

Screenvision Value of Cinema

FINAL REPORT

August 2024



Methodology and Objectives

Objectives:

This study aims to craft a fresh and influential narrative that underscores the distinct advantages of cinema as an advertising medium.

To do so, we will highlight the unique value, impact, and immersive experience of cinema advertising, and enable Screenvision to create a compelling narrative, further enriched by synergistic findings from a concurrent study with Snapchat.

Areas of Exploration:

- The Role and Power of Premium Content
- Value of the Passion and Fandom
- Experience Deep Dive
- Buzz and Community Factor
- Brand Impact

Methodology:

20-minute online survey among 1,600 people in the United States, representative of general internet populations':

- Age
- Gender
- Race / ethnicity

Audience Criteria:

- Age 13-49
- Equal mix of males and females
- Sensitive industry exclusions
- The sample will be balanced to be demographically representative of moviegoing audiences.



SECTION 1

Why Movie-Going Is Still Essential in Today's World

Moviegoing is a uniquely powerful and immersive communal phenomenon that is still a crucial part of the cultural zeitgeist.

Movie-going is a an emotionally powerful passion that creates lasting and meaningful memories

For over 100 years the theater has stood as a cultural symbol of entertainment, with consumers saving the best movies for the Big Screen.



93%

'I pick movies to see in the theater that are **meaningful** or **interesting** to me'
(92% among Gen Z)



89%

'I have **great memories** that involve going to see a movie in the theater'
(94% among 13-17)



84%

'Watching movies in a theatre is an **emotionally powerful** experience'

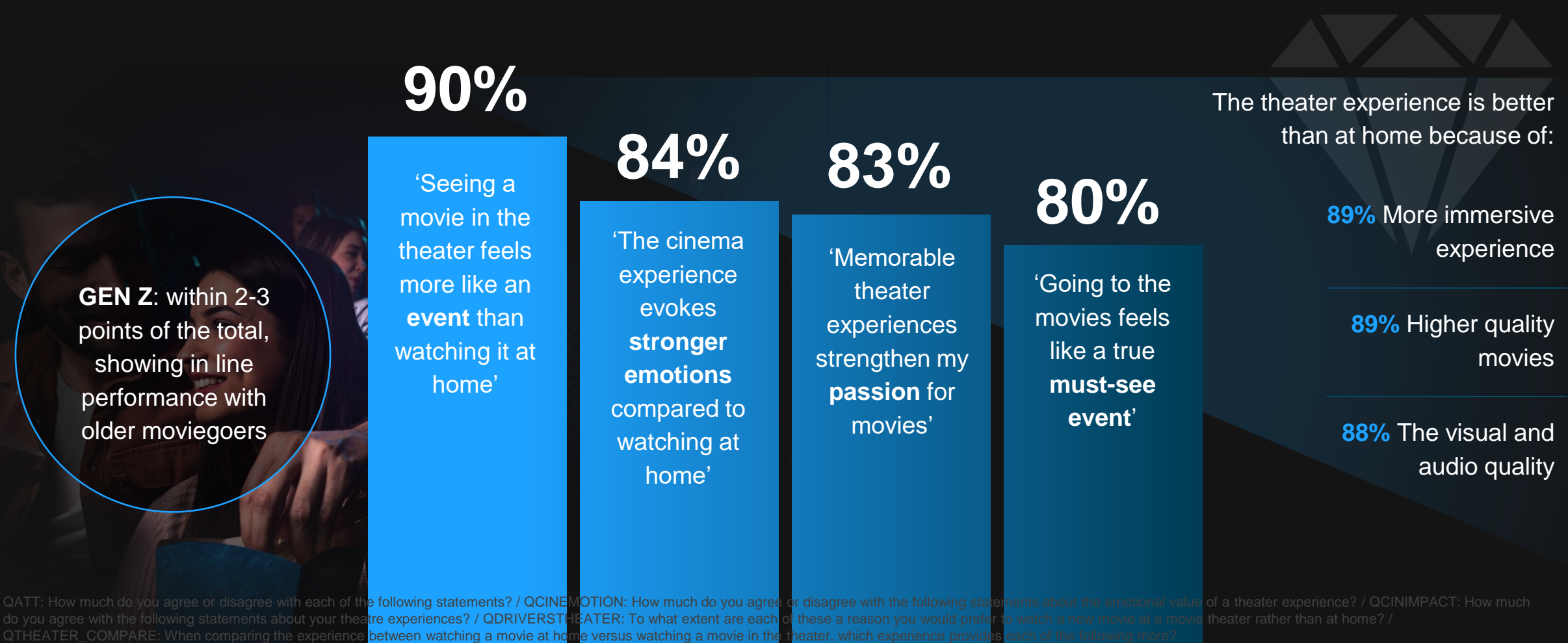


80%

'Going to the movies is a **cherished tradition** for me'
(86% among 13-17)

When it comes to movies, watching at home just doesn't compare to the theatre experience

Going to the movies involves an event that further fuels consumer's passion for the movies they love.



Moviegoing offers an immersive and captivating experience that takes viewers on a journey

This means that consumers are **LOCKED-IN** when they go to the movies, and more receptive to the stories and information they come across.

89%

UNIQUE IMMERSION
'Watching movies in a theater provides a sense of **escape** and **immersion**'

86%

DEEPER ATTENTION
'I pay **more attention** to movies when I'm in the theater'

82%

CHERISHED DISTRACTION
'The world is filled with so much stress and negativity, movies are my **escape**'

81%

FEWER DISTRACTIONS
'So I can disconnect from the outside world for a couple of hours'

QATT: How much do you agree or disagree with each of the following statements?

QDRIVERSTHEATER: To what extent are each of these a reason you would prefer to watch a new movie at a movie theater rather than at home?

QCINEMOTION: How much do you agree or disagree with the following statements about the emotional value of a theater experience?

Going to the movies helps consumers strengthen bonds with friends, family, and the broader movie fandom

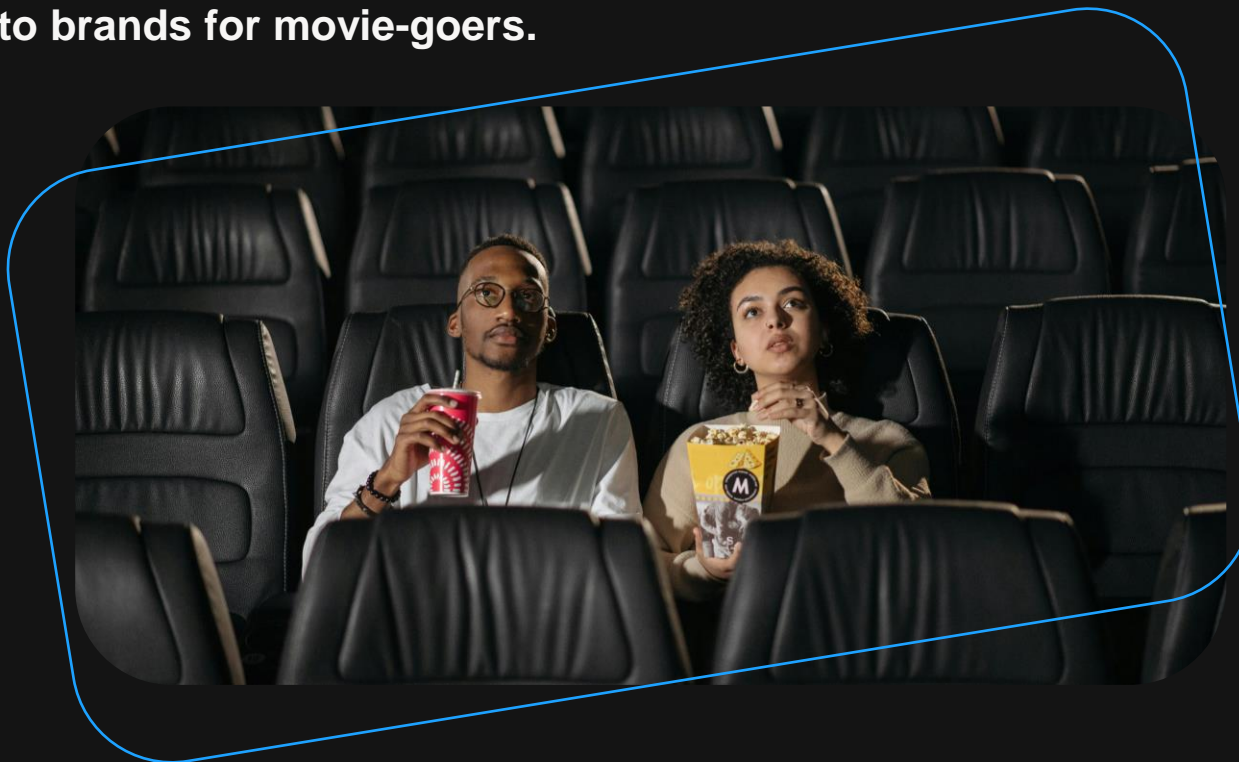
From Gen Z to Gen X, connection sits at the heart of movie-going, so brands and products that fuel this connection will become go-to brands for movie-goers.

90%

'Watching movies in a theatre is a great way to spend quality time with friends and family'

83%

'I enjoy seeing movies in the theater because of the energy of the shared experience with other fans'
(88% for 13-17)



78%

'I feel more connected to friends, family and other fans after seeing a movie in the theater'

62%

'Interacting with strangers around a shared passion can be profound and fun'

Blockbuster movies help viewers connect with the cultural zeitgeist, weaving them into the fabric of society

Across generations, immersing in movie buzz is one way that consumers deepen connections to society and take part in the cultural conversation.

GEN Z: within 2-3 points of the total, showing in line performance with older moviegoers

79%

'Watching movies in a theatre is a good way to be part of social trends and conversations'

75%

'I feel more connected to current cultural conversations after seeing a movie in the theater'

62%

'It is important that I keep up with the most buzzworthy blockbuster movies'

FOMO

Nearly 6-in-10

say 'if I miss out on seeing a movie in the theater, I feel like I've missed out on something'



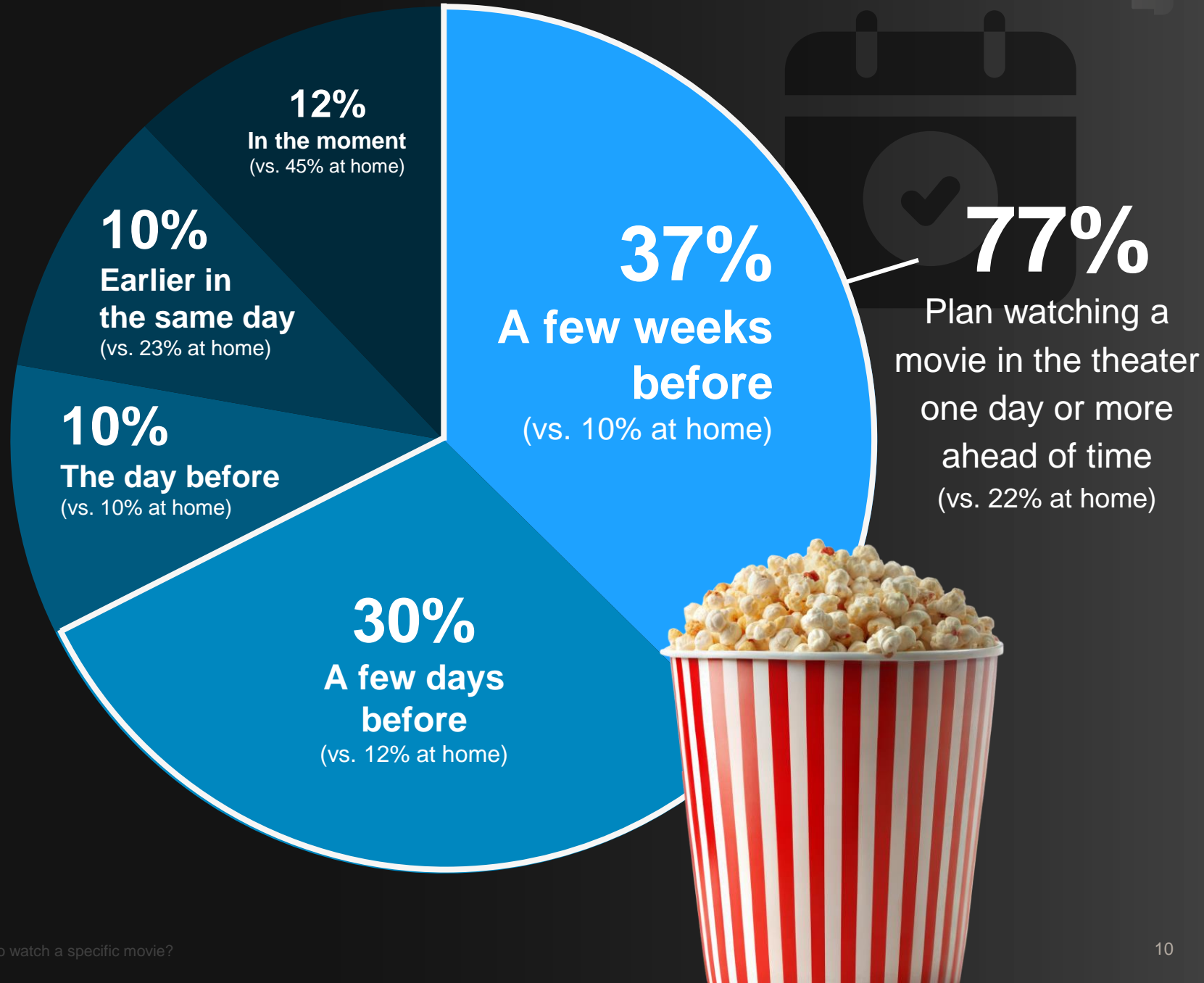
SECTION 2

Cinematic Journey: **Discovery and Planning**

The cinematic experience starts well before butts hit the seats, it begins in online and in-person conversations, getting amped up by discussing, reading reviews, watching trailers, sharing thoughts, and connecting.

When it comes to movie-going, consumers plan ahead, creating plenty of time to get HYPED

Compared to watching at home, the theatre experience is something consumers plan for and eventize. This leads to more passion, anticipation, and engagement surrounding the activity.



Getting pumped to see a movie is always more fun with friends

Forming connection while building excitement for the movie leads to a richer and more memorable experience that consumers are likely to internalize and remember.

76%

.....
'Discussing movies with others helps me feel emotionally connected to them'



In Person Connection:

80% 'Talk and share about the movie with my friends or family leading up to seeing it'



Planning the day:

78% 'Make it an event and plan the day or an evening around the movie'



Connect Online:

59% 'Message friends on social media to build excitement for the movie' (64% among Gen Z)

Staying knowledgeable about movie releases is a crucial part of being a movie fan

No matter the age, staying in the know builds excitement, forms connection, and helps consumers feel in the mix on pop culture conversations.

73%

'Keeping up with the latest movies in the movie theater makes me feel **in-the-know**'
(81% for 13-17)

73%

'I love to keep track of upcoming movie releases'

73%

'I plan out the movies I want to see in theaters far in advance'

71%

'I follow the news and what's trending about my favorite movies'

Engaging online allows consumers to deepen their love for movies immerse in the social zeitgeist

Social media helps connect people with and amplify their passions.

IMMERSE THEMSELVES ONLINE

Watch the movie trailer 88%

Read reviews about the movie before I go 70%

Engage with movie-related content on social media 64%

Follow or check a film's social media account 52%

AMPLIFY THEIR PASSION AND INFLUENCE

64%

Share the movie trailer with others

55%

Post about the movie I'm going to see on social media



Social media engagement fuels all aspects of the movie-going experience and bridges the physical and digital worlds



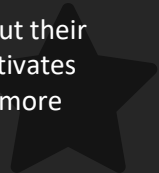
Inspiration

75%

'Recommendations from friends on social media encourage me to go to the theater'

70%

'Seeing others' posts about their theater experiences motivates me to visit the theater more often'



Movie Selection

72%

'Reading reviews and reactions on social media influences my choice of movies to watch in theaters'



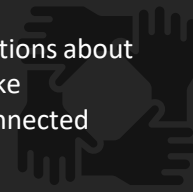
Community-Building

68%

'Social media conversations make me feel like I'm part of a bigger and more connected fan community'
(71% for Gen Z)

65%

'Social media interactions about movies make me feel more connected to others'



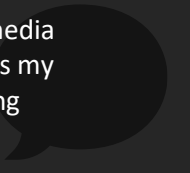
Anticipation

65%

'Discussing movies on social media makes me more excited to see them in theaters'

63%

'Engaging in social media discussions enhances my overall moviegoing experience'



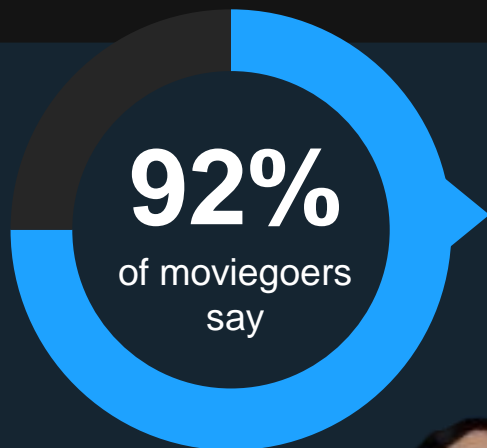


SECTION 3

Cinematic Journey: Moviegoing Experience

At the movie theater, audiences are attentive, engaged, immersed, locked-in. Thus, they take in and retain more information, both about the movie and ads that precede it.

Ultimately, movie-going is most memorable and fun as a co-viewing experience



they typically go to the movies with **at least one other person** (vs. only 65% for home movie viewing)



Movies are the perfect way to create ritualized connection with those special people in your life:

72%

'Have a regular movie date planned with a friend(s) or loved one(s)'



Consumers are also **1.5x more likely** to make theatre-going a larger group activity (going with 2+ people) compared to watching at home.

Consumers' pre-movie connections deepen as they take their seats

Across age groups, being immersed in a dark room with no distractions brings friends and strangers together for a powerful community experience.

79%

'The communal aspect of a theater adds to the emotional impact of the movie'

76%

'The connection I have with others that I've watched the movie with is strong'

89%

of moviegoers agree that movies are a great way to **connect** with friends and loved ones

7-in-10

'I feel a sense of community, even to those I don't know in the theatre'

QEXPERIENCEFEEL: Thinking about the times you have watched a movie in the movie theater, how well do each of the following statements describe your experience?

QTHEATER_COMPARE: When comparing the experience between watching a movie at home versus watching a movie in the theater, which experience provides each of the following more?

QCINEMOTION: Some people say that going to the theater has an emotional value to them. How much do you agree or disagree with the following statements about the emotional value of a theater experience?

When at the movies, consumers are an immersed and CAPTIVE audience

Phones are off, talking is to a minimum. Viewers are zoned-in to what is on screen, a perfect recipe for brands to reach consumers in a powerful and effective way.

88% 'I'm fully immersed in the experience'

88% 'I remember the details about the experience of seeing a movie in the theater - who I went with, how I felt, etc.'

81% 'Pay more attention to trailers and other ads when I'm in the theater'



QEXPERIENCEFEEL: Thinking about the times you have watched a movie in the movie theater, how well do each of the following statements describe your experience?

QATT: How much do you agree or disagree with each of the following statements?

Consumers' attention is focused the minute their butts hit the seats during preshow

Because preshow content is seen as part of movie-going, consumers across age categories are more engaged during this period, receptive to the information they see come on screen.

Preshow content is:



87% entertaining



85% informative



77% relevant to me

96% watch 'all the content before the movie starts, including the preshow, a mix of content, ads, and entertainment'

87% say they're focused on the screen as I wait for the movie (referring to ads in the preshow)

87% say they like to disconnect and be entertained once I take my seat

76% of moviegoers say the ads in theaters are more memorable than ads on TV

QADVIEW: When you arrive at the movie theater, do you watch all the content before the movie starts, including the preshow, a mix of content, ads, and entertainment?

QADVIEWWHY: How much to you agree with the following statements about the preshow before the movie starts?

QADCOMP: For each of the following descriptors, please select whether you think they apply more to advertisements that you see in theaters, or to advertisements that you see on TV

Consumers don't just enjoy the preshow, they ACT on information they see there from brands

Brands that engage during the moviegoer experience and fuel movie-going passion, become beloved and top-of-mind once consumers leave the theatre.

75%



of moviegoers say they are open to discovering new brands through theater advertisements.

62%



of moviegoers say they are more likely to purchase from brands they see advertised in theaters.

How Consumers see brands that take part in their movie passion:

71%
Intriguing

71%
Relevant

70%
Attractive

62%
Trustworthy



SECTION 4

Cinematic Journey: Impressions that Last

The experience is not just a one-time event. It lives in their hearts and minds, and on their social media walls. Moviegoers take what they saw and look for more, investigate brands of interest, discuss the movies with their communities, build memories that last.

After the movie, the journey resumes on social media to memorialize the experience

The social experience bookends the movie-going journey. What started on social with building anticipation and buzz ends on social with memories and reflection.



MOST IMPORTANT TO DO ON SOCIAL AFTER THE MOVIE...

77%

'Watching movies or TV shows related content'

73%

Sharing show or movie recommendations from my close friends and family

65%

'Checking out the social buzz related to the movie'

60%

'Posting my thoughts on shows or movies I have just watched'

59%

'Posting messages, photos, or videos related to a movie I watched in the theater'

GEN Z: within 2-3 points of the total, showing in line performance with older moviegoers

Back home, consumers recall and investigate brands that they came across during the movie

This means that brands must make it easy to understand where to go to learn more, and offer compelling information at those destinations to help convert interest to purchase.

HOW SOCIAL IS USED TO ENGAGE WITH BRANDS, PRODUCTS AND SERVICES...



75%

'Learn about new brands, products, and services from theater advertisements' (81% for Teens)

67%

'I seek out more information about a product or service that was advertised during the preshow' (72% for Teens)

62%

of moviegoers are more likely to purchase from brands that they see advertised in theaters

62%

of moviegoers use social media to follow or engage with brands related to TV or movies they love after seeing a movie in theaters.



SPOTLIGHT

GEN Z Moviegoing : **Conversing and Connecting**

Compared to the short-form content they're used to, theaters provide Gen Z with the opportunity for deeper emotional connection. While online discussions increase their excitement, moviegoing shifts their focus, creating lasting bonds with stories. These connections then drive meaningful conversations on social media, making moviegoing central to their cultural engagement.

In a world of temporary entertainment, moviegoing offers a lasting experience

Gen Z live in a world where content comes and goes as fast as they can scroll, but the theatre is different—it's more meaningful and drives longer term engagement

Moviegoing creates lasting bonds...

85% feel **more connected** to the story when watching in theaters

83% experience a **stronger emotional connection** to movies in theaters

75% feel **more engaged** in **cultural conversations** after seeing a movie in theaters



...that carry over onto social media, to enable deeper shared experiences

76% 'movies in theaters give me **something to talk** about on social media' (compared to just **24%** for TV)

68% 'social media interactions about movies make me **feel more connected** to others'

QSOCIALIMPACT: How much do you agree with the following statements about does engaging in social media?

QCINEMOTION: Some people say that going to the theater has an emotional value to them. How much do you agree or disagree with the following statements about the emotional value of a theater experience?

QTHEATER_COMPARE: When comparing the experience between watching a movie at home versus watching a movie in the theater, which experience provides each of the following more?