‘THE BIG SQUEEZE’ IS A MAIL METRO MEDIA RESEARCH SERIES THAT TRACKS THE ONGOING IMPACT THAT THE COST OF LIVING CRISIS IS HAVING ON CONSUMERS FINANCES AND BEHAVIOURS ACROSS A BROAD RANGE OF CATEGORIES.

EACH WEEK WE ASK OUR MATTERS COMMUNITY MEMBERS ABOUT THEIR BEHAVIOURS IN ONE CATEGORY TO ASCERTAIN IF AND HOW IT HAS BEEN IMPACTED BY THE COST OF LIVING CRISIS.

OUR AIM IS TO OFFER USEFUL INSIGHTS AND PRACTICAL GUIDANCE ON HOW BRANDS CAN NAVIGATE THIS DIFFICULT AND TUMULTUOUS PERIOD.

THIS WEEK WE’RE FOCUSING ON FILM AND CINEMA. WE WANTED TO FIND OUT HOW THE INCREASE IN THE COST OF LIVING MIGHT IMPACT THE WAY CONSUMERS WATCH FILMS AND MOREOVER, THEIR USE OF AND ATTITUDES TOWARDS THE CINEMA.
We wanted to find out people’s film watching preferences, frequency of cinema visits, what they like about the cinema, the amount they’re willing to spend on the cinema and future cinema behaviours.

**Approach:**
10 mins online survey, respondents recruited through Matters Community Survey

**Fieldwork:**
26th May – 1st June 2022

**Sample:**
932 Respondents

Data is weighted to be representative of readership by age, gender and social grade
WHAT WILL WE COVER?

1. KEY FINDINGS
2. FILM WATCHING PREFERENCES
3. FILM AND CINEMA - BEHAVIOURS AND ATTITUDES
4. FILM AND CINEMA - THE BIG SQUEEZE
5. IMPLICATIONS FOR BRANDS
THE CURRENT STATE OF PLAY...

- **Television is the most popular** means used to regularly watch films (9 in 10), followed by **cinema (4 in 10)** and **portable devices (2 in 10)**.

- Those aged below 55 are **significantly more likely** to **regularly watch films at the cinema**.

CATEGORY BEHAVIOURS

- **Under 35s** are the **most frequent cinema goers** – 1 in 2 go once a month or more.

- The **majority** of people would only be **willing to spend up to £10 on a cinema ticket** (3 in 5). 1 in 3 **under 35s** would be **willing to spend £16 or more**.

- **The most popular reasons** people like the cinema is a ‘better experience’ and a ‘good cinema local to me’. Those 55+ are motivated by the cinema experience.

- Although **1 in 3** intend on reducing out-of-home leisure spending, **cinema visiting intentions are currently resilient with 2 in 10 likely to go to the cinema more** in the next 3 months (vs. 1 in 10 who are likely to go less).

- Generally, **under 35s are most likely to go more**, but older audiences do attend and can be accessed via our portfolio - **2 in 5 weekly Telegraph readers** plan to go more.

- The **pressures of a rising cost of living** are evident. **Reduction in cost** and **memberships / loyalty schemes** are amongst the most likely ways to encourage more frequent cinema visits.
“FILM WATCHING PREFERENCES”
Television is the most popular means used to regularly watch films (9 in 10) followed by the cinema (4 in 10). Those below the age of 55 are significantly more likely to regularly watch films at the cinema than those 55+

Source: Subscription Services Matters Community Survey (May-June 2022)
Base: 932 Respondents

Arrows denote significance at 95% confidence rate
The most popular film genres are thriller, drama and action

Over 2 in 5 of those under 35 prefer comedies
3 in 5 of the older demographic have a preference for thriller and drama film genres

Q – Thinking about films. What are your favourite types of film?

Source: Subscription Services Matters Community Survey (May-June 2022) Base: 932 Respondents
“FILM AND CINEMA-BEHaviours AND ATTITUDES”
### Over 7 in 10 go to the cinema

Under 35s are the most frequent cinema goers with over 1 in 2 going once a month or more

**Q – How often, if at all, do you go to the cinema?**

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Total</th>
<th>Under 35</th>
<th>35-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Once a week or more</td>
<td>5%</td>
<td>14%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>2-3 times a month</td>
<td>10%</td>
<td>22%</td>
<td>12%</td>
<td>4%</td>
</tr>
<tr>
<td>Once a month</td>
<td>13%</td>
<td>19%</td>
<td>15%</td>
<td>9%</td>
</tr>
<tr>
<td>Once every 2-3 months</td>
<td>15%</td>
<td>18%</td>
<td>17%</td>
<td>12%</td>
</tr>
<tr>
<td>2-3 times a year</td>
<td>14%</td>
<td>9%</td>
<td>15%</td>
<td>16%</td>
</tr>
<tr>
<td>Less often</td>
<td>20%</td>
<td>10%</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>I don’t go to the cinema</td>
<td>31%</td>
<td>23%</td>
<td>18%</td>
<td>7%</td>
</tr>
</tbody>
</table>

**NET Frequent: 55%**

Source: Subscription Services Matters Community Survey (May-June 2022)
Base: 342 Respondents
The majority will spend up to a tenner on a cinema ticket

Under 35s are significantly more likely than those 55+ to be willing to spend £16 or more on a cinema ticket (1 in 3)

Q – How much, if anything, would you be willing to spend on a cinema ticket?

<table>
<thead>
<tr>
<th>UNDER £10</th>
<th>£10-£15</th>
<th>£16-£20</th>
<th>MORE THAN £20</th>
</tr>
</thead>
<tbody>
<tr>
<td>59%</td>
<td>28%</td>
<td>9%</td>
<td>4%</td>
</tr>
<tr>
<td>Under 35 – 32% ▼</td>
<td>Under 35 – 30%</td>
<td>Under 35 – 21% ▲</td>
<td>Under 35 – 11% ▲</td>
</tr>
<tr>
<td>35-54 – 57% ▲</td>
<td>35-54 – 30%</td>
<td>35-54 – 7%</td>
<td>35-54 – 5%</td>
</tr>
<tr>
<td>55+ – 70% ▲</td>
<td>55+ – 24%</td>
<td>55+ – 3% ▼</td>
<td>55+ – 0% ▼</td>
</tr>
</tbody>
</table>

Source: Subscription Services Matters Community Survey (May-June 2022) Base: 498 Respondents

Arrows denote significance at 95% confidence rate
The most popular reasons for going to the cinema are experience and locality.

3 in 5 of those above the age of 35 like the cinema due to being able to watch films not yet available on TV – they are more likely to be motivated by the cinema going experience.

Q – Thinking now about going to the cinema. What do you like about the cinema?

Source: Subscription Services Matters Community Survey (May-June 2022)
Base: 342 Respondents

Please note: low base size of Under 35s <100

Arrows denote significance at 95% confidence rate.
FILM AND CINEMA – THE BIG SQUEEZE
1 in 3 intend on reducing out-of-home leisure spending

Q – Thinking about the cost of living crisis and your likely behaviours over the next three months. Which of the following statements, if any, apply?

“I will be …”

- Trying to reduce my leisure spending out of home e.g. visiting pubs: 35%
- Reducing the amount I shop for leisure: 34%
- Entertaining at home more: 16%
- Reducing my spending elsewhere to enable spending on subscriptions: 9%
- Spending more money on in-home leisure activities e.g. paying for more films: 7%
- Taking out another streaming service subscription: 5%*

Source: Subscription Services Matters Community Survey (May-June 2022)
Base: 932 Respondents
*Based on readers with subscription (688)
Cinema intention currently resilient with 1 in 5 planning to go to the cinema more in the next 3 months

Only 1 in 10 intend on going to the cinema less in the next 3 months

<table>
<thead>
<tr>
<th>I will go to the cinema more</th>
<th>I will go to the cinema about the same amount</th>
<th>I will go to the cinema less</th>
<th>NET</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>19%</td>
<td>58%</td>
<td>9%</td>
</tr>
<tr>
<td><strong>Under 35</strong></td>
<td>30%</td>
<td>50%</td>
<td>11%</td>
</tr>
<tr>
<td><strong>35-54</strong></td>
<td>23%</td>
<td>58%</td>
<td>8%</td>
</tr>
<tr>
<td><strong>55+</strong></td>
<td>11%</td>
<td>62%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Source: Subscription Services Matters Community Survey (May-June 2022) Base: 717 Respondents
### 2 in 5 weekly Telegraph readers plan to go to the cinema more in the next 3 months

1 in 3 Metro and ‘I’ Weekend weekly readers plan to go to the cinema more in the next 3 months

#### Q – Do you plan to go to the cinema more or less in the next 3 months?

<table>
<thead>
<tr>
<th></th>
<th>I will go to the cinema more</th>
<th>I will go to the cinema about the same amount</th>
<th>I will go to the cinema less</th>
<th>NET</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>19%</td>
<td>58%</td>
<td>9%</td>
<td>+10%</td>
</tr>
<tr>
<td><strong>Telegraph</strong></td>
<td>41%</td>
<td>41%</td>
<td>10%</td>
<td>+31%</td>
</tr>
<tr>
<td><strong>I Weekend</strong></td>
<td>32%</td>
<td>49%</td>
<td>8%</td>
<td>+24%</td>
</tr>
<tr>
<td><strong>Metro</strong></td>
<td>31%</td>
<td>51%</td>
<td>8%</td>
<td>+23%</td>
</tr>
<tr>
<td><strong>I Newspaper</strong></td>
<td>29%</td>
<td>54%</td>
<td>8%</td>
<td>+21%</td>
</tr>
<tr>
<td><strong>Daily Mail</strong></td>
<td>23%</td>
<td>52%</td>
<td>11%</td>
<td>+14%</td>
</tr>
</tbody>
</table>

Source: Subscription Services Matters Community Survey (May-June 2022) Base: 717 Respondents
Cost of living crisis could dampen future demand - a reduction in cost and membership / loyalty schemes are amongst the most likely incentives to encourage consumers to the cinema more

Q – What, if anything, is likely to encourage you to go to your local cinema more frequently?

Source: Subscription Services Matters Community Survey (May-June 2022)
Base: 342 Respondents

Arrows denote significance at 95% confidence rate
“IMPLICATIONS”
Consumers are more conscious of saving money so ensure they are aware of offers and membership reward schemes to continue encouraging people to spend on the cinema.

Showcase offers for all audience types – remember finances of older audiences typically more resilient.

The expense of visiting the cinema might lead to an increase in watching films at home for some audiences. Show how easy it is to rent, buy or watch films at home and how to recreate the cinema experience at home.

Newbrands provide the reach and the impactful creative opportunities required to encourage consumers to watch films.

This doesn’t always have to be done through typical channels, for example 2 in 5 Telegraph readers plan to go more over the next 3 months.
REACHING FILM FANS WITH MAIL METRO MEDIA

Our powerful print and digital portfolio reaches key cinema audiences at scale.

From comedy loving 18-34s, to parents and period drama fans aged 55+, we have publications and creative executions that can deliver scale, engagement and attention.

For more information contact insight@mailmetromedia.co.uk