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Report

Project: 5-19s Cinema Survey 2015



For Into Film
20th August 2015
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Introduction

Background and Objectives

Into Film is an education charity that seeks to put film at the heart of children and young people's learning and cultural experience. Their UK-wide programme will provide 5-19 year olds with unparalleled opportunities to see, think, make and imagine, contributing to their educational, cultural, creative and personal development.

Into Film (previously known as Film Nation UK) incorporates the legacy of two leading film education charities, First Light and Filmclub, and they will be working together with a range of partners in England, Northern Ireland, Scotland and Wales.

Into Film is supported by the BFI, together with funding from the film industry and a number of other sources. A benchmarking piece of research was conducted in 2014 which investigated young people's opinions and behaviour with regards to film viewing and any impact that interaction with Into Film had.

This research has been repeated in 2015, in order to;

- Establish if there has been any change in opinions and behaviour since 2014
- To understand the impact of Into Film to date.

This report details the findings from both waves of research.

Research Approach

Online surveys were conducted with children and young people aged 5-19 years old by Platypus Research Ltd. For children under age 8 the parents and teachers were on hand to help them with the survey.

Both the 2014 and 2015 surveys were completed in July prior to schools breaking up for the summer holidays.

In each wave, two sample sets were used for the research;

- General sample representative of UK 5-19 year olds obtained from an online panel company. This sample is used to benchmark the opinion of children in the UK. The survey was done via direct contact with families.
- School sample obtained from Into Film of schools who were participating in the Into Film Club. The teachers were emailed the survey and they asked children to complete the survey who had attended the Film Club. This sample is the test sample to identify the impact of Into Film.
- From the General sample 9% (90 young people) claimed to be Into Film Club members. These have been referenced in the report where there have been any statistically significant differences to the direct Into Film Club Sample

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- Throughout the report we refer to statistically significant differences at the 95% confidence limit. This means that the difference in results is significant with just a 5% chance of error within the results.

Sample Profile

	WAVE 1 TOTAL (1147)		WAVE 2 TOTAL (1137)	
	School Sample (149) %	Panel Sample (1000) %	School Sample (137) %	Panel Sample (1000) %
Male	52	50	63	50
Female	48	50	37	50
5-10	52	31	32	31
11-16	46	57	59	42
17-19	2	13	9	27
North	18	25	19	26
Midlands	33	24	26	23
South	29	39	31	38
S/W/NI	20	12	25	14

Bold = statistically statistically significantly different from the other sample group

○ = statistically statistically significantly different from 2014/2015

NB – There is a greater proportion of 17-19s in this wave's sample. Weighted data has been checked and this has not skewed the total findings.

Film Viewing Behaviour

Overall, film watching appears to have declined in 2015, particularly amongst 17-19 year old males. There have also been changes in how young people access films, with subscription sites becoming more popular whilst cinema and DVD's have become less popular.

Watching Films – How often?

Film watching appears to have declined statistically statistically significantly in 2015 amongst the general sample of 5-19 year olds. In 2015, the general sample of young people watch an average of almost 5 films per month (4.9) with just 6% watching

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more than 8 in a month. In 2014, young people watched almost 6 films per month on average and 23% watched more than 8. There has also been a significant increase in those who say they do not watch a film every month, from 3% in 2014 to 19% in 2015.

There appears to have been a large decline in film watching amongst 17-19 year olds from 6 films per month on average in 2014 to 4.5 films per month in 2015, driven mainly by a significant decline amongst 17-19 year old males (2014 6.1 versus 2015 4.2). Film watching amongst 5-10 year old girls has also declined from 6.2 in 2014 to 5.3 in 2015. Smaller declines were seen across all the other age and gender groups. This year, girls appear to be slightly more into films than boys (average of 5.1 films per month as compared to 4.7).

There also appears to have been a significant decline in film watching amongst Into Film Club members, from 6.5 films per month on average in 2014 to 4.8 in 2015 and this decline is seen across all age groups and both boys and girls.

Watching Films – How?

Films continue to be viewed via a multitude of sources and platforms.

As seen in 2014, virtually all young people age 5-10 in the general population had watched a film at the cinema (98%), on normal TV (97%), and on DVD or Blu-Ray (96%). Catch up (90%) and pre-recorded films (86%, increased statistically significantly versus 81% in 2014) were the next most commonly accessed by both the general and Film Club sample. A large proportion continues to access films via the internet; downloaded (68% to 72%) and streamed live (70% to 74%). Accessing films via subscription sites has increased statistically significantly from 63% to 71%.

In addition to TV, laptops (76%) and Tablets (67%) continue to be common platforms for viewing films. Games consoles (54%) and mobile phones (46%) are also used to a lesser degree.

Overall, there has been a statistically significant increase in those who watch a film at least weekly on normal TV (49% to 60%), pre-recorded films (38% to 43%) and via subscription sites (32% to 38%). In contrast watching films at least weekly at the cinema (12% to 9%) and on DVD or Blue-Ray (41% to 37%) has declined statistically significantly.

Into Film Club Members vs General Sample

Members of the Into Film Club are more likely to be accessing films weekly via the range of different platforms, particularly downloading.

The list below shows the proportion who watches films at least weekly for Into Film Club members versus the general sample. Whilst Into Film Club members are slightly

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more likely to be watching films weekly via each of the channels including cinema, the difference is only significant for films downloaded from the internet.

Sources;

- On normal TV 64% vs 59%
- On catch up 45% vs 38%
- Pre-recorded 45% vs 43%
- DVD/Blu-Ray 42% vs 36%
- Subscription sites 41% vs 37%
- Downloaded **33%** vs 22%
- Streamed live 30% vs 31%
- At the cinema 15% vs 9%.

Platforms

Interestingly, Into Film Club members were statistically significantly more likely to view films on all platforms;

- TV **72%** vs 63%
- Laptop **41%** vs 29%
- Tablets **39%** vs 24%
- Phone **27%** vs 13%
- Games console **34%** vs 17%.

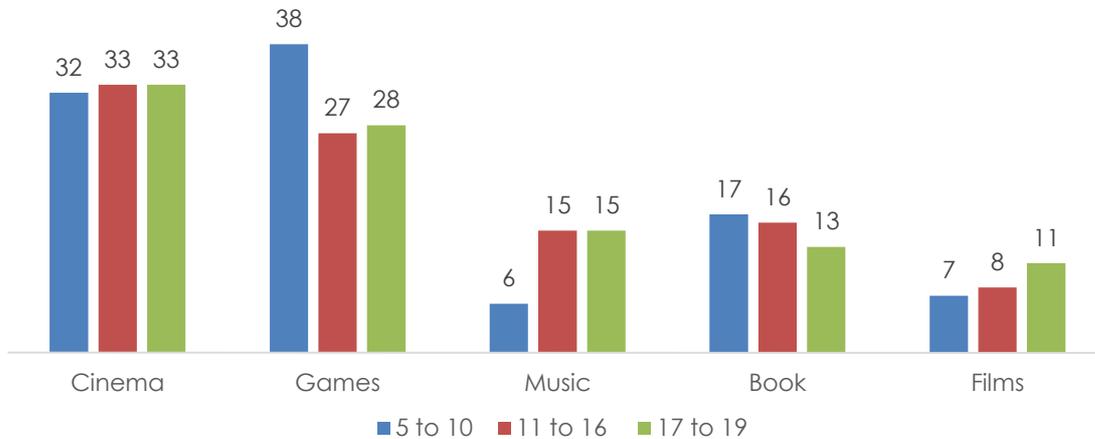
Cinema and Film as a priority

Whilst cinema is still top of the shopping list for young people, there is strong competition from video games, particularly amongst 5-10 year olds.

A third (33%) of the general sample state the cinema would be the first thing they would choose to spend their money on and 31% for games (compared to a book, music, and films (DVDs, online etc.)). Film club members were no more likely to have put cinema at the top of their list compared to the general sample. 11 to 16 year olds and 17 to 19 year olds were the most likely to want to spend their money on the cinema.

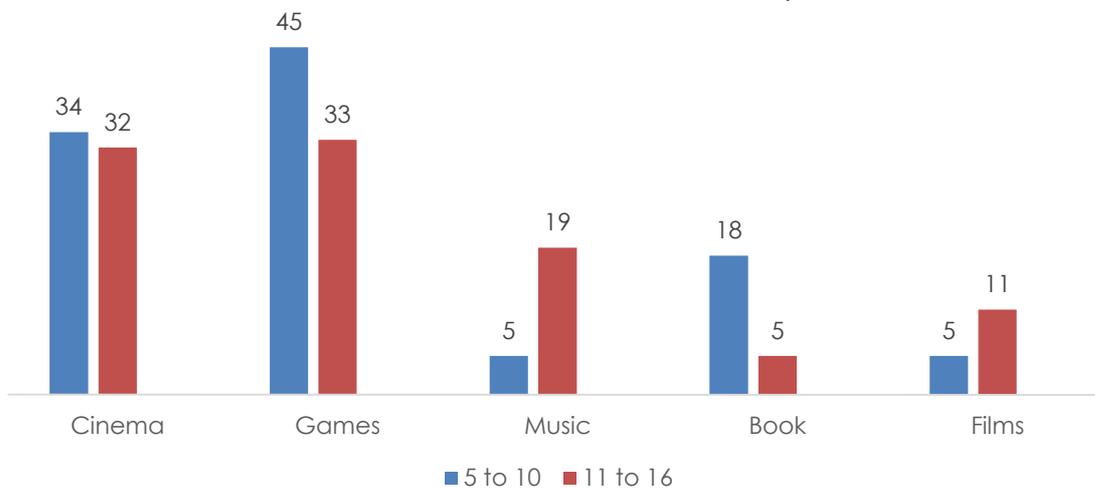


% who would choose to spend their money first
on.....
General Sample



Base: General sample (1000); 5-10 (308), 11-16 (422), 17-19 (270)

% who would choose to spend their money first
on...
Into Film Club Member Sample



Base: Film Club sample (137); 5-10 (44), 11-16 (81), 17-19 (12 NB Base too low)

Cinema going

Whilst cinema visiting continues to be an important pastime for young children and younger teens, it appears to be declining amongst 17-19 year olds.

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As seen in 2014, the majority of young people have been to the cinema in the last 2-3 months (87% of the general sample of 5-19 year olds) and they had visited the cinema twice on average in the last few months (2.1).

In 2014, no significant differences across the different age groups were seen, however the picture is somewhat different in 2015. 5-10 year olds and 11-16 year olds were statistically significantly *more* likely to have visited the cinema in the last few months (87% and 87% versus 92% and 91% respectively), however 17-19 year olds were statistically significantly *less* likely to have done so (87% versus 76%). Frequency of visiting has also fallen amongst 17-19 year olds, from 2.4 in 2014 to 1.7 in 2015.

Members of the Into Film club are more frequent visitors to the cinema compared to the general sample; on average 2.6 times in the last few months and this remains the same as seen in 2014.

Cinema Venues

Amongst the general population, young people are most likely to visit a chain cinema such as Vue or Odeon (91%) with just 18% visiting local independent cinemas and there has been no change since last year. There are no differences by the age of the child.

Film club members are more likely to go to an independent cinema than the general sample with 29% (32% in 2014) claiming they visit an independent cinema vs 76% who visit a chain.

Attitudes to Cinema

Young people continue to love watching films and going to the cinema, with the excitement being highest for younger children. Maintaining this excitement for older children (11+), in particular older teens, remains a challenge.

In 2014, virtually all children aged 5-19 years loved to watch films and liked going to the cinema and this has not changed in 2015;

- 93% agree or strongly agree that they love to watch films (51% strongly agree).

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- 90% agree or strongly agree they like going to the cinema (50% strongly agree).

Watching films at the cinema is also a special experience for the majority of young people with four out of five (81%) agreeing with this and more than one in three agreeing strongly (37%).

The cinema experience becomes less appealing and exciting as children get older. The 5-10 age bracket are the most likely to say they like going to the cinema (63% strongly agree) and that going to the cinema is a special experience (55% strongly agree) whereas the 17-19 age bracket increasingly less likely to think so (34% strongly agree they like going to the cinema, 20% strongly agree going to the cinema is a special experience, as compared to 39% and 27% respectively in 2014).

Reasons for going to the cinema

The reasons why children and young people choose to go to the cinema can be broken down into five categories; Film, social, event, offers, something to do. The films themselves are the main reason that drives young people to the cinema, followed by social reasons and then due to a special event or treat. The list below shows each category and the percentage of young people who claimed these are the reasons they go to the cinema and any significant differences compared to 2014 are shown;

- **Film based reasons** **81% (60% main reason)**
 - There's a film I want to see (80%)
 - Family are interested in films (31% versus 25% in 2014)
 - Interested in films due to work at school (8%)
- **Social** **69% (25% main reason)**
 - Someone suggested it (29% versus 40% in 2014)
 - Great place to go with friends (45% versus 40% in 2014)
- **Special event** **48% (10% main reason)**
- **Something to do** **19% (versus 29% in 2014, 2% main reason)**
- **Offers** **18% (1% main reason)**
 - Offer on ticket price (14% versus 17% in 2014)
 - Offer on food/snack (4%).

Special events continue to be a key driver for younger children to go to the cinema. As seen in 2014, younger children aged 5-10 years differ in their reasons for going to the cinema compared to 11+ year olds. They are still very much driven by films (77%, 54% main reason), but special events continue to be a really important reason for visiting (19% claim it is the main reason). There continues to be an opportunity to



utilise the birthday/event theme, combining with cinema offers, food and drink offers and as part of a communication strategy and to build loyalty.

As children get older (11+ years) going to the cinema is increasingly about the social experience, becoming virtually as important as the film. However, it is also interesting to note that the social aspect of cinema going has become more important amongst 5-10 year olds as compared to last year.

The sociability of cinema visiting provides opportunities with regards to cinema communications, promotions and food/drink offers. Currently, cinema visiting is not particularly offer driven. It is difficult to know why this is the case without conducting analysis of the offers available and awareness of these offers; it may be that the offers are not sufficiently motivating, or that young people are simply unaware of them. Whilst offers appear currently to be unlikely to instigate cinema visiting on their own, they may encourage young people to look for films that they would like to see, or to suggest a social visit to the cinema rather than another activity.



The table below shows the key drivers of going to the cinema by age;

Reasons for going to the cinema	5-10 years %		11-16 years %		17-19 years %	
	2014	2015	2014	2015	2014	2015
Film	74	77	87	83	78	83
Social	55	63	73	73	73	71
Special event	50	56	51	48	33	40
Something to do	15	11	36	19	35	26
Offer	12	13	20	16	24	19

NB – Figures in bold are statistically significantly higher compared to the other age group(s) for that reason. Figures in **63** are statistically significantly higher compared to the other year for that reason.

The categories listed above have been grouped together using a wider list of prompted statements that respondents agreed or disagreed with.

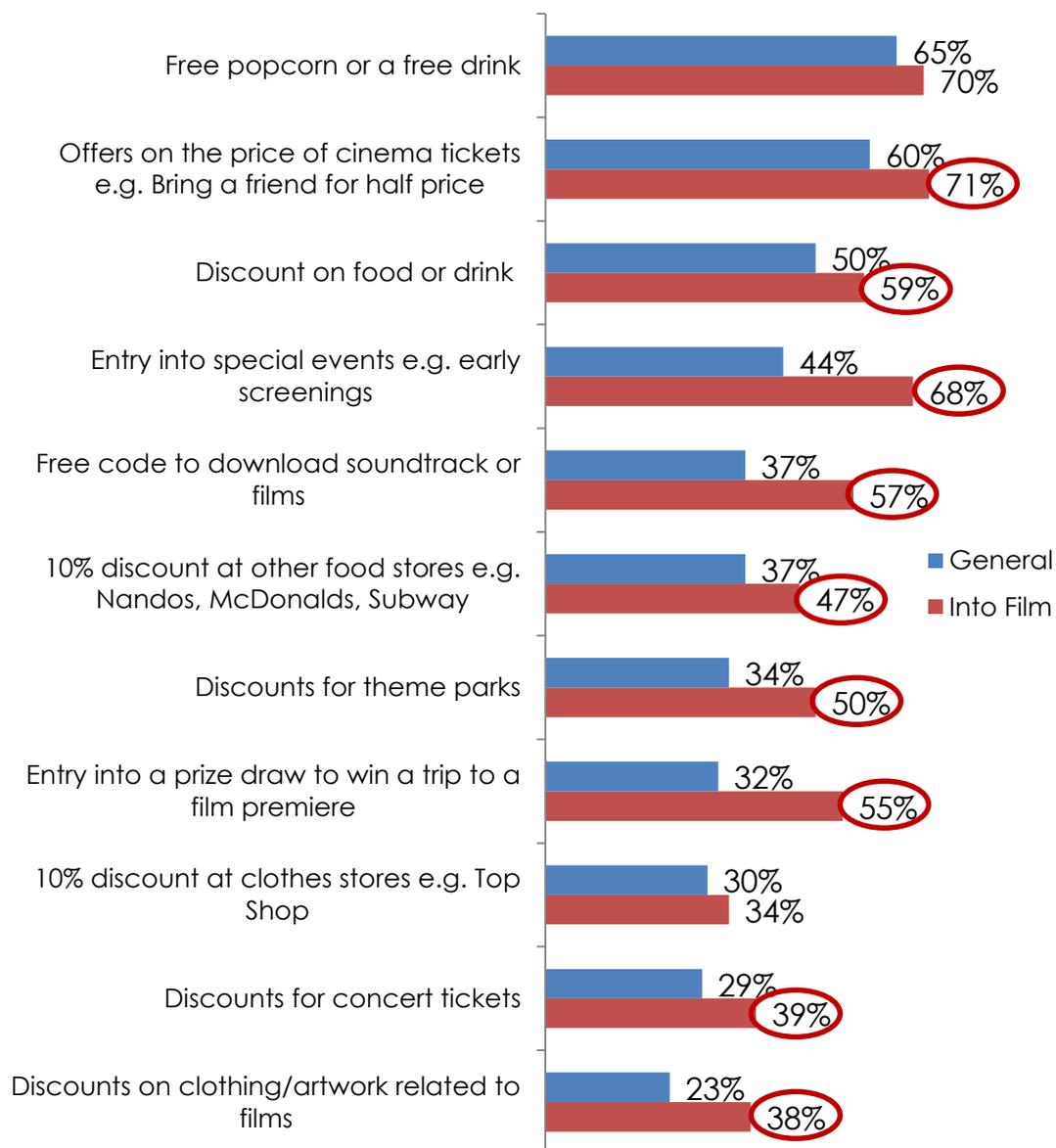
Encouraging cinema visiting

Offers which impact upon the cost of visiting the cinema are the most motivating across all age groups.

Although offers have not been described as one of the main reasons that young people visit the cinema, cost was identified as the main barrier against cinema visiting in 2014. It is therefore no surprise that some of the special offers tested are highly motivating for young people.



The table below shows how many young people in the general population and Into Film Club samples said that each offer would make them want to visit the cinema a lot more often;



Overall, Into Film Club members were more likely to find the majority of discounts and offers appealing.

Amongst both the general population of young people and Into Film Club members, the offers which are the most attractive to are those which have the greatest impact on the cost of cinema visiting. Almost two thirds (65%) of young people said free popcorn/drink offers would make them want to visit the cinema more often, increasing to 70% amongst Into Film Club members. Two in five (60%) young people said offers on the price of cinema tickets would be appealing and this type of offer is even more appealing amongst the older age groups (11-16 year olds 63%, 17-19 year olds 66%) and Into Film Club members (71%).



Although not as motivating, discounts relating to food and drink are appealing to half of the general population young people (50%) and 59% of Into Film Club members. Amongst the general population, these types of discounts are more appealing to older children (11-19 year olds).

Generally, discounts or offers unrelated to cinema visiting were less appealing to young people in the general population and particularly did not appeal to 5-10 year olds, however for Into Film Club members these types of offers were statistically significantly more appealing. In particular, entry into special events, soundtrack or film downloads and film premier prize draws were much more appealing to club members.

Interestingly, discounts for theme parks were statistically significantly more appealing to 5-10 year olds (42%) than the older age groups (11-16 31%, 17-19 30%).

Attitudes to Film and the Film Industry

Understanding and respect for the film industry has improved, although this continues to be more challenging amongst 17-19 year olds. Into Film continues to be successful in creating greater respect amongst its members.

Encouragingly, there appears to have been a significant increase in the proportion of young people in 2015 who agree that films are important to them (72% agree and 23% strongly agree compared to 62% and 20% respectively in 2014).

Films appear to hold the least importance for older teens; two thirds (64%) of 17-19 year olds say they are important compared to 73% of 5-10 year olds and 75% of 11-16 year olds.

The feeling that films are important translates into an increased respect for the British film industry, with 67% agreeing and 23% strongly agreeing in 2015 that they totally respect the British film industry (compared to 60% and 18% respectively in 2014).

It is also encouraging to see that whilst there continues to be a group of young people (especially the younger age group), who are not sure whether they respect the British film industry, attitudes and understanding appear to be improving somewhat.

- 29% are unsure whether they totally respect the British Film Industry or not (35% in 2014).
- Just under half (47%) of 5-10 year olds, a quarter (26%) of 11-16 year olds and one in four (23%) 17-19 year olds are not sure whether they totally respect the BFI (as compared to 57%, 32% and 24% in 2014).

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- Of those who are able to state an opinion, 94% agreed that they respect the British Film Industry and 6% disagreed (compared to 91% and 9% in 2014).

However, there continues to be a lack of understanding of the impact of piracy.

Although the phrase 'British Film Industry' is not familiar to some, young people understand that there are many people involved in making a film with 90% agreeing with this and three in five (56%) strongly agreeing.

However, this does not necessarily translate into the knowledge that films can only be made if people pay to watch them. Two in three (62%) agree (23% strongly) that films can only be made if people pay to watch them, which remains similar to last year. Whilst it is encouraging that disagreement overall is relatively low at 13%, there remains 25% who are unsure, suggesting that education in this area could still be improved. Those most likely to disagree that films can only be made if people pay to watch them continue to be 17-19 year olds (20% disagree).

Working in the film industry

Just over a quarter (29%) are interested in working in the film industry in the future. Whilst differences are not significant, interest is highest amongst 5-10 year olds (33%) and lowest amongst 17-19 year olds (24%).

Differences in attitude for Film Club Members

Film club membership continues to have a positive impact on young people's attitudes. Film club members are more engaged with film and enjoy going to the cinema more. They are also more respectful of the British film industry and more likely to be interested in working in the film industry.

Film club attendees are more likely to strongly agree that they;

- Love watching films (71% vs 51%)
- Like going to the cinema (66% vs 50%)
- Films are important to them (41% vs 23%)
- Totally respect the British film industry (35% vs 23%)
- Interested in working in the film industry (25% vs 8%).

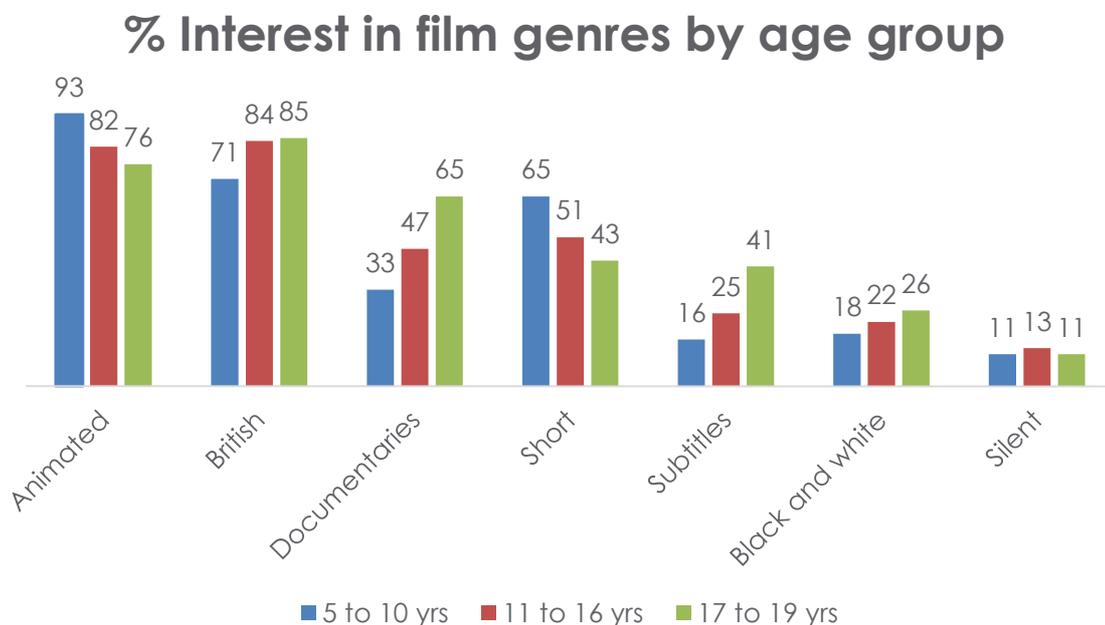


Interest in Film Genres

There is a wider interest in different film genres amongst older teens (17-19s) and Into Film club members.

Animated and British films have the greatest appeal across all age groups. Older teens (17-19s) are the most interested in a wider range of film genres in particular British, documentaries, subtitled and black and white films. These age differences should be taken into account when deciding on the types of films to be shown in these genres.

The chart below shows the differing levels of interest for a range of film types;



Encouragingly, there has been an increase in those interested in British films across all age groups. Additionally, 11-16 year olds are more interested in animated and short films and 5-10 year olds are more interested in short films. Interest in documentaries has declined amongst 11-16 year olds, which suggests better tailoring of the content may be required to encourage viewing.

Differences for Into Film Club Members

Film club members have a greater interest in watching certain genres of films compared to the main sample of young people for both younger and older age groups. The differences are shown below by age group (NB no data for 17-19 year olds due to base size);



	5-10 years		11-16 years	
% interested in watching each film genre	General sample (308)	Film club members (44)	General sample (422)	Film club members (81)
Animated	93	84	82	83
British Films	71	84	84	68
Documentaries	33	41	47	48
Short	65	61	51	56
Subtitles	16	41	25	44
Black and white	18	25	22	21
Silent	11	23	13	19

Bold = statistically significantly higher than the other age group.

Infringement

Infringement continues to be an issue amongst young people, with two in five claiming to have watched a pirate film and almost one in six infringing regularly.

There continues to be some uncertainty amongst young people around piracy, with 20% of the general sample claiming not to know what a pirate version of a film is (18% in 2014). Unsurprisingly, younger children were the least likely to know (42% did not know, compared to 36% in 2014). However by age 11 it would seem that most children know what pirate films are, with almost 9 out of 10 11-16 year olds (88%) and 17-19 year olds (91%) being aware.

Of those who are aware, two out of five (41%) claimed to have watched a pirate version of a film, which remains the same as seen in 2014

As seen in 2014, from the general sample who are aware what a pirate version is:

- 17% are infringing regularly (half or more of the films they watch are pirate versions).
- 24% are infringing occasionally (less than half of the films they watch are pirate versions)
- 59% never watch pirate versions.

17-19 year old males are the most likely to watch pirate films with one in four infringing regularly (26% said that half or more of the films they watch are pirate versions).



The majority of young people have discussed or heard something about pirate films. Young people are most likely to have talked about pirate films at their film club (33%), seen it discussed on websites/forums (28%), or discussed it with friends (29%).

Young people are also aware of piracy being addressed by the media. One in five (20%) have read about pirate films in newspapers or magazines, 18% have seen an advertising campaign at the cinema and 16% recalled seeing an advertising campaign online and 15% on TV. 15% specifically recall seeing the 'Moments worth paying for' campaign.

Generally the proportion of young people who have seen or discussed piracy increases with age, with the differences shown in the table below, apart from discussion at a film club which is higher amongst 5-10 year olds as compared to those aged 11 and older.

	% 5-10 year olds	% 11-16 year olds	% 17-19 year olds
Discussed at film club	58	26	15
Discussed with friends	14	31	43
Seen it on websites/forums	13	32	39
Seen it in newspapers/magazines	10	22	29
Seen advertising campaigns at the cinema	7	21	27
Seen advertising campaigns online	6	18	24
Seen advertising campaigns on TV	6	15	24
Heard of the 'Moments Worth Paying for' campaign	3	16	25
Seen on news websites	4	11	17
Discussed at school	6	10	15
Seen on news on TV	3	5	2
Nowhere, it's not something I really know about	1	5	7

Bold = statistically significantly higher than the other age group/s



It is concerning to see that those who have attended an Into Film Club are more likely to have watched a pirate version of a film (53%) compared to the general sample and their infringement behaviour has increased since last year. Film club membership also appears to have little impact on the extent to which young people have discussed or heard about pirate films.

Whilst awareness of piracy is similar amongst Into Film Club members, with 18% claiming to not know what a pirate version is, infringement amongst those aware appears to be increasing.

In 2015;

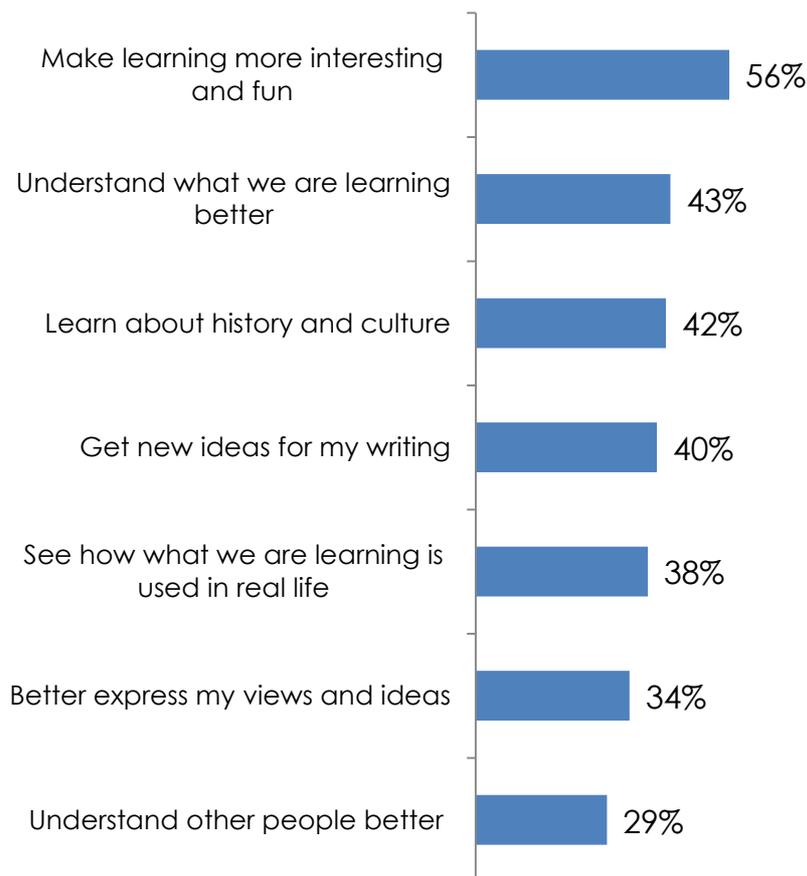
- 26% are infringing regularly (half or more of the films they watch are pirate versions) as compared to 12% in 2014 and versus 17% of the general sample
- 27% infringe occasionally (less than half) as compared to 34% in 2014
- 47% never watch pirate versions (54% in 2014).

As seen amongst the general sample of young people, the majority of Film Club members have discussed or heard about pirate films somewhere (96% compared to 95% of the general sample). However, no differences were seen in the ways that young people have heard or talked about pirate films amongst Film Club members aside from a higher level of awareness of discussion on TV (13% compared to 4%). This suggests there is an opportunity for film clubs to give piracy much greater prominence.

Filmmaking Activities

Just over half (54%) make, watch or discuss films in lessons and taking part in these activities at school is more prevalent amongst 5-10 year olds (57%) and 11-16 year olds (59%) as compared to 17-19 year olds (43%).

Young people were asked to what extent watching and discussing films in lessons helps them with a number of different aspects and the proportion who said that it helps them 'a lot' is detailed in the following chart;



Overall, students feel that discussion about films in lessons has a range of benefits. They see the greatest impact as being upon their enjoyment (56%). Around two in five believe it helps them to better understand what they are learning (43%), learn about history and culture (42%) and provides inspiration for their writing (40%).

Young people also mentioned taking part in filmmaking activities (such as storyboarding, making animations or short films) both inside (41%) and outside (23%) of school. A third (36%) had taken part in these activities during lessons and almost one in 10 (9%) during school clubs. Almost two in five (18%) had taken part in filmmaking activities at home, 9% at a club outside of school and 5% specifically at a film club. Involvement in filmmaking activities was higher amongst young people aged 11 and over (59% compared to 50% of 5 to 10 year olds).

Into Film Membership

Overall, 30% of young people had heard of any of the film companies tested; Film Club (25%), Into Film (5%) or First Light (5%). Young people aged 11-16 (32%) and 17-19 (36%) were more likely to be aware of any of these as compared to 5-10 year olds (22%). Young people living in the North (32%) were the least likely to have heard of any (23%).



Of those aware, over a third (37%) had heard of an Into Film Club in their area and awareness is highest amongst 5-10 year olds (54%) and lowest amongst 17-19 year olds (23%). Awareness is also higher amongst boys (43% versus 30%).

The majority had heard about Into Film at school (97%) rather than out of school (3%). Almost two thirds (64%) of those aware of Into Film attended at school and one in five (21%) attended outside of school. Overall, 9% of young people aged 5-19 years have attended an Into Film Club, which is an increase compared to 2014 when 5% had attended.

Into Film Club attendance is higher amongst 5-10 year olds (9% of the general sample) and 11-16 year olds (10% of the general sample) as compared to 17-19 year olds (6% of the general sample). Given the poorer attitudes and increased infringement behaviour amongst 17-19 year olds, there appears to be an opportunity to better target this age group.

Into Film members continue to claim the club has increased their cinema going and respect for the industry. Challenges exist around decreasing infringement but positive movements are being made.

Since joining the Into Film Club, two thirds (66%, fallen from 77% in 2014) of the school sample claimed they have watched more films than before with two in five (41%, similar to 44% in 2014) claiming they watch a lot more. The film club members from the general sample appear to be less strongly impacted by their membership; 61% claimed to be watching more films and 21% a lot more as a result of joining the film club (in 2014 46% watched more, 23% a lot more, NB low base n=35).

As seen in 2014, the Into Film Club continues to make young people love film more and be more interested in the film industry. Whilst the majority of young people still believe that Film Club has increased their appreciation of what goes into making films, the proportion who agree has declined statistically significantly since 2014, suggesting that there has perhaps been less focus on this area in the last year.

Almost two in five believe that Film Club has made them more likely to want to protect the film industry and more likely to visit the cinema.

Positively, half of those who had watched a pirate film (NB low base, n=24) said Film Club has made them think more about the impact of watching pirate films and two in five say they are less likely to view, buy or download pirate versions of a film as a direct result of attending the Into Film Club.



The Film Club has had the following effects on attitudes towards film and cinema;

Film Club has.... % agree or strongly agree (% strongly agree)	2014 School (77)	2015 School (68)
Made me love films even more	86 (53)	74 (50)
Made me more interested in film industry	70 (40)	65 (41)
Made me think what it takes to create something	83 (38)	62 (32)
More likely to want to protect the film industry	57 (22)	57 (29)
Made me realise all the hard work that goes on behind the scenes	77 (43)	57 (41)
More likely to visit the cinema	70 (23)	56 (26)
Make me think more about what happens when people watch pirated films	57 (22)	50 (38)
Make me less likely to view, buy or download pirate versions of films	39 (17)	42 (29)



Conclusions

- Into Film continues to have a positive impact on its members for cinema going behaviour, attitudes to cinema and to the film industry.
- Film Club members are more engaged with films, watching more films via a range of different platforms compared to the general population. They are also more frequent visitors to the cinema compared to the general population and are more likely to access films across different genres e.g. subtitled. This passion and interest for film is something for Into Film to work with and encourage further in the club sessions. Making the Into Film Club members feel special, 'in the know' and showcasing with them some of the less mainstream films could be a way of increasing their engagement and loyalty to film and cinema.
- However, as is the case with all young people in the sample, Film Club members are watching fewer films compared to last year. This is an area for further exploration.
- Positively, Into Film Club members are statistically significantly more motivated by cinema offers and offers on cinema tickets, entry into special events and discount on food and drinks than the general population. These are all motivating incentives that could be offered for club members to increase their cinema going.
- Also, whilst Into Film Club members report that the club has made them think more about the impact of piracy and that they are less likely to buy or download a pirate version of a film, there appears to have been an increase in actual infringement behaviour, suggesting that this topic could be given much greater prominence in club sessions.
- 17-19 year olds as a demographic are a key challenge; attendance of this demographic at Into Film Clubs is lower, they have poorer attitudes to film and increased infringement behaviour, so there appears to be an opportunity to better target this age group. The current format and positioning of Into Film Clubs should be explored and evaluated with this age group in more detail to determine the best fit.

Implications more generally for the film and cinema industry

- Encouragingly, interest in British films has increased since last year.
- However, film watching in general appears to have declined compared to 2014, particularly amongst 17-19 year olds (males). Maintaining excitement and engagement with films across all ages is a key challenge.

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- Subscription sites are an increasingly important channel for communicating with young people about the importance of paying for films and encouraging respect for the industry.
- Whilst cinema visiting continues to be an important pastime for young children and younger teens, it appears to be declining amongst 17-19 year olds.
- Cinema faces huge competition from gaming for share of spend across all age groups whether or not they are Film Club members, particularly for the 5-10 year olds.
- Whilst the film itself is the main reason for visiting across all age groups, special events are key for the younger age group (5-10 year olds). Communications and offers around special events such as birthdays could be a useful tool for encouraging visiting the cinema.
- As young people get older the social element of cinema going becomes more important and the excitement factor dwindles, so it continues to be important to encourage cinema visiting as opposed to watching films at home.
- Currently offers are not a key driver of cinema visiting, however, in 2014 cost was identified as the main barrier to visiting more often. Unsurprisingly, offers which directly impact on the cost of visiting the cinema are the most appealing, in particular free popcorn/drinks offers and offers on the price of cinema tickets, which could be tied into group discounts.



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