

SPARK

**THE
CINEMA
SOCIETY.**

WHY CINEMA IS THE PERFECT VOLUNTARY BENEFIT FOR EMPLOYERS WHO CARE ABOUT THEIR PEOPLE

The Cinema Society Annual Survey 2024

INTRODUCTION

Cinema has long been an iconic part of the UK leisure scene. We all remember our first trip to the cinema. The anticipation, the smell of popcorn and new carpets, the neon, the darkness of the auditorium, the trailers (of course the trailers) and then, finally, the logos and the move from dark to light on the huge screen.

A trip to the cinema is a social experience. It's also one of the few remaining forms of entertainment where you're forced to remove yourself from the pressures of daily life, you can't look at your phone, you can't check your messages, it's just you, your family and friends and the movie.

Cinema is good for the soul. There are reams of research that tells us that a trip to the cinema can help with a feeling of mental wellbeing, believe it or not it's also good for the heart (yep, really!) For more about cinema and wellbeing get in touch...we've lots to share.

THE SURVEYS

We first surveyed our members in August 2020 to see what they were missing about the cinema. We returned to them in March 2021 to see what the reopening of cinemas meant to them, a survey focussed on perceptions and feelings of wellbeing.

We then followed up with further research in April 2024 to find out how they are consuming cinema today, the impact of discounts and how they feel about the organisations that enable those discounts.



SPARK operates **The Cinema Society**, the largest cinema benefit club in the UK and Ireland, with over **1 million members**. We offer discounted tickets, food, and memberships for all major chains and lots of independent cinemas too.

Each year we ask a representative portion of our **Cinema Society members** about their cinema going habits, how discounts impact their actions and how they perceive employers offering cinema tickets as benefits and rewards.

We normally keep this information to ourselves to help us to refine our offering and ensure that we're working effectively for our clients and members. This year we've decided to make the information available to anyone who wants to read it.

We surveyed over 3,000 individuals from diverse demographics, all of whom had joined our Cinema Society club within the past four years. Among the respondents were those who had activated a cinema discount and those who had registered but had not yet activated their discount. We're grateful to the thousands of people that shared their thoughts. We hope you find it as interesting as we do and would invite you to contact us to delve deeper into the information and what it means.

SETTING THE SCENE

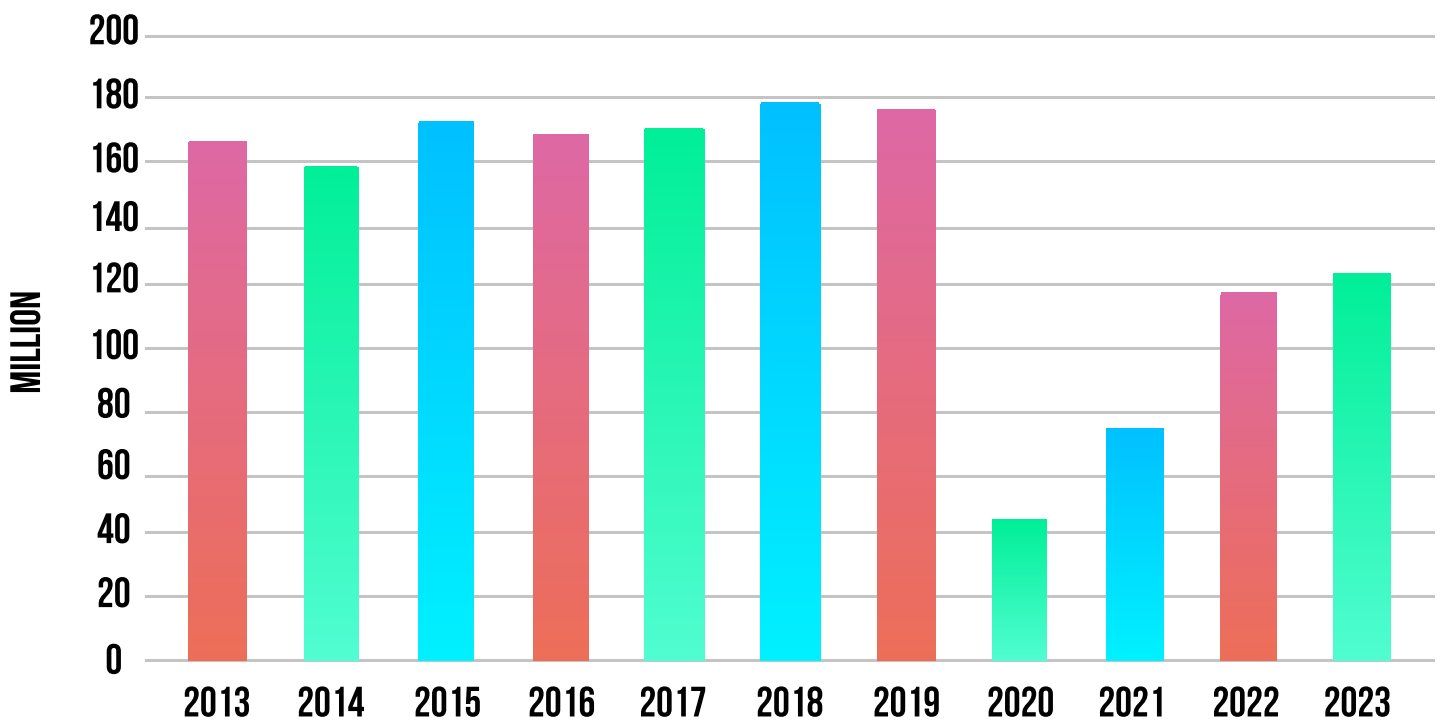
The cinema industry has faced a highly publicized and challenging recovery from the COVID pandemic. Media outlets often consider cinema audiences as a barometer for the overall performance of the leisure industry. Additionally, factors like the Hollywood strikes and the cost of living crisis have further slowed the sector's recovery.

But recovering it is. Content has been sporadic with popular titles such as Mission Impossible, Barbie and Oppenheimer interspersed with periods of lower-profile

releases (a nod back to the impact of the writers and actors strikes of 2023). There have been casualties. Empire Cinemas closed their doors for the final time (for their cinemas to be quickly picked up by Omniplex, Everyman and Curzon), some independents disappeared but there have also been high-profile openings from Picturehouse and others.

To illustrate the point, let's look at the number of admissions at cinemas in the last 10 years:

Cinema Admissions



Source: UK Cinema Association

Admissions were up 5.3 per cent on 2022 at 123,618,878 and figures from Comscore confirmed that 2023 saw another step in the recovery of the UK cinema sector, with an increase in box office of over 8 per cent on the previous year.

At the same time box office for UK and Ireland broke the £1 billion barrier for the first time since the pandemic.

Why cinema is the perfect voluntary benefit for employers who care about their people

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A TRIP TO THE CINEMA MEANS DIFFERENT THINGS TO DIFFERENT PEOPLE, BUT IT ALWAYS MEANS “SOMETHING” TO EVERYONE.



**DAVE PEARSON,
CEO, SPARK**

The world of cinema has had an interesting last 12 months. One minute the naysayers are predicting its end and the next the Barbenheimer phenomenon hits screens and records tumble.

Long-term confidence is high. Tim Richards (founder and CEO of Vue Cinemas) warned that 2024 was going to be a “very, very, tough year” with some really good titles (but not enough of them) and it’s possible, even likely that the 2024 admissions might not reach the 2023 number. That said, there is still great content to come this year, including these titles:

JULY



AUGUST



SEPTEMBER



OCTOBER



NOVEMBER



DECEMBER



Exciting stuff, and things look even better in 2025...

We’re looking forward to some incredible releases including guaranteed hit sequels and franchises including: **Captain America: Brave New World, Mission Impossible: Dead Reckoning, How to Train your Dragon, Jurassic World 4, The Fantastic Four and Avatar** (amongst many others)

Look out too for the unexpected return of some old favourites including **Downton Abbey 3** and **Bridget Jones: Mad About the Boy, Star Trek, Blade** and even **Freaky Friday**.

But what of cinema as an Employee benefit? What impact does it have on people’s perceptions of their employer? How does it affect their mental health? and how does it make them feel about an employer offering them the opportunity to visit the cinema for less?

THE SURVEYS

Our initial survey took place in August 2020 as we were keen to understand what our members missed most about the cinema experience. In March 2021, we reached out again to explore how the reopening of cinemas influenced their perceptions and overall sense of well-being.

How much have you missed the cinema?

AUGUST 2020



MARCH 2021

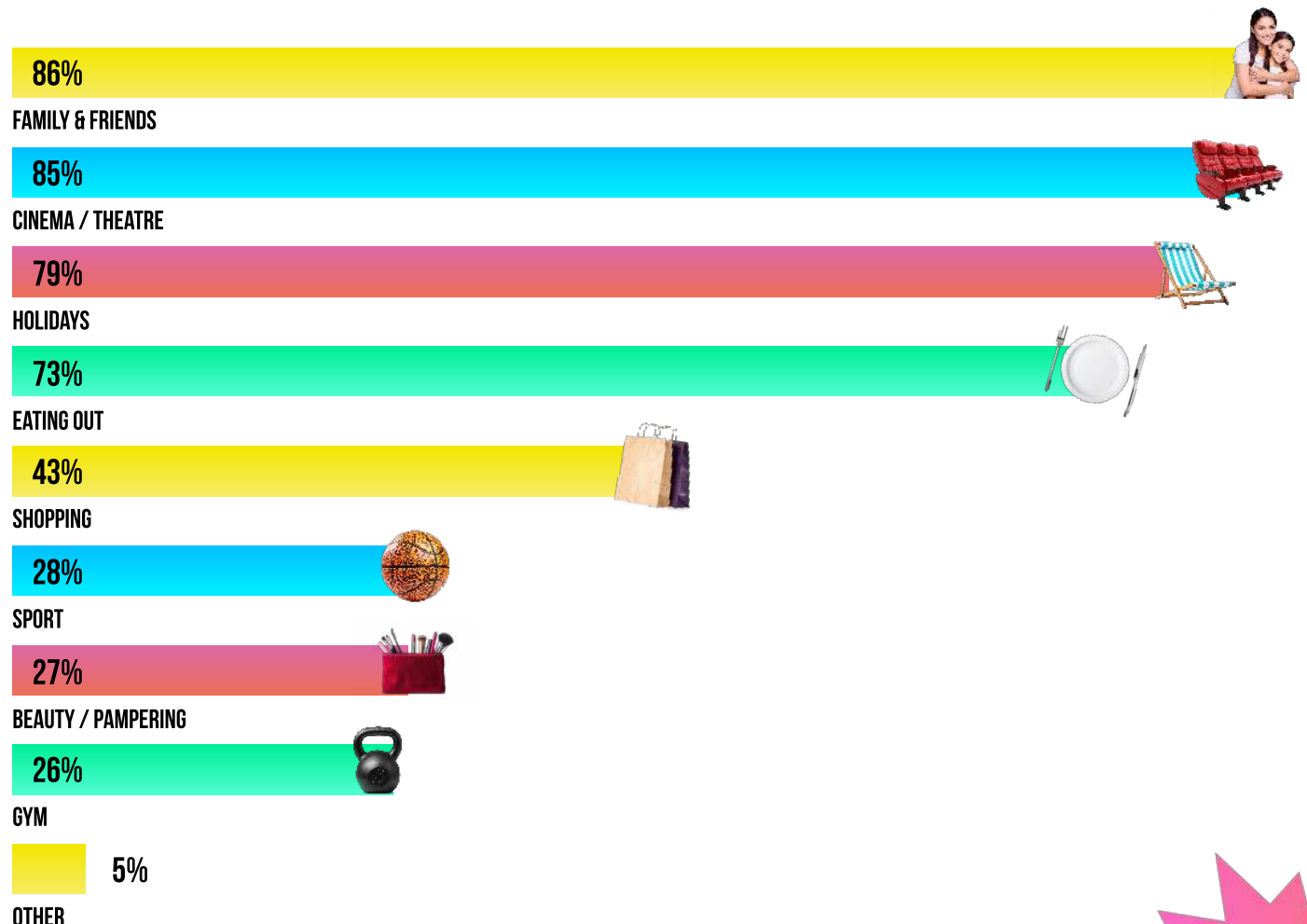


A GREAT DEAL **A LITTLE** **NOT AT ALL**

*Sample size 10,000 – with 1,000 respondents

It was also interesting to find that of all of the **activities that people missed during the pandemic**, a trip to the cinema (85%) or theatre was second only to seeing their family and friends:

What have you missed most during the pandemic lockdown?

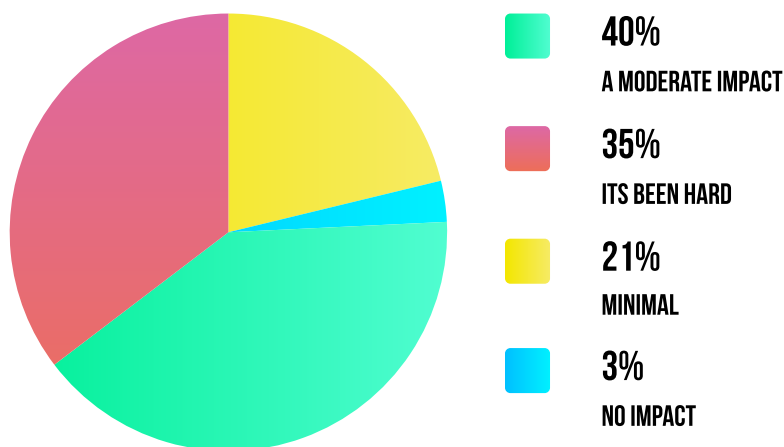


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CINEMA AND MENTAL HEALTH

We also asked our members what impact missing those activities had on their mental wellbeing. 75% told us that it had a “moderate” impact or that it had been “really hard”



According to cinema advertising experts DCM (**Digital Cinema Media, Cinema Update 2022**) 71% of cinemagoers see a trip to the cinema as a way to treat themselves and 70% say that going to the cinema **“allows them to switch off from everyday life”** reinforcing the idea that cinema can boost feelings of wellbeing.



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CINEMA DISCOUNT CLUBS, THEIR ROLE AND IMPACT...

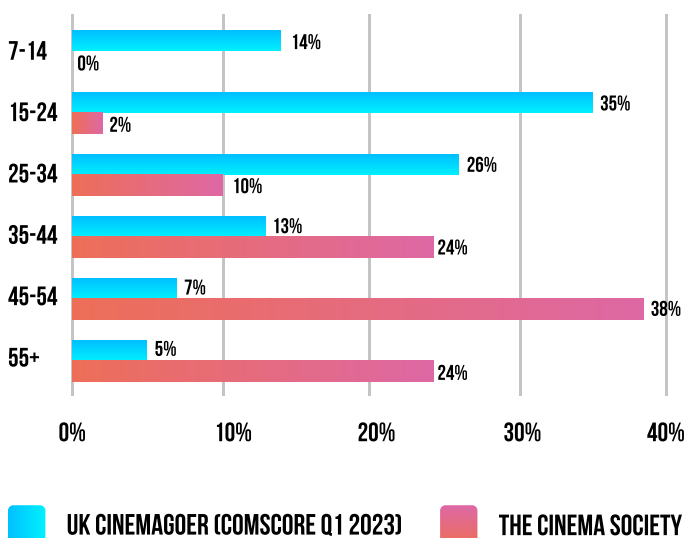
Where The Cinema Society sits alongside other benefits, our clients will often tell us it's "in the top 5" most popular benefits. There are lots of reasons for that. A trip to the cinema is an event in itself and a memorable one at that. We all remember seeing a really great movie when we were young, we all remember the feeling when the lights go down and the curtains open.

We also know that a cinema ticket has a "value" and it's more than an amount of money. A trip to the cinema means different things to different people but it always means "something" to everyone. SPARK help employers and brands to harness that and we hope to illustrate some of the reasons why that's true.

THE AUDIENCE — THOSE WHO ENGAGE WITH CINEMA DISCOUNT CLUBS

According to Pearl & Dean, the UK cinema audience is broadly split 51:49 Female:Male

When it comes to the age of cinema club members against the cinemagoing population as a whole there are some big differences. The Cinema Society audience is older, much older than the normal cinemagoing profile.



62% of The Cinema Society's membership is **over the age of 45** (compared with just 12% of the overall cinemagoing market in Q1 2023).

86% of The Cinema Society's membership is over the age of 35 compared with just 25% of the general cinemagoing public.

Indeed, studies have shown that it's this, older demographic who have failed to return to the cinema in large numbers since the pandemic suggesting that cinema clubs in general could have a role to play in re-engaging with this audience.

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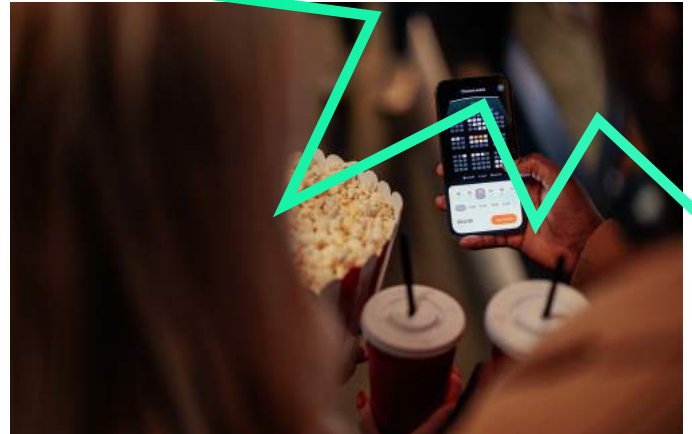
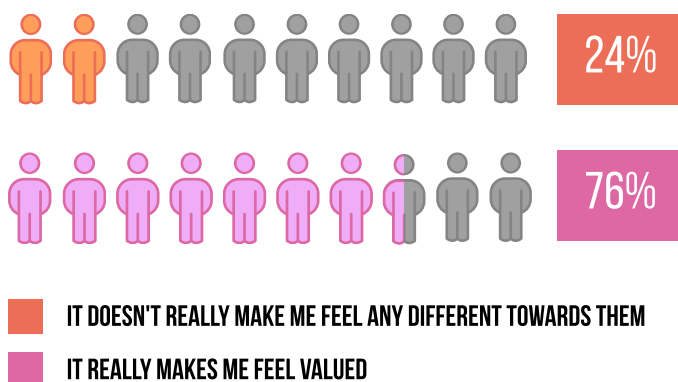
THE IMPACT OF DISCOUNTING ON CINEMA VISITATION

SPARK are against discounting en masse, but, used sparingly and delivered as a true benefit for closed user groups, discounting desirable experiences can be hugely impactful. That's where The Cinema Society was born.

We're passionate about keeping membership strictly for employees or customers of our clients and our ticket sales make up less than 2% of all admissions to the cinema in the UK and Ireland. That means that the offer and proposition remain special for the member without damaging the perceived value of a trip to the cinema.

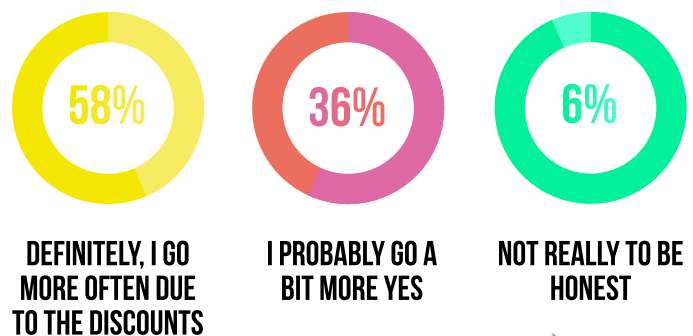
The scarcity of discounts makes the benefit valuable.

How do discounts on cinema tickets make you feel about the employer that's offering them to you?



Over three-quarters of people when surveyed told us that being given the opportunity to save money on their cinema tickets really makes them feel valued, illustrating how a relatively low investment in making the offer available can really change an individual's feelings towards a their employer, what's more, the discounts help people visit the cinema more often, promoting a sense of wellbeing and life-balance.

Do the discounts you enjoy as being a part of The Cinema Society make any difference to how often you visit the cinema?



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THE IMPACT OF DISCOUNTING ON CINEMA VISITATION

It seems that discounts on cinema tickets significantly increase people's likelihood of going to the cinema.

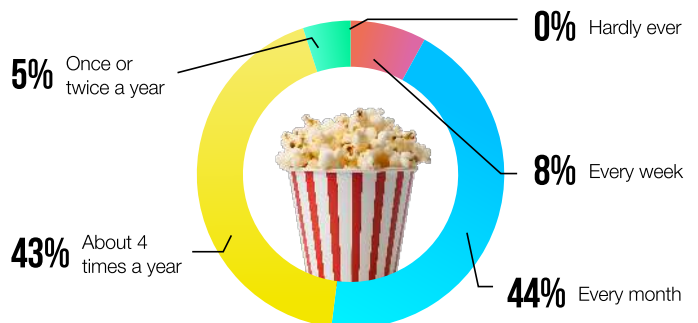
The total number of **cinema visits in 2023 was 123.6m**, suggesting that the average person in the UK **visits the cinema 1.82 times per year**, a significant reduction since before the pandemic.

However, **members of The Cinema Society** significantly outperform those statistics, with **52% visiting as regularly as every month** (some weekly!), and when collating the numbers who visit weekly, monthly & quarterly, we see a **huge 95% visiting the cinema at least 4 times a year**.

WHILE THE AVERAGE PERSON VISITS THE CINEMA 1.8 TIMES ANNUALLY, THOSE WITH CINEMA DISCOUNTS GO AT LEAST 4 TIMES YEARLY!



How often do you go to the cinema?



What's also important to note is the relationship between our members life-stage and their cinema visits.

As our members are typically older they are more likely to have families and research suggests that those with families are more likely to visit the cinema than those without.



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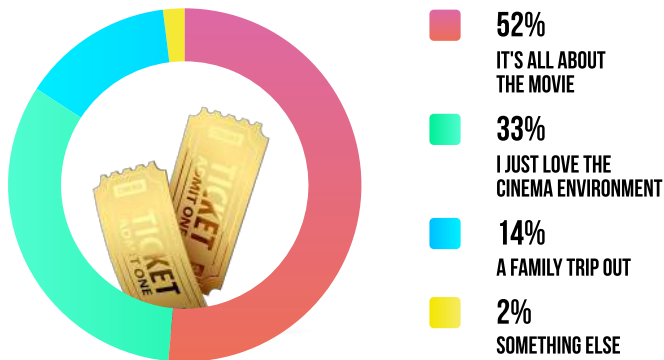
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THE VALUE CINEMAGOERS PLACE ON DIFFERENT ASPECTS OF A CINEMA TRIP

The anticipation, the popcorn, finding your seat, the ads, the trailers and...the film.

A trip to the cinema is filled with excitement and in recent years cinema companies have sought to differentiate from each other with ever more impressive offerings from the advent of 3D to IMAX to seats that actually involve you in the film. But what do cinemagoers truly value amongst all this choice? The reality suggests that what they are looking for is something a little more “standard”.

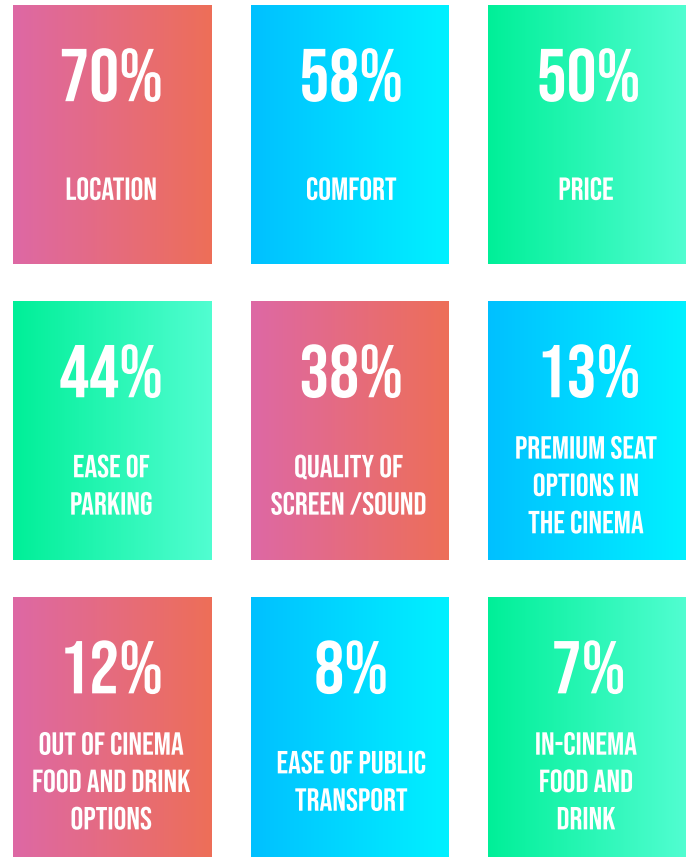
Generally, what’s the main reason you visit the cinema?



Unsurprisingly the main reason for a trip to the cinema is the fact that there’s a film on release that people want to see. Encouragingly though for a third of people, the most important factor is simply a love of the cinema environment – that excitement of a trip to the cinema still exists!

We went on to ask our members about the main factors that drive their decision to visit a particular cinema.

Tell us the TOP 3 factors that make you choose the cinema you normally visit:



So, unsurprisingly the location of the cinema is the most important factor (i.e. how close it is) but what the feedback also suggests is that it’s the basics of the quality of the cinema offering that has the biggest impact on the choice of where to visit (locations, comfort, price, parking and screen/sound are way out ahead of the more “premium” factors of seat options and food and drink.



HOME MOVIE STREAMING... THE END OF THE CINEMA?

“I LOVE NETFLIX, BUT FK NETFLIX. THERE’S NOTHING LIKE SITTING IN A CINEMA.”**

DAME HELEN MIRREN, CINEMAICON 2019

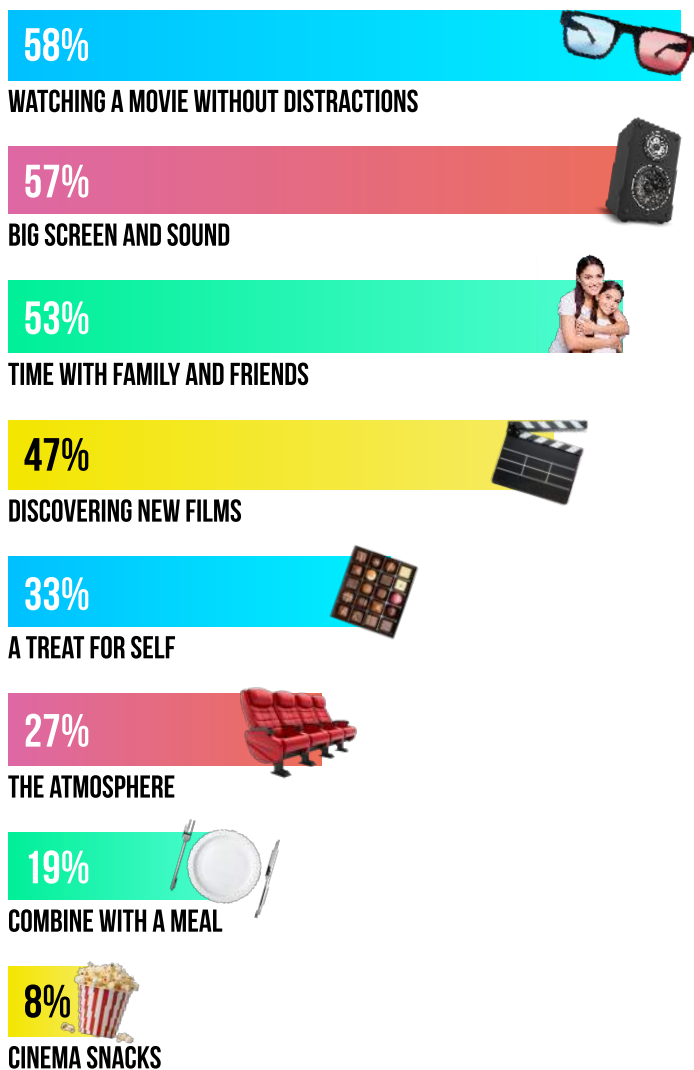
Many things have been predicted to “kill” cinema. Television, wars, pandemics, video, DVD and currently streaming will be cinemas' great nemesis in the eyes of many. But is that the case? Or does a trip to the cinema offer something different from what’s on offer from the streamers? Are the people who are streaming movies the same people who visit their local cinema to watch on the big screen? And is it in the film studio’s interest to allow cinema to



HOME MOVIE STREAMING... THE END OF THE CINEMA?

WHAT MAKES A TRIP TO THE CINEMA GREAT?

When we asked our members what they love about a trip to the cinema, their responses suggested that a trip to the cinema still has something over watching movies at home...



So, of the things that people love about the cinema, interestingly the top-ranked are things that you really cannot enjoy when streaming at home.

The mobile phone has put paid to being able to watch a film at home without distractions and while home cinema systems are possible, they are still very expensive and cannot possibly compare with the size and scale of the big screen in cinema.

We also asked the audience what the worst things about a trip to the cinema are with the cost being the number one worst thing (we'll tell you the rest but you'll need to get in touch!)



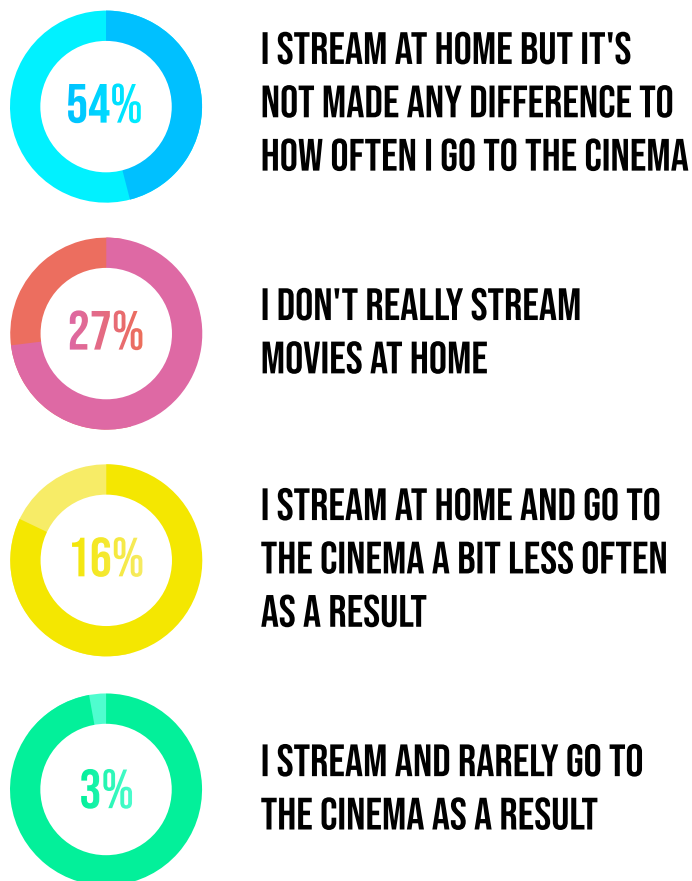
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HOME MOVIE STREAMING... THE END OF THE CINEMA?

We went on to ask the audience what impact home movie streaming had on their behaviour, and on the whole, the reaction suggested that there is very much room for both.

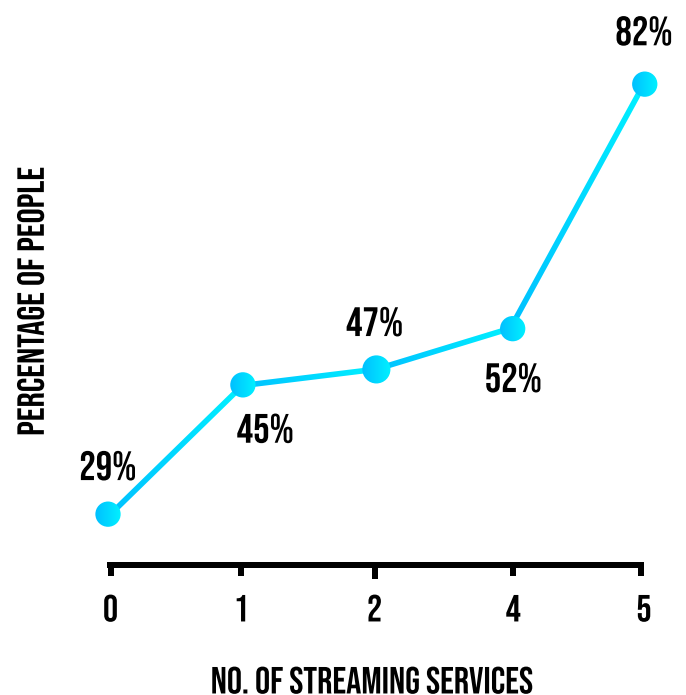
Think about streaming movies at home, which of the following statements is most appropriate to you?



Overall, their responses suggested that home streaming is complimentary to the cinema experience with only 19% suggesting that the ability to stream movies at home had

made any difference at all to how often they visit the cinema. The 27% who told us that they don't stream movies at home at all surprised us a little!

Indeed, the **FAME research in 2019 (Q1)**, published by DCM suggests that those people that do stream movies at home have a higher propensity to go to the cinema the more they stream:



So generally, the more streaming services you have subscribed to, the more often you go to the cinema. **Streaming strengthens cinema – it doesn't weaken it.**

SUMMARY

At SPARK we love the cinema and we're delighted that so many of the people that we work with, supply, and partner feel the same.

There's no doubt it's been a challenging time for the industry but even with the number of blockbusters limited by strikes, cinema retains its iconic place at the centre of the entertainment industry.

Newly built leisure facilities seek out cinema partners to "anchor" their offering. Cinemas still have the power to attract restaurant tenants, shops and stores and, most importantly the paying public.

Through The Cinema Society, SPARK harnesses the lasting power of cinema for employers. Bring the glamour of Hollywood to your employees. Get in touch to find out how.



Get in touch to add cinema discounts to your workplace benefits.

Mike Croston, Business Development Director
07795 630 764

David Pearson, CEO
07850 211 958

hello@wearespark.com

sparkcinema.co.uk

All figures unless otherwise stated are from The Cinema Society 2024 Annual Survey

Survey dated: 4th April 2024

Profiles: Cinema Society Active member – Sample size 35, 549, Cinema Society Registered member – sample size 52,712

Total respondents: 3,164

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