation, two closely watched retail reports showed, but people were happy to pay for Hollywood blockbusters and travel.



THE APPEAL OF THE CINEMA EXPERIENCE IS STRONG

The cinema experience is valued, even by those with less disposable income to spend on entertainment

% of all cinemagoers who agree

% of cinemagoers with **less to spend on entertainment** who agree

66%

‘Watching films at the **cinema** is
something I value’

68%

‘Watching films at the **cinema** is
something I value’

65%

“The **cinema** is a good choice for a
night out because I/we **know exactly**
what it will cost beforehand’

67%

“The **cinema** is a good choice for a
night out because I/we **know exactly**
what it will cost beforehand’

71%

‘I see a trip to the cinema as a way
to **treat myself**’

73%

‘I see a trip to the cinema as a way
to **treat myself**’

REGULAR CINEMAGOERS ALSO FEEL THE CINEMA IS GOOD VALUE FOR MONEY

Those engage with the cinema frequently highly value its 'night out' potential, the experience and believe it to be good value

% of monthly cinemagoers who agree



69%

'Watching films at the cinema is something I value'



67%

'The cinema is a good choice for a night out because I/we know exactly what it will cost beforehand'



60%

'A trip to the cinema is good value for money'



THOSE WITH LESS TO SPEND ARE RE-ASSESSING SVOD BUT AREN'T KEEN ON AD TIERS

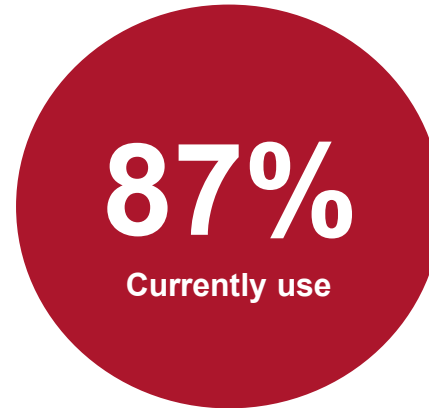
While most cinemagoers currently use Netflix/Disney+ the majority aren't keen on the ad-supported tiers, so advertisers are unlikely to be able to reach many through these platforms.

SVOD services don't escape the re-assessment of monthly outgoings by those with less disposable income...

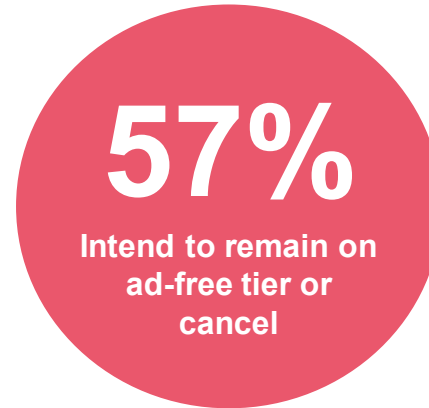


Intend to cancel at least one SVOD service subscription

NETFLIX



Currently use



Intend to remain on ad-free tier or cancel

Disney+



Currently use



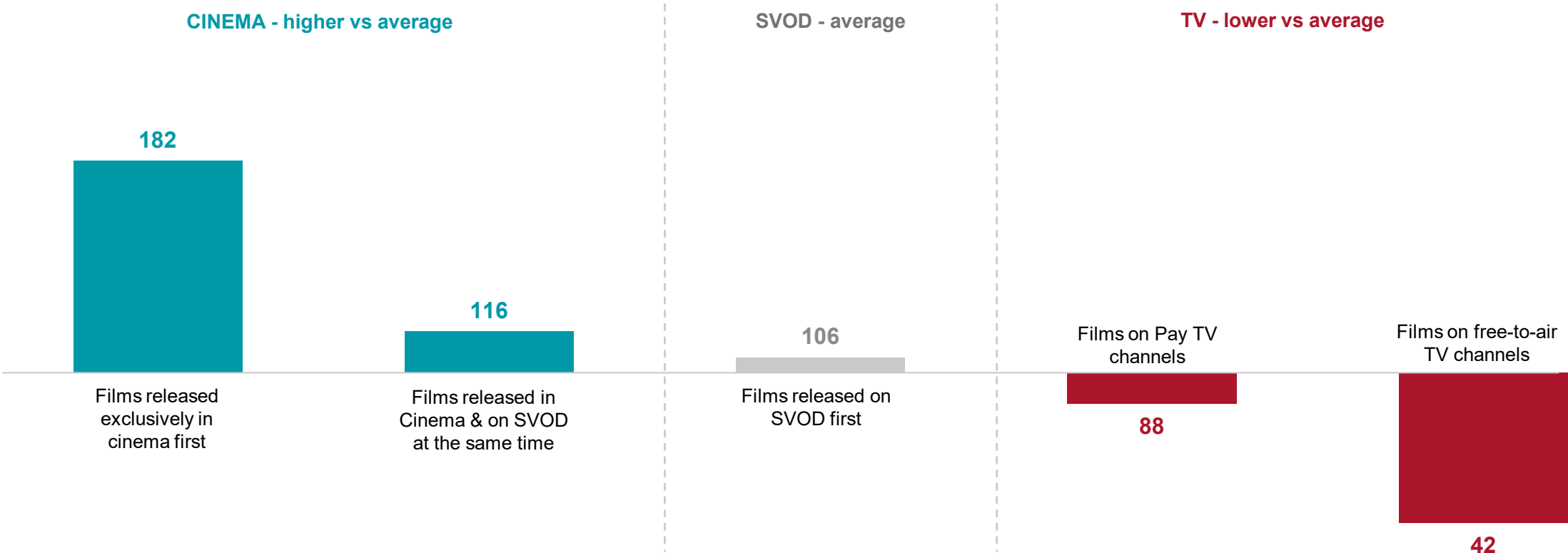
Would pay more for ad-free tier or cancel if ads introduced



FILMS RELEASED EXCLUSIVELY IN CINEMAS FIRST ARE SEEN AS HIGHEST QUALITY

While quality perceptions of SVOD exclusive films are about average, releasing films in cinema is still seen as a real marker of quality – particularly those that have exclusive theatrical windows.

Perceptions of high-quality film releases (Index vs the average if all were of equal quality)



THE BENEFITS OF THE COLLECTIVE CINEMA EXPERIENCE ARE CLEAR

Not only do cinemagoers believe the collective viewing heightens the experience but the wellbeing benefits of switching off from other devices and distractions are felt by most too.

% of cinemagoers who agree



71%

‘Going to the cinema allows me to take a break from social media, my phone and constantly being connected’



71%

‘Watching a film at the cinema feels more special than watching at home’



70%

‘Going to the cinema allows me to switch off from everyday life’



69%

‘When I’m watching a film at the cinema I completely forget about the outside world’



66%

‘Being part of a cinema audience heightens the experience of a film’

CINEMA DELIVERS A PREMIUM, IMMERSIVE EXPERIENCE VS OTHER AV EXPERIENCES

Most cinemagoers also agree that the ads (while typically the same) tend to be more entertaining than ads they see elsewhere.

+67%

More premium than (S)VOD
and Live TV

+45%

More immersive than (S)VOD
and Live TV

61%

agree

‘cinema ads tend to be
more entertaining
than ads in other places’

PERCEIVING ADS IN CINEMA TO BE MORE ENTERTAINING = INCREASED RECEPETIVITY

As many cinemagoers agree that they don't mind cinema ads as the film plays uninterrupted after as those who find it frustrating having to watch ads at regular intervals when watching content at home.

% of cinemagoers who agree



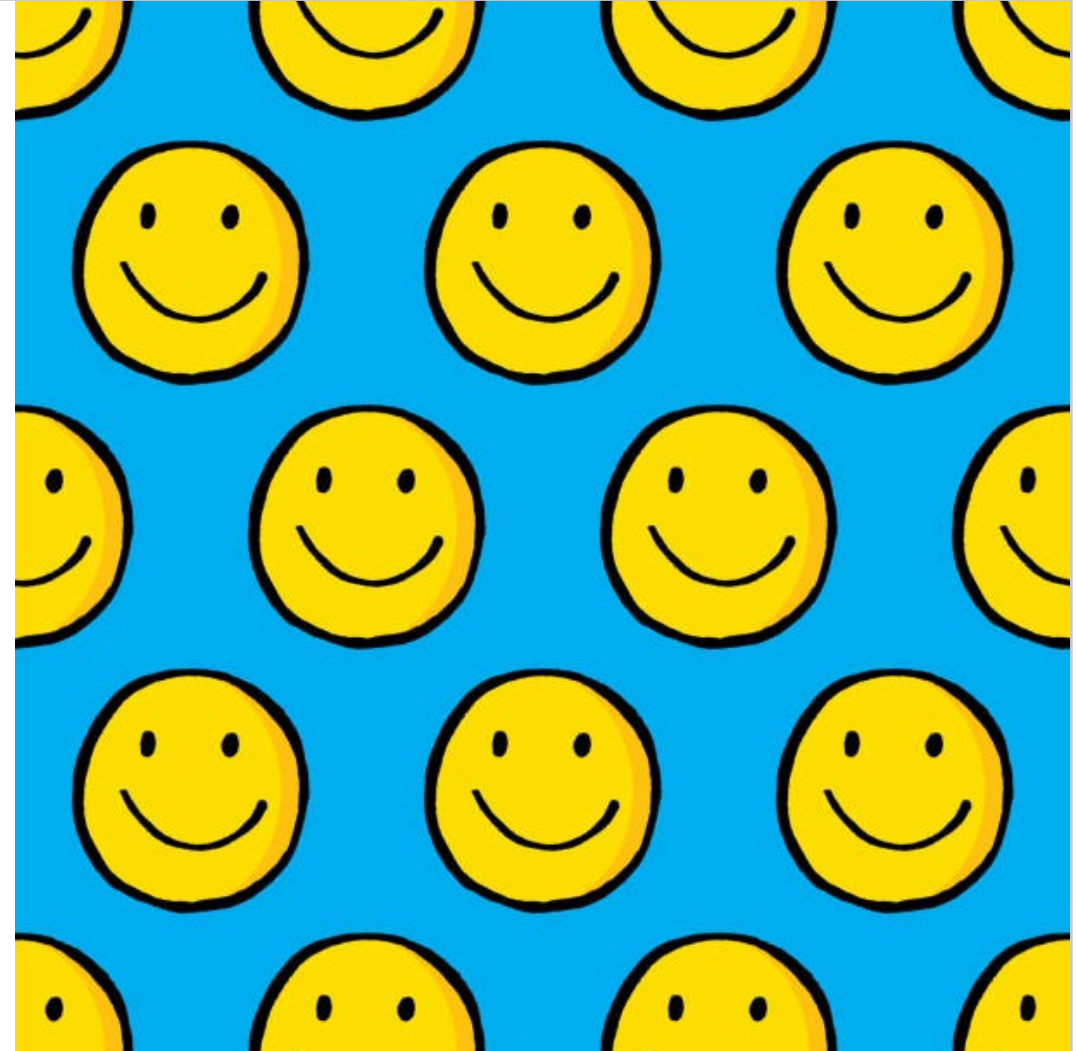
62%

'I don't mind the ads at the cinema because I know I'll get to watch the film **uninterrupted** after them'

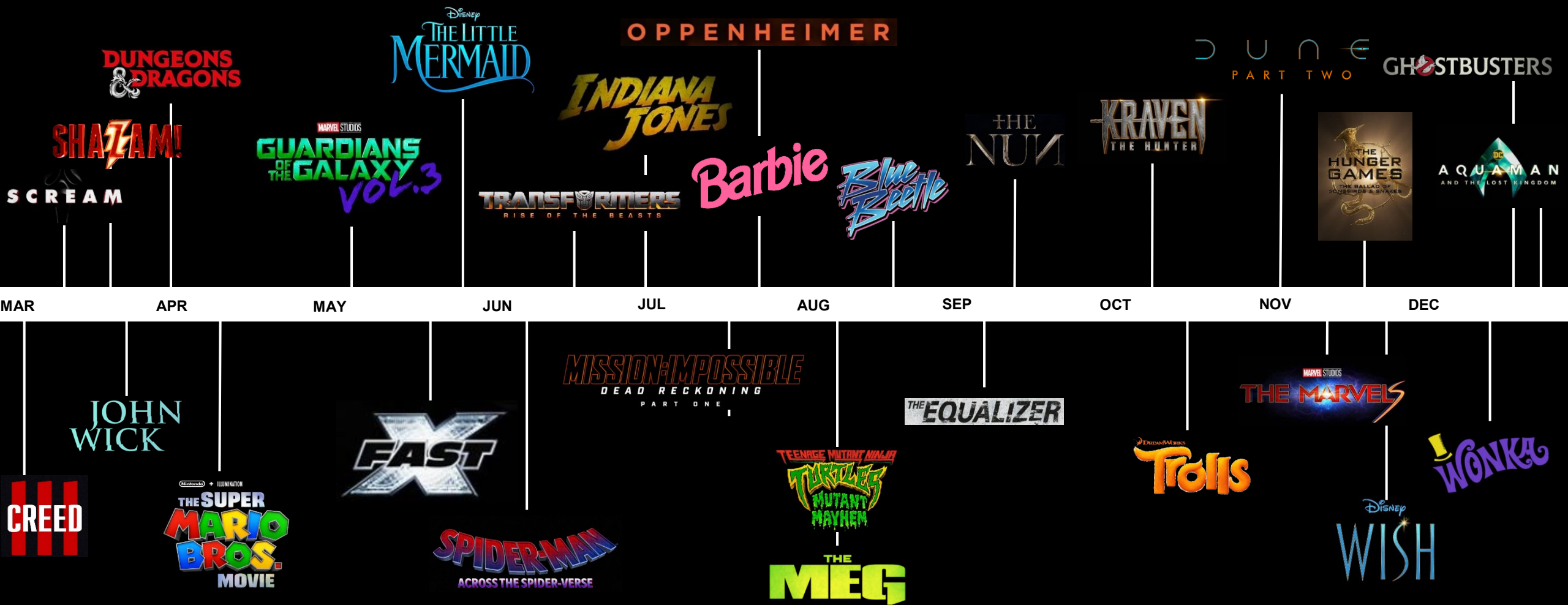


62%

'It's frustrating having to watch ads at regular **intervals** when watching films, TV shows, documentaries & sport at home'

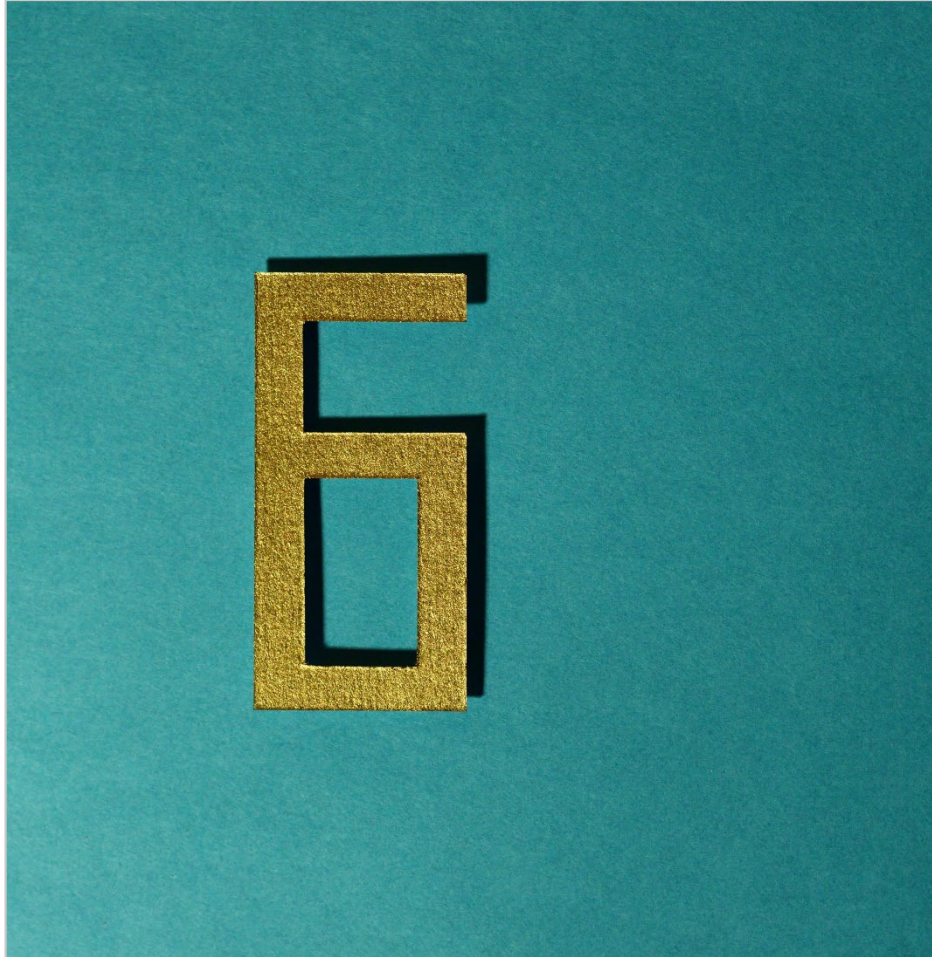


THE REST OF THE YEAR IS SHAPING UP TO BE AN EXCITING ONE WITH PLENTY ON OFFER...



...AND THE SLATE LOOKS APPEALING TO CINEMAGOERS

96% of cinemagoers plan to see at least one of this year's big releases, with cinemagoers on average planning to watch 6 of the upcoming titles tested. This is also the case even among those who earlier said they intended to go to the cinema less.



Number of titles selected on average
for intend to watch when released

6

All cinemagoers

6

Those who intend
to visit the cinema
less

6

Those who intend to
visit the cinema the
same amount

8

Those who intend
to visit the cinema
more

*Those who say they plan to go to the cinema less are still on a par with
the average cinemagoer for the number of films they intend to watch*



CINEMAGOERS'S TOP 2023 PICKS

An exciting selection of animation, the closing chapter of Guardians of the Galaxy and the re-imaginings of Disney classics look set to entice cinemagoers this year

Top 6 upcoming titles cinemagoers say they intend to watch at the cinema...



Super Mario Bros

40%
(increasing to 53% for those with children)



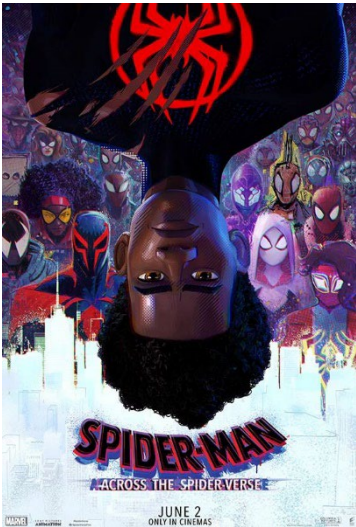
Guardians of the Galaxy Vol. 3

38%



Fast & Furious 10

32%



Spider-Man: Across The Spider-Verse

31%
(increasing to 34% for 16-34s)



Wonka

31%



The Little Mermaid

30%

THIS IS WHY WE EXPECT TO SEE UK CINEMA ADMISSIONS CONTINUE TO GROW IN 2023

Cinema admissions are expected to get back to near pre-pandemic levels in the next couple of years



SUMMARY

Cinemagoers love and value the experience of being at the cinema and continue to recognise the films as being of the highest quality.

Over 7 in 10
cinemagoers intend
to visit as often or
more frequently in the
next six months

Cinema-first releases
have the strongest
association with
quality, well ahead of
SVOD exclusive and
Pay TV releases

This year's slate has
broad appeal with
cinemagoers
intending to see 6
films – in line with
pre- pandemic
average frequency