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**UK'S  
RETURNING  
AUDIENCES**

—  
**BEHAVIOURAL INSIGHTS INTO  
PRE AND POST-PANDEMIC  
MOVIEGOERS**

# DATA OVERVIEW

## GLOBAL SCALE

45.3 M

Global Active Moviegoers\*

57

Countries

10 yrs

Historical Data

## UK MOVIEGOERS

7.4 M

UK Active Moviegoers\*

9

Exhibitors

## THIS STUDY

3.4 M

2019 Active Moviegoers

~950 K

Returning Moviegoers

## DATA SET

Direct POS

Direct point-of-sale integration  
(offline, online, cash and credit)

Members

Loyalty, subscription, online ticketing  
accounts

Full profile: age, gender,

\* Moviegoers with a valid email, active in the past 24 months

~ 28%

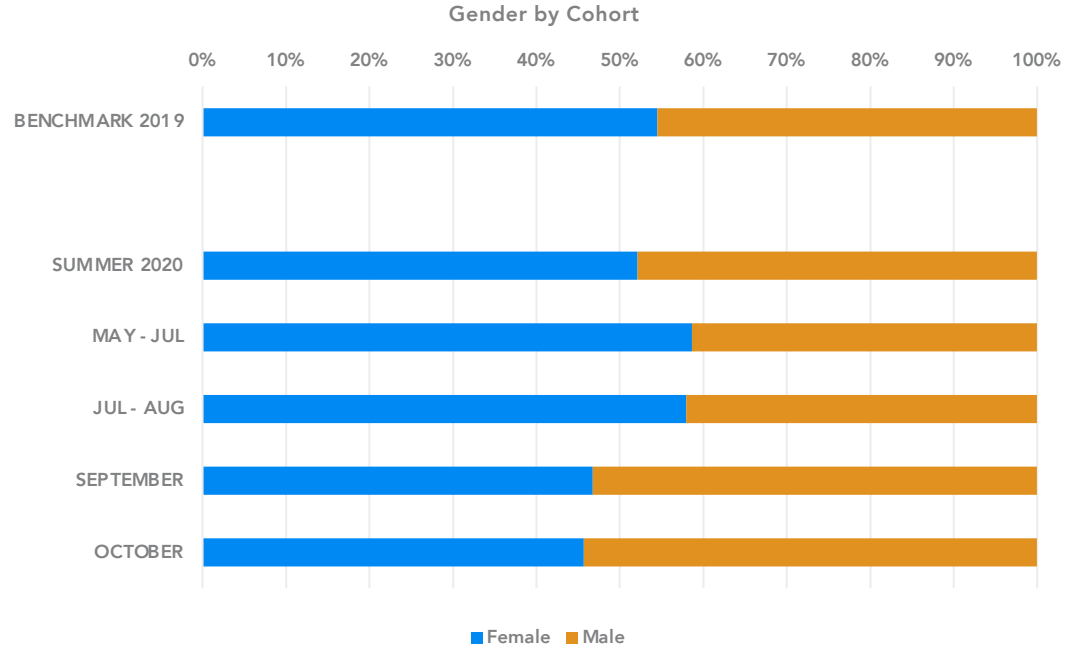
# SCOPE OF ANALYSIS

TIMEFRAME: MAY 17<sup>TH</sup> - OCTOBER 5<sup>TH</sup>

SUMMER 2020	MAY - JUL	JUL - AUG	SEPTEMBER	OCTOBER
<b>20%</b>	<b>40%</b>	<b>23%</b>	<b>9%</b>	<b>8%</b>
Returning Moviegoers	Returning Moviegoers	Returning Moviegoers	Returning Moviegoers	Returning Moviegoers
<b>1<sup>st</sup> Visit</b>	<b>1<sup>st</sup> Visit</b>	<b>1<sup>st</sup> Visit</b>	<b>1<sup>st</sup> Visit</b>	<b>1<sup>st</sup> Visit</b>
July – October 2020	May 17 – July 18, 2021 <ul style="list-style-type: none"><li>• Cinemas reopen</li><li>• Restrictions in place</li></ul>	July 19 – August 31, 2021 <ul style="list-style-type: none"><li>• Restrictions being lifted</li></ul>	Sept 1 – Sept 29, 2021 <ul style="list-style-type: none"><li>• No restrictions</li><li>• Vaccine uptake 75%</li></ul>	Sept 30 – Oct 5, 2021 <ul style="list-style-type: none"><li>• Bond audience</li></ul>

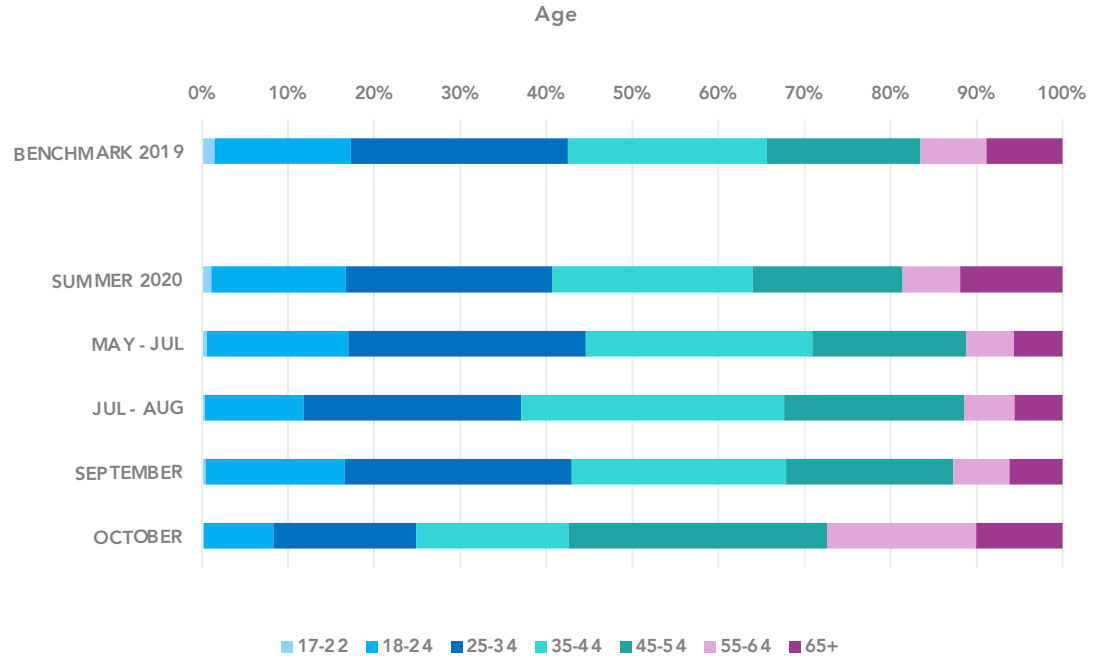
# DEMOGRAPHIC ANALYSIS [ GENDER ]

- Early 2021 returners skewed more female
- More recent returning cohorts influenced by specific content
- Gender not a significant factor of influence



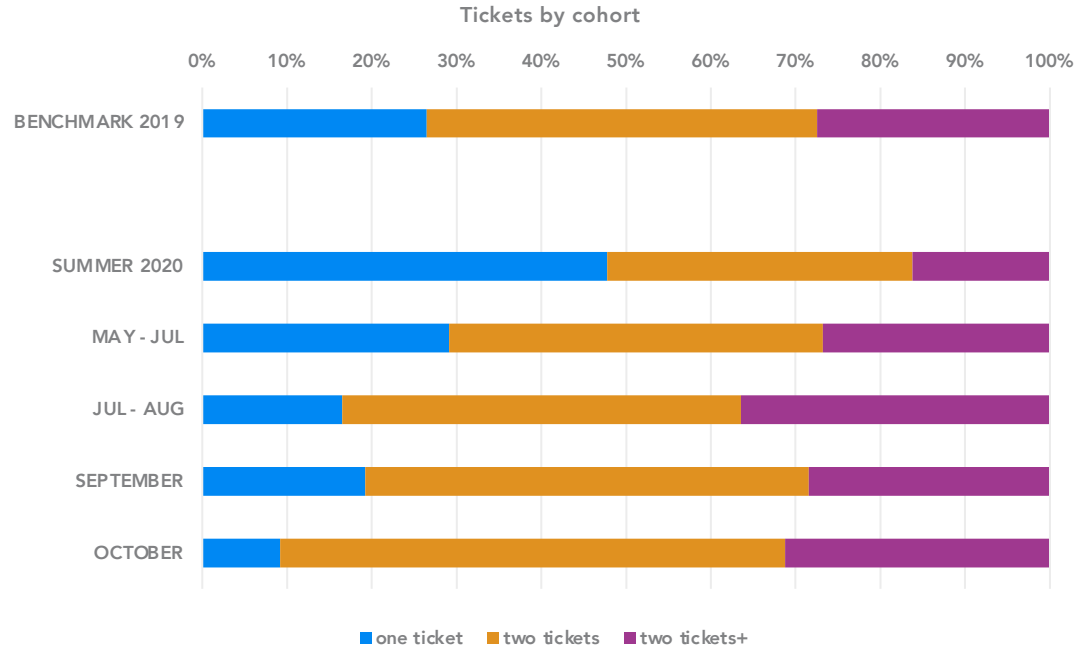
# DEMOGRAPHIC ANALYSIS [ AGE ] :

- Most loyal older audiences were early returners to cinema
- Early returners in 2021 skewed younger
- NTTD has brought out a significant older audience for the first time



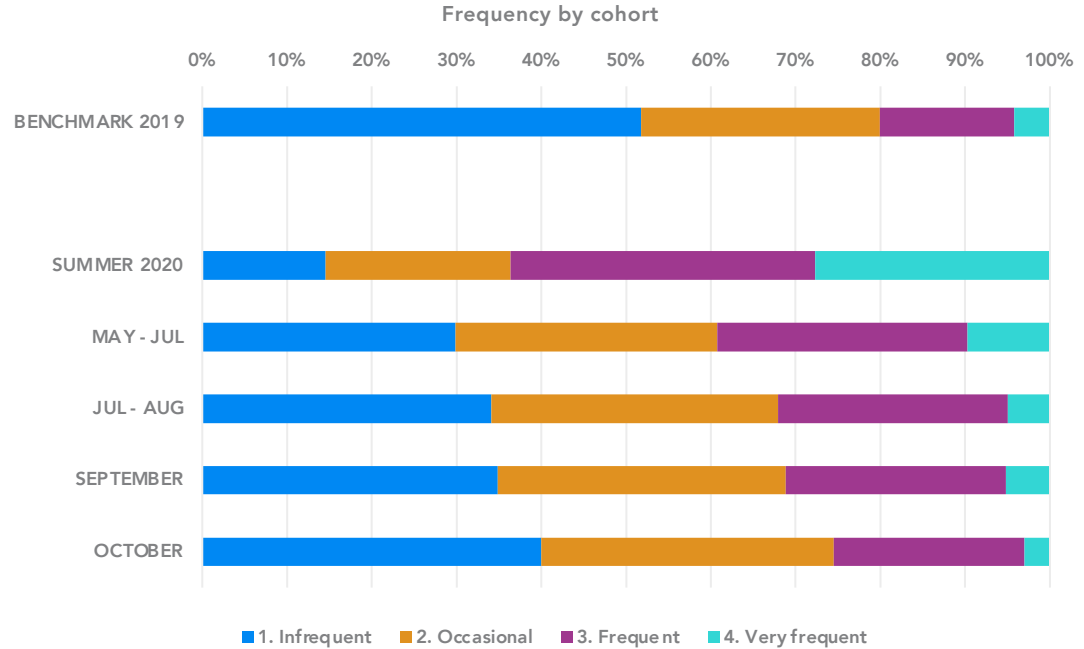
## BEHAVIOURAL ANALYSIS [ ADMISSIONS ]

- Ticket purchasing habits have changed
- Single ticket purchases increased for the first returners, likely tied to social distancing requirements
- Among recent returners, pairs and groups are driving ticket sales at a higher proportion than in 2019



# BEHAVIOURAL ANALYSIS [ FREQUENCY ] :

- The frequent and very frequent were the first to return
- 2021 has begun to attract back the infrequent and occasional moviegoers
- Frequency breakdowns trending back to 2019



Frequency (over one year):  
≤ 2 Infrequent 2-3 Occasional.  
4-11 Frequent 12+ Very Frequent



TOP MOVIES - ALL RETURNERS

## TOP MOVIES [ ALL RETURNERS ] :

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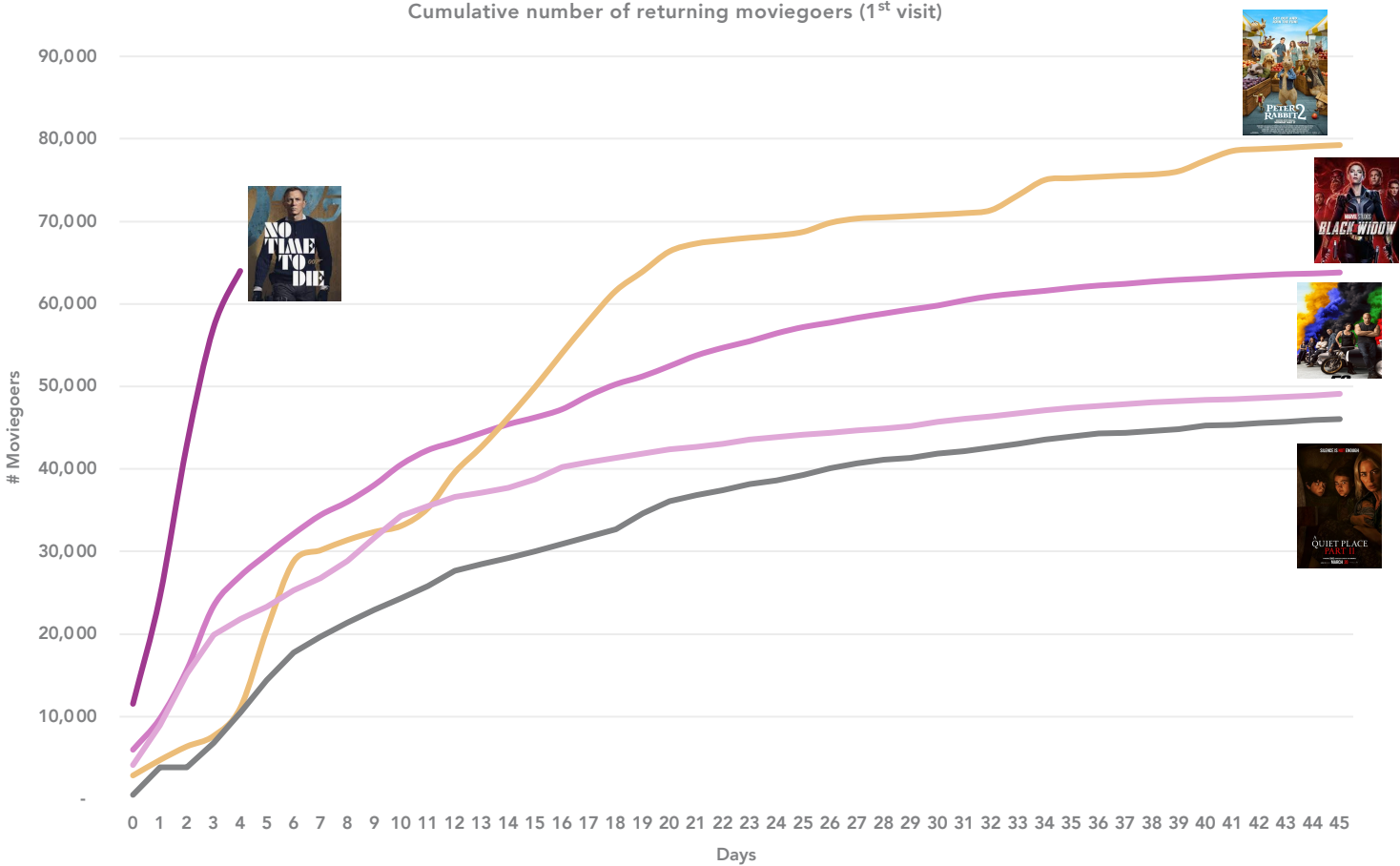
- Blockbusters are clearly important to bring back audiences at scale
- Top 10 is varied in terms of genre
- Breadth of content in the market is essential for the industry to build back

### Top 10 Movies by 1<sup>st</sup> Visit (% of the total visits)

Peter Rabbit 2: The Runaway	11.1%
Black Widow	8.0%
No Time To Die	7.9%
F9 (Fast & Furious 9)	6.2%
A Quiet Place: Part II	5.9%
Cruella	5.3%
Shang-Chi and the Legend of the Ten Rings	4.7%
Free Guy	4.1%
The Conjuring: The Devil Made Me Do It	3.9%
The Suicide Squad	3.9%
...	
<b>Top 10 Movies</b>	<b>~61%</b>
<b>Other movies (# 98)</b>	<b>~39%</b>

# RETURNING AUDIENCE BY MOVIES

- Top 5: 40% returners
- Other ~102: 60% returners
- No Time To Die in a league of its own



WHAT ABOUT THE OTHER 72%

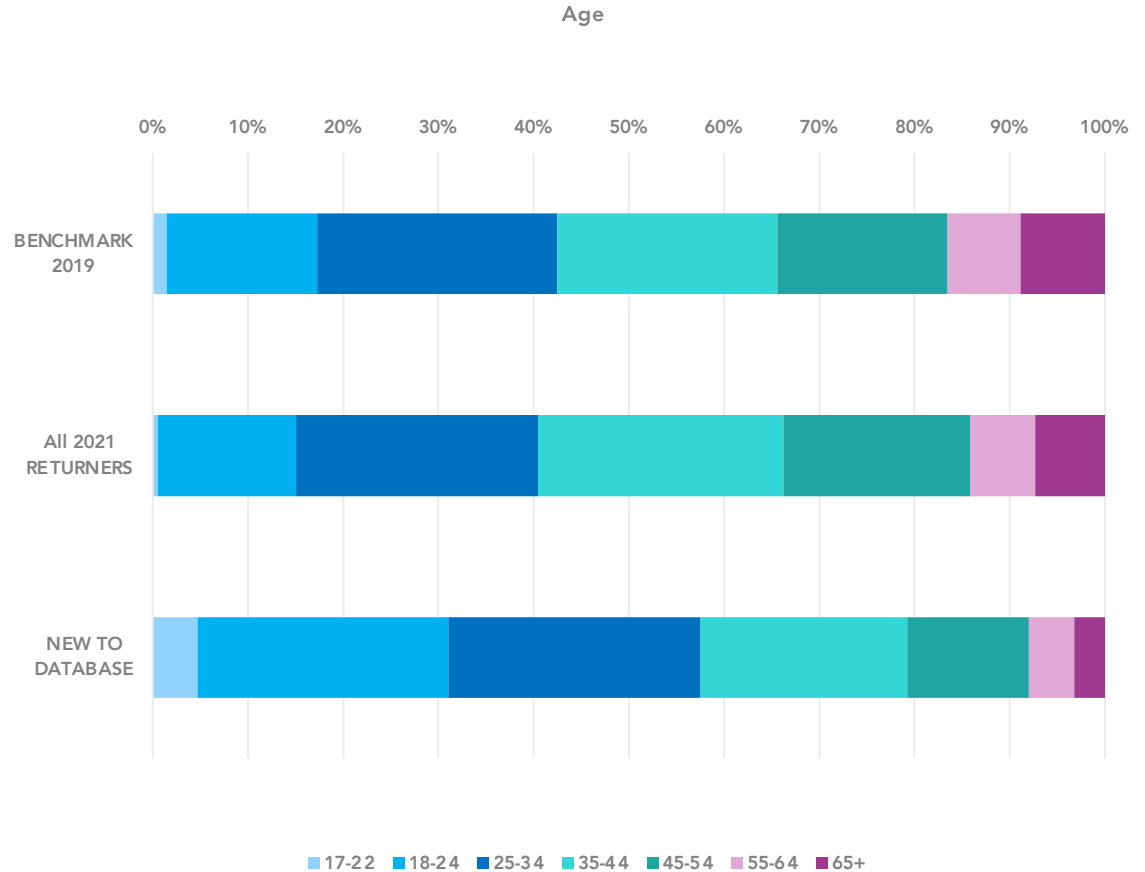
## THE OPPORTUNITY

- Better understand who has yet to return and what will motivate them to come back.
- Don't limit yourself to focusing on one customer segment.
- We can't rely only on the tent-pole releases
- Capitalise on your newly registered guests, building repeating attendance
- Continue to cast your net to reach new audiences, go beyond your owned marketing channels

WHAT DO NEW AUDIENCES LOOK LIKE?

## NEW TO DATABASE [ AGE ]

- When looking at all returners together, age breakdowns are consistent with 2019
- New moviegoers to our database are skewing much younger



**MOVIO**