Now Showing: Millennials’ Movie-Going Experience

Q1, 2016
Background & Objectives
Millennials dominate the movie-going scene

**Frequent Millennial Movie-Goers (2014)**

38% This makes up the largest frequent movie-going age group

**Millennial Movie-Goers & Tickets Sold (2014)**

36% Share of Millennial Movie-Goers

36% Share of Tickets Sold

Source: Theatrical Market Statistics, 2014

Millennials were defined as A18-39

Studios have realized the importance of Millennial movie-goers and have leveraged Millennials’ passions for movies and movie franchises.
This generation is quite invested in the overall movie-going process.

- **70%** Enjoy watching trailers
- **60%** Recommend movies to family/friends
- One in two make their viewing decision after seeing a preview
- One in three enjoy helping to generate buzz about movies
- One in four discover movies through social media

Source: Annalect’s Proprietary Program Discovery Research, 2015
In an effort to explore and gain insight into the movie-going attitudes and behaviors of Millennials, Annalect/Outdoor Media Group partnered with National CineMedia (NCM).

**Research Design**

**Methodology**
OMG/Annalect Primary Research partnered with NCM and CivicScience to collect data using CivicScience’s online polling platform.

**Sample**
Total completed interviews: ~3,400
Among frequent US movie-goers (attends movies more than once a year)
Millennial Sample: ~1,400
Gen Z Sample: ~500
Millenials w/ kids: ~218
Millenials w/o kids: ~672

**Timing**
Fieldwork was conducted in November 2015 – December 2015

**Research Objectives**

**We asked the following questions about Millennials:**

1. What is the significance of going to see movies?
2. How does “Fear of Missing Out” drive them to stay current with movies as a means of keeping up with what their friends will be talking about?
3. What forms of influence impact them when deciding to see a movie?
4. How do they use social media as part of their movie-going experience?

Source: Annalect’s Proprietary Research, 2015-2016; NCM Millennials Movie Going Research, 2015-2016
Detailed Findings

Understanding the significance of movies in Millennials’ lives, what drives them to go to the theater, how are they influenced when deciding which movie to see, and the role that social media plays in the overall movie-going experience.
Overall, movies play an important role in Millennials’ lives, even impacting their world views

**Importance of Movies in Millennials’ Lives**

- **62%** like movies
- **38%** changed a social, political, or environmental view after seeing a movie
- **35%** consider movies a passion/important

*Source: Annalect’s Proprietary Research, 2015-2016; NCM Millennials Movie Going Research, 2015-2016*
Although a third of Millennials are not passionate about movie franchises, the majority have a strong affinity for them…

Millennials’ Passion for Movie Franchises

I am passionate about at least one movie franchise: 32%

I have favorite movie franchises, but I am not passionate: 36%

I am not passionate about movie franchises: 32%

The majority of Millennials who are passionate about franchises are passionate about multiple franchises.

Millennials (32%) are also more passionate than the Total movie-goer (27%) about movie franchises.

Base: Millennial Movie-goers (n=1,482); Total Movie-goers (n=3,484)
Q: Are you passionate about a particular movie franchise, such as The Avengers, or Star Wars?
Source: Annalect’s Proprietary Research, 2015-2016; NCM Millennials Movie Going Research, 2015-2016
…and it’s the franchise, as well as the movie itself, that drives Millennials to the theater, especially during opening weekend.

Motivations for Seeing a Movie in the Theater

- Really wanted to see the film: 42%
- Specifically wanted to see the film in theater: 20%
- Going for a date: 16%
- Going with friends: 11%
- Just really like going to the movies: 9%

During opening weekend…

- Millennials with Kids (48%) compared to Millennials w/ no Kids (40%) are more likely to see movies on opening weekend.

Source: Annalect's Proprietary Research, 2015-2016; NCM Millennials Movie Going Research, 2015-2016
In-theater viewing is about the overall experience for Millennials

Why Millennials Enjoy Seeing a Movie in a Theater

- **40%**
  - To get out of the house on a night out

- **37%**
  - To enjoy the movie on the big screen with a great sound system

- **14%**
  - To escape the real world

- **10%**
  - To connect with friends and discuss the movie after viewing

**Base:** Millennial Movie-goers (n=1,479)

Q: Which of the following best describes why you enjoy seeing a movie in a theater, aside from the film itself?

**Source:** Annalect’s Proprietary Research, 2015-2016; NCM Millennials Movie Going Research, 2015-2016
While many Millennials do not require in-theater perks, upgraded amenities are an added bonus.

**Theater Attributes That Motivate Attendance**

- **20%** are motivated by upgraded formats (e.g., IMAX screens, surround sound, etc.)
- **18%** are motivated by dine-in theaters
- **17%** are motivated by luxury seating in theaters
- **5%** are motivated by reserved seating in theaters

**40%** of Millennials are still driven to the theater without these amenities.

*Base: Millennial Movie-goers (n=1,479)*

Q: Which of the following physical theater attributes most motivates you to go to a theater to see a movie?

*Source: Annalect’s Proprietary Research, 2015-2016; NCM Millennials Movie Going Research, 2015-2016*
In-theater viewing is a part of a larger outing, which satisfies Millennials’ need for instant gratification for content…

Reasons for Seeing a **New** Movie in Theater vs. Waiting to View at Home

- **39%**
  - Don’t want to wait until it’s available at home

- **34%**
  - Go to the movies as part of a larger outing (i.e. shopping, eating out, etc.)

- **17%**
  - Like to see movies that only work well in theater formats

- **6%**
  - Want to be part of the community that supports the genre/franchise

Source: Annalect’s Proprietary Research, 2015-2016; NCM Millennials Movie Going Research, 2015-2016

Gen Z movie-goers (26%) more so than Millennial movie-goers (12%) consider going to the movies as one of the best dating activities.
…which is not necessarily a planned event for Millennials

What is the Furthest in Advance You Have Ever Purchased Movie Tickets?

- **41%** Prior to the Day of the Film
- **28%** Day of the Film*
- **31%** At the Theater**

*Day of the film* is the time up until they get to the theater
**At the Theater** is purchasing the ticket right at the theater

**Millennials w/ no Kids** (23%) are more likely to purchase a ticket a week or more prior to the film than **Millennial w/ Kids** (14%)

Base: Millennial Movie-goers (n=1,482); Millennials with no Kids (n=682), Millennials with Kids (n=232)
Q: What’s the furthest in advance you’ve ever bought tickets to see a movie in a theater?
Source: Annalect’s Proprietary Research, 2015-2016; NCM Millennials Movie Going Research, 2015-2016
Trailers are more influential than online reviews when deciding to see a specific film

**Influential Factors When Deciding to See a Particular Movie**

- **Online Trailers**: 24%
- **Movie Theater Trailers**: 22%
- **Online Reviews**: 16%

**Millennial movie-goers** are more likely than **Total movie-goers** to be influenced by online media:

- Millennial movie-goers Indexing Compared to Total movie-goers
  - Online Trailers: +30%
  - Online Reviews: +16%

**Millennial movie-goers (46%)** are more likely than **Total movie-goers (40%)** to use trailers as the main factor for deciding which film to see.

**Base**: Millennial Movie-goers (n=1,482); Total Movie-goers (n=3,456)

**Q**: Which of the following do you find to have the bigger influence when you’re deciding to see a particular film?

**Source**: Annalect’s Proprietary Research, 2015-2016; NCM Millennials Movie Going Research, 2015-2016
Four-in-ten Millennials even arrive in time to view these trailers, suggesting that movie trailers are very much a part of the overall movie-going experience.

Theater Arrival Times

- **47%** Arrive early to get good seats
- **39%** Arrive during the pre-show/ads, *before* the trailers start
- **14%** Arrive during or after the trailers

86% of Millennials arrive to the theater early
Social media matters in the movie-going experience, especially for recommending and commenting…

How Social Media is Used Throughout the Movie-Going Process

Making a Recommendation About a Movie

53%

use social media to recommend movies

Commenting on a Movie While in Theater

51%

use social media to comment during a movie, in theater

30% of Millennials saw a movie in the last 6 months based on a social media recommendation from:

- Someone famous: 2%
- Both: 7%
- Friends/family: 21%

Source: Annalect’s Proprietary Research, 2015-2016; NCM Millennials Movie Going Research, 2015-2016
Most Influential Social Media Platforms to See a Film in a Theater

- **Facebook**: 22%
- **YouTube**: 18%
- **Twitter**: 4%
- **Other**: 3%
- **Instagram**: 2%

Although Millennials use social media throughout the movie-going process…

- **90%** of Millennials rarely comment on public platforms such as online movie reviews, fan videos, or trailers.

They mainly engage with only friends/family.

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**Millennials w/ no Kids (40%)** are more than four times as likely than **Millennials w/ Kids (9%)** to be influenced by YouTube.

Base: Millennial Movie-goers (n=1,478); Millennials without Kids (n=685); Millennials with Kids (n=216)

Q: From which of the following platforms would a recommendation most likely convince you to see a film in a theater?

Q: How often do you create or comment on online movie reviews, fan videos, or trailers?

Source: Annalect’s Proprietary Research, 2015-2016; NCM Millennials Movie Going Research, 2015-2016
Learnings & Implications

Implications for marketers/advertisers when communicating and engaging with Millennial Movie-Goers.
Overall Learnings & Implications

Movies play an important role in Millennials’ lives

Identify the specific and unique drivers that are going to appeal to Millennials; target them properly and they are yours

Movie content & franchises drive theater attendance; trailers are most influential

Be aware of the power of trailers when engaging Millennials; leverage all platforms for Millennials’ access

Movie-going is an experience that extends beyond the theater

Leverage the unique appeals of in-theater viewing and provide Millennials with opportunities for them to get there early

Social media plays an integral role in the movie-going experience

Facebook & YouTube rule Millennials’ social world; leverage their love affair with both sites and understand their use-case for each
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Appendix I

Detailed learnings and implications.
MOVIES PLAY AN IMPORTANT ROLE IN MILLENNIALS’ LIVES

Millennials on the whole have a strong affinity for movies, so it is not surprising that Millennials are big fans of movie franchises, more so than the Total movie-goer. Additionally, over a third of Millennials state that movies they’ve seen have even impacted their socio-economic views.

Understanding Millennials’ perceptions and behaviors surrounding movies and franchises is important when developing communication efforts towards this cohort. These communication efforts can be more appropriately tailored to Millennials by incorporating this overall understanding. Additionally, use Millennials to help generate buzz around new movies, knowing the important role that movies play in their lives.
The movie content itself should be front and center when targeting towards Millennials. Millennials are well known for their ability to find and sift through content, but trailers are particularly important for them. By developing trailers that resonate and engage with Millennials, as well as making them widely available (particularly online) will help Millennials make their decision. Further, recognize that both in-theater and online are effective communication arenas for marketing about new movie releases.

Content is king when driving Millennials to see films in the theater. The actual movie and the franchise(s) are the two most compelling reasons for Millennials to go see a movie in the theater, especially during opening weekend. Additionally, movie trailers – both online and in theater – are now a part of the movie-going experience, and these trailers influence which movies they decide to see; so much so that 40% of Millennials arrive to the theater in time to watch the trailers.
It is important to understand that while Millennials have a host of media content to choose from, movies will always have a place in their social lives. Since the movie-going experience is not one that can be fully replicated at home, there is opportunity to leverage the unique appeals of theater viewing. Meeting Millennials’ desires for a larger “night out”, and providing them with the right tools to plan their theater trip ahead of time will continue to draw them to the theater seats.
Social media creates opportunities for engaging with Millennials, and can further maximize audience reach. Having movie content that is easily accessible on Facebook and YouTube is a must, as these sites provide for an easy way to make/receive movie recommendations. Facebook and YouTube can be used hand-in-hand in a rather simple way: use YouTube as the go-to source for Millennials to view movie trailers, clips, sizzle reels, etc., and use Facebook as a platform for Millennials to share these videos, check out recommendations, get information about and discover specific movies, etc.

Social media is used throughout the movie-going experience, and is mainly used for making and receiving recommendations, specifically for/from family and friends. Facebook and YouTube are the most popular platforms for Millennials when seeking out a movie recommendation. Interestingly, Millennials tend not to participate in wider online communities, such as reviews sites, fan videos, or even trailers.
Appendix II

Detailed research approach.
Research Approach

OMG/Annalect, and NCM joined with CivicScience to conduct this research through CivicScience’s platform. This platform was designed to answer the business objectives through a series of customized questions to meet our objectives of gaining insight into the Millennial movie-goer.

**Civic Science Platform**

- **Dynamic Question Library**
- **Publisher Audience Network**

**Question Types**

1. **Engagement**
   - **Role**: entice the respondent to interact
   - **Example**: Is Amy Winehouse a musical legend?

2. **Value**
   - **Role**: collect consumer data relative to a specific research objective
   - **Example**: How important is it to you to buy American-made products?

3. **Profile**
   - **Role**: build up consumer profile data
   - **Example**: What best describes your marital status?