UNDER 30s AND FILM

ATTITUDES, BEHAVIOURS AND PROFILES OF YOUNG INDEPENDENT FILM AUDIENCES

BIFA Research
July 2019

INTRODUCTION

BIFA exists to promote the best British independent films. For over 20 years it has done that through the Awards, which have grown in stature and consequence in the UK and internationally. But we believe that BIFA has the potential to do more to help the British films and talent it celebrates to connect with audiences.

As a film watcher, it increasingly feels like we are reaching a point of choice paralysis. From a filmmaker's, distributor's or exhibitor's perspective, it can feel difficult or impossible for a single project or film to cut through the noise.

We believe that as an organisation (and as an industry) we need to make sure that we use our resources collectively in order to use them in the most effective way possible.

Backed by the BFI with National Lottery funding, we commissioned The Audience Agency and embarked on this research project in the summer of 2018 on behalf of, and in collaboration with, the independent film industry.

Our collective aim was to better understand what audiences are watching, where, why and with who, in order that we can shape our future activity to keep this audience engaged with independent filmmaking. The project was one of the recommendations in the BFI's Independent Film Commission report.

INTRODUCTION

The research shows that young audiences love watching film – they value it and value cinema as an experience. But in-home film watching is also hugely important and has a key part to play in broadening film-watching habits and tastes.

There is data about audience behaviour, about how tastes are formed and about the key drivers and barriers of film choice for this audience. There are recommendations for distributors, cinemas and platforms, and also for producers and commissioners about the kinds of films young audiences want to see.

Qualitative, quantitative and social listening data is all available for the industry to explore, interpret and put to use.

Based on this research, we have created a plan for BIFA to convert 20 years of expert credibility into public visibility for the benefit of the whole independent industry, in collaboration with distributors, exhibitors and platforms, and in dialogue with young people.

We want to make independent film a central part of the cultural life of young audiences in the UK and welcome partners from across the industry to work with us to realise this ambition.

OUR RESEARCH

The aim of our research was to help film distributors, exhibitors, producers and marketers better understand young film fans and to strengthen the independent film distribution and exhibition sector by answering the following questions:

- **How can under-30s film audiences be encouraged to explore and engage with non-mainstream film?**
- **What is the profile of those most likely to ‘convert’ from mainstream to nonmainstream film?**
- **How can independent film be better championed across cinema and digital viewership?**

Following consultation with the industry, additional questions were raised about under-30s audiences – you can find the most common in the ‘Questions from the Industry’ section at the end of this document.

Our research, carried out by The Audience Agency, looked at existing studies and created new datasets from quantitative and qualitative surveying of young film audiences with varying degrees of interest in nonmainstream film. Research methods included:

- **A large-scale panel survey distributed to 700 cinema attendees aged 16-29**
- **Focus groups with 16-29 year-olds held around the country**
- **Online & Brandwatch social media analyses of filmrelated behaviours and discussions of the under-30s**

You can find a more detailed breakdown of our research methods at the end of this presentation.

THE HEADLINES

The under 30s love film

Amongst other cultural activities outside the home, cinema is king. Younger audiences currently make up the largest portion of cinema audiences (47%) and are also the most frequent. 15-19 year olds are particularly passionate and frequent cinema-goers. The under-30s value and appreciate the experience of watching long-form film in all its settings, in theatres and at home.

Younger audiences are engaged and passionate, seeking authenticity, integrity, representation, relevance and experience

Forget the stereotypes of antisocial teenagers and distracted 20-somethings. Gen Z (16 to 22) and Millennials (23 to 35) are heavily engaged with the world around them and respond to seeing relevant themes, events and characters portrayed in films. They value experiences over possessions and have an eye for fake hype, responding better to authenticity, integrity and community. They want to be represented and included in their media and the discussion surrounding it and draw their information from a diverse range of sources and influencers.

Cinema is special, discovery is digital

Watching a film at the cinema is a highly-valued experience but ticket price is a significant factor for many younger audiences. This generally has the effect of limiting the types of films that they ‘take the risk’ of watching in theatres, with better-advertised mainstream films and films with outstanding cinematic aspects (e.g. cinematography, effects) being most appealing. On digital platforms, however, especially subscription-based services, cost is a less limiting factor and so film choice diversifies and discovery flourishes, presenting a huge opportunity for non-mainstream films to expand their audiences.

HOW TO USE THIS DOCUMENT

We've done our best to present several hundred pages of findings in the most user-friendly and engaging way (this presentation is not several hundred pages long, please continue reading).

Each of our headlines has two subsections: data and insights. The 'data' sections contain charts, graphs and other research results. The 'insights' sections contain specific findings and conclusions drawn from analyses of the data.

At the end of the presentation, you can find:

- **Lists of the top relevant findings for distributors, cinemas and digital exhibitors**
- **Audience profiles and targeting information for the under-30s**
- **FAQs from the industry answered**

THE UNDER 30s LOVE FILM

THE STATS

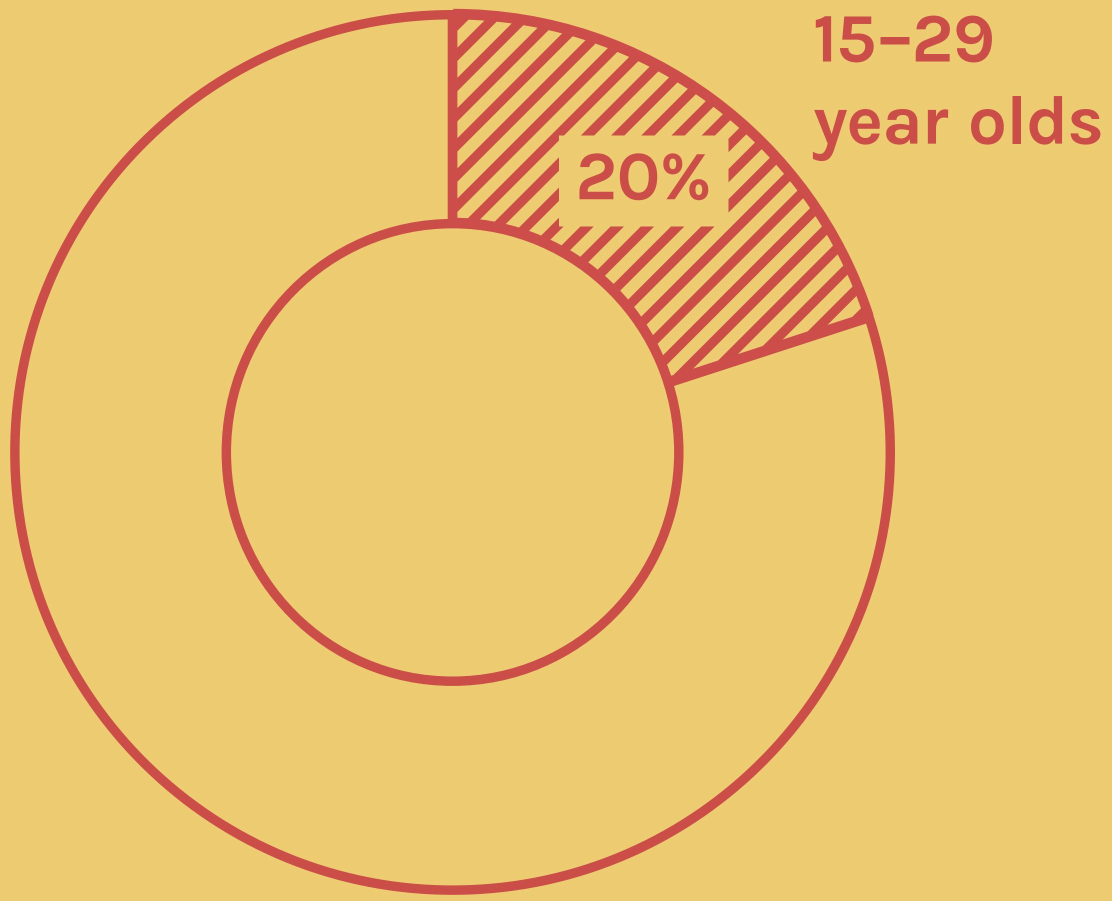
FIND OUT MORE

THE INSIGHTS

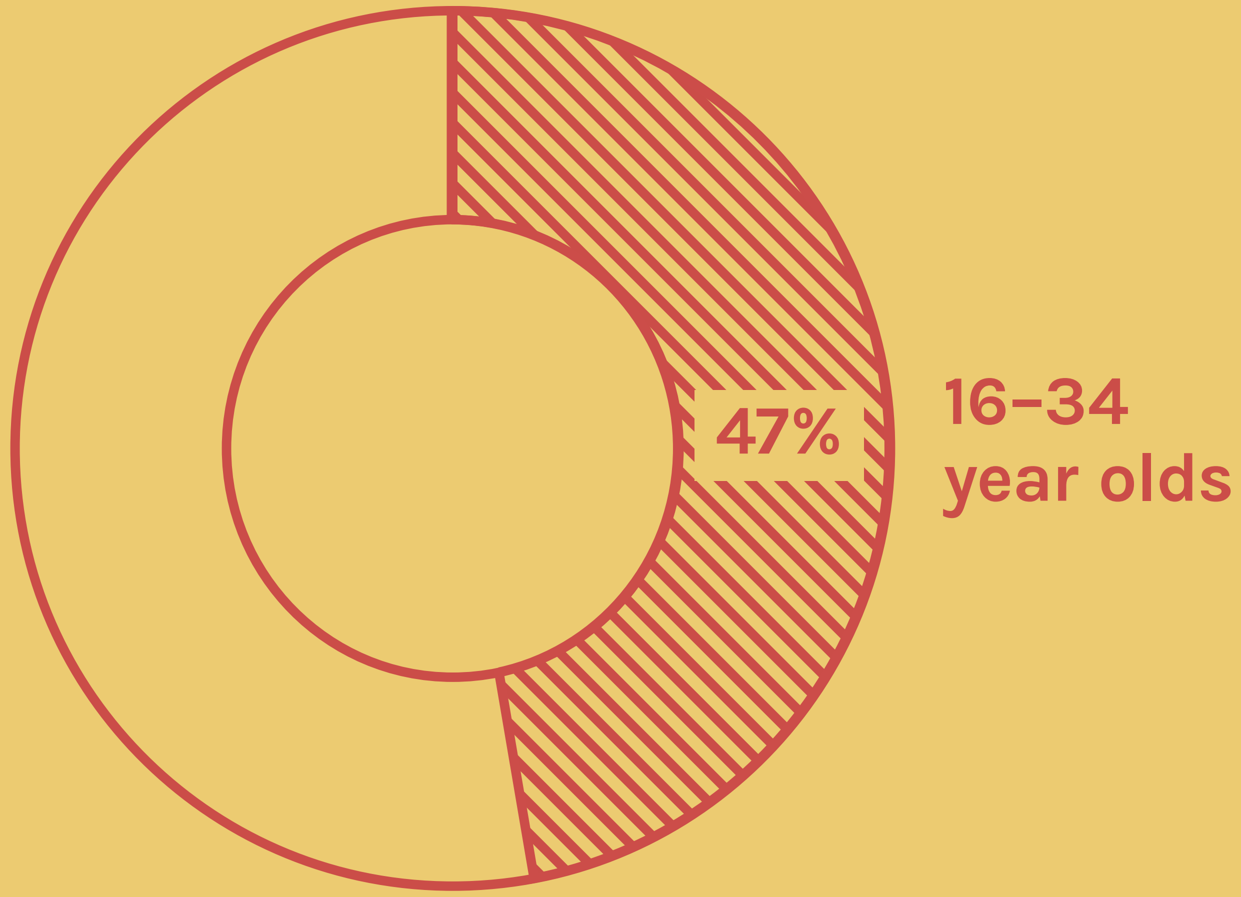
FIND OUT MORE

THE STATS

UK population



UK cinema audiences



Younger audiences are also the most frequent cinema visitors

16–34 YEAR OLDS

8.1

visits per year

15–19 YEAR OLDS

9.6

visits per year

THE STATS

Research participants categorised the following titles as 'mainstream' and 'non-mainstream' films...

Mainstream
Casino Royale
Toy Story
Black Panther
10 Things I Hate About You
Dirty Dancing
The Dark Knight
Toy Story
Mean Girls
Space Jam
Eternal Sunshine
of the Spotless Mind
The Greatest Showman
Shaun of the Dead

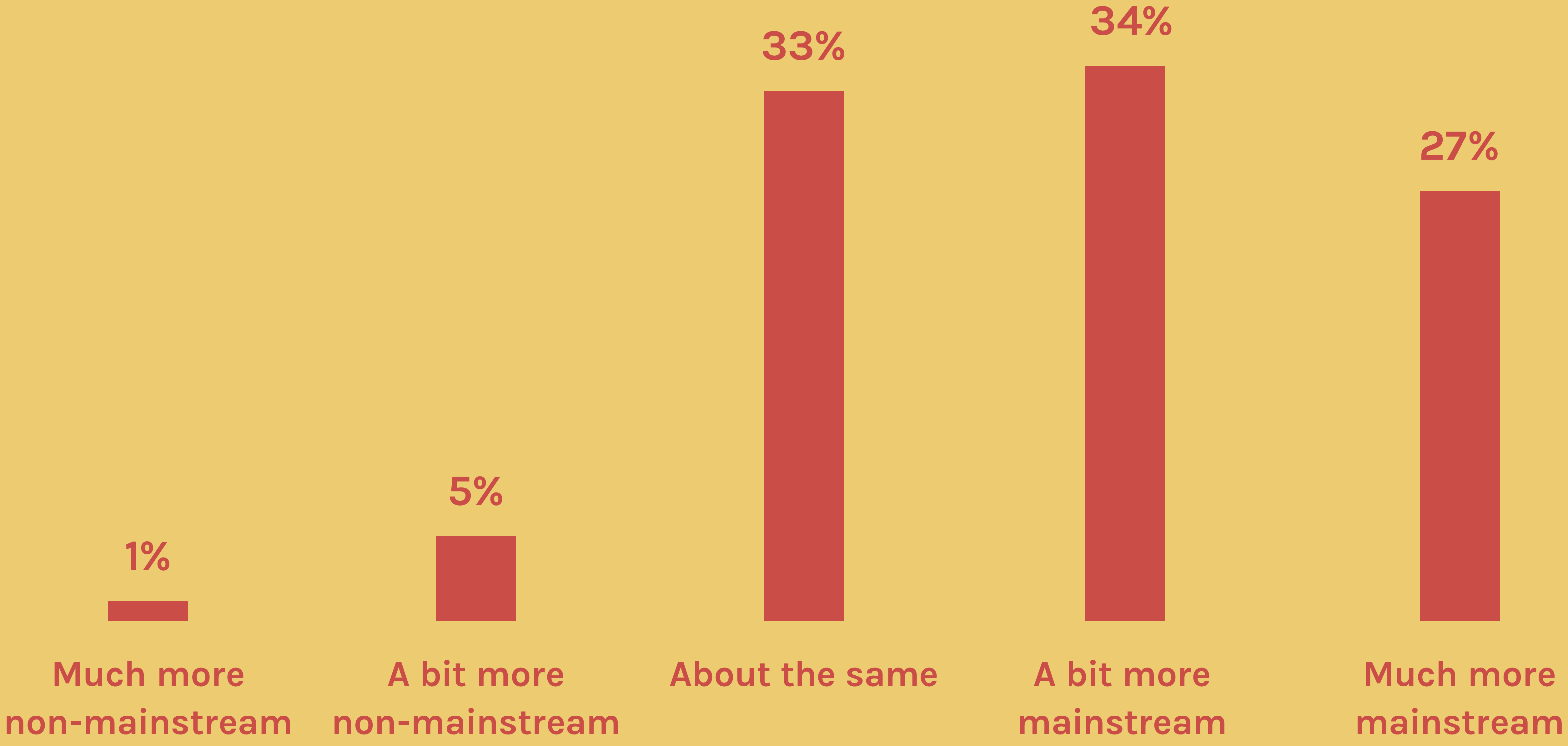
Non-Mainstream
Submarine
Billy Elliot
I, Daniel Blake
Three Billboards Outside
Ebbing, Missouri
Call Me By Your Name
Shaun of the Dead
Eternal Sunshine
of the Spotless Mind
Mean Girls
Isle of Dogs

...and mentioned the following titles when asked to name 'British' films:

British Films
I, Daniel Blake
Shaun of the Dead
Billy Elliot
Submarine
Slumdog Millionaire
Control
King's Speech
Casino Royale
Kidulthood

THE STATS

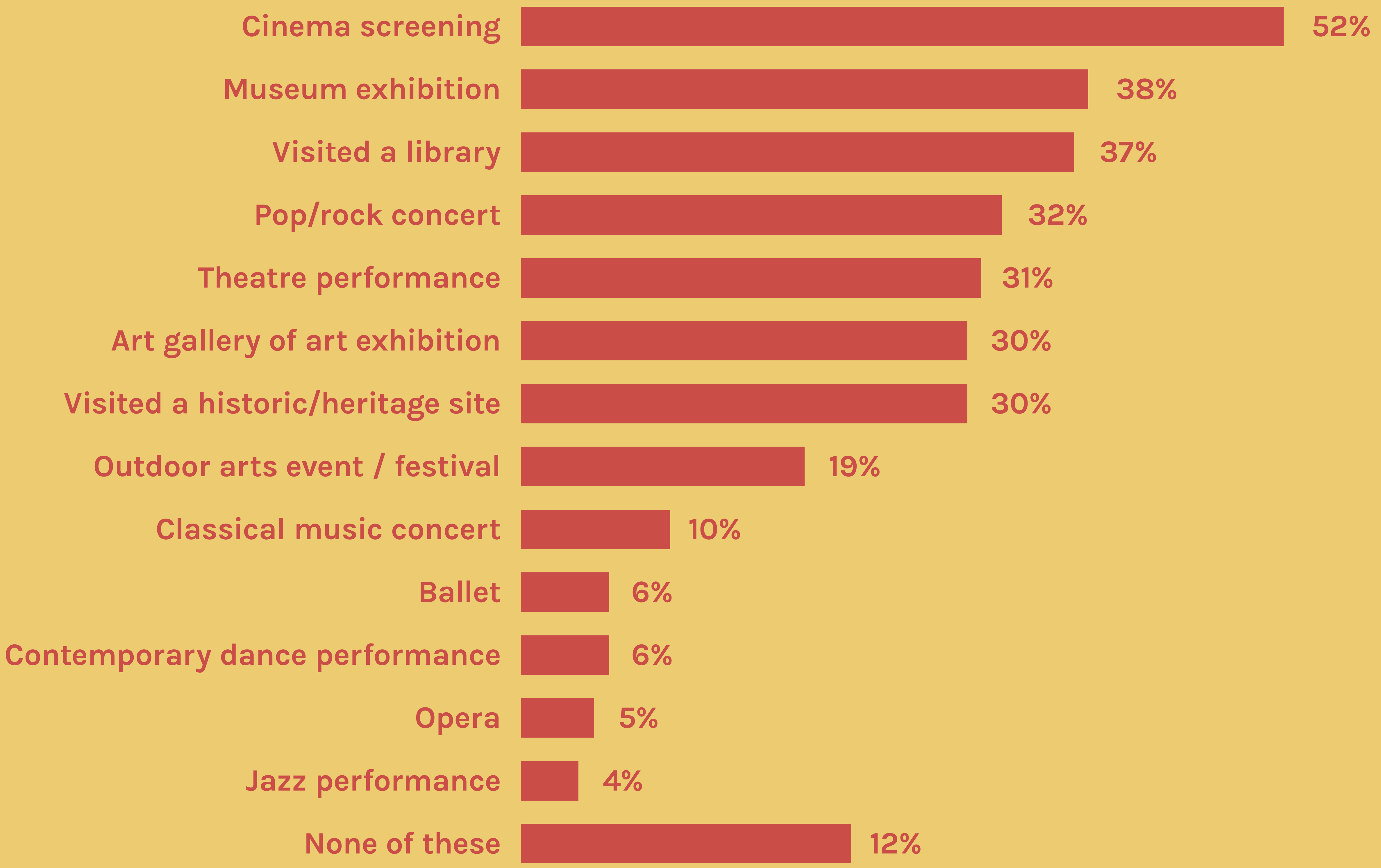
In the last year, have you watched more mainstream or non-mainstream films?



Base, unweighted: all respondents 700

THE STATS

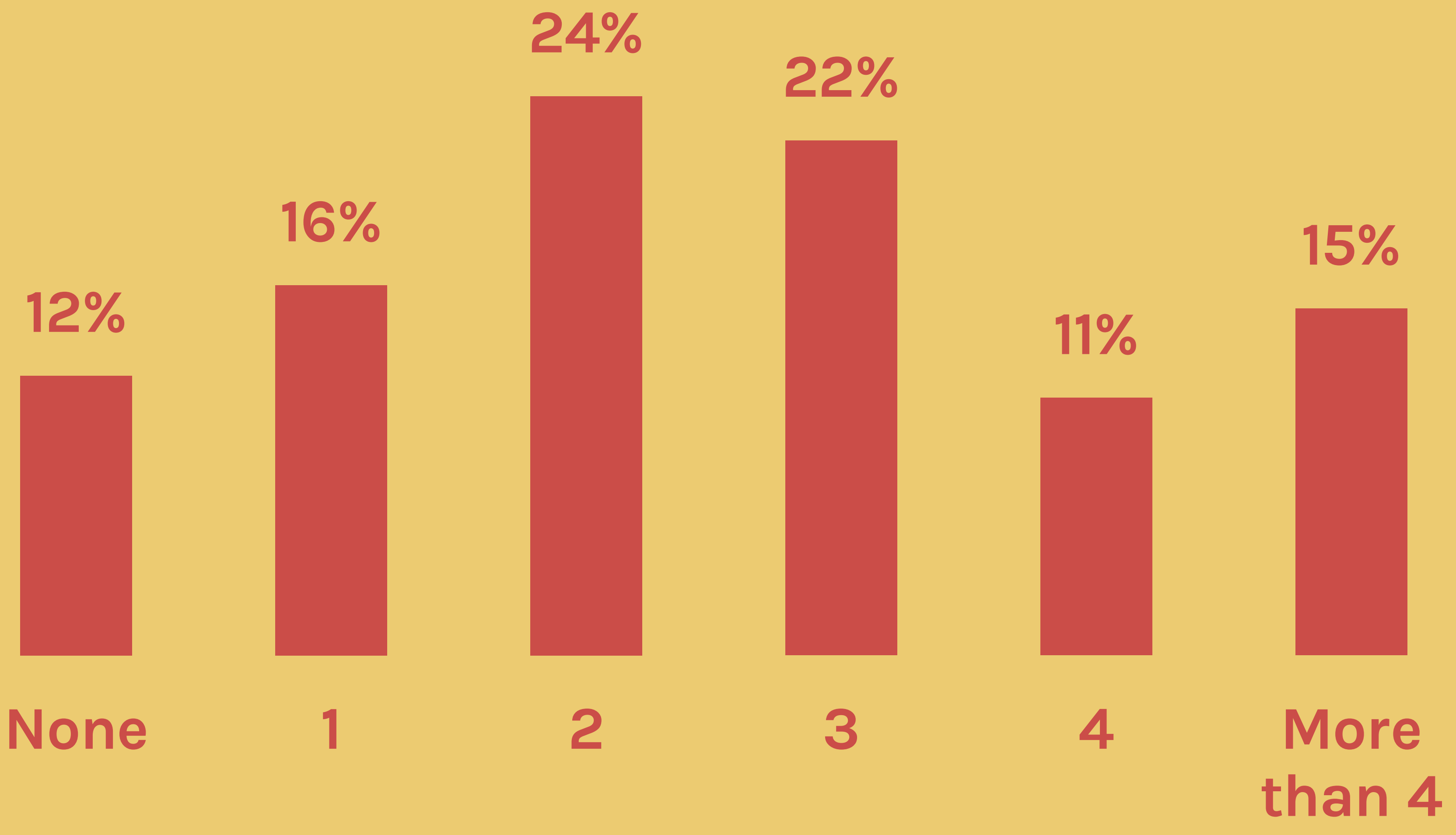
Which of the following types of arts or heritage events have you attended within the last three years?



Base, unweighted: all respondents 700

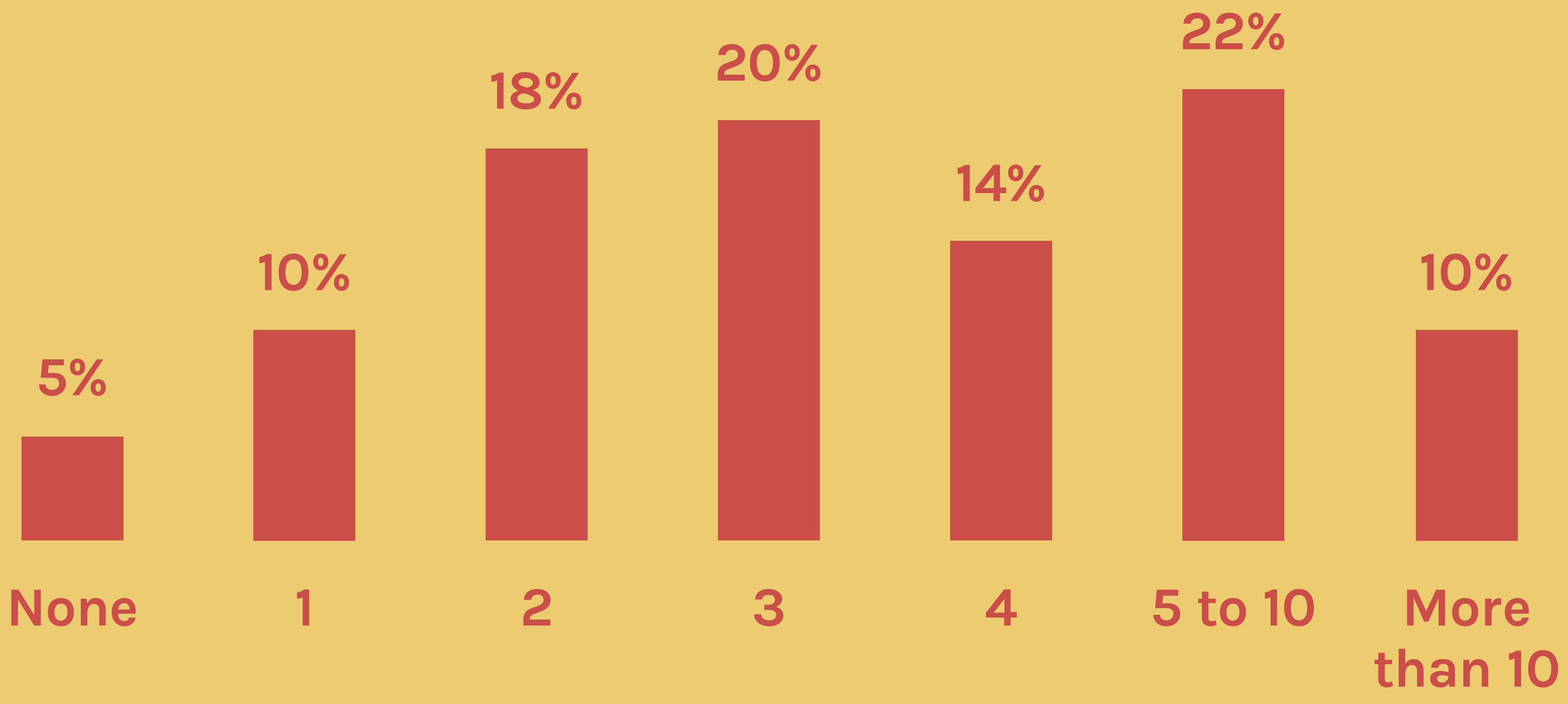
THE STATS

In the last three months, approximately how many full-length films have you watched at the cinema?



Base, unweighted: all respondents 700

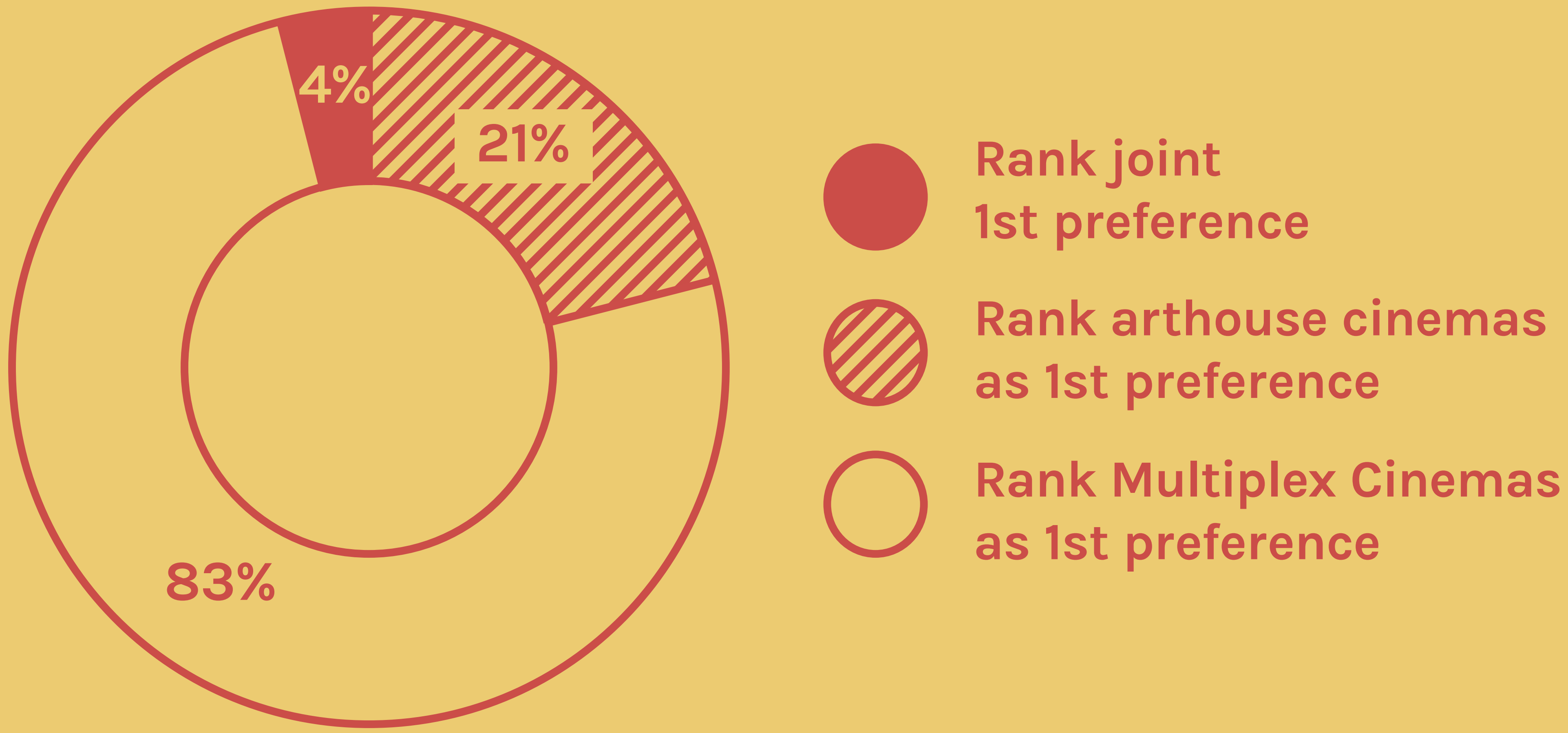
In a typical month, approximately how many full-length films do you watch on digital platforms (e.g. video on demand, subscription video on deman, catch-up TV, etc.)?



Base, unweighted: all respondents 700

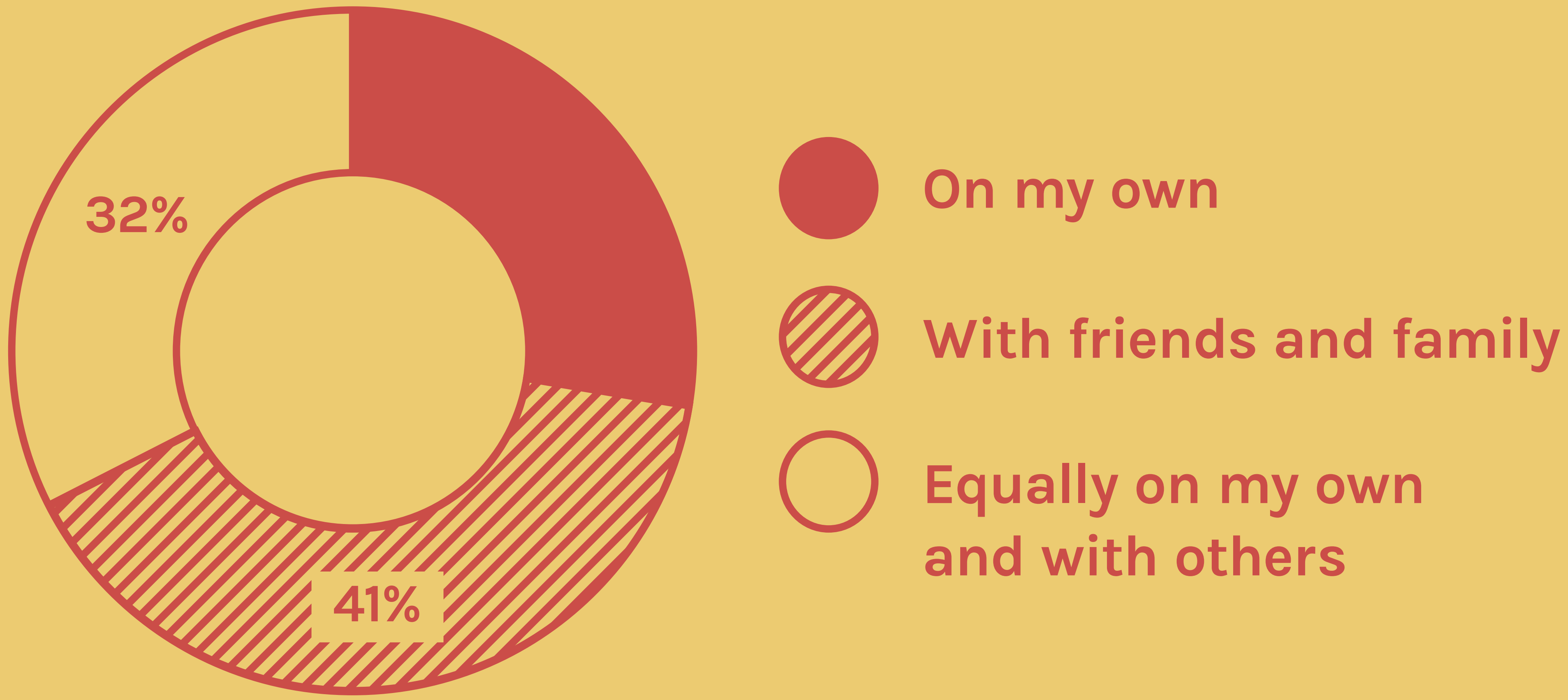
THE STATS

Arthouse vs Multiplex Cinema preference



Base, unweighted: all respondents 700

Do you tend to watch more films on your own or with friends and family?



Base, unweighted: all respondents 700

THE STATS

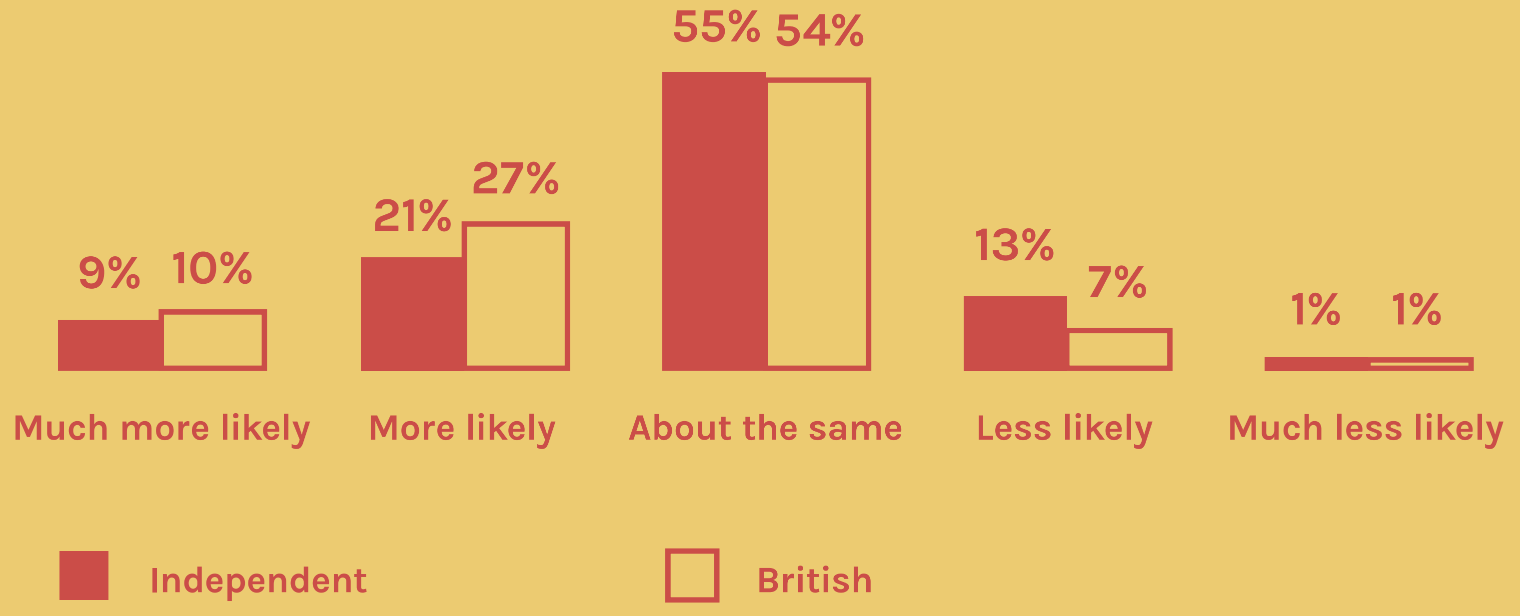
GENRES	INDIE FILMS – ALL POPULATION	INDIE FILMS – 18–29 years
Coming of age	20.1%	32.8%
Romance	26.2%	35.8%
LGBT	27.5%	37.2%
Drama	43.7%	56.6%
Thriller – Mystery	11.9%	14.7%
Comedy	21.6%	25.4%
Crime	11.0%	11.9%
Sci-fi	4.3%	4.4%
Horror	9.1%	9.1%
Documentary	3.1%	1.1%
Silent	0.3%	0.1%
Musical	0.5%	0.1%

RANKING OF GENRES	INDIE FILMS – ALL POPULATION	INDIE FILMS – 18 to 29 years
Drama	1	1
LGBT	2	2
Romance	3	3
Coming of age	5	4
Comedy	4	5
Thriller – Mystery	6	6
Crime	7	7
Horror	8	8
Sci-fi	9	9
Documentary	10	10
Musical	11	11
Silent	12	12

LGBT and coming of age films are not necessarily the most popular genres amongst young people at all times. At the time the survey was conducted, these types of films happened to be prevalent in theatres. However, this data does go to show that one of the key factors influencing younger people to engage with film across different genres is relevance - how is the story or theme of the film relevant to, or representative of, them?

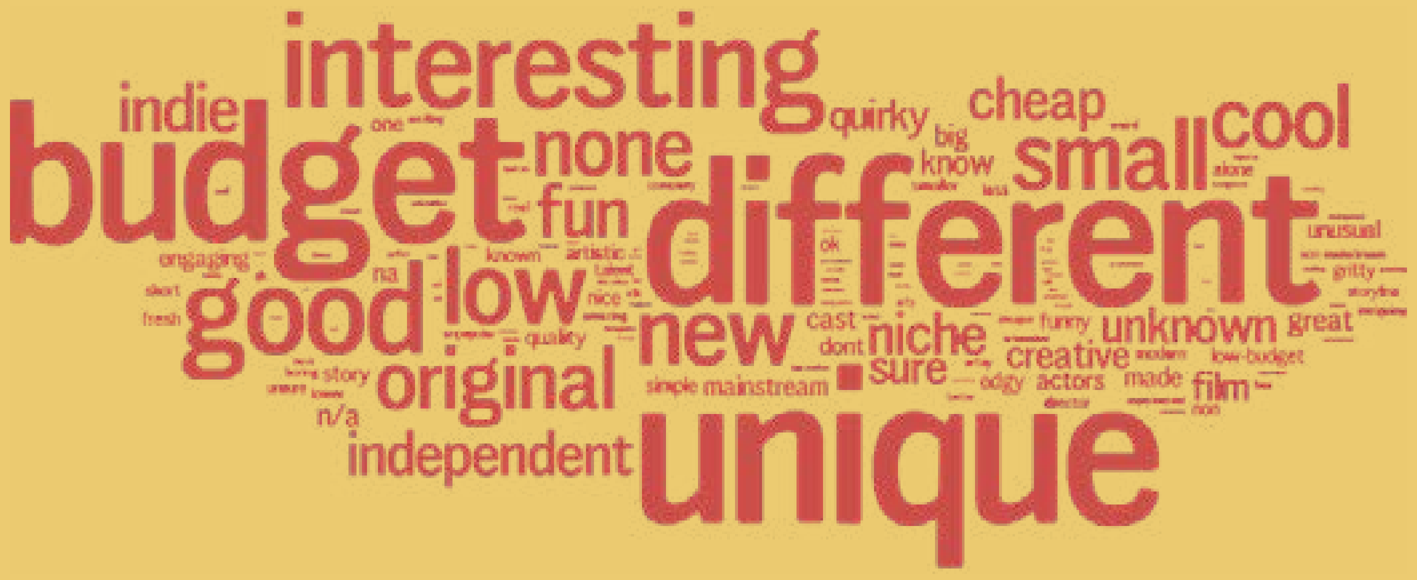
THE STATS

Does a film being talked about as [Independent/British] make you more or less likely to be interested in seeing it?



It seems that, generally speaking, younger audiences have positive feelings towards the label of 'independent' film - or at least are not negatively influenced by it. The audience have similarly positive feelings towards the term 'British' film – in total, fewer than a quarter of respondents are put off by either term.

Please list three words you would use to describe 'independent film' (all respondents)



Please list three words you would use to describe 'British film' (all respondents)

THE INSIGHTS

— Approaching and engaging the under-30s with film can sometimes seem challenging when they have so many distractions but watching films is still an incredibly highly valued and popular past-time. Cinema is the most popular cultural activity that requires a trip out and filmwatching online, although not as popular as watching box-sets, is prolific.

— 16-34 year-olds make up the biggest proportion of cinema-goers in the UK (47%) and 15-19 year-olds make the most average visits to cinemas every year (9.6 visits).

— Ease of access, lower prices and lower risk has made digital platforms the primary way in which under-30s audiences engage with film. However, the rise of digital distribution has not made young people less likely to go to the cinema, it's made them more likely to watch more films at home.

— It's easy to make the assumption that the under-30s want their film like they want their music: on any device, any time and anywhere. This is true for solitary viewing but watching films, both in cinemas and at home, is still very much seen as an 'event'; a group activity where value is derived from uninterrupted watching and reduced distractions.

THE INSIGHTS

— Cost is an important factor, especially for the younger age ranges. Under-30s are relatively unlikely to use pricier platforms such as Sky or Virgin unless their parents are paying for it, which is usually the case for under-16s. Subscription-based services like Netflix and Amazon are far more popular than rental and digital download sites.

— Netflix dominates the digital market for the average viewer due to their price point and amount of content available. The more interested a person is in film, the more likely they are to pay for other / different digital services and subscribe to cinema ticket deals.

— Taste in film is formed in the family. The films that your parents choose to watch with you as a child heavily influence your interest in film as a teenager and adult.

— Relevance and mood-matching are the most influential factors in attracting younger audiences to particular titles.

— ‘Under 30’ is a wide target. To better understand some of the nuances and conclusions of the research, it’s helpful to segment the audience by age and by level of interest and involvement in film. Please take a look at the ‘Audiences’ section to see more.

THE UNDER 30s ARE ENGAGED AND SEEK AUTHENTICITY

THE STATS

FIND OUT MORE

THE INSIGHTS

FIND OUT MORE

THE STATS

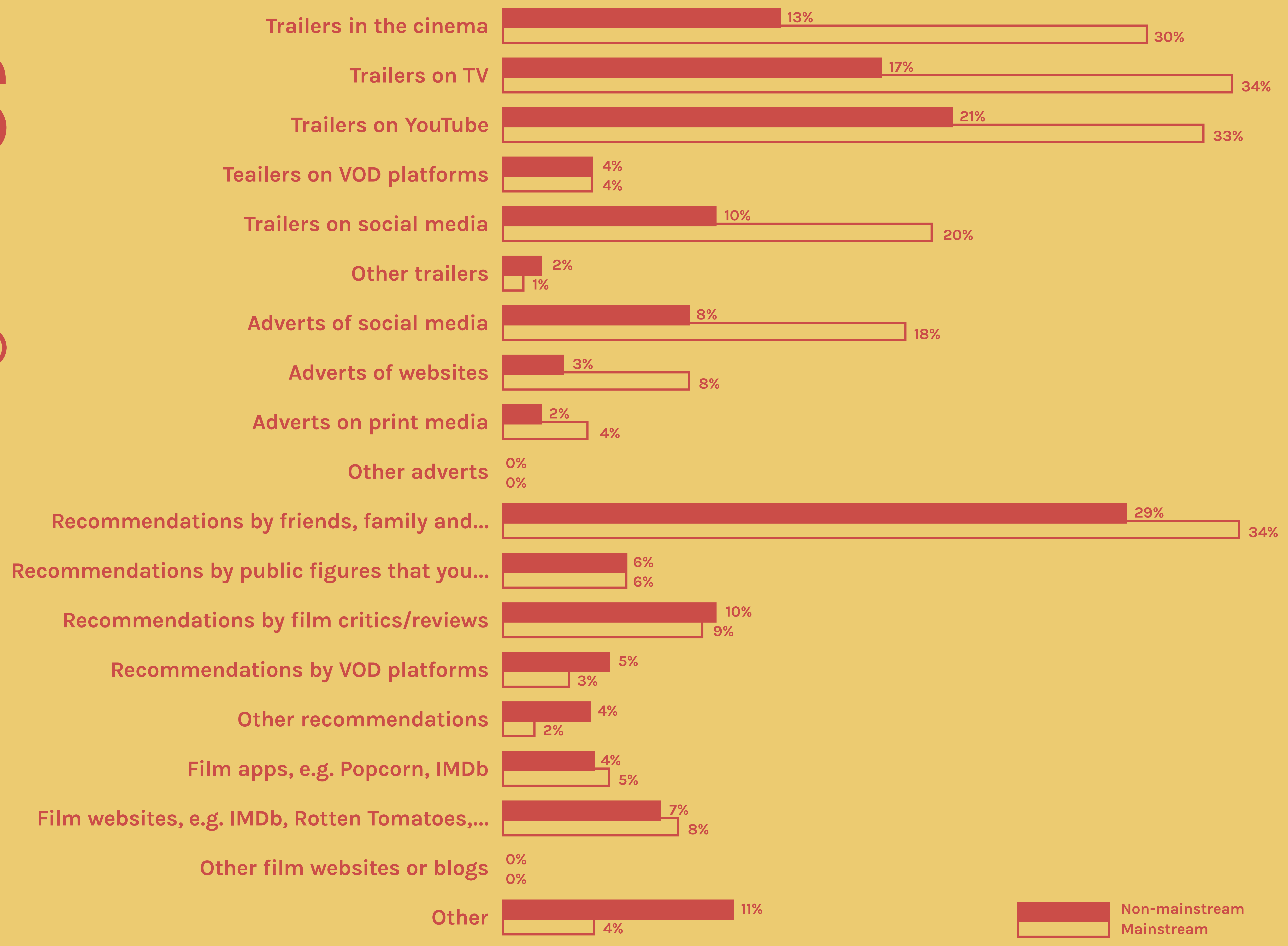
General topics of conversation on Twitter amongst 18–29 year olds in the target population in the year of study were:

Film festivals and VOD/streaming are the top occasions that generate discussion about indie films on social media:

OCCASIONS	INDIE FILMS – 18–29 years
Festivals	2.4%
VOD/Streaming	1.6%
In-Theatre	0.4%
Downloads	0.2%
Dates	0.1%
Alone	0.1%
Live TV	0.1%
Family	0.1%
Friends	0.1%
YouTube	0.0%

THE STATS

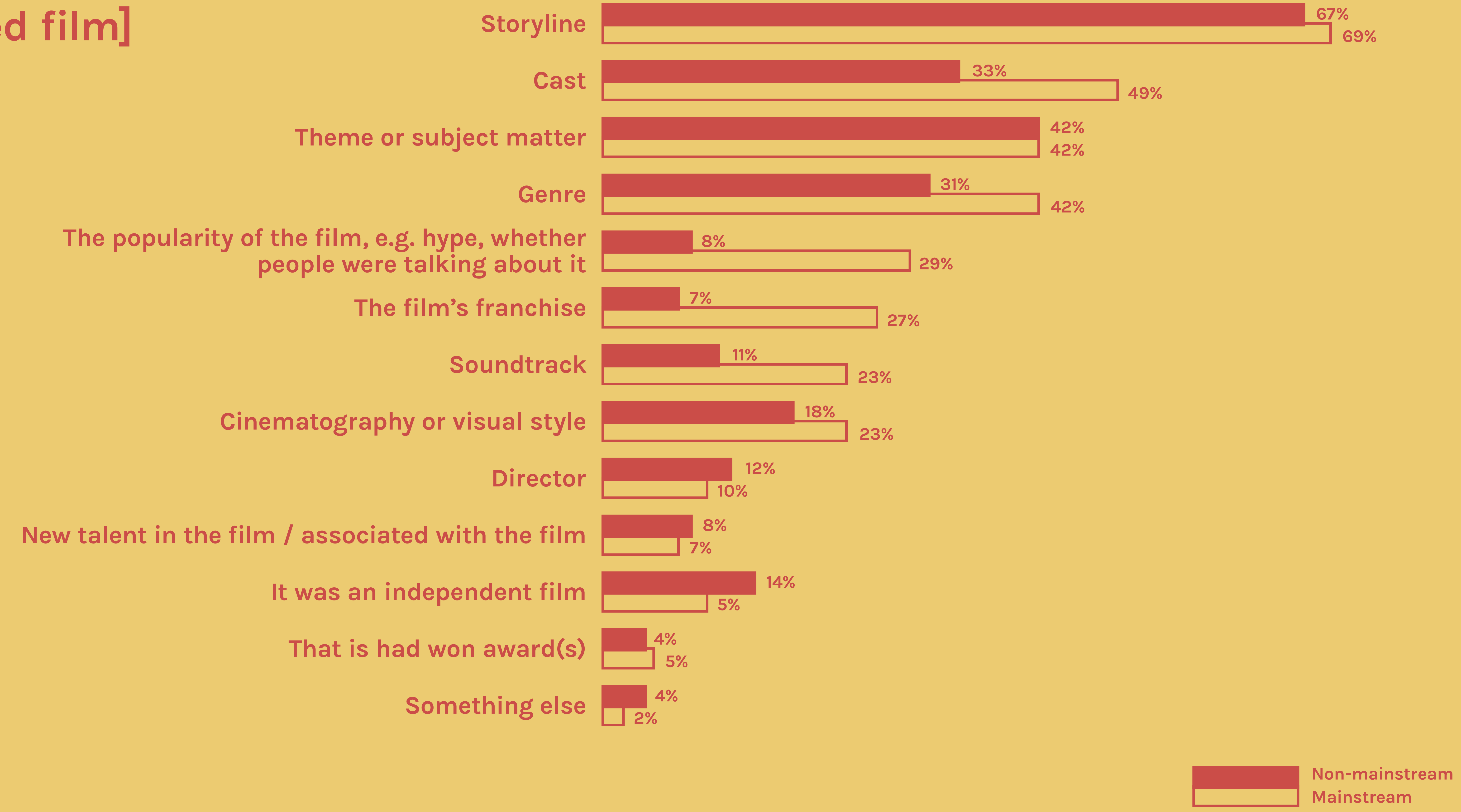
How did you find out about [selected film]? (please select all that apply)



Base, unweighted: all respondents mainstream 651, non-mainstream 499

THE STATS

What was it about [selected film] which most engaged you?



Base, unweighted: all respondents mainstream 651, non-mainstream 499

THE STATS

#tags for film

The majority of film related hashtags are the nams of films and words such as film, movie, cinema. The following is a list of hashtags which we used by 18–29 year olds about independent film

Topic Name	Mentions	Topic Name	Mentions
#indiefilm	67231	#filmmaker	8076
#film	27151	#movie	7833
#filmmaking	26100	#thriller	7662
#supportindiefilm	20553	#godsowncountry	7468
#horror	18581	#director	7401
#indie	17781	#actor	7053
#shortfilm	11056	#independentfilm	7033
#london	10903	#film festival	6628
#aquietplace	10700	#filmmakers	6242
#callmebyyourname	10535	#oscars	5828
#lovesimon	9375	#womeninfilm	5801
#cinema	9031		
#threebillboards	8136		

Independent film goers website references

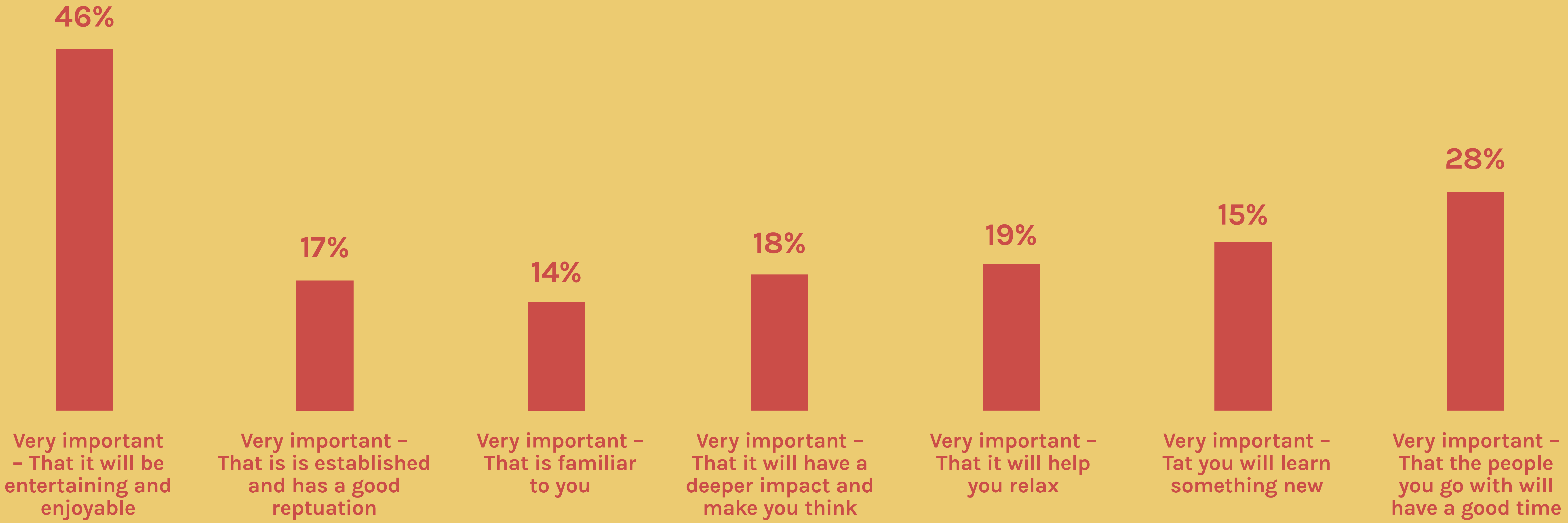
These are the top sites cited in social media by 18–29 year olds when talking about independent film

twitter.com	393367	79.1%
instagram.com	33201	6.7%
filmfestivals.com	4185	0.8%
reddit.com	868	0.2%
liveforfilm.com	453	0.1%
musnet.com	453	0.1%
wherevent.com	342	0.1%
justjared.com	205	0.1%
careerboard.com	141	0.0%
forums.moneysavingexpert.com	133	0.0%
thestudentroom.co.uk	127	0.0%
audioboom.com	108	0.0%
artsjobs.org.uk	106	0.0%
ilxor.com	86	0.0%
redcarpet-fashionawards.com	86	0.0%
premier.org.uk	82	0.0%
nerdly.co.uk	77	0.0%
cookdandbombd.co.uk	74	0.0%
starburstmagazine.com	72	0.0%

Source: Brandwatch

THE STATS

When deciding what arts or cultural activities to do, how important are the following factors to you?



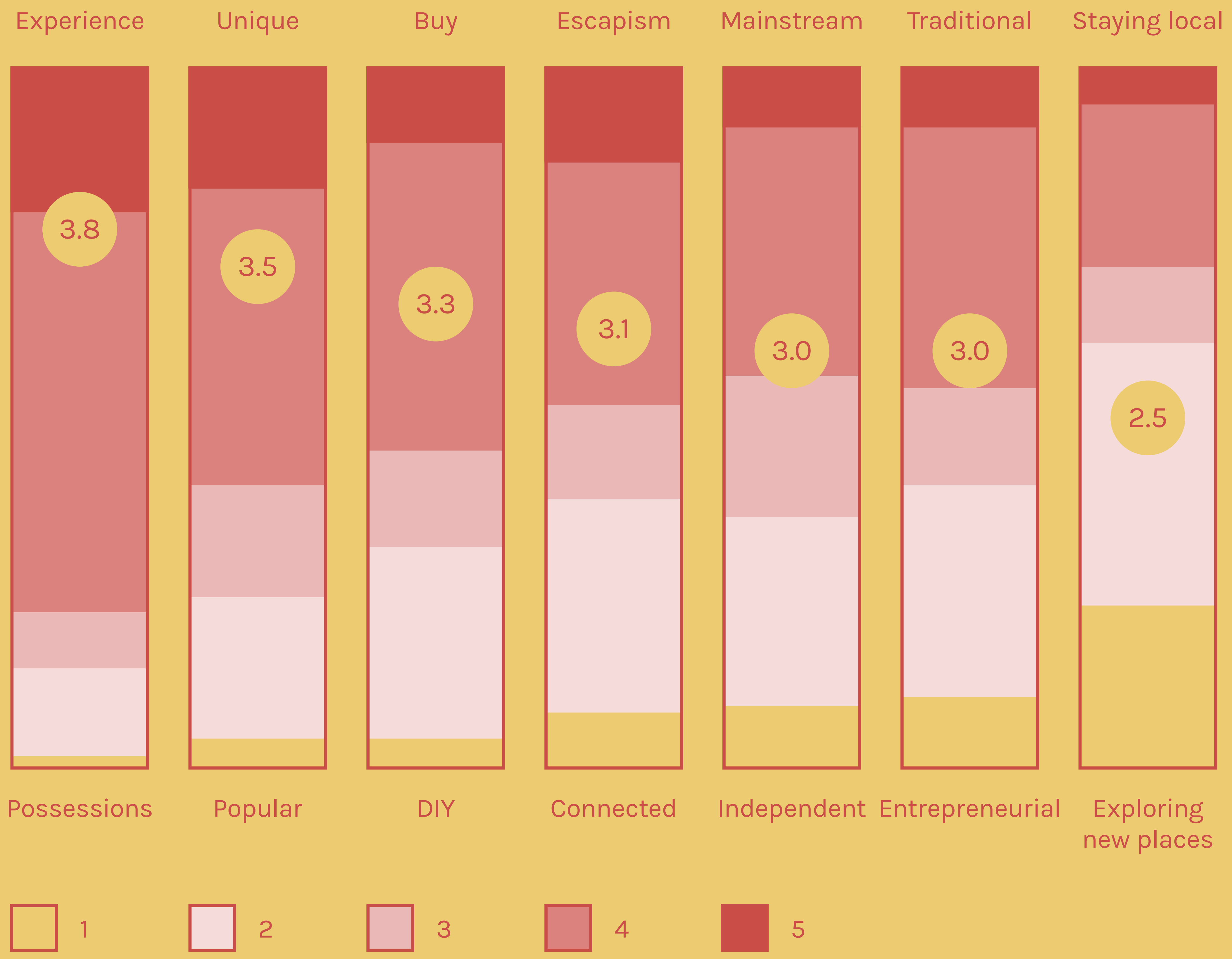
THE STATS

Lifestyle and attitudes

Generally, the respondents were more likely to gravitate towards the ends of the scale which were experiences over possessions, unique rather than popular, exploring new places over staying local and slightly more likely to go for buy and not DIY.

— 20% possessions, 77% experiences
— 31% DIY, 54% buy
— 61% exploring new places, 28% staying local
— 24% popular, 59% unique
— 39% connected, 47% escapism
— 41% entrepreneurial, 45% traditional
— 36% independent, 43% mainstream

Thinking generally about your values, where would you place yourself on the following scales?



THE INSIGHTS

— The most important influences for young people when picking which film to watch, particularly when it comes to independent films, are the storyline, themes and genre. These three aspects can be summed up as ‘relevance’ – people are most interested in watching films that are most relevant to them.

— Mood is another vital factor. The majority of film watching happens digitally after a brief period of browsing where most people pick a film to match their mood. Genre can be a helpful indicator for audiences but more often as a way of ruling films out rather than ruling them in (i.e. they don’t know what they want to watch - but they know what they don’t want to watch).

— Next to effective and widespread trailering, recommendations and word of mouth are the most effective way to get younger audiences interested in non-mainstream film.

— Personal recommendations from friends and family work best for all demographics but teenagers are also more likely to pay attention to automated recommendations than adults. Generally, however, people beat algorithms every time.

THE INSIGHTS

— Influencers, such as celebrities or popular figures on social media, are effective in getting people to hear about a film but less effective in converting that interest to views. Personal recommendations bring the views.

— Despite the preference for word-of-mouth and personal recommendations, only 9% of the under-30s consider themselves 'recommenders' - people who actively promote services and products they experience to their social circles.

— Generally speaking, Facebook skews older (23-30) and Instagram skews younger (18-25). 80% of the social media conversations about non-mainstream film happen on Twitter.

— The top reasons that people go on social media are to find content that is:
1. Funny. 2. Tells a story 3. Evokes an emotion 4. Is visually appealing

— YouTube is used in multiple ways to both discover and get information about new films. The under-30s spend a significant amount of their time browsing on the platform for entertainment and information.

— Visual content works best for younger audiences. Trailers are still the most effective way to catch their attention, followed by other strongly visual content such as animations, GIFS and images.

THE INSIGHTS

— Non-visual film media such as reviews, articles, podcasts etc. are far more effective at engaging those with an established interest in film than those with an occasional or passing interest.

— The decision-making pathways for choosing what film to see and where to see it are not linear. Most under-30s, but particularly those who are most interested in film, get their information and entertainment from a variety of traditional and digital platforms.

— Employing multiple strategies across different audience segments is most effective for reaching a wide audience.

— 'Breadcrumbing' content across different platforms over time is most effective for engagement and views: the frequency and accumulation of information and content encourages audiences to make the decision to watch a film.

— Campaigns need to be well-timed and coordinated, approaching the audience from multiple angles.

— Under-30s, and especially under-20s, have a good eye for hype, advertising and sales pitches as well as a natural aversion to them. They also don't appreciate the fetishisation of 'difference' and diversity in their media. For example, having characters who are LGBT, BAME or disabled is seen as normal and representative, not something that a film should's promotional campaigns should be paint unusual or as an exceptional virtue of the film.

THE INSIGHTS

— Overall, 16-29 year-olds who are actively engaged with film are politically aware and conscious of environmental and economic change. The traits that they value most are authenticity, integrity and honesty. They also prefer experiences over possessions.

— Younger audiences want to engage with the films they're watching and should be involved across the film value chain, from production to promotion. The more they're involved in the conversation about a film, the more likely they are to watch it. The key is not to patronise or lecture, but rather to create spaces and strategies for young people to be involved in a film's 'life' and the discussion surrounding it.

— Due to their preference for authenticity, younger people are more likely to listen to influencers who are directly involved in making films (e.g. actors, directors) than those who are deemed to be 'experts' on film excellence (e.g. reviewers). They are also looking for a range of perspectives and opinions from the different influencers they follow.

— Distributors should embrace all platforms and champion the experience of watching a film.

CINEMA IS SPECIAL, DISCOVERY IS DIGITAL

THE STATS

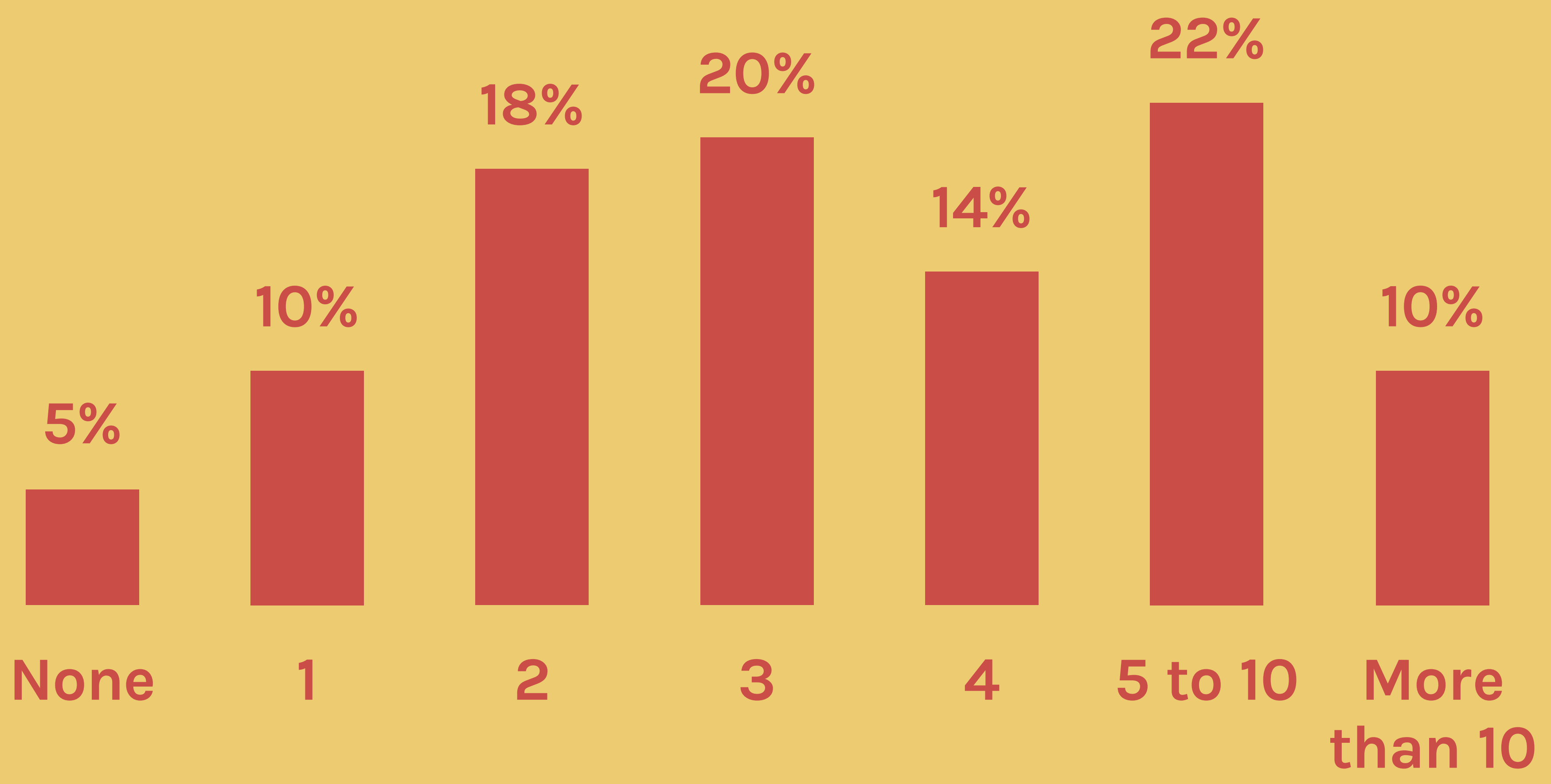
FIND OUT MORE

THE INSIGHTS

FIND OUT MORE

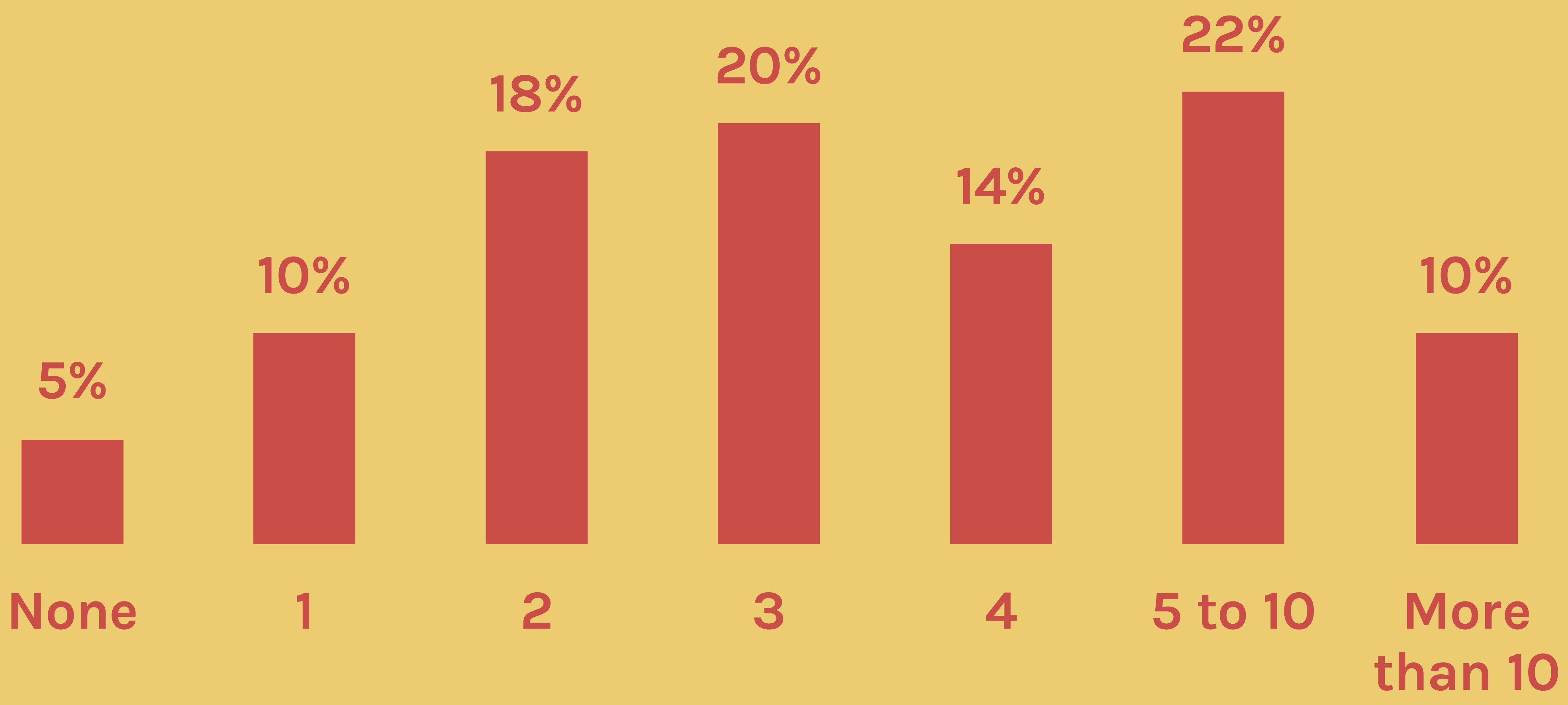
THE STATS

In a typical month, approximately how many full-length films do you watch on digital platforms (e.g. video on demand, subscription video on demand, catch-up TV, etc.)?



— 95% of respondents had seen one or more films on a digital platform in the last month.

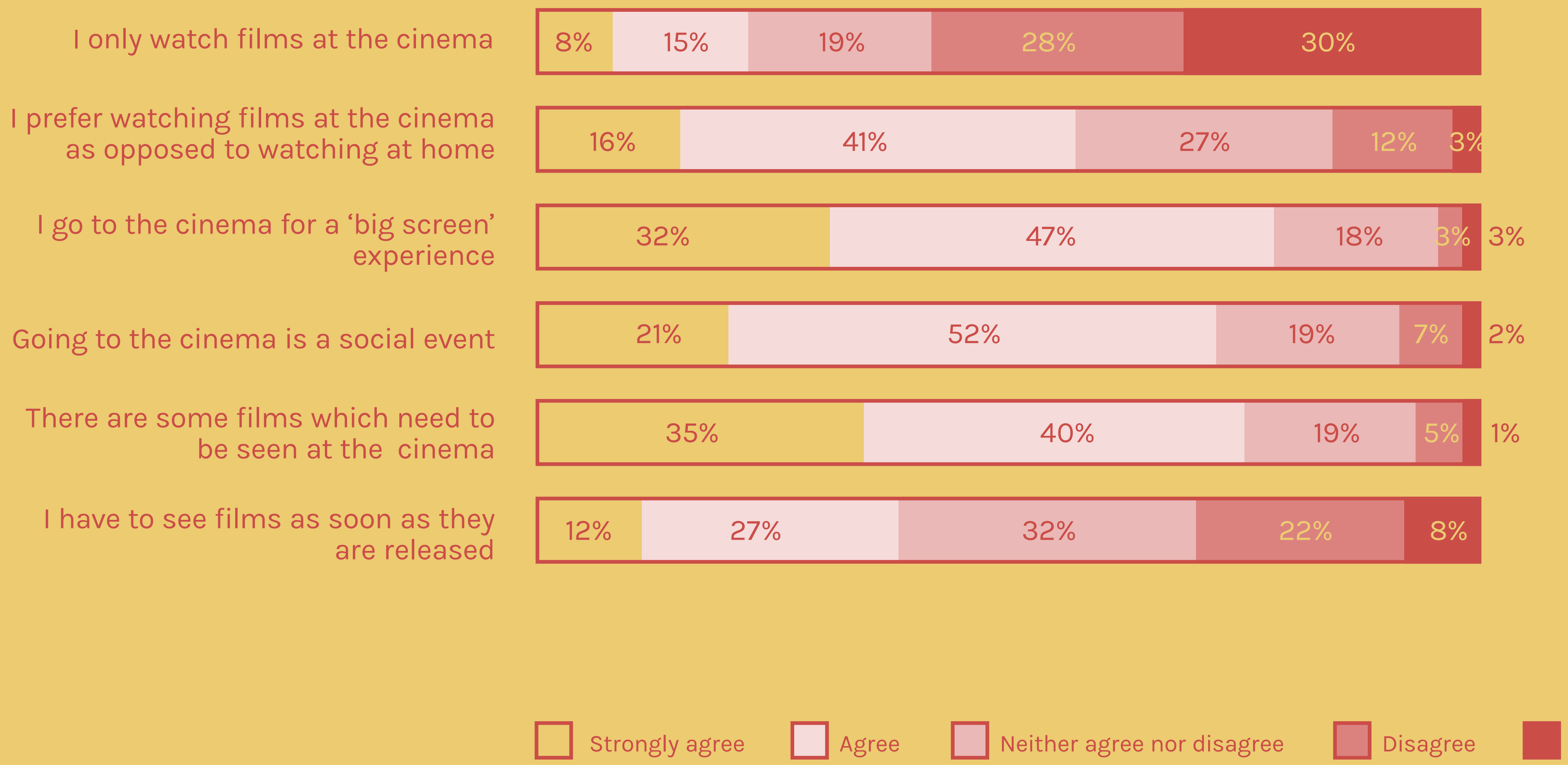
In the last three months, approximately how many full-length films have you watched at the cinema?



— 88% of respondents had seen one or more films at the cinema in the last 3 months.

THE STATS

Thinking generally about watching films at the cinema, to what extent do you agree with the following:



Please explain why you would choose to watch a film at [first choice: cinema type]

Base, unweighted: all respondents 700

THE STATS

Please explain why you would choose to watch a film at [Q4_firstchoice]

When choosing which cinema to go to, which of the following influence your decision the most? (please select up to three things which influence your decision the most)

— 72% What is showing at the cinema

— 67% Location

— 68% Price/access to ticket offers

— 7% Whether you feel welcome at the cinema

— 11% Whether it’s your regular cinema

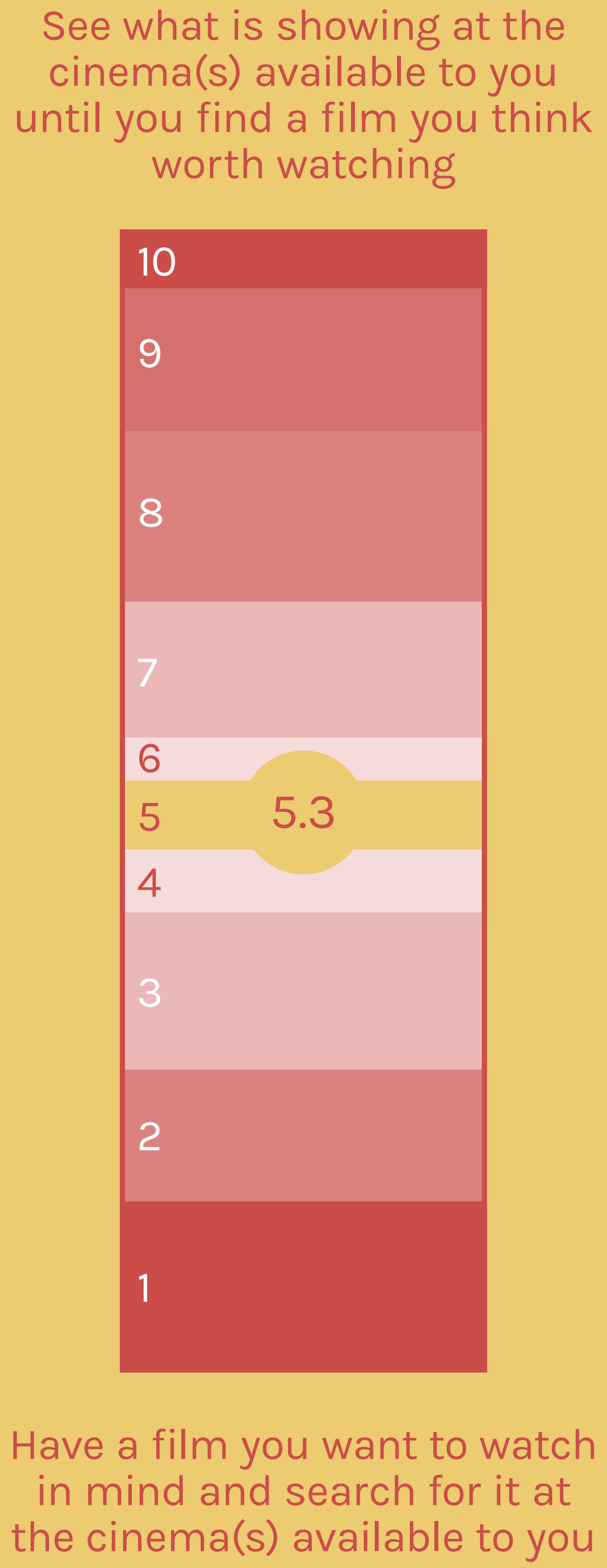
— 1% Other

THE STATS

When planning to go out to watch a film, to what extent do you do the following...

— 40% positioned 1–3 – Have a film you want to watch in mind and search for it at the cinema(s) available to you

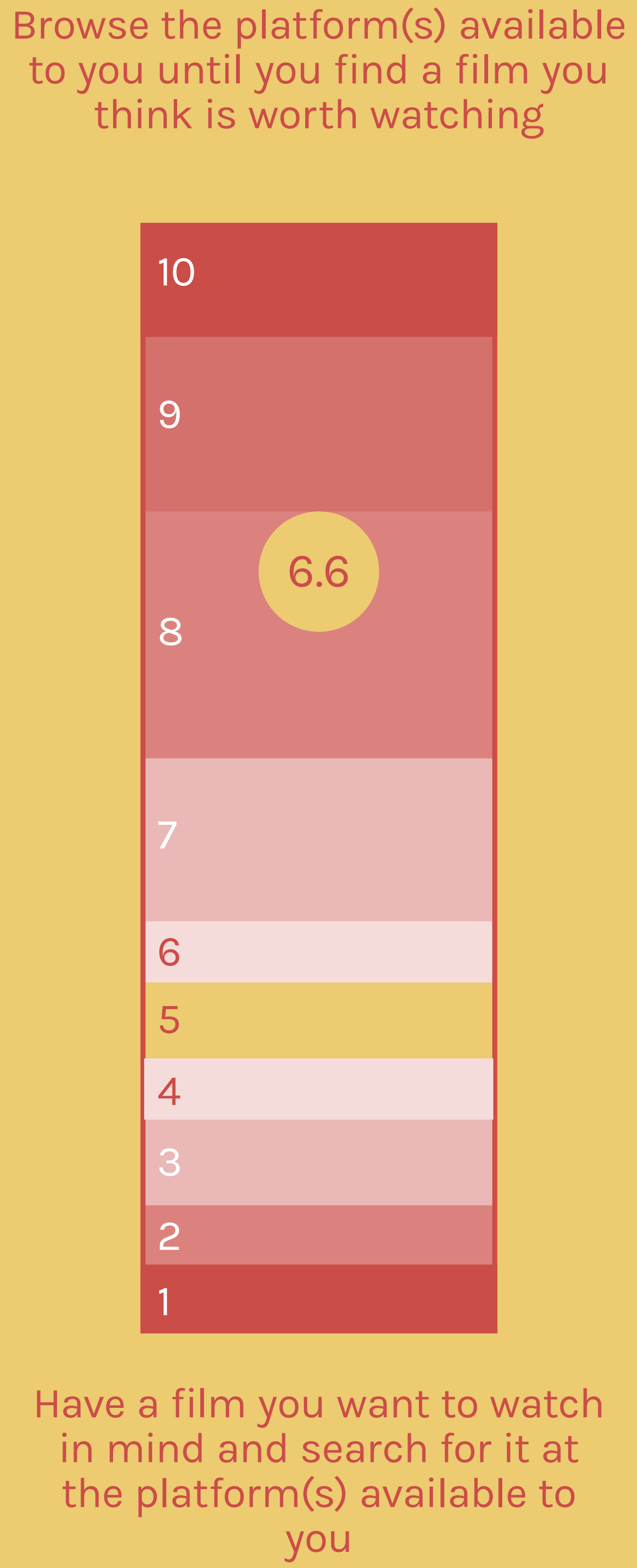
— 33% positioned 8–10 – See what is showing at the cinema(s) available to you until you find a film you think is worth watching



When planning to watch a film on a digital platform, to what extent do you do the following...

— 19% positioned 1–3 – Have a film they want to watch in mind and search for it on the platform(s) available to you

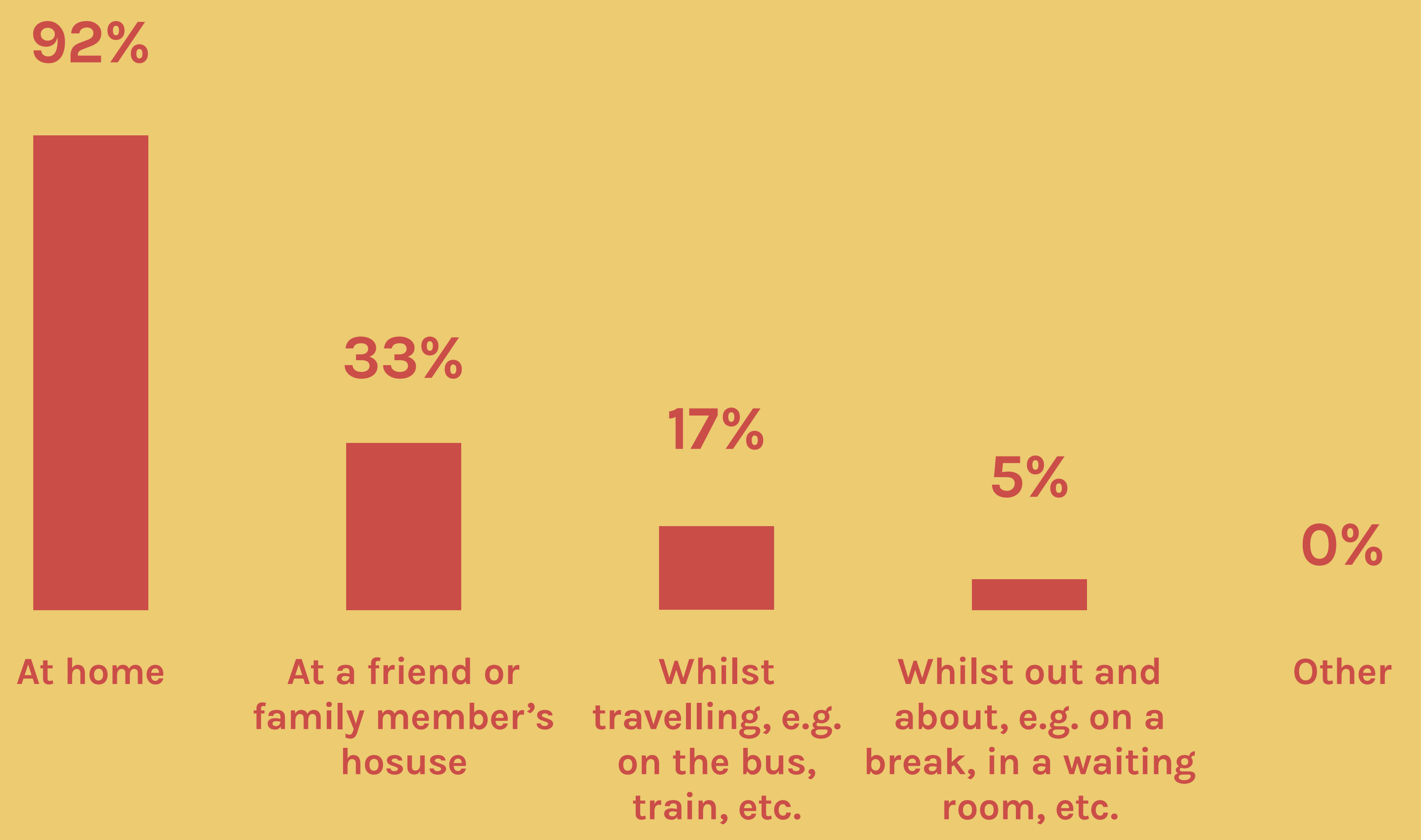
— 49% positioned 8–10 – Browse the platform(s) available until they find a film they think is worth watching



THE STATS

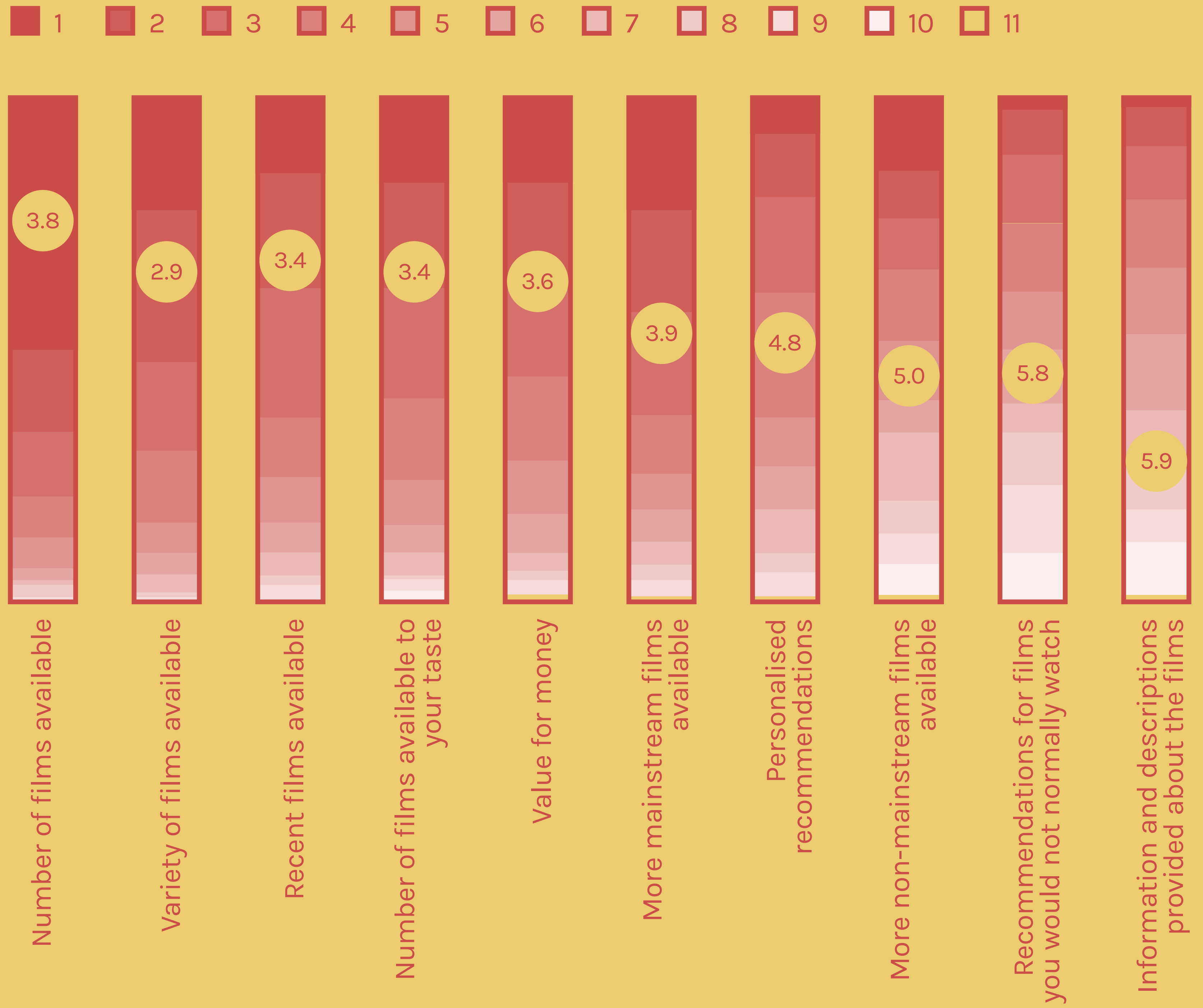
- Film talks, Q&A, film seasons, festivals or other film events (pop-up cinema, immersive film experience or special event) are likely to make someone choose a particular screening for 39%–49% of respondents.
- 73% agree – Going to the cinema is a social event.
- 79% agree – I go to the cinema for a 'big screen' experience.
- 75% agree – There are some films which need to be seen at the cinema.
- 7% always / 19% never – Split viewing over a number of days / times of day.
- 6% always / 14% never – Give up on a film before the end.

Where do you tend to watch films using digital platforms? (Please select all that apply)



THE STATS

Which of the following are important to you in a digital platform? Please rank the following in order of importance.



— 50% ranked 1st preference – Number of films available

— 22% ranked 1st preference – More mainstream films available

— 15% ranked 1st preference – More non-mainstream films available

— 22% ranked 1st preference – Variety of films available

— 74% agree – I match the film I choose to watch with my mood

— 73% agree – I catch up with films I have missed at the cinema

— 66% agree – I watch films I didn’t want to pay for at the cinema

— 70% agree – Digital platforms give me access to films I wouldn’t otherwise be able to watch

THE STATS

What do you like about watching films on [your top 3 chosen platforms]

— 'Easy to stream and affordable and good variety'

— 'Platform is easy to use, available to watch via TV, laptop and mobile, good selection of films'

— 'Phone access, easy, cheap'

— 'I can browse what films there are out of a good choice, as lots of times I find films I never heard of our think to watch'

— 'Can watch anytime you want and however many times you want. Lots of choice available. Good sound and picture quality.'

Adults in the UK (16+) watch programmes and films in different location on a range of devices or services:

— 51% in the bedroom

— 24% on holiday

— 16% in the kitchen

— 9% in the garden

— 9% in the bathroom

— 7% in the pub/cafe

THE INSIGHTS

— Generation Z and Millennials are more interested in services and experiences that provide uniqueness and value for money than in possessions. Subscription-based digital channels that provide the largest range and amount of content, such as Netflix and Amazon Prime, are most popular. Festivals and special events / screening programmes are some of the most effective generators of discussion about independent films online and attract significant interest and audiences.

— Although episodic and interrupted watching across multiple devices is normal, young people appreciate and value the experience of sitting down to watch a film without distractions whether at home or at the cinema. In both cases, the quality of the experience is important.

— Part of a good film experience is the ability to access the film easily across cinema and digital. Distributors should consider working seamlessly across cinema and digital and make it easy for young audiences to access the film on the platform they want to, whenever they want to.

THE INSIGHTS

— 79% of those surveyed agreed that they went to cinemas for ‘the big screen experience’ and that some films just ‘have to be seen at the cinema’. Watching films at the cinema is still highly valuable and young people know that it gives them an experience that they can’t get at home - but only if the film has some exceptional aspects which magnify that experience (e.g. cinematography, effects, music). Films that highlight their ‘big screen experience’ aspects are more likely to attract a cinema audience than those that highlight thematic / character / dramatic aspects.

— Price is a crucial factor when determining whether to watch a film at a cinema or not. Younger audiences, particularly those who are more interested in film, are keen for discounts and opportunities to spread the cost of cinema trips (Netflix’s allowance for multiple people to share one account is particularly popular).

THE INSIGHTS

- ‘What’s on at the cinema’ is the strongest factor deciding what people choose to watch, indicating that they have already made the choice to go to the cinema in the first place. So the decision-making journey for watching a film is usually:
  Who with? → Where (cinema or digital)? → What sort of film (using genre to exclude)? → Which available film?
- Cinema tickets are seen as being relatively expensive and the risk associated with spending money to watch something that might not be enjoyable is prohibitive to many younger audiences, who prefer to take viewing risks on digital platforms where the financial and social risks of disliking their film choice are mitigated.

CONCLUSIONS

GENERAL INSIGHTS

1. Watching a film, at the cinema or at home, means different things for different age groups and other demographics of young people based on their tastes and habits. Segment your under-30s audiences by age and taste, applying different approaches to influencing each segment.

2. Focus on visual content and create a presence on the platforms that young people use for information and discussion (Twitter, YouTube).

3. Work across multiple communications lines and platforms, breadcrumbing information and content to create an accumulation of content and interest over time.

4. Be authentic and honest with your content and communications. Don't misrepresent or attempt to manufacture hype.

5. Involve young people in a film's life and story. Create space for and encourage reviews, recommendations and other ways that young people can be involved in the life of a film across the value chain, from development to distribution

6. The most important factor for young people when choosing a film to watch is its relevance to them, particularly in terms of the plot and themes, so these need to be clearly signposted.

7. Mood-matching is also a hugely popular way of choosing what film to watch. Genre plays a part in this but only to rule certain types of films out.

8. Although their attention is frequently divided, young people still treasure the experience of watching a long-form film uninterrupted at the cinema and at home. Champion the experience and value of watching a long-form film, wherever that may be.

9. Taste and viewing habits for film are formed in the early teenage years at home. To ensure that future generations watch many different kinds of film, it is vital to engage with families and young people who will be creating them.

SPECIFIC INSIGHTS

FOR DISTRIBUTORS

1. Consider working seamlessly across cinema and digital to offer audiences maximum accessibility and choice.
2. Young people believe that there are some films which 'need to be seen in the cinema'. To highlight cinematic releases, highlight cinematic aspects of the films (e.g. cinematography, effects, music)
3. Influencers work to create interest. Personal recommendations and word of mouth work to create bookings and views. Automated suggestions have their place, especially for a younger audience, but people always work better than algorithms.

FOR CINEMAS

1. Going to the cinema is still the most popular past-time for young people and 16-19 year olds in particular. However, it is seen as relatively expensive and group film choice tends to get squashed down to mainstream films.
2. Key issues for the under 30s are value for money and experiences over possessions. They like to explore new places and attend special events. Most young people watch nonmainstream film at festivals, programmed seasons and other screening events.
3. Personal recommendations and word of mouth are the most powerful influencers when it comes to people picking a film to watch. Encourage frequent cinema-goers to talk to their friends and family and bring them to the cinema.
4. Young people believe that there are some films which 'need to be seen in the cinema'. To highlight cinematic releases, highlight cinematic aspects of the films (e.g. cinematography, effects, music).

FOR DIGITAL

1. Key issues for the under 30s are value for money and experiences over possessions. They prefer subscription services to rental or ownership of their media and access to as much content and choice as possible. Younger audiences (18 and under) usually rely on their parents' choice of digital services.
2. Due to the lower cost, digital platforms are places of film discovery and riskier choices. The majority of non-mainstream film watching happens online.
3. Influencers work to create interest. Personal recommendations and word of mouth work to create bookings and views. Automated suggestions have their place, especially for a younger audience, but people always work better than algorithms.

QUESTIONS FROM THE INDUSTRY

How frequently do the under-30s watch films at the cinema / on digital services?
16-34 year-olds make on average 8.1 visits to the cinema per annum. This number rises to 9.6 visits for 16-19 years olds. Watching films on digital services is significantly more frequent, with two thirds of the audience watching three or more films a month online.

Where do young people watch most of their films and with who?
Most under-30s watch a majority of their films online, so either at home or at a friend's house. Cinema attendance depends heavily on their age and taste in film / viewing habits. Under-16s tend to watch films with their parents and other family; 16-24 year olds with friends; and those over 25 with partners.

What sorts of films do the under-30s watch in cinemas / on digital services?
The most important factor in deciding what to watch is relevance to the audience, often represented as the plot and themes of a film. Coming-of-age and LGBT films are the most popular genres for younger audiences, followed by dramas and thrillers. Documentaries, musicals and silent films are least popular. Mainstream films tend to be favoured at the cinema because the cost of tickets discourages taking risks when choosing a film. However, young people recognise that some films need to be seen at the cinema and will make the effort to attend a screening for exceptional cinematic aspects (e.g. cinematography, effects, music).

Why does this audience choose to go to the cinema / watch films on digital services?
Watching a film is seen as a valuable, social experience whether at a cinema or on digital. The cinema offers a big screen experience for films that need to be seen there - some films are worth the ticket price for the spectacle and young people will approach a venue already knowing what film they want to see and with who. Digital platforms are places for catching up, browsing, discovery and risk-taking, especially those that are subscription-based and allow access to the most content.

QUESTIONS FROM THE INDUSTRY

How do young people find out about films in cinemas / on digital services? Where do they discuss them?
Younger audiences prefer visual content and trailers of all kinds (cinema, online, TV) are still incredibly effective tools for catching their attention. However, the best way to engage someone with a film and encourage them to watch it is through personal recommendations and word-of-mouth. Most young people get news and information from their social media platforms. Most trailers are seen on Youtube and an overwhelming majority of discussion about films, particularly non-mainstream ones, takes place on Twitter.

Do influencers and reviewers / critics work? Who is most trusted?
Celebrity / high-profile influencers are effective at raising awareness about a film but less effective at encouraging engagement - that job is best suited to personal / community influencers. Younger audiences value authenticity and honesty from their media and influencers and prefer influencers who are actively involved in making films, such as actors and directors, to ‘experts’ on film quality such as critics. They are also looking for a range of perspectives and opinions from the different influencers they follow.

What drives film discovery? What are the barriers to watching non-mainstream film at the cinema?
Discovery is risky and so tends to take place on digital platforms, which are seen as being cheaper (and easier to stop watching on). Despite its popularity, cinema is seen as relatively expensive activity. However, the under-30s love experiences; the majority of non-mainstream film watching in the cinema takes place at festivals, programmed seasons and other special events which offer increased value for money or reduced ticket prices. Ticket deals and discounts are effective, but mostly on those who are already frequent visitors to the cinema. Another barrier for non-mainstream films to overcome is limited run lengths and access. It may take several days or weeks for an individual or group to be convinced to watch a film, by which time it has often already stopped screening. Young people with a strong interest in film report that ‘What is available at the cinema’ is a key factor in their choices of films, suggesting that more varied programming would attract a core audience of cinephiles.

QUESTIONS FROM THE INDUSTRY

How can films cut through to younger audiences?
Choose your target audience and tailor strategies to them. Use highly-visual content, spread across multiple platforms and accumulating from multiple angles. Promote your film with authenticity, honesty and integrity, do not attempt to manufacture fake hype. Involve younger audiences with the life of the film across the value chain, from production to distribution, and encourage conversation and community engagement on the platforms they use.

How do young people perceive 'British' and 'Independent' film?
'Independent film' tended to be described as 'Interesting / Unique / Good / Original / New'. Other (less frequent) words used to describe it were 'Budget / Low / Cheap / Niche / Small'.

Words most associated with 'British film' were 'Good / Funny / Classic / Comedy / Actors / Gritty / Quality', but also (less frequently) 'Boring'.

Generally speaking the audience were apathetic towards these labels in terms of convincing them whether or not to watch a film, with roughly a third saying that they'd be more likely to watch a British / independent film and just over half reporting that it didn't make a difference to them.

HOW THE RESEARCH WAS CONDUCTED

LITERATURE REVIEW

A review of existing studies, focus on younger people's engagement with film and independent film

GOAL
Quantify and describe the film marketplace

SECONDARY DATA

Examination of existing datasets, including statistics from Census, TGI Leisure and The Audience Agency's own large -scale panel survey undertaken in 2014

GOAL
Quantify and describe the film marketplace

STAKEHOLDER INTERVIEWS

32 stakeholder interviews with organisations across the industry

GOAL
Ensure that the industry's concerns and questions are addressed

SOCIAL MEDIA ANALYSIS

Brand Watch social media analysis of 18 to 29 year-old viewers of independent films

GOAL
Identify themes of conversation, trends and key influencers

HOW THE RESEARCH WAS CONDUCTED

PANEL SURVEY

Served to 700 16-29 year olds across the UK

GOAL
Provide quantitative research and corroborate qualitative research findings

DISCUSSION GROUPS

Qualitative research with five discussion groups of 16-29 year-olds from around the UK with differing levels of engagement in film

GOAL
Better understand behaviours, attitudes, motivations and interests towards film from the target age groups

RESEARCH PANEL

Channel4 / 4Youth research panel including 16-29 year-olds with differing levels of engagement in film

GOAL
Build similar insight to the discussion groups using an online approach to collect qualitative responses

OVERALL PROFILE OF RESPONDENTS (PANEL SURVEY)

– 54% female and 44% male, compared to 51% and 49% respectively in the UK population

– 78% White, 4% Mixed/Multiple ethnic group, 11% Asian or Asian British, 4% Black or Black British, 1% other – the panel has a lower proportion of respondents identifying as being from a White ethnic group (78% compared to 87% in UK) and Mixed/Multiple ethnic group (4% compared to 2% in UK), and a higher proportion identifying as Asian or Asian British (11% compared to 7%)

– In terms of respondent employment status:
  – 41% are employed full-time, 14% part time, 4% self-employed
  – 8% unemployed, 27% full-time students
  – 3% looking after home or family, 2% long-term sick or disabled

THE AUDIENCES

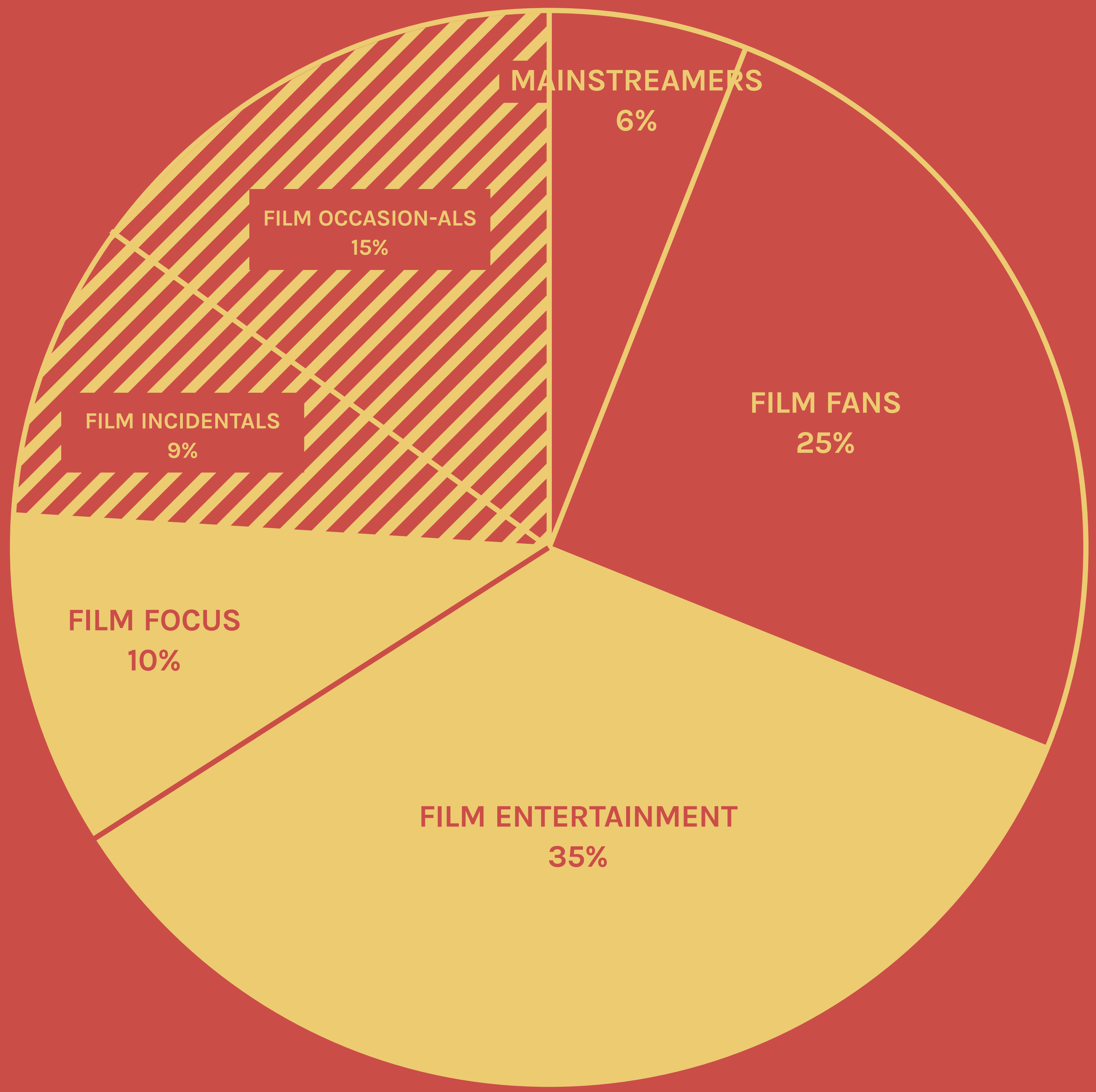
THE AUDIENCES

SUMMARY

Medium interest in film

Low interest in film

High interest in film



THE AUDIENCES (BY AGE)

16–19

FREQUENCY OF FILM WATCHING
Medium / high

TASTES
Mix of indie & mainstream, but prefer mainstream - independent film can sometimes be seen as a risky choice and tastes are still developing

FILM ACCESS
Digital = Medium frequency
Cinema = High frequency

More autonomous than younger teens, have more choice over what they watch and where. Digital still leads but cinema trips are more frequent and varied. This demographic is most frequent cinema visitor of all. May primarily rely on parents for home entertainment and digital services so likely to have access to both streaming and digital / smart TV services.

INFLUENCED BY
- Recommendations from friends & family
- Trailers
- Hype
- Automated & platform recommendations
- What's on at the cinema

OTHER NOTES
Digital natives: multiple screens / devices, multiple distractions, multiple interest, multiple apps, multiple sources of info. They lead active social lives and follow contemporary culture. In typical teenage fashion, they are experience-seekers but like to follow the crowd and stay relatively safe.

THE AUDIENCES (BY AGE)

20–30

FREQUENCY OF FILM WATCHING
Medium / high

TASTES
Mixed preferences for mainstream & indie film. Tastes have also solidified by this point and those who are used to watching independent film continue to do so in multiple ways.

FILM ACCESS
Digital = High frequency
Cinema = Medium frequency

Habits are solidifying: those with a special interest in film and cinema catch films wherever they can, in screens and at home. Those with a more passing interest save trips to the cinema for special occasions and films, preferring to take chances on more independent offerings through digital services. Digital platforms that offer the most value-for-money (ie. access to most content for lowest price) are the most popular.

INFLUENCED BY
— A wide range of film media - unlikely to be a single thing

— Personal recommendations from friends and other influencers
— Value for money
— What's on at the cinema
— Experiences over possessions

OTHER NOTES
High digital & cultural consumption & engagement.

Happy to look at various places for information but prefer a single screen for watching - the experience of watching a film is valuable in any context.

Generally looking for value for money and quality of experience.

THE AUDIENCES (BY TASTE)

MAINSTREAMERS

(6% of under-30s film audiences)

BEHAVIOURS

AGE:
Generally older - highest proportion of 29 years olds is here (18%), and highest proportion who live with partner and children (20%)

FILM FREQUENCY:
Rank joint first for frequency of film watching (4 or more films pm)

WATCH WITH:
Most likely to watch with their partner and / or children

FILM TASTE:
Watch mainstream films almost exclusively, at a multiplex or at home. Unlikely to search out new films, focus on what's available

OTHER TRAITS:
- Love boxsets and series - particularly on Netflix
- High digital consumption & engagement
- More mainstream and popular cultural tastes generally
- Particularly enjoy exploring new places

THINK:
Grownups who like superheroes

ENGAGEMENT

MORE LIKELY TO GET INFORMATION FROM:
- Auto-recommendations / search engines
- Hype
- Online trailers
- Personal recommendations

LESS LIKELY TO GET INFORMATION FROM:
- Reviews / film media

DRAWN IN BY:
- Trailers
- Digital availability
- Ease of access
- Genre / type of film
- Storyline
- Film relevance

RECOMMENDATIONS FOR TARGETING:
- Influencing their influencers (friends & family)
- Put independent film in familiar surroundings - i.e. multiplexes
- Involve the audience. Champion their stories of discovery and support their choices to watch film / media across multiple platforms and devices. Encourage conversations
- Connect cinema and digital: encourage catching up or watching higher-risk films at home. 'If you liked this in the cinema, you'll love this at home'
- Identify film-watching as an 'event' on whichever platform it is

CINEMA VS DIGITAL

25% seen 0 films at a cinema in the last 3 months
25% seen 1 film at a cinema in the past 3 months
11% not seen any films on VOD in last month

- Not frequent watchers but prefer VOD when they do
- Cinema is a bit of a special occasion / treat

FIND FILMS IN CINEMAS BY:
- Seeing what's on at their local / usual place
- Recommendations

FIND FILMS ONLINE BY:
- Auto-recommendations
- Recommendations
- Looking for films they already know about (eg if they've missed them at the cinema)

PASSIONATE ABOUT FILM

THE AUDIENCES (BY TASTE)

FILM FANS

(25% of under 30s film audiences)

BEHAVIOURS

AGE:
People in their mid-late 20s, live with partners, flatmates or alone

FILM FREQUENCY:
Rank joint first for frequency of film watching

WATCH WITH:
Most likely to watch with a partner and / or friends

FILM TASTE:
Equally interested in mainstream & independent film. Proactive engagement with film and surrounding media

OTHER TRAITS:
- High digital consumption & engagement
- Culture vultures with a broad range of interests
- Proactive in recommending and organising activities

THINK:
Arts & culture geeks to be found at the hippest new pop-up

ENGAGEMENT

MORE LIKELY TO GET INFORMATION FROM:
- Personal research
- Recommendations from friends
- Reviews

LESS LIKELY TO GET INFORMATION FROM:
- Ads

DRAWN IN BY:
- Events such as festivals and seasons
- Positive reviews (from professionals or friends)
- Interesting film journeys (e.g. festivals, awards) and communities
- Genre / type of film
- Storyline
- Film relevance

RECOMMENDATIONS FOR TARGETING:
- Use reviewers, curators and influencers
- Involve the audience as early as possible and make them feel part of the film's life. Create a 'community' around the film
- Create oppportunities for them to influence friends / be the first / gain rewards
- Use recommendations / suggestions to foster discovery

CINEMA VS DIGITAL

42% seen 4 or more films at a cinemas in the last 3 months
52% seen 5 or more films on VOD in the last month

- Higher cinema-going proportion than other groups. Prefer to watch at the cinema if they can, particularly new releases
- Strongly agree that they go to the cinema for a big screen experience (44%)
- Look for VOD platforms based on number of films available. Use it to catch up and to discover new films

FIND FILMS IN CINEMAS BY
- Seeing what's on at their local / usual place
- Knowing what film they want to see and searching for it
- Recommendations

FIND FILMS ONLINE BY
- Browsing
- Recommendations
- Looking for films they already know about (e.g. if they've missed them at the cinema)

PASSIONATE ABOUT FILM

FILM ENTERTAINMENT

(35% of under 30s film audiences)

BEHAVIOURS

AGE:
Generally younger - teens through to early 20s

FILM FREQUENCY:
Medium-frequency watchers (2 or 3 films pm)

WATCH WITH:
Most likely to watch with groups of friends

FILM TASTE:
Don't mind non-mainstream if it's relevant to them but prefer mainstream. Passive engagement with film & surrounding media

OTHER TRAITS:
- High digital consumption & engagement
- Active on social media, follow contemporary culture
- Biggest other interest: museums
- Follows the crowd
- Experience seeker

THINK:
Culturally-engaged young adults and older teens

ENGAGEMENT

MORE LIKELY TO GET INFORMATION FROM:
- Hype
- Recommendations
- Trailers
- Advertising

LESS LIKELY TO GET INFORMATION FROM:
- Searching for new films

DRAWN IN BY:
- Low-risk: anxious about the people they're with having a good time
- Availability: they'll usually watch what's on
- Genre / type of film
- Storyline
- Film relevance

RECOMMENDATIONS FOR TARGETING:
- Put independent film in familiar surroundings - i.e. multiplexes
- Use reviewers, curators and influencers. Prompt conversations between them and the audience
- Involve the audience. Champion their stories of discovery and support their choices to watch film / media across multiple platforms and devices
- Connect cinema and digital: encourage catching up or watching higher-risk films at home. 'If you liked this in the cinema, you'll love this at home'
- Identify film watching as an 'event' on whichever platform it is

CINEMA VS DIGITAL

CINEMA VS VOD:
22% seen 4 or more films at a cinemas in the last 3 months
31% seen 5 or more films on VOD in the last month

- Cinema seen a bit more like a special treat. Will go if hyped up for it / it's a film they want to see there
- More likely to watch non-mainstream films on VOD, where discovery has less risk

FIND FILMS IN CINEMAS BY:
- Seeing what's on at their local / usual place
- More likely to book if the screening is part of a special event / season / festival
- Recommendations

FIND FILMS ONLINE BY:
- Recommendations
- Browsing
- Looking for films they already know about (e.g. if they've missed them at the cinema)

THE AUDIENCES (BY TASTE)

INTERESTED IN FILM

THE AUDIENCES (BY TASTE)

INTERESTED IN FILM

FILM FOCUS

(10% of under 30s film audiences)

BEHAVIOURS

AGE:
People in their mid-late 20s, live with partners, flatmates or alone

FILM FREQUENCY:
Medium-frequency watchers (2 or 3 films pm)

WATCH WITH:
Most likely to watch with a partner or alone

FILM TASTE:
Love independent and other non-mainstream films. Also love independent services / experiences around cinema: biggest attenders of indie cinemas and largest preference for services other than Netflix

OTHER TRAITS:
- Frequent cultural engagers, engage with contemporary arts and explore new things
- Least likely to be influenced by ads or trailers on social media, but use it for research
- Looking for experiences over possessions
- Value arthouse and independent cinemas and enjoy watching film in unusual settings / locations and events
- Price / value for money is important

THINK:
Has Netflix, Amazon, Hulu, MUBI and a loyalty card to their local cinema

ENGAGEMENT

MORE LIKELY TO GET INFORMATION FROM:
- Culture / Arts news sources & reviews
- Film-specific journalism / discussion sites
- Recommendations

LESS LIKELY TO GET INFORMATION FROM:
- Social media
- Trailers
- Ads

DRAWN IN BY:
- Film experiences
- Price
- Location
- Genre / type of film
- Storyline
- Film relevance

RECOMMENDATIONS FOR TARGETING:
- Focus on experience / events: film in independent / unusual venues / cinemas
- Focus on price
- Use reviewers, curators and influencers. Prompt conversations between them and the audience
- Involve the audience. Champion their stories of discovery and support their choices to watch film / media across multiple platforms and devices

CINEMA VS DIGITAL

CINEMA VS VOD:
27% seen 4 or more films at a cinema in the last 3 months
25% seen 5 or more films on VOD in last month

- Only segment that seems to consistently prefer cinema to VOD
- And prefer independent cinemas to multiplexes at that!
- Only segment where Netflix isn't completely dominant as choice of digital platform

FIND FILMS IN CINEMAS BY:
- Knowing what film they want to see and searching for it
- More likely to book if the screening is part of a special event / season / festival
- Recommendations

FIND FILMS ONLINE BY:
- Recommendations
- Browsing
- Looking for films they already know about (e.g. if they've missed them at the cinema)

THE AUDIENCES (BY TASTE)

FILM INCIDENTALS

(9% of under 30s film audiences)

BEHAVIOURS

AGE:
Graduates / people in mid-20s (highest proportion live with a partner but no kids)

FILM FREQUENCY:
Low frequency film watchers (a film a month or fewer)

WATCH WITH:
Most likely to watch with a partner

FILM TASTE:
Mostly mainstream - will only watch non-mainstream films if relevant to them. More likely to watch box sets at home

OTHER TRAITS:
— Active social lives & eclectic interests, follow contemporary culture
— Looking for value for money

THINK:
Busy young professionals who like to unwind in front of box sets

ENGAGEMENT

MORE LIKELY TO GET INFORMATION FROM:
— Auto-recommendations / search engines
— Hype
— Online trailers
— Personal recommendations

LESS LIKELY TO GET INFORMATION FROM:
— TV or cinema trailers
— Reviews / film media

DRAWN IN BY:
— Hype / the crowd
— Ease of access
— Genre / type of film
— Storyline
— Film relevance

RECOMMENDATIONS FOR TARGETING:
— Focus on digital engagement and recommendation
— Put independent film in familiar surroundings - ie. multiplexes
— Connect cinema and digital: encourage catching up or watching higher-risk films at home. 'If you liked this in the cinema, you'll love this at home'

CINEMA VS DIGITAL

CINEMA VS VOD:
25% seen 0 films at a cinema in the last 3 months
25% seen 1 film at a cinema in the past 3 months

FIND FILMS IN CINEMAS BY:
— Seeing what's on at their local / usual place
— Recommendations

FIND FILMS ONLINE BY:
— Auto-recommendations
— Recommendations
— Looking for films they already know about (e.g. if they've missed them at the cinema)

LITTLE INTEREST IN FILM

THE AUDIENCES (BY TASTE)

LITTLE INTEREST IN FILM

FILM OCCASION-ALS

(15% of under 30s film audiences)

BEHAVIOURS

AGE:
Highly likely to live with a parent, guardian or carer, so younger teens or people in their 20s who need looking after

FILM FREQUENCY:
Low frequency film watchers (a film a month or fewer).

WATCH WITH:
Most likely to watch films with family or alone

FILM TASTE:
Mix of mainstream and non-mainstream, don't have a particular preference

OTHER TRAITS:
– Watch a lot of visual content of all kinds
– Highest interest in pop / rock
– Value for money is important (when spending their own)

THINK:
Younger teenagers and other groups without much financial autonomy

ENGAGEMENT

MORE LIKELY TO GET INFORMATION FROM:
– Auto-recommendations / search engines
– Hype
– Online trailers
– Personal recommendations

LESS LIKELY TO GET INFORMATION FROM:
– Reviews / film media

DRAWN IN BY:
– Trailers
– Digital availability
– Ease of access
– Genre / type of film
– Storyline
– Film relevance

RECOMMENDATIONS FOR TARGETING:
– Influencing their influencers (friends & family)
– Put independent film in familiar surroundings - i.e. multiplexes
– Involve the audience. Champion their stories of discovery and support their choices to watch film / media across multiple platforms and devices. Encourage conversations.
– Connect cinema and digital: encourage catching up or watching higher-risk films at home. 'If you liked this in the cinema, you'll love this at home'

CINEMA VS DIGITAL

CINEMA VS VOD:
25% seen 0 films at a cinema in the last 3 months
25% seen 1 film at a cinema in the past 3 months
11% not seen any films on VOD in last month

– Not frequent watchers but prefer VOD when they do
– Cinema is a bit of a special occasion / treat

FIND FILMS IN CINEMAS BY:
– Seeing what's on at their local / usual place
– Recommendations

FIND FILMS ONLINE BY:
– Auto-recommendations
– Recommendations
– Looking for films they already know about (e.g. if they've missed them at the cinema)

AUDIENCE PROFILE TARGETING

FOR INDEPENDENT FILM

	AWARENESS (How to get the first impression)	INTEREST (How to get them engaged)	DESIRE (How to put a film in their calendar)	ACTION (How to get them to book)
MAINSTREAMERS	Building hype Online trailers (Youtube) Advertising	Focus on familiarity Reduce perceived risk	Highlight the value and experience of cinema Make it social	Offer a cinema or digital event or special screening
FILM FANS	Multiple media & industry sources Influencers & recommendations Reviews	Provide more information / media Behind-the-scenes Peer review and involvement	Create a habit and a special time for film Focus on the hobby / passion of cinema	Offer cheap options at convenient locations
FILM ENTERTAINMENT	Building hype Advertising Trailers	Focus on entertainment value	Make it social Highlight the big-screen experience	Encourage social online and offline engagement such as challenges, campaigns
FILM FOCUS	Multiple media & industry sources Influencers & recommendations Local outreach / advertising Event marketing	Focus on location / experience Peer review and involvement	Highlight experience Highlight value for money Highlight film accolades	Focus on: Cost Value Experience
FILM OCCASIONALS	Advertising Trailers Maximum visibility	Focus on entertainment value	Focus on story, genre, relevance	Highlight film as a treat for family / friends

THANK YOU FOR READING

IF YOU HAVE ANY QUESTIONS OR COMMENTS, OR WOULD LIKE COPIES OF OUR UNEDITED RESEARCH DATA AND INSIGHTS, PLEASE GET IN TOUCH:

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