

**UK'S
RETURNING
AUDIENCES**

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

DATA OVERVIEW

GLOBAL SCALE

45.3 M

Global Active Moviegoers*

57

Countries

10 yrs

Historical Data

UK MOVIEGOERS

7.4 M

UK Active Moviegoers*

9

Exhibitors

THIS STUDY

3.4 M

2019 Active & Full Profile
Moviegoers

~950 K

Returning Moviegoers

DATA SET

Direct POS

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

Members

Loyalty, subscription, online ticketing
accounts

Full profile: age, gender,

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

SCOPE OF ANALYSIS

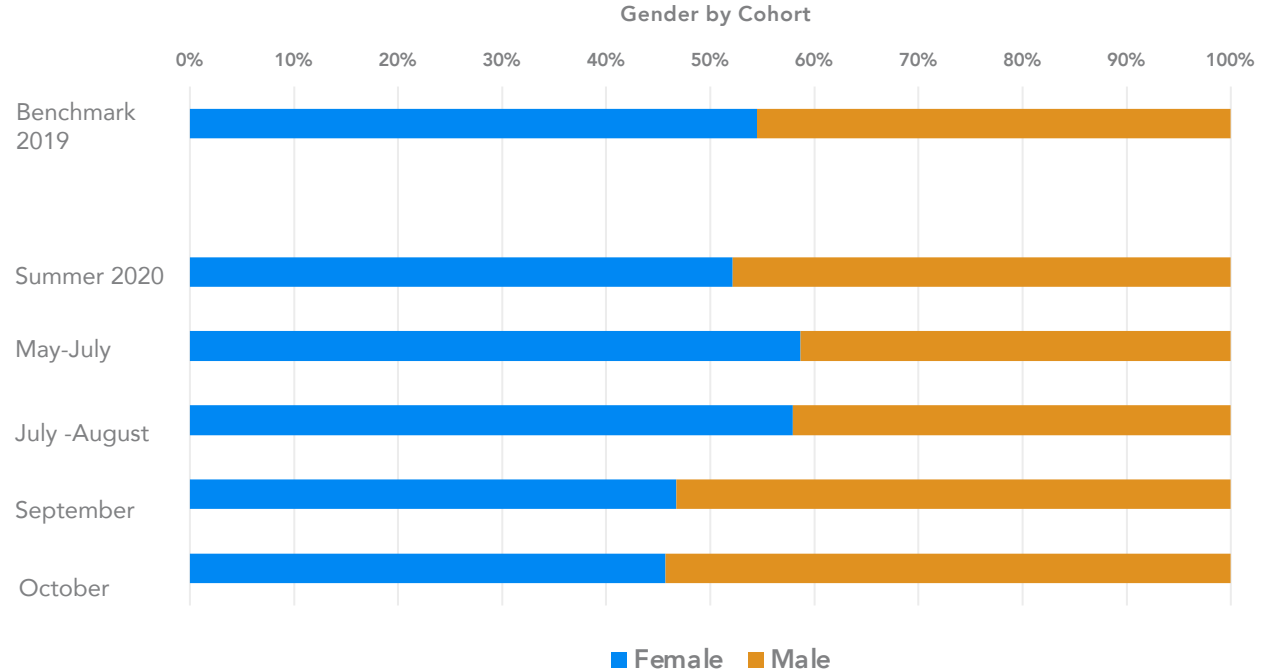
SUMMER 2020	MAY - JUL	JUL - AUG	SEPTEMBER	OCTOBER
20%	40%	23%	9%	8%
Returning Moviegoers	Returning Moviegoers	Returning Moviegoers	Returning Moviegoers	Returning Moviegoers
1st Visit	1st Visit	1st Visit	1st Visit	1st Visit
July – October 2020	May 17 – July 18, 2021 <ul style="list-style-type: none">•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

WHAT HAVE WE LEARNED?

- Age and gender returning to pre-pandemic share of audience
- Pairs and groups of tickets are being purchased at a greater rate post-pandemic
- Pre-pandemic frequency was an indicator of speed to return following lockdown.
- Diversity and breadth of content has been a critical factor in attracting audiences back for their first visit
- Younger audiences are over-indexing as new moviegoers to the database

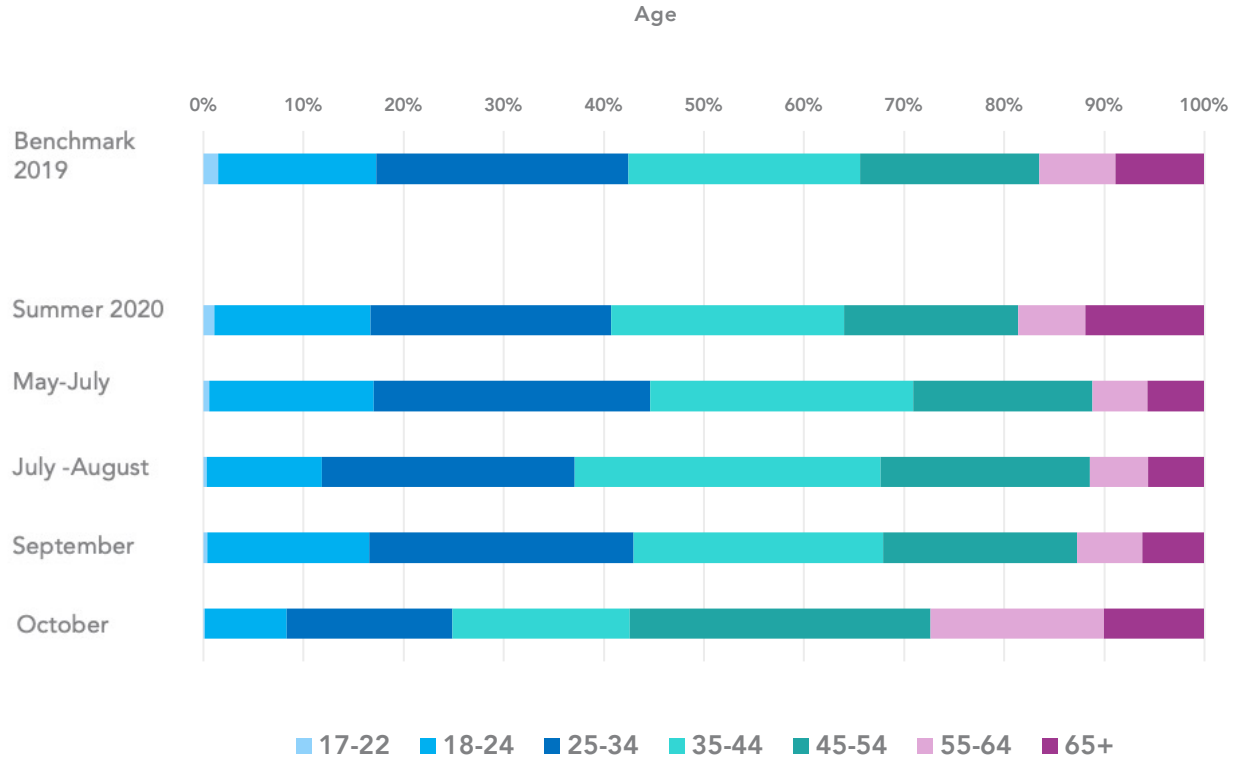
DEMOGRAPHIC ANALYSIS [GENDER]

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



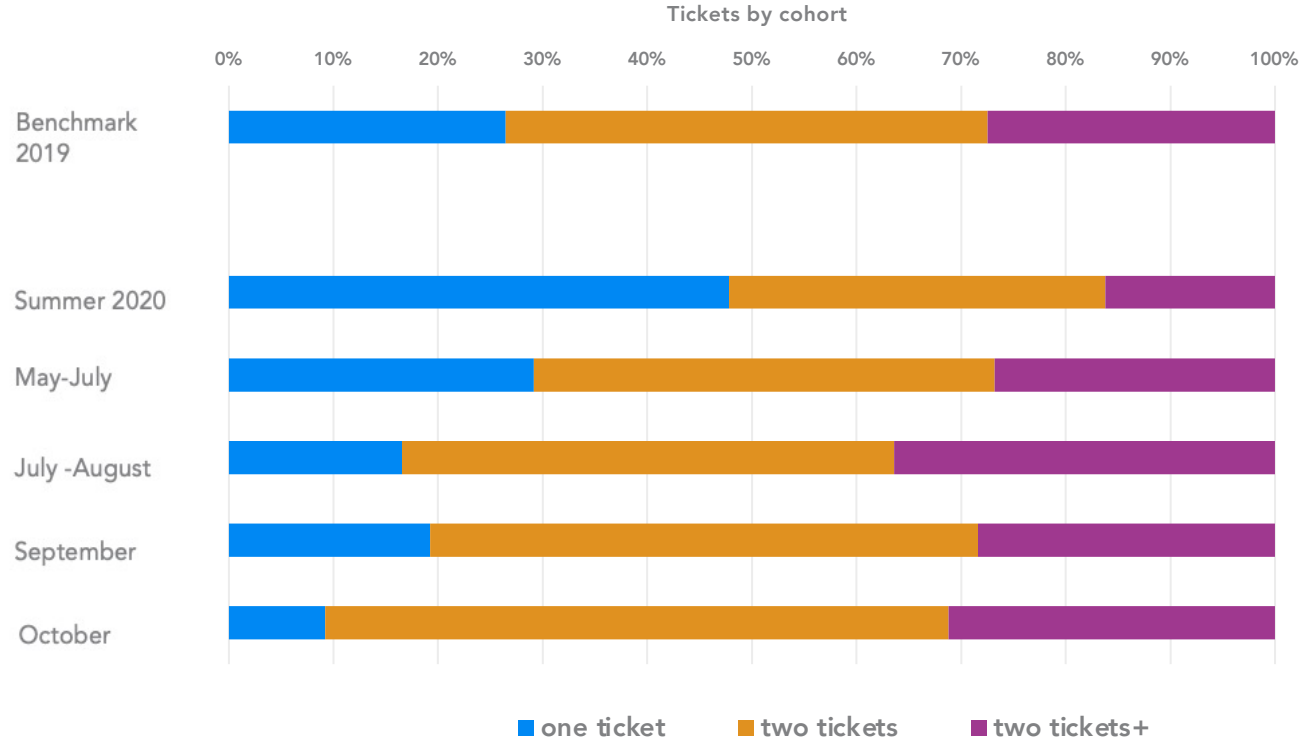
DEMOGRAPHIC ANALYSIS [AGE] :

- Older audiences over indexed in their return to cinema after lockdown 1
- Early returners post lockdown 2, skewed younger
- *No Time to Die* is successfully attracting older audiences back again



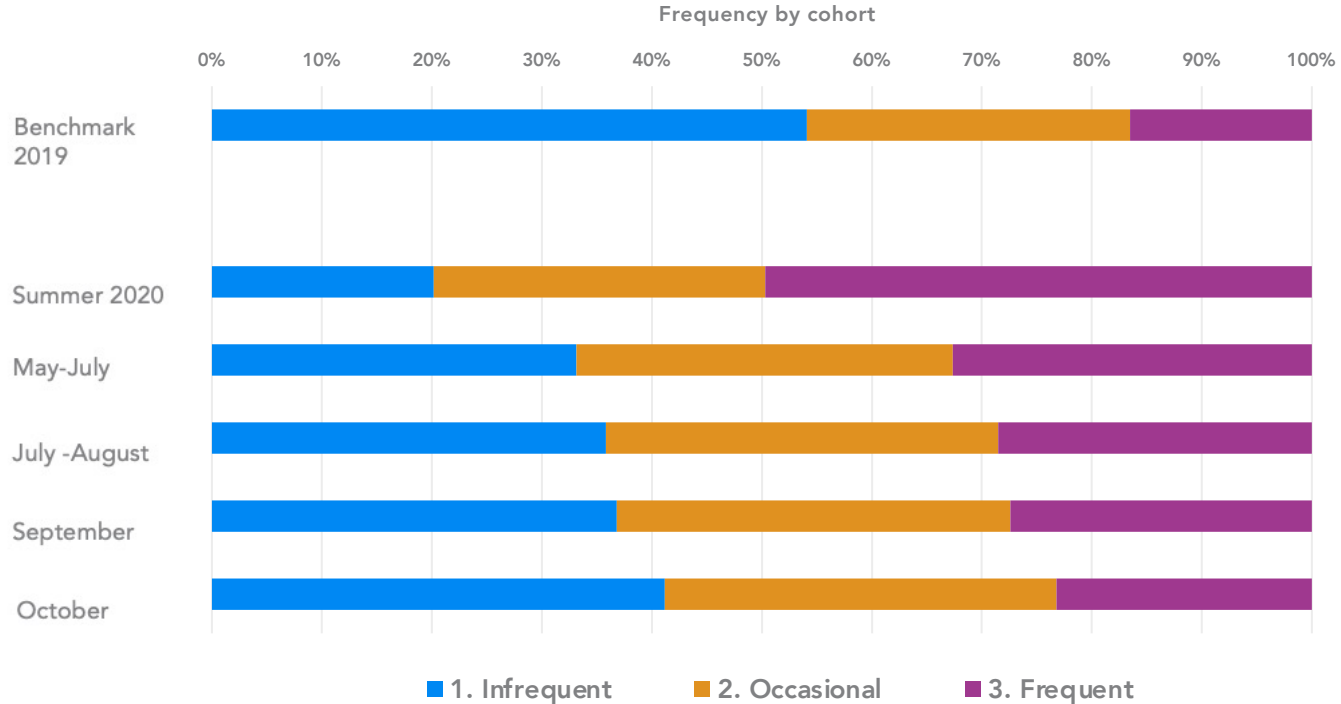
BEHAVIOURAL ANALYSIS [ADMISSIONS]

- Ticket purchasing habits have changed
- Single ticket purchases increased for the first returners, likely tied to social distancing requirements
- In 2021, pairs and groups are driving ticket sales at a far greater proportion than in 2019



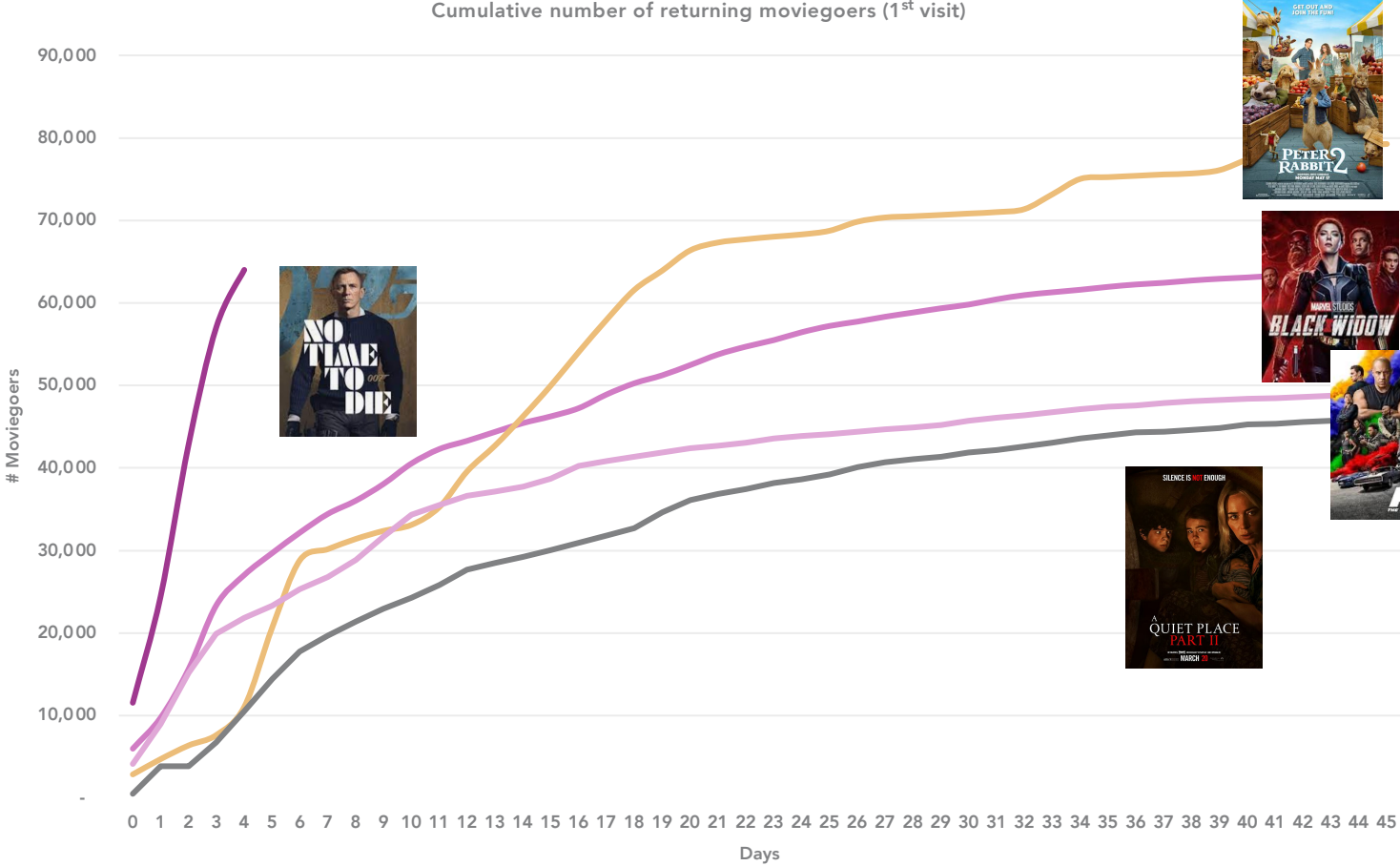
BEHAVIOURAL ANALYSIS [FREQUENCY] :

- The frequent and very frequent have been the first to return
- As time progresses, the occasional and infrequent moviegoers are starting to return



RETURNING AUDIENCE BY MOVIES

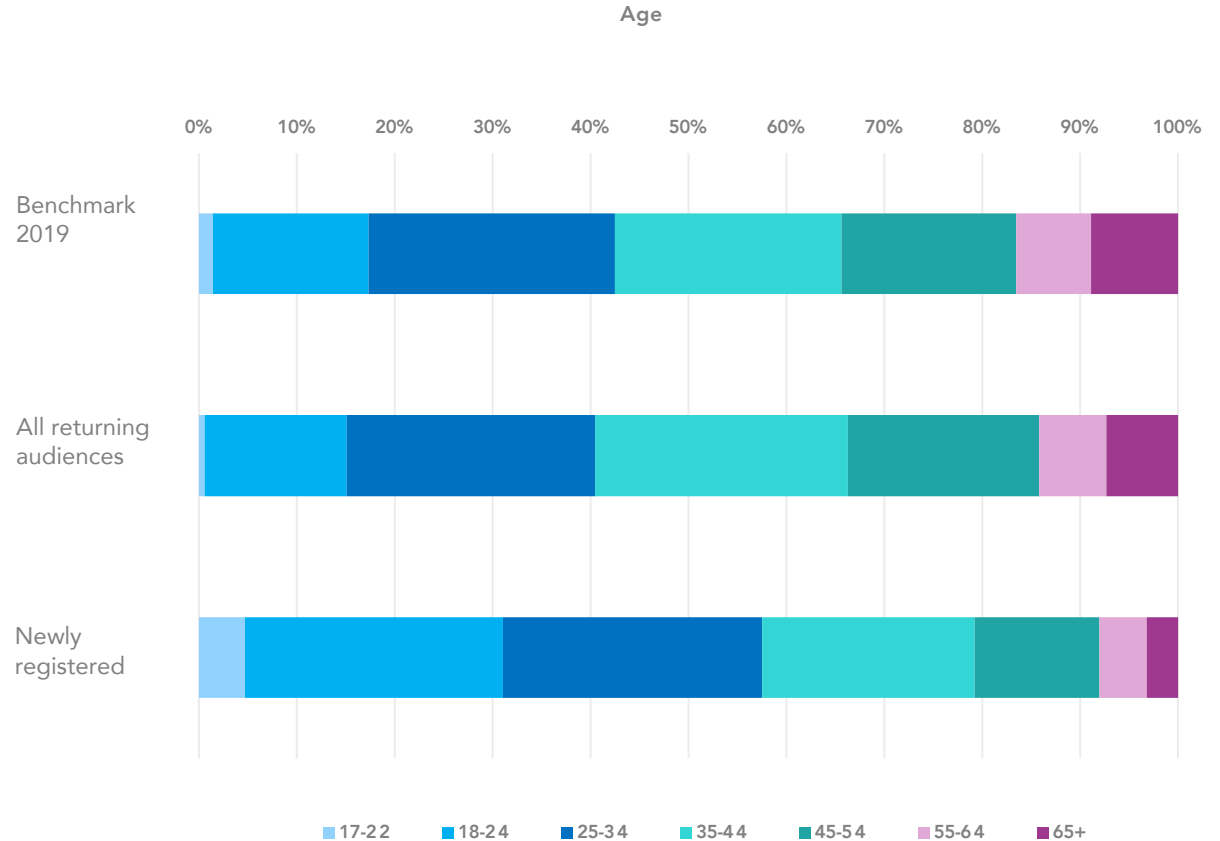
- Top 5 films = 40% returners
- Other ~90 films = 60% returners
- *No Time to Die* on a trajectory to be the most successful movie in the UK to attract people back to the cinemas



WHAT DO THE NEW AUDIENCES LOOK LIKE?

NEW MOVIEGOERS [AGE]

- Newly registered moviegoers are much younger in age
- 32% being under 24 years
- 57% being under 34 years



THE OPPORTUNITY

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

MOVIO