INTO FILM
REGAINING YOUNG AUDIENCES
RESEARCH

PREPARED FOR

BY

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CONTENTS

INTRODUCTION

Young audiences are a key demographic for cinemas. 15- to 24-year-olds make up a larger proportion of cinema audiences than any other age group – in 2017 they made up 28% of admissions in the UK, despite being only 12% of the population. Between 2011 and 2017, UK cinema admissions were close to static (a 0.6% decline) whereas admissions from 15- to 24-year-olds fell by 20.6%[1].

As adolescence is such a key period for habit formation[2], understanding the attitudes and perceptions of young people is key to securing them as future audiences for cinema.

This report examines the attitudes and habits of 1000 11- to 15-year-olds towards cinema and competing activities. This is the age bracket directly preceding the documented decline, during which young people are just beginning to make independent decisions and form habits. Connecting with this group provides a key growth opportunity.

We investigate these young people's decision-making process for leisure time activities and attitudes to the cinema experience itself. We then explore the areas cinema has an advantage over competitor activities and pull out key insights for reaching the least-frequent cinema-goers in this age group.

A note from Into Film

Into Film is a charitable organisation with a mission to put film at the heart of children's and young people's lives and learning. Our work engages over a million 5-19 year-olds annually and has reached over half of UK schools over the last five years. We deliver creative learning resources and teacher training to establish film's place in the classroom and support an extensive network of extracurricular film clubs. We also run an in-cinema programme that offers the opportunity to watch a range of films on the big screen, including our annual flagship event, the Into Film Festival: the world's largest free film festival for children and young people.

All these activities drive our central goal to foster the largest possible, curious, informed, passionate and diverse young audience for film and cinema. We work closely with industry partners to achieve this and are uniquely positioned to offer the sector insights into the motivators and barriers that affect existing and potential young audiences.

After commissioning a literature review into existing young audience research we identified an insights gap around the behaviours and attitudes of 11-15 year olds, a key segment on the cusp of becoming regular independent cinemagoers (or not!). This research addresses that gap; it will inform Into Film's audience development strategy and its work with key partners to nurture the young audience of today and the audience of tomorrow. We hope it will be of interest and value to colleagues across the industry.

[1] There has been a reduction in the population of this age group, however the reduction in their cinema admissions is bigger. The reduction in population of 15- to 24-year-olds was 4% over the same period. Admissions were calculated by multiplying the percentage admissions of 15- to 24-year-olds by the total admissions that year, for which both figures are reported by the BFI Statistical Yearbook.

[2] Engagement in the arts as a child is a key determinant of engagement as an adult (CASE. 2010. Understanding the drivers, impact and value of engagement in culture and sport). Furthermore, in qualitative interviews with avid cinema goers, it was found that childhood cinema attendance was a key part of their cinema habit formation (UK Film Council. 2007. A Qualitative Study of Avid Cinema-goers.)

EXECUTIVE SUMMARY

Leisure activities of 11- to 15-year-olds

- 69% of young people went to the cinema at least once in the last month.
- 95% of young people watched a film at home at least once in the last month.
- Frequency of cinema-going is affected by: region, gender, social grade, availability of cinema, spending money, and frequency of film viewing at home.

Drivers of leisure activity

- The most important factor for young people when deciding what to do with their free time is how much fun the activity is. Other top considerations are being able to do it with friends, getting permission from parents, and the cost of doing it.
- Those who don't receive pocket money or are from lower social grades are more likely to be concerned about the cost of activities.
- Young people are most influenced by their friends' opinions, though also perceive themselves as making their own decisions. Beyond this, where they acknowledge others' influence, this is by-and-large their parents/guardians. This is especially true for the least frequent cinema-goers.

Attitudes to the cinema

- When asked which facility in their local area they would be most upset to lose, cinema came top along with sports facilities. Cinema was more valued than facilities for more frequently performed activities, such as shopping centres.
- There was no difference between genders in selection of cinema as a most valued facility, suggesting the difference in levels of attendance between genders isn't due to attitudes towards the cinema experience.
- Older people in this age group were more likely to value cinema than the younger people, despite no difference in levels of attendance.

Deciding to go the cinema

- The top factor driving cinema trips is wanting to see a specific film as soon as possible. The next highest ranked drivers are whether young people's friends and family are spurring on trips.
- For the frequent cinema-goers, just wanting to go to the cinema because they like it is enough of a motivation.
- For others, wanting to see a film in a cinema because it particularly suits the big screen experience is another strong driver.
- Recommendations are more important than 'buzz' for these young people – friends talking about the film and good reviews are more important than seeing lots of people talking about the film on social media.

Barriers to cinema attendance

- The barriers to cinema attendance range widely across these young people, with no single barrier emerging strongest. Barriers fall into the following four categories:
- Logistical barriers: young people want to go, but it's a lot of time/effort. These barriers were highly ranked, especially a lack of time, and weren't specific to any particular group.
- Social barriers: lack of people to go with. This is another very high block for young people, despite ranking cinema as a popular activity to do with friends. It seems that cinema is popular at a particular frequency range for some, and thus friends not wanting to go beyond this frequency is a block to going more often for others.
- Film selection: females and older people in this age group especially felt that the cinemas not showing films they want to see is a barrier to going more often. For the frequent cinema-goers, friends/family having different film tastes is a strong barrier to going more often. Connecting frequent cinema-goers for group trips may tackle this barrier.
- Cinema experience: among the least frequent cinema goers, barriers related to the cinema experience were strongest. Having better things to do was top for this group, closely followed by not wanting to go too often as that makes it less special. Thus, the least frequent cinema-goers are a mix of those who don't enjoy the cinema much, and those who enjoy it but are choosing not to go very often.

Changes to the cinema experience

- In terms of practical changes to cinemas, most young people would only really change how close it was to where they live and the range of films. Despite lots of focus on optimising apps and websites for young people, this is the aspect of cinemas they are most content with.
- For wider changes to the cinema experience, young people ranked financial incentives top. However, offers alone aren't what motivate young people to go to the cinema, as these incentives were about making the experience larger. Along the same lines, places to hang out before/after the screening is popular.
- Film related incentives such as personalised recommendations for films, talks about the film before/after the screening, film merchandise etc. mainly appeal to the already frequent cinema-goers.

Cinema vs competitor activities

- Cinema ranks very highly compared to competing activities on fun, sociability, and popularity with friends, and lower on being relaxing and easy to organise. Of all these factors, fun is the most important for these young people.
- The advantage cinema has over competing activities is being seen as sociable by facilitating group activities for young people. This is one of the most important considerations young people have when choosing what to do with their time.

Predictors of cinema attendance

- Using a predictive model across all attitudes and demographic groups revealed in this study, it emerges that the strongest predictors of cinema attendance are either related to money or availability of cinema.

- Attitudinal differences towards leisure time or the cinema are not strong predictors of cinema attendance.
- The strongest positive predictors are receiving pocket money or having a part-time job. Related to this, being from social groups ABC1 is one of the top predictors.
- Other top predictors are having a cinema nearby or living in a city.
- The strongest negative predictor is associating cinema with the word ‘expensive’. This remains true across social grades, which suggests it’s not just about affordability but perceived value, i.e. those who did not associate the word ‘expensive’ have different primary associations with cinema, not simply more spending money.

The potential cinema-goers

- Potential cinema-goers are those with a cinema very nearby, but who haven’t been at all in the past month. They are much more price-sensitive when choosing free-time activities and are much more likely to have a primary association with cinema as “expensive”.
- Potential cinema-goers care more about whether friends want to do activities and they are most influenced by friends’ opinions. Correspondingly, friends wanting to go to the cinema is the top non-film-driven reason they go. Therefore, targeting potential cinema-goers should focus on group experiences.
- Among the potential cinema-goers that like and value the cinema, the top barrier for not going more often is not wanting to make it less special. This group is perceiving cinema as an activity to only be done occasionally, and changing this perception is important in increasing their cinema attendance.

Recommendations

- Targeting young people needs to focus on supporting group cinema-going and enabling young people to make the experience larger than just the screening. Sociability is the key selling point of cinema for young people.
- Cinema is valued, but it’s also considered an infrequent activity. A big block for the least frequent cinema-goers is not wanting to go more often as that makes it less special. There is a choice here to either change this habit by facilitating more frequent visits, or to work with this by allowing young people to make the occasion even more special.
- For the already frequent cinema-goers, friends/family having different film tastes is a strong block to going more often. Facilitating group outings for these cinema-goers held back by the film tastes of their friends is an opportunity to increase attendance, perhaps through film clubs.
- Spending money and socio-economic factors are very strong predictors of cinema attendance, and the potential cinema-goers especially have less spending money and are from lower socio-economic backgrounds. Adjusting ticket prices is therefore likely to particularly affect the potential cinema-goers.
- The strongest negative predictor of cinema attendance is the association with cinema as ‘expensive’. This is true across socio-economic groups, and thus changing perceptions of the value of the cinema experience should be able to impact this association. The key priority areas around which to change perceptions are how relaxing the cinema experience is, and how easy to organise the activity is. Relaxation is ranked highly as a free-time decision criterion, but among the potential cinema-goers the cinema is especially viewed as difficult to organise.

FINDINGS IN DETAIL

Leisure activities of 11- to 15-year-olds

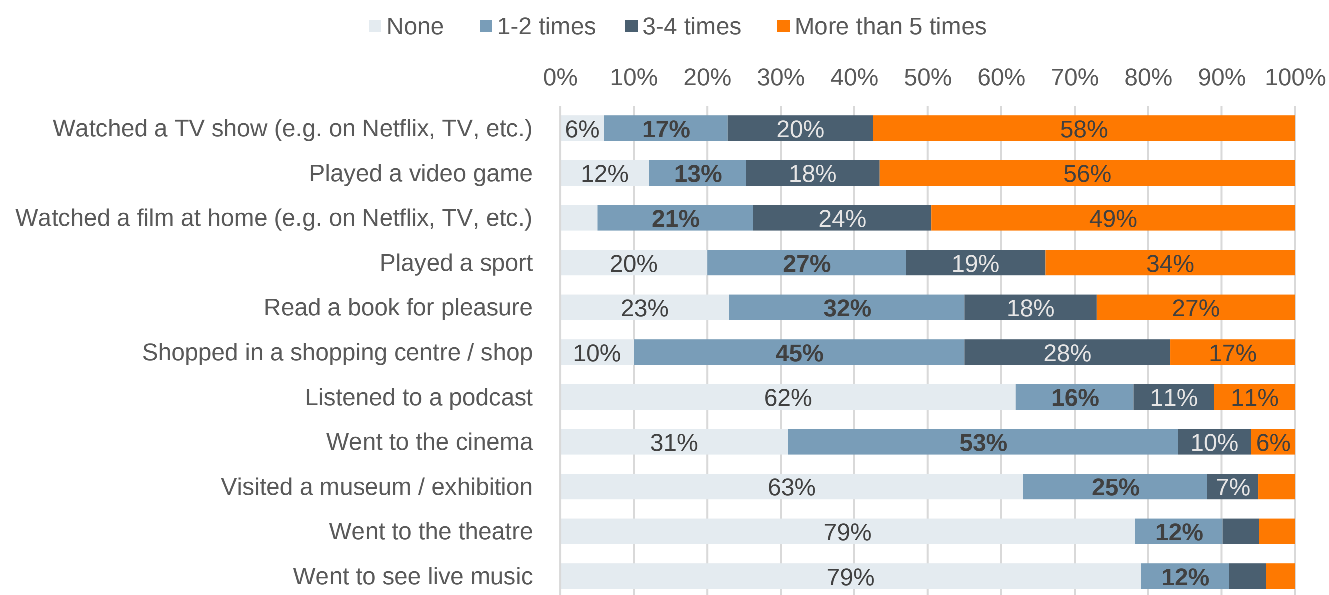
- *69% of young people went to the cinema at least once in the last month.*
- *95% of young people watched a film at home at least once in the last month.*
- *Frequency of cinema-going is affected by: region, gender, social grade, availability of cinema, spending money, and frequency of film viewing at home.*

The most frequent activities for young people are watching TV, playing video games, and watching films at home.

Most tend to go the cinema one or two times a month. Cinema stands out as an activity where participation largely falls within this frequency range.

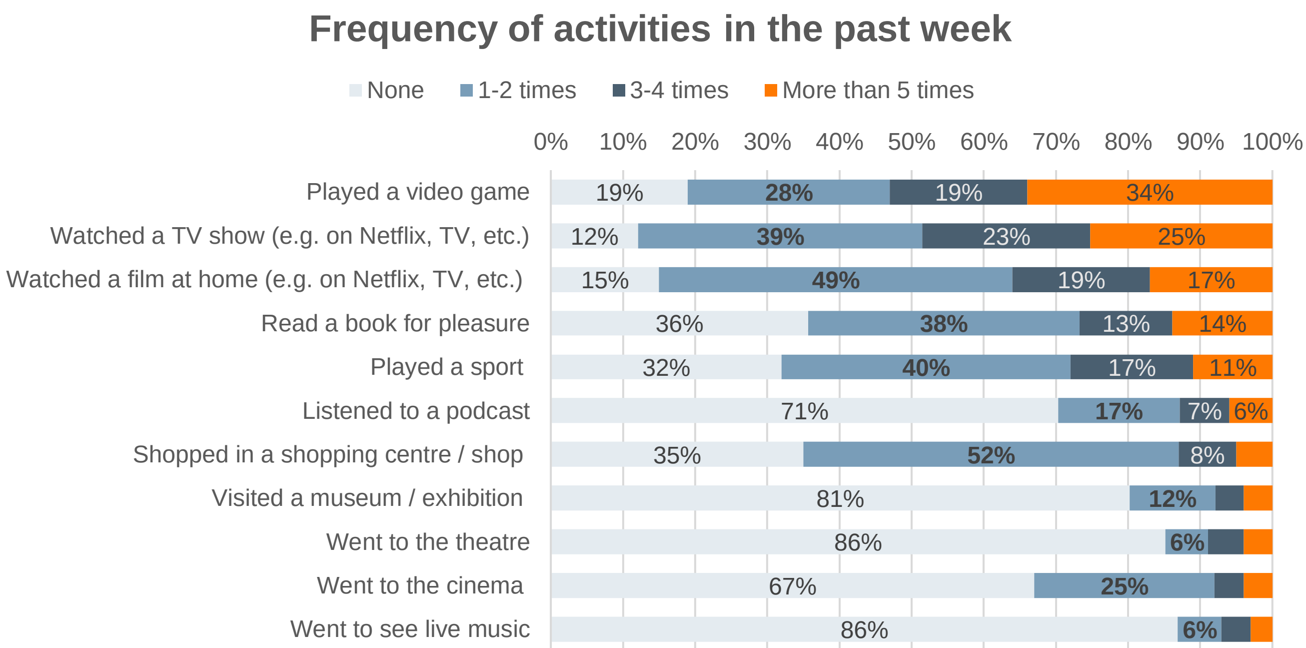
It is interesting that shopping, another money-dependent activity, is the other activity that is most frequent in this range. However, on average, shopping is more frequent than cinema.

Frequency of activities in the past month



In the last month, how many times did you do the following? Base: all respondents (1000)

The pattern is largely the same when we look at how often young people have done these activities in the past week, though it does give us more insight into the most frequent activities, such as playing video games or watching films at home.



Now think about the last week. How many times did you do the following? Base: all respondents (1000)

Playing video games is the most frequent activity for these young people, performed three times a week on average.

However, the most common activities are watching TV and watching films at home – 88% have watched TV in the last week, and 85% have watched a film in the last week, compared to only 81% that have played a video game.

Thus, while playing video games is the most frequent activity among those who already play them, watching films is more universal.

Factors affecting cinema attendance

Age

Age was not a significant factor – young people went to the cinema equally frequently across all age groups sampled.

Region

Young people in London visit the cinema far more frequently than in any other region.

	London	South	Midlands	North	Scotland	Wales	Northern Ireland
base	*158*	*263*	*183*	*268*	*53*	*53*	*22*
None	16%	35%	32%	33%	33%	36%	25%
1-2 times	44%	55%	56%	53%	54%	49%	66%
3-4 times	17%	9%	7%	10%	14%	7%	0%
More than 5 times	22%	1%	4%	5%	0%	7%	10%
Mean frequency	2.49	1.18	1.33	1.41	1.28	1.39	1.51

Cinema visits per month by region. Base: all respondents (1000)

This same trend is seen when looking at settlement type, though London still has a higher average frequency of cinema visits per month (2.49) to the average city (2.01).

Gender

Overall, males go to the cinema more often than females, however there is no difference in the proportion that have not been to the cinema at all in the past month. The difference is that males are more likely to be repeated cinema-goers. There is no significant difference in film viewing at home by gender, resulting in similar overall film views per week.

	Cinema visits per month		Film views per week	
	Male	Female	Male	Female
base	*520*	*477*	*520*	*477*
None	32%	30%	17%	13%
1-2 times	48%	58%	45%	52%
3-4 times	13%	7%	20%	18%
More than 5 times	8%	4%	18%	16%
Mean frequency	1.58	1.34	2.37	2.31

Cinema visits per month and film views per week. Base: all respondents (1000)

Social grade

Young people are more likely to go to the cinema if their parents are grade ABC1, or university educated, or they go to an independent or grammar school.

	Social grade		Parent's education		School Type				
	ABC1	C2DE	University	Non-university	Comprehensive	Academy	Grammar	Free school	Independent
base	*546*	*454*	*458*	*542*	*369*	*305*	*106*	*107*	*95*
None	24%	38%	22%	38%	35%	36%	20%	32%	10%
1-2 times	54%	52%	54%	53%	56%	53%	48%	55%	50%
3-4 times	12%	8%	13%	8%	7%	9%	17%	9%	18%
More than 5 times	10%	2%	11%	2%	3%	3%	15%	4%	22%

Mean frequency	1.78	1.16	1.86	1.16	1.22	1.26	2.15	1.38	2.59

Cinema visits per month by socio-economic indicators. Base: all respondents (1000)

Availability of cinema

Young people are more likely to go if there is a cinema within 15 minutes of travel time.

	Cinema nearby	
	Yes	**No**
base	*631*	*369*
None	25%	41%
1-2 times	58%	46%
3-4 times	10%	9%
More than 5 times	7%	4%
Mean frequency	1.62	1.21

Cinema visits per month by proximity of cinema. Base: all respondents (1000)

Spending money

Young people are more likely to go if they receive pocket money or if they have a part time job.

	Pocket money		Part-time job	
	No	**Yes**	**No**	**Yes**
base	*199*	*801*	*859*	*141*
None	49%	27%	34%	11%
1-2 times	44%	56%	55%	38%
3-4 times	5%	11%	7%	28%
More than 5 times	2%	7%	3%	23%
Mean frequency	0.96	1.59	1.26	2.81

Cinema visits per month by pocket-money and part-time jobs. Base: all respondents (1000)

Frequency of film viewing at home

The more frequently young people watch films at home, the more frequently they tend to go the cinema.

	Frequency of Watching a Film at Home in Last Week			
	None	**1-2 times**	**3-4 times**	**More than 5 times**
base	*145*	*480*	*207*	*168*
None	54%	33%	18%	19%
1-2 times	40%	59%	53%	50%
3-4 times	6%	7%	19%	12%
More than 5 times	0%	1%	10%	18%
Mean frequency	0.82	1.20	2.01	2.18

Frequency of cinema attendance per month by frequency of film viewing per week. Base: all respondents (1000)

Drivers of leisure activity

- *The most important factor for young people when deciding what to do with their free time is how much fun the activity is.*
- *Other top considerations are being able to do it with friends, getting permission from parents, and the cost of doing it.*
- *Those who don't receive pocket money or are from lower social grades are more likely to be concerned about the cost of activities.*
- *Young people are most influenced by their friends' opinions, though also perceive themselves as making their own decisions. Beyond this, where they acknowledge others' influence, this is by-and-large their parents/guardians. This is especially true for the least frequent cinema-goers.*

Factors influencing free time decisions

When young people are deciding what to do with their free time, what are the most important things they think about?

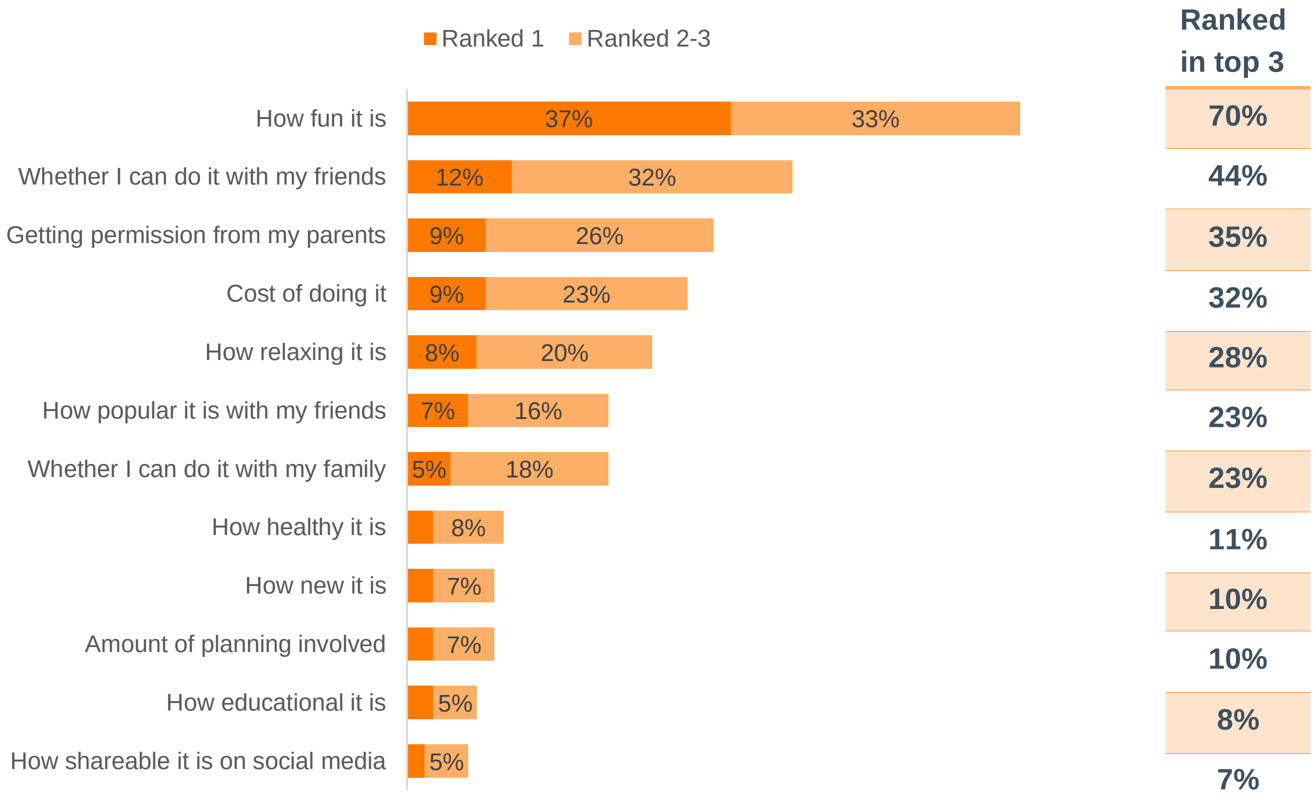
The top factor, by a long-way, that young people consider when deciding what to do with their free-time, is how much fun the activity is.

The next most important consideration is whether they can do it with their friends. This is a key element to think about when considering the decline in attendance among young people. As this group likes to do things collectively with their friends, a reduction in the appeal of cinema in a subset of this demographic has much wider knock-on effects as this reduces the appeal of cinema to their friends, and thus their friends, and so on. Males are more likely than females to care about how popular the activities are with their friends.

Getting permission from parents was considered important by all ages, though especially among 11- to 13-year-olds[3].

[3] 35% of 11- to 13-year-olds ranked it in top three, vs 26.5% of 14- to 15-year-olds.

Key considerations when choosing what to do with free time



When you decide what to do with your free time, what are the most important things to think about? Base: all respondents (1000)

Cost of doing activities is another particularly important factor for these young people. It is interesting to consider this point in more detail, as we have seen that those from lower-socioeconomic backgrounds are much less frequent cinema goers.

Males are less price sensitive than females – only 31% of males ranked 'cost of doing it' as a key consideration, compared to 40% of females.

Young people who didn't receive pocket money were nearly 10% more likely to pick "cost of doing it" as an important factor.

Socio-economic markers such as social grade or parent's education had a strong effect on price sensitivity.

	Social grade		Parent's education		School Type				
	ABC1	C2DE	University	Non-university	Comprehensive	Academy	Grammar	Free school	Independent
base	*546*	*454*	*458*	*542*	*369*	*305*	*106*	*107*	*95*
Cost of doing it	32%	39%	29%	40%	34%	42%	28%	36%	22%

% who ranked 'cost of doing it' as top 3 factor in deciding what to do with free time, by socio-economic indicators. Base: all respondents (1000)

Age also affects leisure drivers – the younger ages of this group are relatively more concerned with how fun the activity is[4] and whether they can do it with their family[5]. The older ages are more worried about the cost of activities[6], though the general trend of preferences is true across ages.

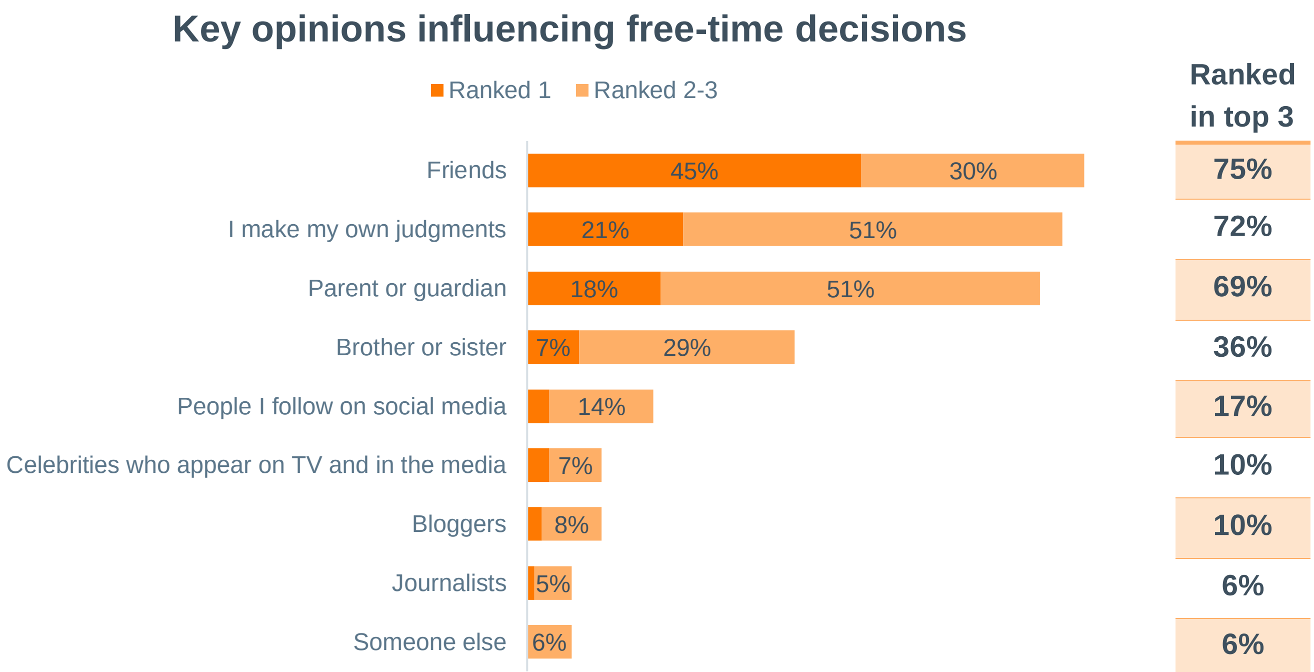
There are also some large differences in values between settlement types. Those living in towns and villages had much greater preferences for how fun it is[7], whether they can do it with friends[8], and cost of doing it[9]. Those living in cities had a wider spread of values and cared significantly more about some of the lower ranked factors – how new it is[10], how healthy it is[11], how educational it is[12] and how shareable it is on social media[13].

There are some points to note regarding the least frequent cinema goers. The least frequent cinema goers had less of a spread of values, and so cared much less about the activities are the bottom of the list – how healthy it is, how new it is etc. Rather, they cared much more than others about how much fun the activities are and the cost of doing them – 41% if those that hadn't been to the cinema in the past month chose cost as a key consideration, compared to 33% of those who had.

People influencing free time decisions

Above all, young people value the opinions of their friends when making free-time decisions, though they also feel strongly that they make their own decisions. Where they acknowledge others' influence, this is by-and-large their family.

[4] 77% of 11-12 year-olds ranked in top three, vs 66% of 13-15 year-olds.
[5] 27% of 11-12 year olds ranked in top three, vs 20% of 13-15 year olds.
[6] 39% of 13-15 year-olds ranked in top three, vs 30% of 11-12 year-olds.
[7] 73.5% in towns/villages ranked in top three, vs 62% in cities.
[8] 50.5% in towns/villages ranked in top three, vs 35% in cities.
[9] 41.5% in towns/villages ranked in top three, vs 28% in cities.
[10] 18% in cities ranked in top three, vs 4% outside of cities.
[11] 17% in cities ranked in top three, vs 6% outside of cities.
[12] 14% in cities ranked in top three, vs 4.5% outside of cities.
[13] 11% in cities ranked in top three, vs 5.5% outside of cities.



Whose opinions do you value the most when picking the activities you do in your free time? Base: all respondents (1000)

The value of parents' and friends' opinions is consistent across all ages of this group.

As before, those living in cities had a greater spread of factors they value and, compared to those from towns and villages, a larger proportion valued the opinions of people they follow on social media[14] and celebrities who appear on TV and the media[15].

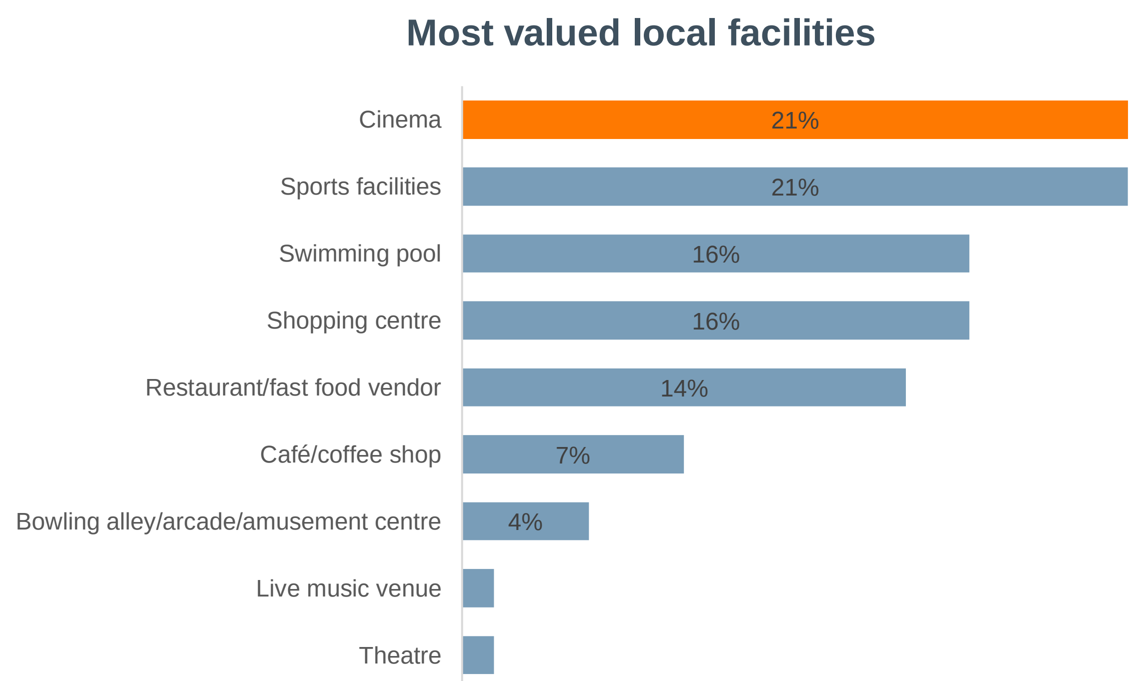
The least frequent cinema-goers cared much less about distant/public opinions – those of people they follow on social media[16], celebrities[17], and bloggers/journalists[18]. Rather, they predominantly valued their own opinions and those of friends and parents.

[14] 25% in cities ranked in top three, vs 13% outside of cities.
[15] 14% in cities ranked in top three, vs 8% outside of cities.
[16] 10% of those that had not attended in the past month ranked in top three, vs 20% of those that attended at least once.
[17] 5% of those that had not attended in the past month ranked in top three, vs 12% of those that attended at least once.
[18] 8% vs 11% ranked bloggers, and 2% vs 9% ranked journalists in top three.

Attitudes to the cinema

- *When asked which facility in their local area they would be most upset to lose, cinema came top along with sports facilities. Cinema was more valued than facilities for more frequently performed activities among young people, such as shopping centres.*
- *There was no difference between genders in selection of cinema, suggesting the difference in levels of attendance between genders isn't due to attitudes to the cinema experience.*
- *Older people in this age group were more likely to value cinema than the younger people, despite no difference in levels of attendance.*

When asked which of their local facilities they would be most upset to lose, cinema came joint first with sports facilities, showing that cinema is highly valued among these young people.



Think about the facilities you have access to in your local area. Which of them would you be most upset about losing? Base: all respondents (1000)

Playing sports is the most frequent out-of-home activity for this age group, and it's certainly significant that cinemas are valued equally to these facilities, despite being utilised less frequently. Similarly, despite shopping being a more frequent activity than cinema, these young people were less concerned with losing shopping centres than cinemas.

There were gender differences for several of the activities, such as males favouring sports facilities and females favouring shopping centres, but no difference in the proportion choosing cinema. This is interesting given that males are seen to go to the cinema more frequently than females, and may suggest that it's not the cinema experience putting females off, but the films on offer.

Age bracket also had an effect; despite no differences in levels of cinema attendance among this age group the older people in this age group were significantly more likely to select cinema as a most valued local facility[19].

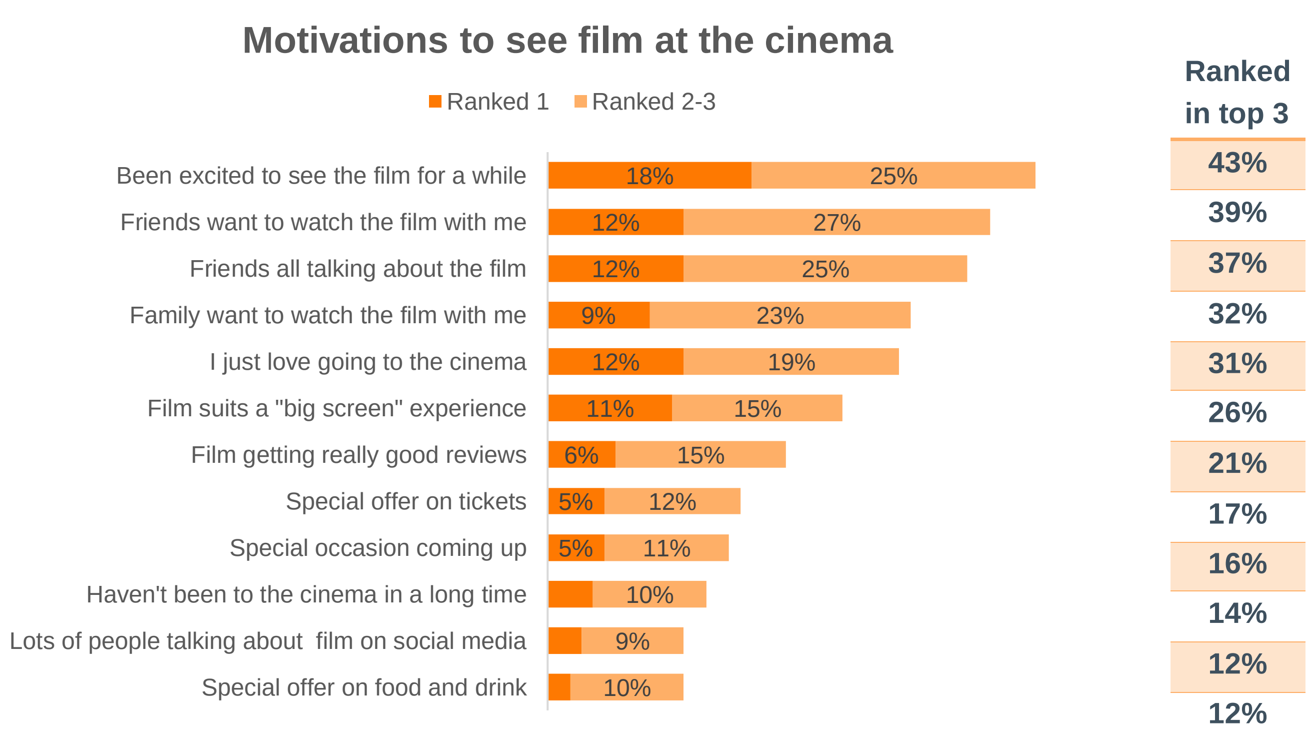
The same factors that affected cinema attendance also affected the proportion valuing cinemas in their local area. Class indicators had a particularly strong effect – 25% of those from ABC1 grades chose cinema, compared to 17% of C2DE.

[19] 26.5% of 14- to 15-year-olds vs 17% of 11- to 13-year-olds

Deciding to go to the cinema

- *The top factor driving cinema trips is wanting to see a specific film as soon as possible.*
- *The next ranked driving factors are whether young people's friends and family are spurring on trips.*
- *For the frequent cinema-goers, just wanting to go to the cinema because they like it is enough of a motivation.*
- *For others, wanting to see a film in a cinema because it particularly suits the big screen experience is another strong driver.*
- *Recommendations are more important than 'buzz' for these young people – friends talking about the film and good reviews are more important than seeing lots of people talking about the film on social media.*

Given existing evidence that going to the cinema is often a film-driven decision, we investigated the decision-making process on the premise there was a film that had just come out that they were interested in seeing. What would make them decide to go the cinema rather than wait to see it at home?



A new film comes out that you're interested in seeing. You're deciding whether to watch it at the cinema now, or wait until you can see it at home. What are the main reasons you would choose to see it at the cinema? Base: all respondents (1000)

At the top of this list is the film itself – if they really just want to see the film they don't want to wait till they can watch it at home.

The factors after this are about whether their social circle (friends or family) are spurring on the trips to see it. Interestingly, friends talking about the film ranks second, but seeing lots of people talking about the film on social media was much less important. It seems that this preference is about receiving direct recommendations rather than following 'buzz' – corroborating this, film reviews came up higher than seeing people talk about the film on social media.

Other important factors in this decision were related to the cinema experience itself – "I just love going to the cinema" and "the film has special effects and suits a big screen experience". "I just love going to the cinema" was a stronger factor among frequent cinema-goers, but "the film suits a big screen experience" was the same among all these young people.

Despite money being such a key predictor in cinema attendance, special offers are not what motivate people to get up and go to the cinema. This is an interesting finding and may be to do with entrenched spending habits, as this is consistent across socio-economic groups.

A greater proportion of the younger people in this age group cared about whether their family wanted to watch the film with them[20], while the older groups cared about whether their friends wanted to[21] – the same preference pattern that came up as key drivers of leisure activities. Slightly more of the younger groups cared about whether there was a special occasion coming up[22].

The least frequent cinema-goers were especially motivated by specific films[23] and if they haven't been to the cinema in a long time[24].

Frequent cinema-goers rated seeing people talk about the film on social media as a higher motivating factor than less frequent cinema-goers[25].

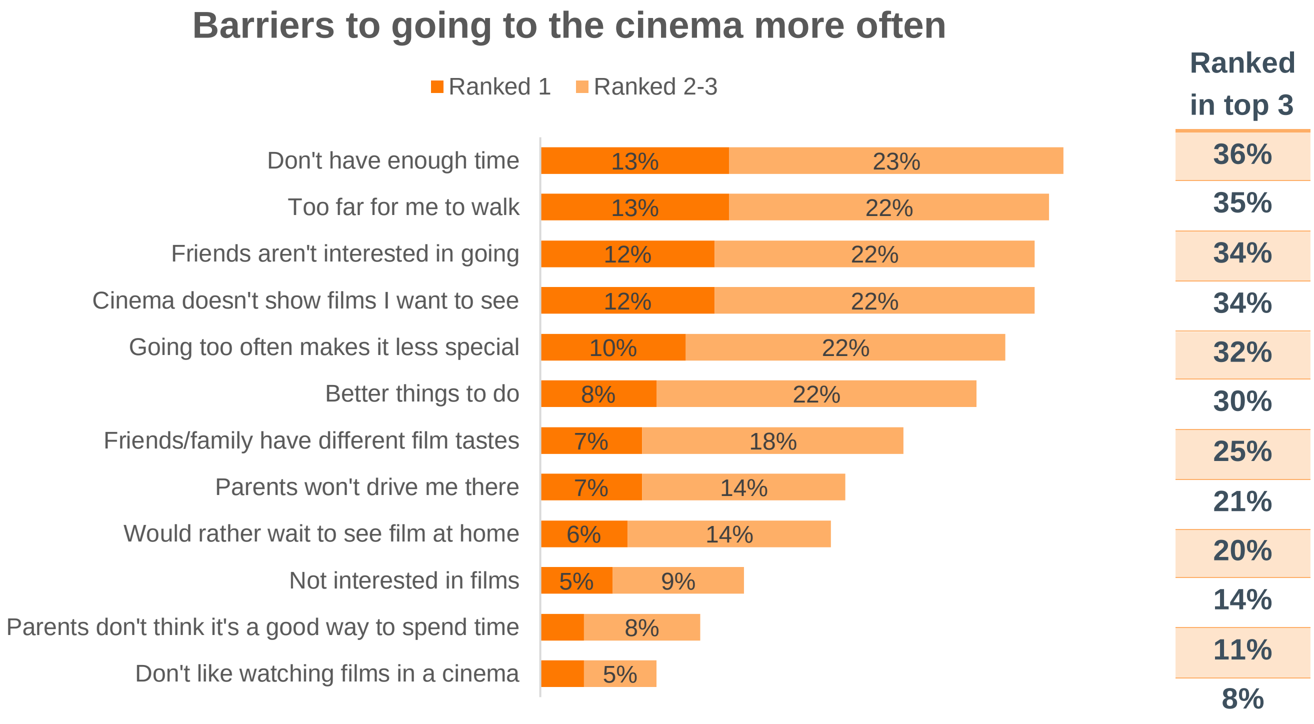
[20] 44% of 11-year-olds, vs 29% of 12- to 15-year-olds.
[21] 31% of 11-year-olds, vs 38% of 12- to 15-year-olds.
[22] 25% of 11-year-olds, vs 14% of 12- to 15-year-olds.
[23] 47% of those that hadn't been the cinema in the last month, vs 41% of those that had been more than once in the last month.
[24] 24% of those that hadn't been the cinema in the last month, vs 10% of those that had been more than once in the last month.
[25] 8% of those that hadn't been the cinema in the last month, vs 14% of those that had been more than once in the last month.

Barriers to cinema attendance

- *The barriers to cinema attendance range widely across these young people, with no single barrier emerging strongest. Barriers fall into the following four categories:*
- *Logistical barriers: young people want to go, but it's a lot of time/effort. These barriers were highly ranked, especially a lack of time, and weren't specific to any particular group.*
- *Social barriers: lack of people to go with. This is another very high block for young people, despite ranking cinema as a popular activity to do with friends. It seems that cinema is popular at a particular frequency range for some, and thus friends not wanting to go beyond this frequency is a block to going more often for others.*
- *Film selection: females and older people in this age group especially felt that the cinemas not showing films they want to see is a barrier to going more often. For the frequent cinema-goers, friends/family having different film tastes is a strong barrier to going more often. Connecting frequent cinema-goers for group trips may tackle this barrier.*
- *Cinema experience: among the least frequent cinema goers, barriers related to the cinema experience were strongest. Having better things to do was top for this group, closely followed by not wanting to go too often as that makes it less special. Thus, the least frequent cinema-goers are a mix of those who don't enjoy the cinema much, and those who enjoy it but are choosing not to go very often.*

What do young people identify as the key barriers that prevent them going to the cinema more often, apart from cost?

There is a real range of answers to this question, from logistical barriers (e.g. too time consuming/hard to get to), to issues with the experience (e.g. better things to do) and disappointment in the film selection (cinema doesn't show films I want to see). No single barrier emerges as strongest.



Apart from money, what are the main things that stop you from going to the cinema more often? Base: all respondents (1000)

Not having enough time ranks highly, so clearly going to the cinema carries a higher burden than watching films/TV at home, which is to be expected as it was also rated as harder to organise. The cinema being too far away to walk also comes out strongly as a barrier (higher than parents won't drive me), so there's a clear drive for being able to go to the cinema independently among these young people (those living in cities are less likely to choose "too far to walk" or "parents won't drive me").

Once again, the social experience of cinema is a key driver, and friends not wanting to go is one of the top blocks. This matches the findings that whether your friends want to do an activity is a key consideration, and friends' opinions are the top influence on these decisions. What's interesting is that cinema was ranked as one of the top activities as popular among friends. It may be a perception of cinema as only an occasional treat, and thus this is a barrier to going more often.

This may also help explain why "going too often makes it less special" comes out as one of the top barriers. There could a perception of the cinema as an activity to only be performed occasionally. Thus, despite social grade being a strong indicator of attendance, offers weren't identified as a top factor for why young people would go the cinema to see a film they're interested in rather than wait. The cinema is certainly a valued facility for these young people, disproportionately to the frequency they utilise it.

Film selection is another barrier. The cinema not showing the films they want to see or their friends/family having different film tastes so they don't have anyone to go with rank highly. Importantly, there's no difference in selection of these factors among those with greater choice in cities vs those living in more rural areas. Rather, this is a barrier that more strongly affects the frequent cinema-goers. Thus, there may be an opportunity to increase cinema attendance for the already frequent cinema-goers by organising film clubs to facilitate group outings for those held back by the film tastes of their friends.

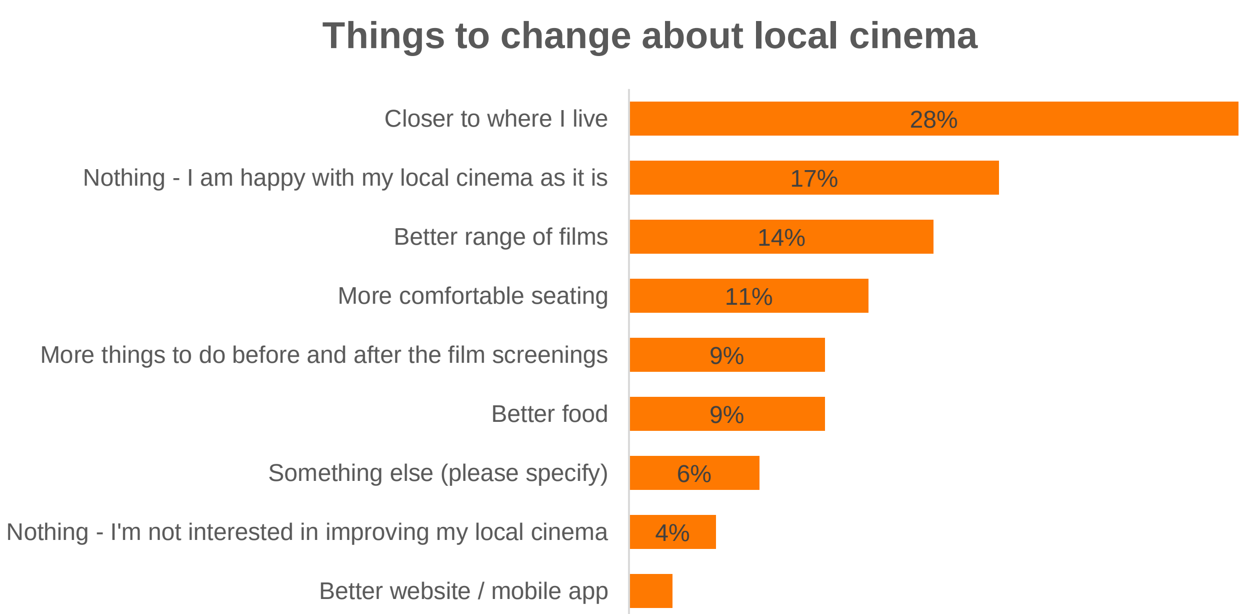
When we group up these high-ranking factors, we can differentiate the young people particular barriers apply to:

- Logistical – want to go but lots of effort
    - *Don't have enough time*
    - *Too far for me to walk*
    - *Parents won't drive me there*
        - These barriers were present across all groups. However, of those that had a cinema nearby, "not having enough time" was less of a barrier for the least frequent cinema attenders.
- Social – lack of people to go with
    - *Friends aren't interested in going*
        - This is a barrier selected equally by all these young people.
    - *Friends/family have different film tastes than me*
        - This mainly affects the frequent film-viewers and frequent cinema-goers. This barrier is also disproportionately identified by those from higher social grades.
- Film selection
    - *Cinema doesn't show films I want to see*
        - This was identified as a barrier by 36% of females compared to 31% of males, which helps to explain the differences in levels of cinema attendance despite both genders valuing the cinema equally, and there being no difference in wider film-viewing.
        - This was also much more of a barrier for the oldest people in this age group – 39% of 15-year-olds felt this way, compared to 32% of 11- to-14-year-olds.
    - *Not interested in films*
        - This isn't a strong block for these young people generally, rather only for a minority of the least frequent film-viewers.
- Cinema experience
    - *Better things to do*
        - This is the top factor chosen for the least frequent cinema attenders – both those with a cinema nearby and without. Of those with a cinema nearby, 42% of the infrequent cinema-goers identified this is a barrier, vs 27% of those that had been at least once in the past month.
        - 34% of males felt this was a barrier, compared to 26% of females. This again suggests that the difference in cinema attendance between females and males isn't driven by attitudes to the cinema experience itself, but by film selection.
    - *Going too often makes it less special*
        - This is the second highest factor chosen by the least frequent cinema attenders.
    - *Would rather wait to see film at home*
        - Another top factor for infrequent cinema goers.

Changes to cinema experience

- *In terms of practical changes to cinemas, most young people would only really change how close it was to where they live and the range of films. Despite lots of research on optimising apps and websites for young people, this is the aspect of cinemas they are most content with.*
- *For wider changes to the cinema experience, young people ranked financial incentives top. However, offers alone aren't what motivate young people to go to the cinema, as these incentives were about making the experience larger. Along the same lines, places to hang out before/after the screening is popular.*
- *Film related incentives such as personalised recommendations for films, talks about the film before/after the screening, film merchandise etc. mainly appeal to the already frequent cinema-goers.*

If the cinema experience itself is putting young people off going to the cinema more often, what would they like to change about it?[26]



If you could change just one thing about your nearest cinema, what would it be? Base: all respondents (1000)

Accessibility to cinemas comes out top here – thereby reducing the effort of the activity, one of the key areas where cinema was lacking compared to competing activities.

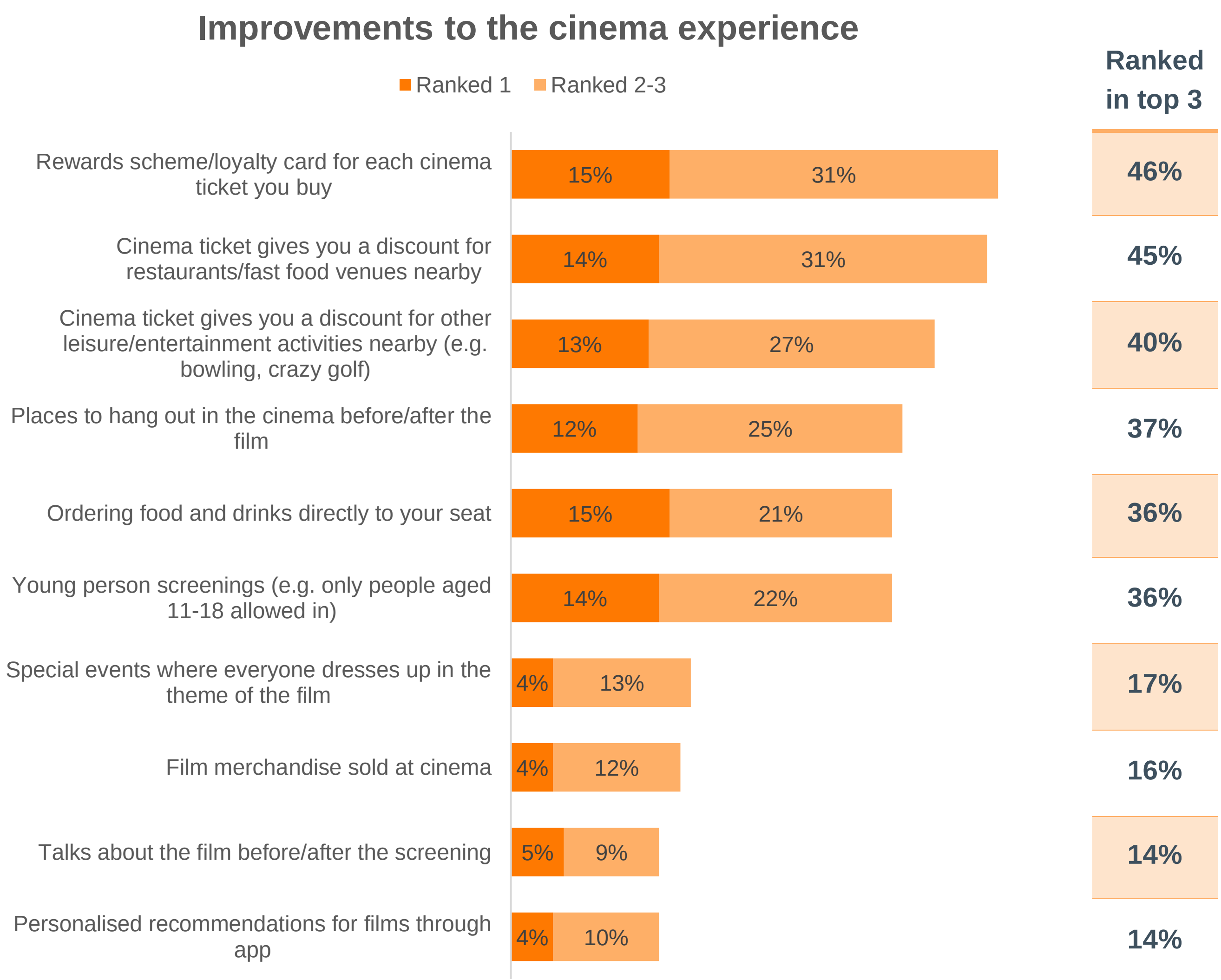
Interestingly, "Closer to where I live" is still a top factor even for those with a cinema within 15 minutes travel time. This may be related to whether young people can get to the cinema independently, as

[26] Where they selected 'Something else', 95% specified something price-related.

"too far for me to walk" was also identified as a key barrier to cinema attendance among those with a cinema nearby.

Despite lots of research on optimising apps and websites for young people, this is the aspect of cinemas they are most content with.

What would they like to change about the wider experience?



Here are some ideas for improving the experience when you visit a cinema. Please rank your top three. Base: all respondents (1000)

Top of the list for improving the cinema experience are financial incentives; though these aren't just about reducing the price of cinema outings, but also making the experience larger by combining with other events. Along the same lines, places to hang out in the cinema before/after the film ranked highly – this was especially so for those living in villages[27].

The youngest ages were more interested in discounts for other leisure/entertainment activities[28] while older ages were more interested in discounts for restaurants/fast food venues[29].

[27] 46% of those living in villages ranked it in the top three, vs 36% living in towns or cities.
[28] 44% of 11-year-olds vs 38.5% of 12- to 15-year-olds.
[29] 49% of 13- to 15-year-olds vs 38.5% of 11- to 12-year-olds.

A highly rated idea among all ages in this group is ‘young person screenings’. This idea speaks to facilitating group experiences for these young people.

Frequent cinema-goers were much more interested in the film-related options which appealed less to others: talks about the film before/after the screening, personalised recommendations for films, film merchandise being sold at the cinema and special events in the theme of the film. This may be another opportunity to increase levels of attendance by the already frequent cinema-goers along with film clubs described earlier.

Cinema vs competitor activities

- *Cinema ranks very highly compared to competing activities on fun, sociability, and popularity with friends, and lower on being relaxing and easy to organise. Of all factors, fun is the most important for these young people.*
- *The advantage cinema has over competing activities is being seen as sociable by facilitating group activities for young people. This is one of the most important considerations young people have when choosing what to do with their time.*

Young people ranked their most frequent activities across five key factors:

- How much fun they have doing them
- How sociable they are
- How relaxing they are
- How popular they are with friends
- How easy to organise they are

We can see how important these young people consider these factors when deciding what to do with their leisure time.

Free-time decision factor	Ranked in top three
How much fun it is	70%
Whether I can do it with my friends	44%
How relaxing it is	28%
How popular it is with my friends	23%
Amount of planning involved	11%

When you decide what to do with your free time, what are the most important things to think about? Base: all respondents (1000)

The table below shows how often each activity was chosen first across these categories, in order of importance.

Amount each activity was ranked top for each factor

	Fun	Sociable	Relaxing	Popular with friends	Easy to organise
Going to the cinema	18%	20%	13%	17%	7%
Watching a film at home	7%	4%	21%	5%	14%
Watching a TV show	8%	3%	14%	7%	17%
Playing a video game	30%	16%	17%	36%	30%
Playing a sport	13%	27%	5%	11%	5%
Shopping in a shopping centre / shop	10%	19%	4%	17%	5%
Reading a book for pleasure	6%	2%	18%	1%	16%
Going to see live music	3%	3%	2%	2%	2%
Listening to a podcast	2%	1%	3%	2%	3%
Visiting a museum/exhibition	1%	3%	2%	1%	1%
Going to the theatre	1%	2%	1%	1%	1%

Cinema performs among the best of these activities across these key factors, though falls slightly short for how relaxing and easy to organise it is. Not being perceived as relaxing is the key issue here, as this is a more important consideration for young people when picking activities, and the perception of relaxation is easier to control.

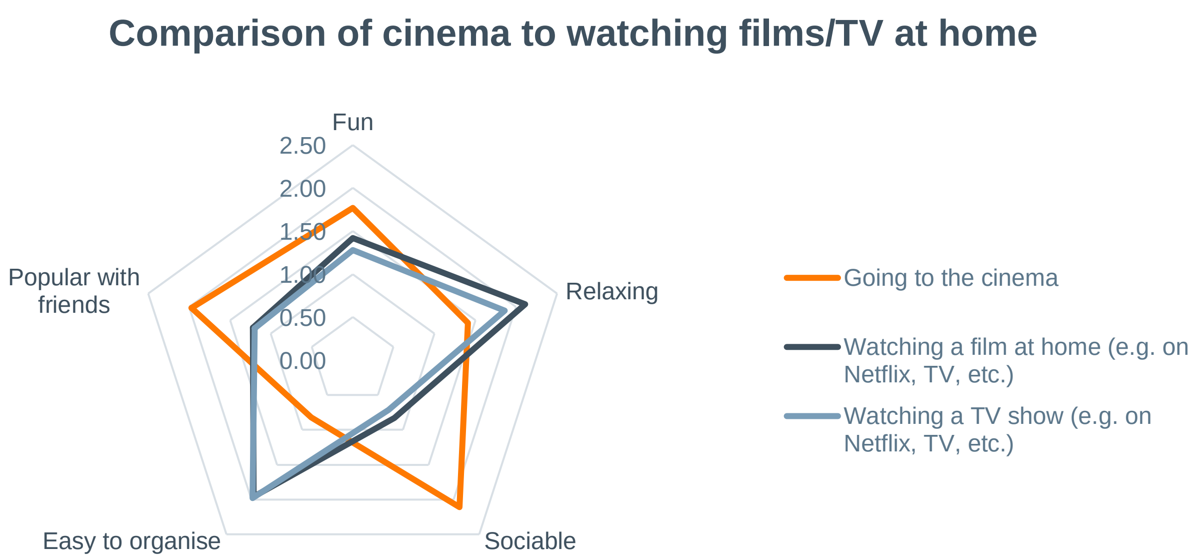
We created a scoring system for each of these factors in order to better compare activities. If the activity was ranked top for a factor, it received a score of 5, if it was ranked second it received a score of 4, and so on… If it ranked lower than fourth, it received a score of 1. This gives us an average score between 1 and 5 for each activity against each factor, allowing us to compare how key activities perform across different factors.

Cinema vs watching films/TV at home

Watching films or TV at home are the most common activities for these young people, and key competitor activities for cinema when young people are making film-driven decisions of whether to go to the cinema, or wait till the film is available to watch at home.

Watching films and TV perform very similarly across these categories, showing that even though the content is different are the activities are perceived in the same way. This suggests that their leisure role is largely driven by the format of viewing, and cinema can be seen to have several 'wins' over this format.

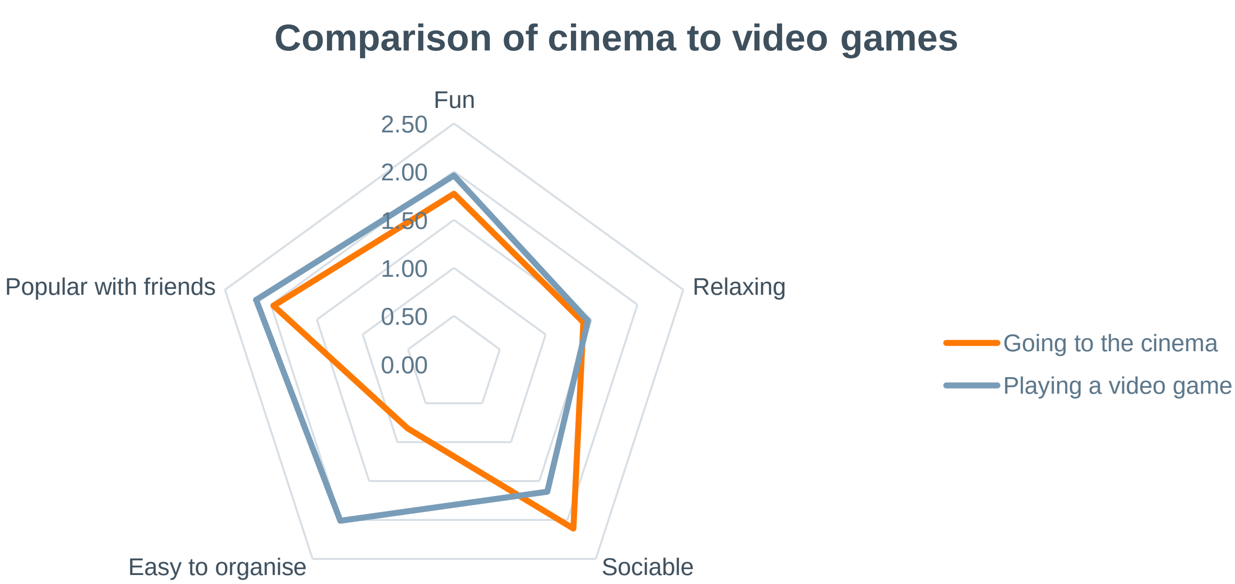
Cinema performs better than watching films/TV at home on being fun, popular with friends and sociable. However, it performs worse on being relaxing and easy to organise (these tend to go hand-in- hand).



Cinema vs video games

While watching TV and films is the most common activity for these young people, playing video games is the most frequent.

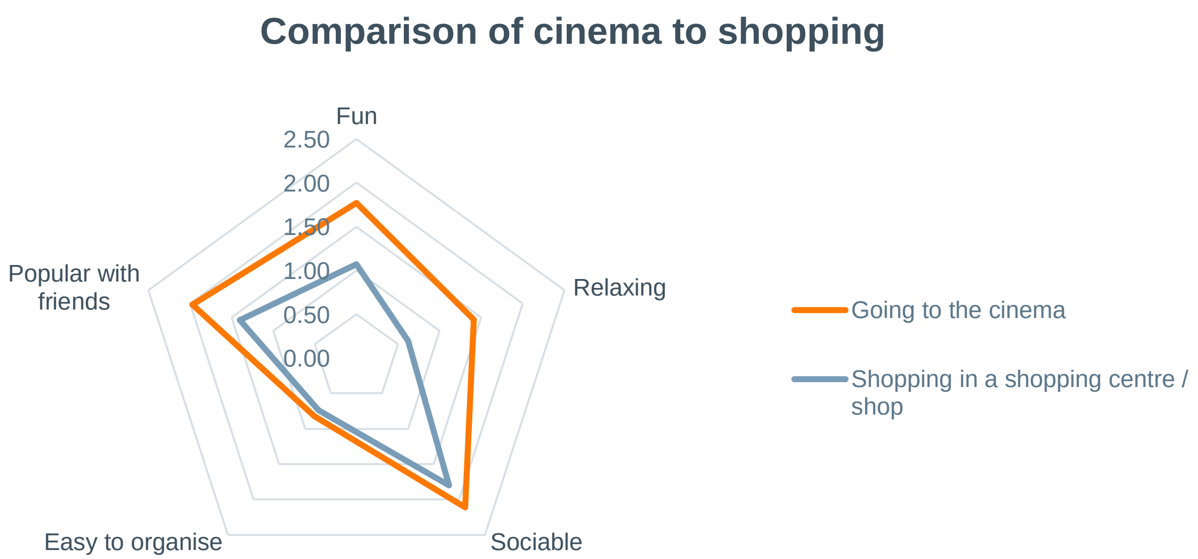
Playing video games also ranked the overall highest of all activities across these factors. However, cinema exceeded video games in sociability. This is important, as whether friends want to do activities is one of the top considerations when choosing free-time activities, and friends' opinions are highly important when picking activities.



Cinema vs shopping

Shopping is the most frequent cost-dependent activity for young people. Like cinema, it was also most commonly performed 1-2 times a month, though shopping was more frequent on average.

Shopping also has the most similar spread across these factors to cinema. However, cinema exceeds shopping in most key factors, especially fun, relaxing and popular with friends – some of the factors young people consider most important when making leisure decisions. Therefore, despite cinema performing better across these factors, there must be other barriers to performing this activity more frequently. Cinema is also much more valued among these young people as a local facility than shopping centres.



Sociability is a key selling point of cinema

Sociability is the key selling point of cinema as an activity – only sport outperformed cinema as top ranked for this factor, but when using our scoring system, cinema came top with a score of 2.1, compared to a score of 1.7 for sport. This may be because sport is less universal for these young people – those that enjoy it value it greatly as a social activity, however across the group this doesn't come through.

PREDICTORS OF CINEMA ATTENDANCE

- *Using a predictive model across all attitudes and demographic groups revealed in this study, it emerges that the strongest predictors of cinema attendance are either related to money or availability of cinema.*
- *Attitudinal differences towards leisure time or the cinema are not strong predictors of cinema attendance.*
- *The strongest positive predictors are receiving pocket money or having a part-time job. Related to this, being from social groups ABC1 is one of the top predictors.*
- *Having a cinema nearby and living in a city are also top positive predictors. Living in a city is a top predictor, even when proximity to cinema is controlled for, which suggests that either the availability of independent travel or differences in values in a city drive this.*
- *The strongest negative predictor is associating cinema with the word 'expensive'. This remains true across social grades, which suggests it's not just about affordability but perceived value, i.e. those who did not associate the word 'expensive' have different primary associations with cinema, not simply more spending money.*

We can use all the answers to questions in this study to see which single factor most strongly predicts cinema attendance[30].

Among all attitudinal and demographic factors, the strongest predictors of cinema attendance are related to money or the availability of the cinema.

The value "Likelihood of cinema attendance" shows how much more likely someone from a certain group is to attend the cinema, compared to those outside of that group. For example, receiving over £10 a week of pocket money makes you 2.8 times as likely to be a cinema-goer as someone who receives less than £10 a week pocket money, while associating cinema with the word 'expensive' makes you half as likely to be a cinema-goer as someone who doesn't associate cinema with 'expensive'.

[30] Details of methodology in Appendix.

Driver/barrier	Direction	Likelihood of cinema attendance
Pocket money: >£10 per week	Positive	2.8
Part-time job: Yes	Positive	2.4
Word association "Expensive": Yes	Negative	0.5
Cinema within 15 mins proximity: Yes	Positive	1.9
SEG: ABC1	Positive	1.5
Dwelling: City	Positive	1.4

Estimated R^2: 0.57

Receiving more than £10 a week pocket money and having a part-time job are the strongest predictors of going to the cinema.

Conversely, the single strongest negative predictor of cinema attendance is having a primary association with cinema as "expensive". This is true for those from higher social grades as well as lower. The table below shows the percentage of each social grade that have attended the cinema at least once in the past month, by whether they had "expensive" as a primary association with cinema.

	Cinema attendance in past month (%) Word association: "Expensive"	
Social grade	**Expensive**	**Not expensive**
AB	69%	89%
C1	58%	74%
C2	46%	74%
DE	42%	70%

% cinema attendance in past month by social grade and word association "expensive". Base: all respondents (1000)

For all social grades, perceiving cinema as "expensive" reduces the likelihood someone has attended the cinema in the past month (though the effect is smaller for those from higher social grades).

This suggests the reason for this effect isn't just about affordability of cinema, but about perceived value – that is, those who didn't select 'expensive' during word association have different primary associations with cinema, not simply more spending money.

Being from higher social grades is a key predictor of cinema attendance itself. However, it should be noted that young people from higher social grades do a wider range of activities with greater frequency in general – young people from AB social grades have done 8.5 activities in the past month, while young people from C2DE social grade have done 6.5 activities on average.

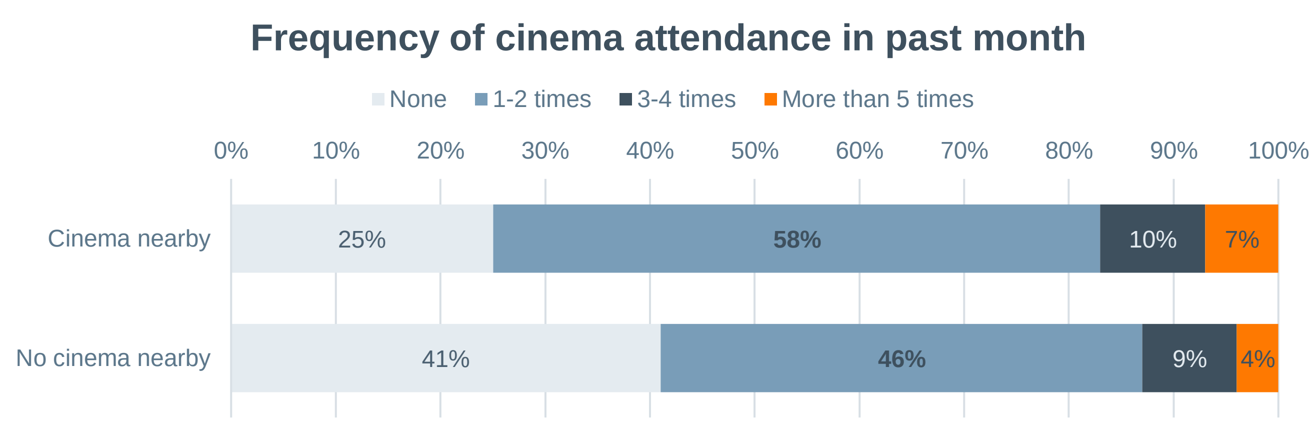
This may explain why attitudinal factors, such as ranking the cinema highly as 'fun' or 'relaxing' weren't strong predictors of cinema attendance. Some of the most frequent cinema-goers are driven by a removal of barriers, rather than strong preference toward the cinema.

Other key predictors of cinema attendance are logistical: having a cinema nearby or living in a city. It is interesting that living in a city is such a strong predictor of cinema attendance having controlled for the proximity of cinemas. Our findings showed that this doesn't seem to be about choice of films, as we saw young people in cities equally selecting 'cinema doesn't show films I want to see' as a barrier to attendance. Rather, this may be about the possibility of independent travel or differences in values/perception.

POTENTIAL CINEMA-GOERS

- *Potential cinema-goers are those with a cinema very nearby, but who haven't been at all in the past month. These potential cinema-goers have different attitudes and demographic breakdowns, that are helpful to explore in order to understand how to reach them.*
- *Potential cinema-goers are much more price-sensitive when choosing free-time activities, and they are much more likely to have a primary association with cinema as "expensive".*
- *Potential cinema-goers care more about whether friends want to do activities and they are most influenced by friends' opinions. Correspondingly, friends wanting to go to the cinema is the top non-film-driven reason they go. Therefore, targeting potential cinema-goers should focus on group experiences.*
- *Among the potential cinema-goers that like and value the cinema, the top barrier for not going more often is not wanting to make it less special. This group is perceiving cinema as an activity to only be done occasionally, and changing this perception is important in increasing their cinema attendance.*

As we've seen, having a cinema nearby is a strong predictor of cinema attendance – it reduces the effort of cinema trips, which is one of the key weaknesses of cinema when compared to competing activities. Those with a cinema nearby are also most likely to be the most frequent cinema-goers – an important group for the industry.



However, of those with a cinema close to home, one in four have not been at all in the last month.

This section compares in more detail those who have a cinema nearby and have been at least once in the past month, the cinema-goers, to those who have a cinema nearby and have not, the potential cinema-goers.

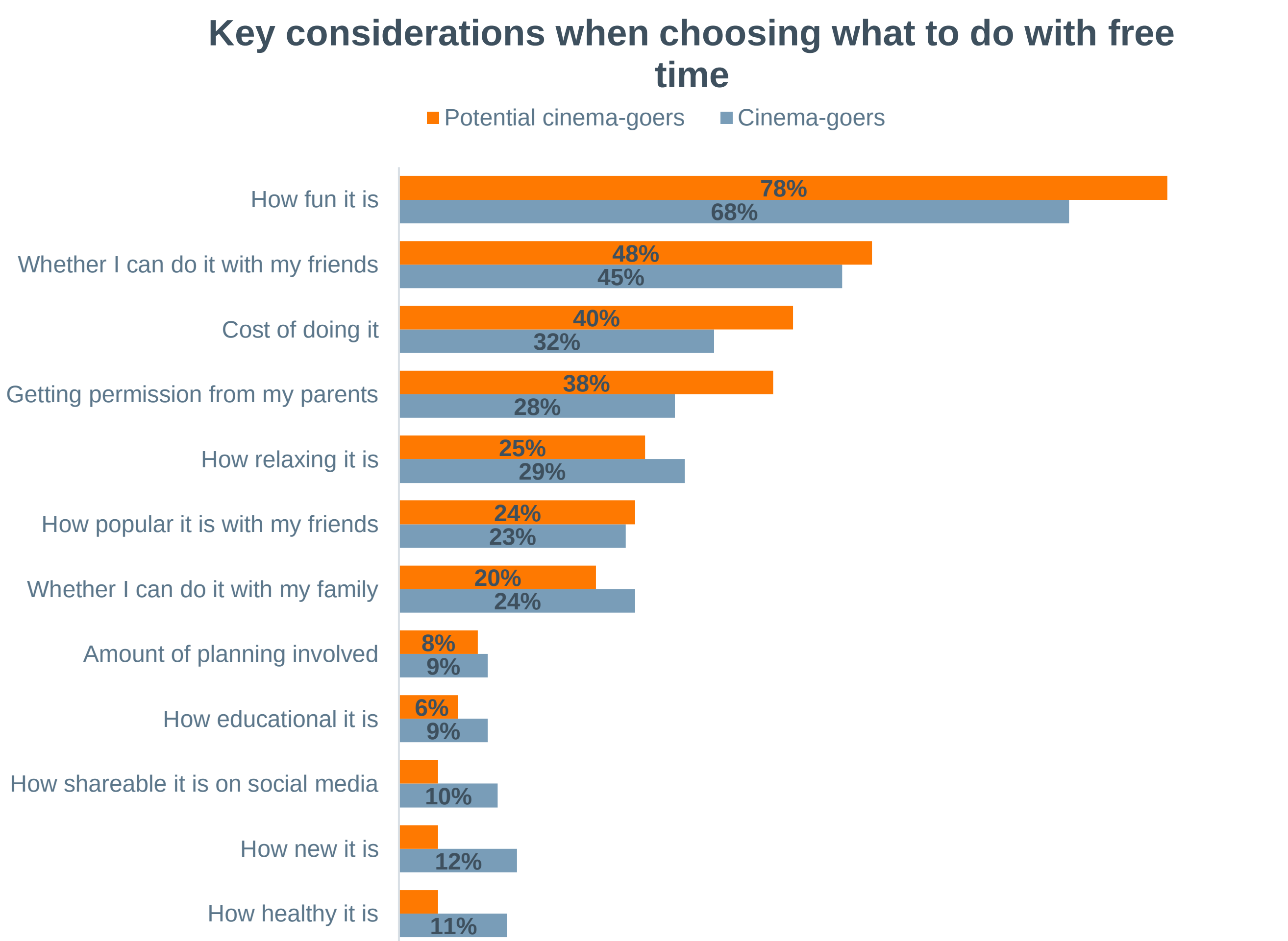
Understanding the differences and attitudes in this group allows us to discover how best to reach these potential cinema-goers.

Attitudes

Leisure time decisions

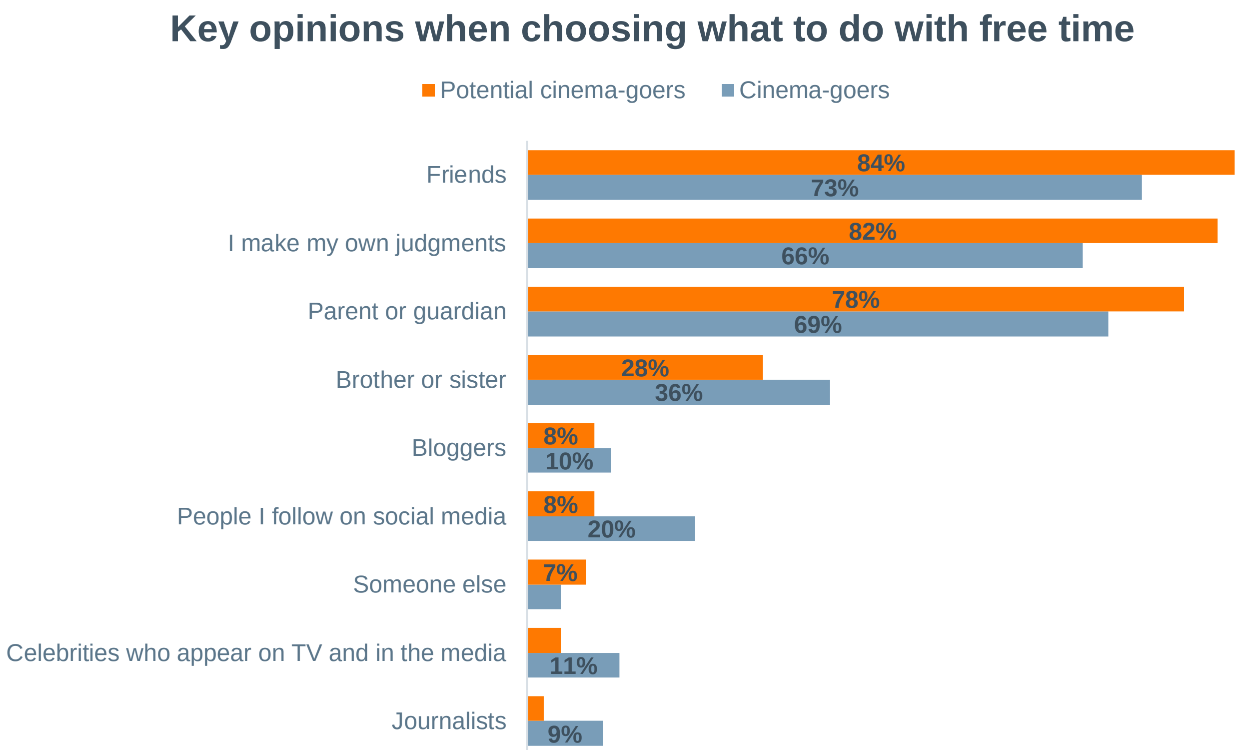
Potential cinema-goers are especially concerned about how much fun activities are, whether they can do them with friends, the cost of activities, and getting permission from parents.

It is especially noteworthy how much more price-sensitive this group is.



When you decide what to do with your free time, what are the most important things to think about? Base: cinema nearby (631)

As well as valuing doing activities with friends, potential cinema-goers are especially influenced by friends' opinions. This is a very important consideration when targeting this group – facilitating group behaviour is necessary here.

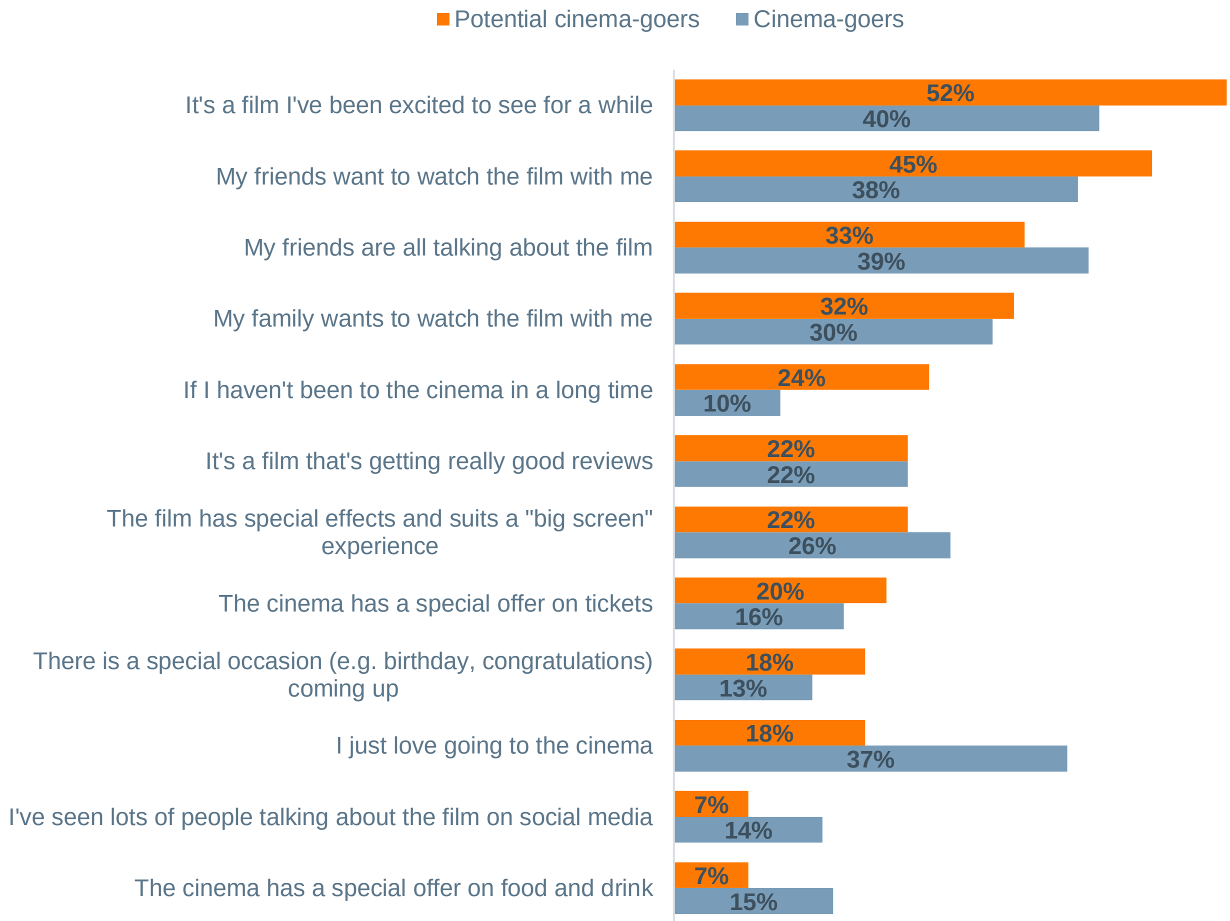


Whose opinions do you value the most when picking the activities you do in your free time? Base: cinema nearby (631)

Driven by films and friends

Much more than the frequent cinema-goers, decisions to go to the cinema among potential cinema-goers are driven by a want to see a specific film as soon as possible. They are also more concerned with whether their friends want to go with them.

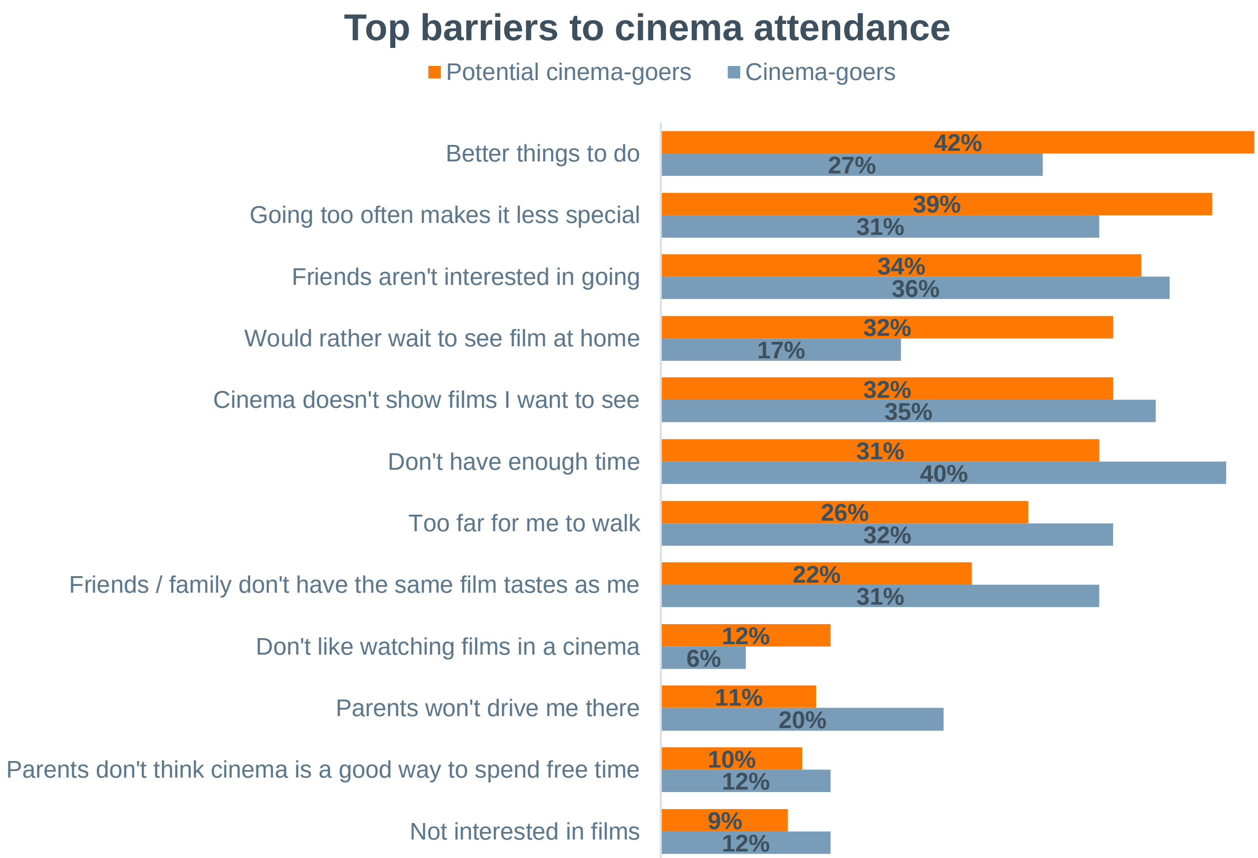
Motivators to go to the cinema



A new film comes out that you're interested in seeing. You're deciding whether to watch it at the cinema now, or wait until you can see it at home. What are the main reasons you would choose to see it at the cinema? Base: cinema nearby (631)

Potential cinema-goers are more likely to think of going to the cinema if they haven't been in a long time.

This is reinforced when looking at their barriers to attendance. Not wanting to go to the cinema too often is a key block to attendance. This suggests they are perceiving these trips as occasional treats, and deciding to go the cinema based on the frequency of their last visit.



Apart from money, what are the main things that stop you from going to the cinema more often? Base: cinema nearby (631)

Other key barriers identified are more negative to the cinema experience – "better things to do" and "would rather wait to see the film at home".

It is clear that it's not the film selection on offer that is discouraging the potential cinema-goers, as this is more of a barrier for the cinema-goers.

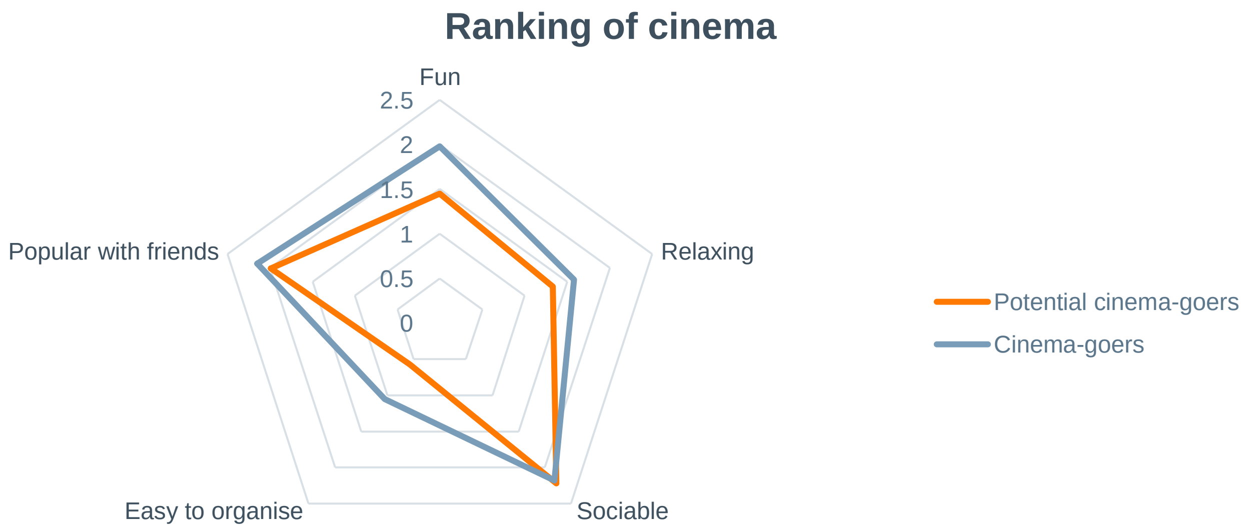
This highlights an opportunity to increase the frequency of cinema visits for the already frequent cinema-goers. As they feel particularly limited by their friends/family not having the same film tastes as them, but still strongly value group cinema experiences, a film club/scheme connecting these frequent cinema-goers may facilitate increased trips.

Cinema is expensive

Potential cinema-goers are much more likely to associate cinema with being expensive – 23% chose it as the primary association, compared with 7% of the cinema-goers. This further highlights a strong opportunity in removing barriers for repeated visits amongst the already frequent cinema-goers.

Cinema is less fun, less easy to organise, and less relaxing

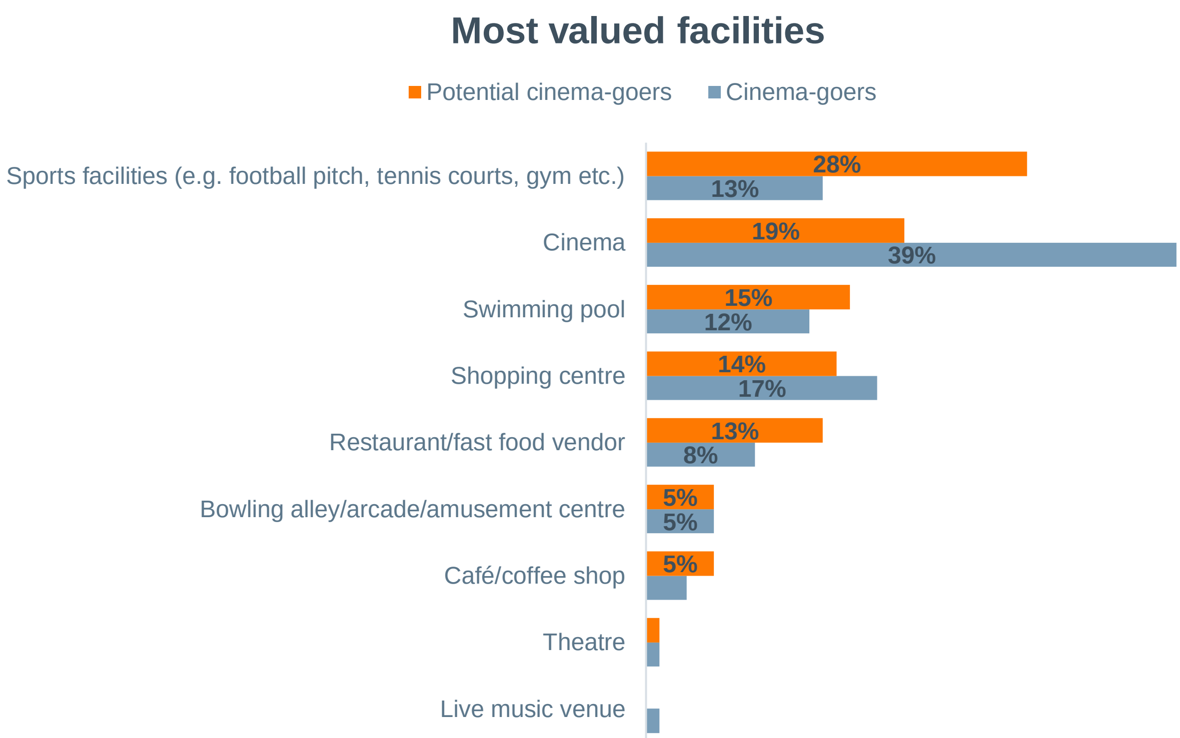
The least frequent cinema attenders rank cinema worse across all factors – except how sociable and how popular with friends it is. This is interesting, as this group also values the opinions of their friends more when choosing activities, and whether their friends want to go with them is more of a motivator. In that case, other aspects of the cinema experience are putting them off. How much fun activities are is the most important factor these young people think about when deciding what to do with their free-time, and is a priority area for change in perception.



Cinema is less valued

Given the more negative perception of cinema among the potential cinema-goers, it is unsurprising that this group is much less likely to value the cinema as a local facility.

Nonetheless, one in five of the potential cinema-goers still value cinema the most of their local facilities.

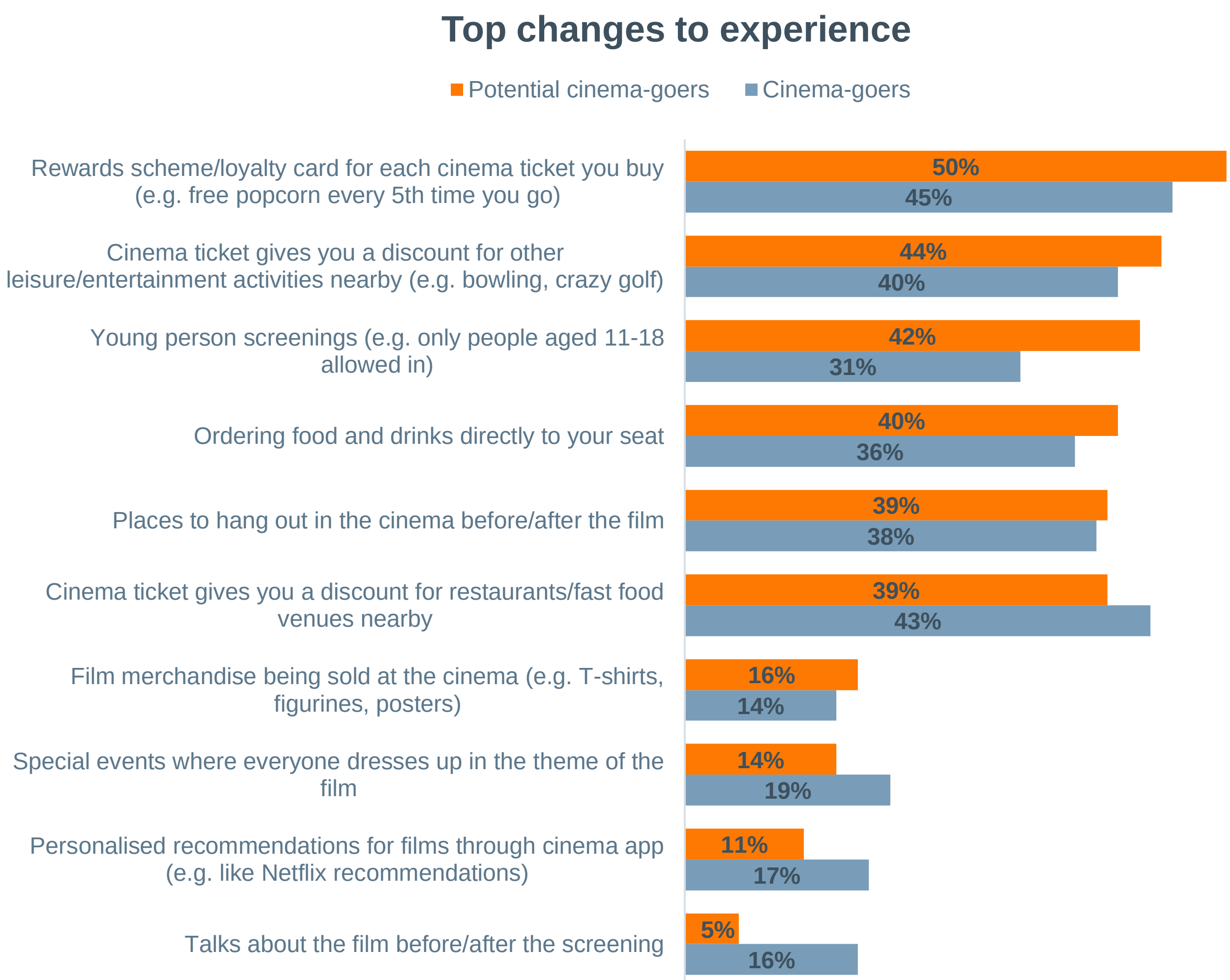


Think about the facilities you have access to in your local area. Which of them would you be most upset about losing? Base: cinema nearby (631)

Adapting the wider experience

Potential cinema-goers are especially interested in a rewards scheme for frequent cinema visits, and discounts to other leisure activities.

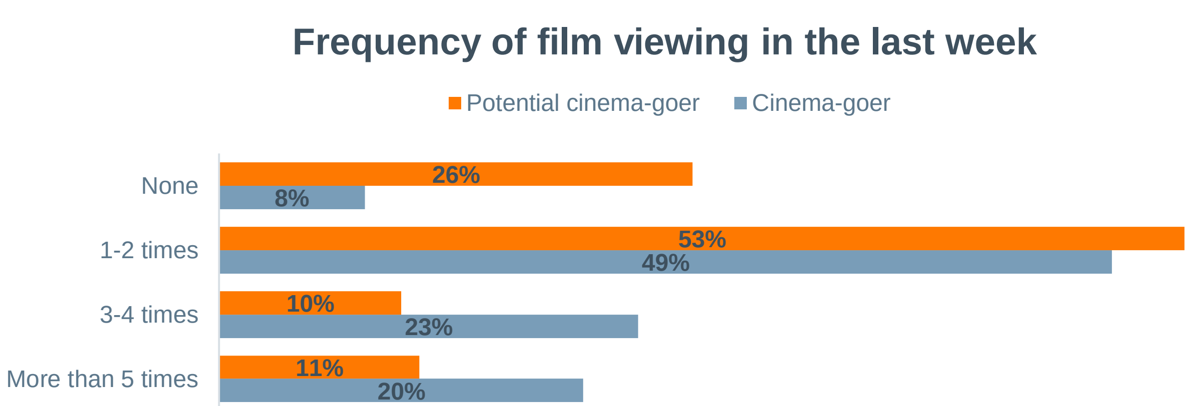
Young person screenings are also particularly appealing for the potential cinema-goers. This is an incentive focused on the group experience, so this finding is supported by potential cinema-goers being most concerned with their friends' opinions, and being able to do activities with their friends.

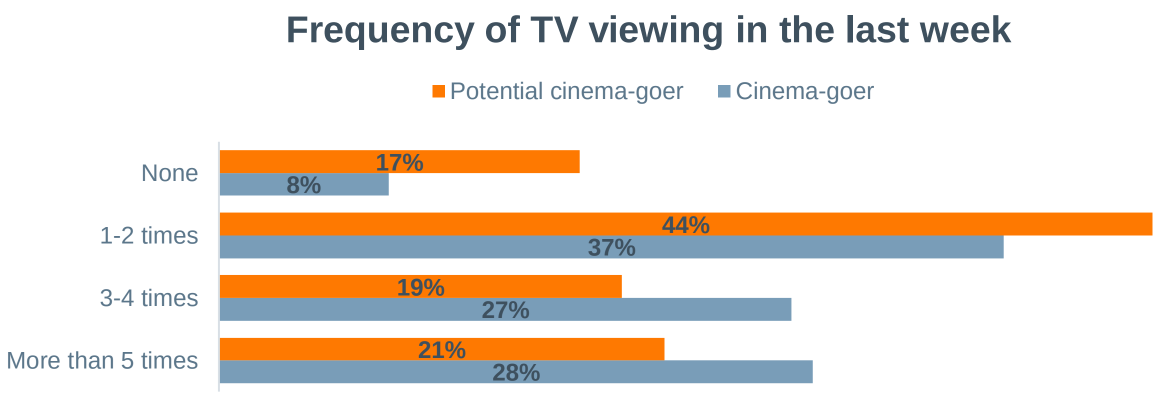


Here are some ideas for improving the experience when you visit a cinema. Please rank your top three. Base: cinema nearby (631)

Less frequent consumers of film/TV generally

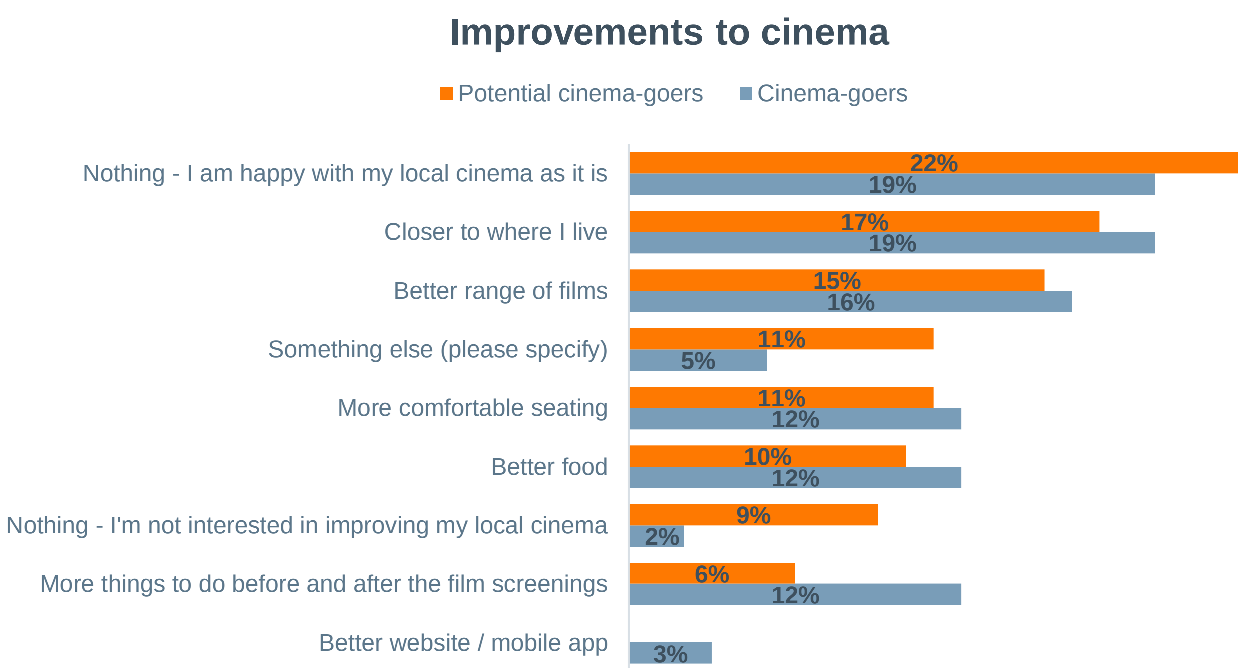
The potential cinema-goers are less frequent viewers of films generally, and also less frequent viewers of TV. Therefore, it may not be just the format that's a barrier, but the content itself.





Availability of cinema

The potential cinema-goers and the cinema-goers all have a cinema available within 15 minutes travel time, as identified by their parents. Significantly then, a large proportion still identified “Closer to where I live” as a key improvement to their local cinema. Travel time is therefore not the only key here, but independent travel is also important.



If you could change just one thing about your nearest cinema, what would it be? Base: cinema nearby (631)

Some love it but don't want to go too much, some aren't interested

As we examine the answers of the potential cinema-goers, we see a real mix of attitudes that can be categorised in approximately two equally sized groups:

- Occasional cinema-goers
    - This group value the cinema, selecting it as the local facility they'd be most upset to lose.
    - However, they perceive the cinema as only an occasional activity. "Going too often makes it less special" is a key block to attending the cinema more frequently, and "If I haven't been to the cinema in a long-time" is a key driver in going.
    - This group is making decisions based on the frequency they go, and is actively deciding not to go more frequently, despite enjoying and valuing the cinema.
    - Changing this perception is a key opportunity for growth and changing cinema habits just as they are forming.
- Cinema haters
    - This group just isn't a big fan of the cinema.
    - "Better things to do" and "would rather wait for the film to come out at home" are the top blocks to going to the cinema more often.
    - Reaching this group is a low-priority.

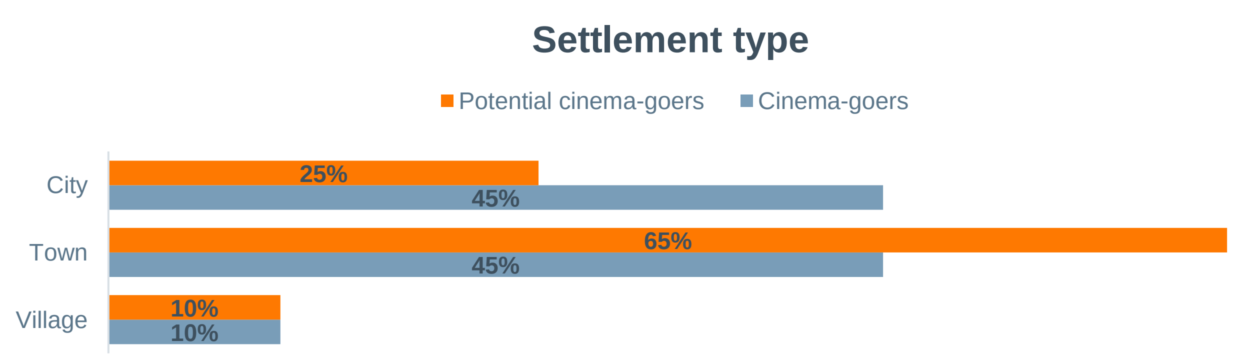
Demographics

Equal gender representation

Potential cinema-goers have an equal gender split, representative of the population – this is noteworthy, as across all young people, males are the most frequent cinema-goers. This difference is due to increased repeated visits rather than differences in non-attendance.

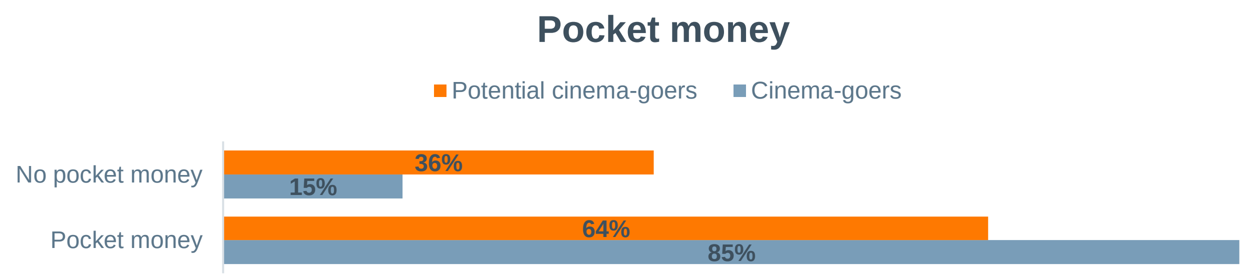
Town based

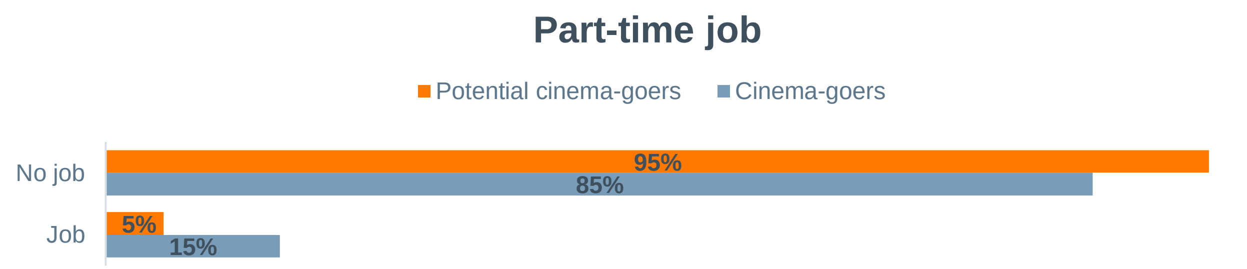
Potential cinema-goers are more likely to live in a town than they are in a city. Non-attendance may be, then, related to the possibility of independent travel possible: if they live in a town, they're more dependent on transport from parents.



Less spending money

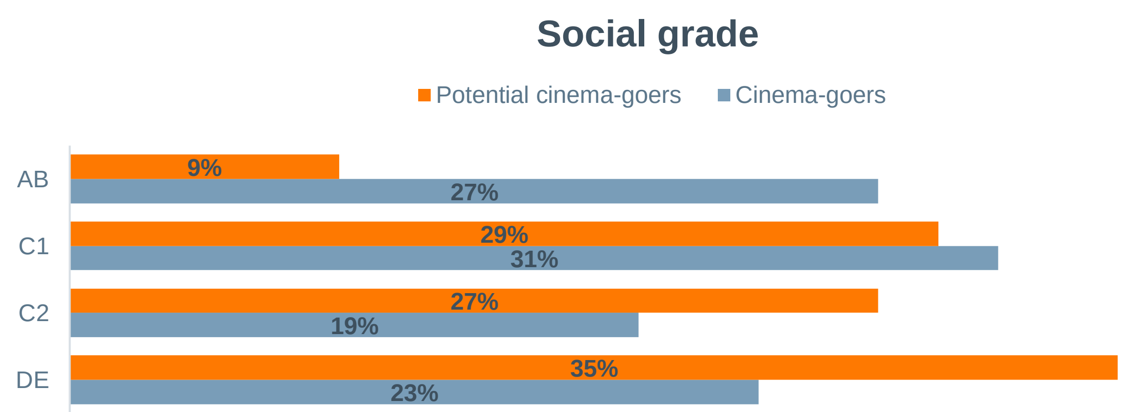
This group is less likely to have a part-time job and less likely to receive pocket money, which helps to explain why they are particularly considerate of the cost of activities when deciding what to do with their free time.





Lower socio-economic grades

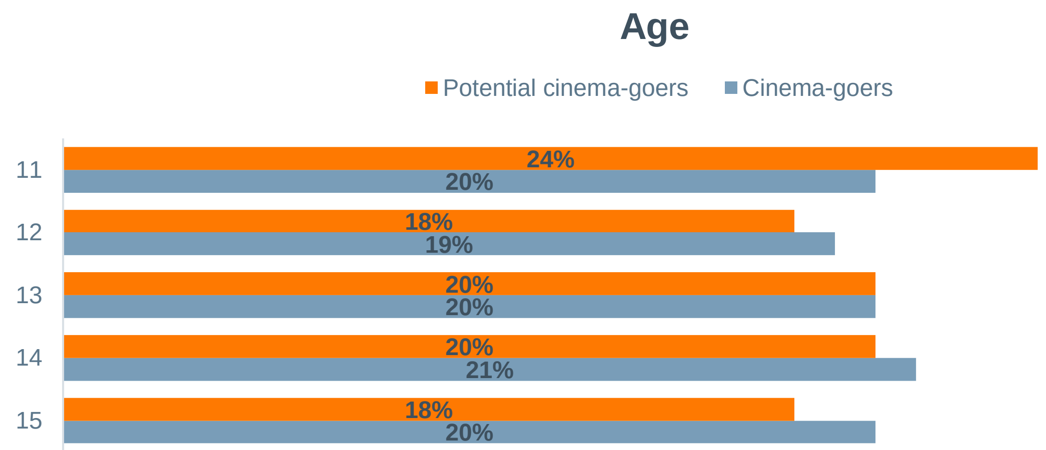
Potential cinema-goers are also much more likely to be from lower social grades.



They are also less likely to be from a household where the parents have university-level education and are less likely to go to a grammar school or independent school.

Younger

The potential cinema-goers are slightly younger than the cinema-goers.



THE BIG PICTURE

The most important things to know about young people when trying to regain these audiences are:

- They care a lot about doing activities as a friendship group, and greatly value the opinions of their friends.
- Cinema loses out compared to competing activities in not being perceived as relaxing or easy to organise. Young people identify how relaxing activities are as an important consideration when deciding what to do with their free-time, therefore changing this perception is one of the top priorities.
- Cinema is still highly valued as an activity and a local facility.
- The advantage cinema has over all other activities is how sociable it is – this is second most important factor for young people when deciding what to do with their time.
- Among those who have a cinema very nearby, cinema is perceived as especially hard to organise by the least frequent cinema-goers. Thus, there are other logistical barriers for the potential cinema-goers.
- The decision to go the cinema to see a film they're interested in is largely driven either by how much they want to see that specific film, or whether their friends/family are spurring on trips.
- There is a wide range of barriers to cinema attendance, but for the least frequent cinema-goers these are primarily related to the cinema experience itself: either they feel they have better things to do, or they're worried about making it less special by going too often.
- The frequent cinema-goers have a similar range of barriers to increased cinema attendance, but are especially affected by not having enough time and their friends/family having different film tastes to them. There may be an opportunity to increase cinema attendance for the already frequent cinema-goers by organising film clubs to facilitate group outings for those held back by the film tastes of their friends.
- The perception of cinema as 'expensive' is the strongest predictor of not going to the cinema. This is true for all social grades, and thus it's likely not just about affordability, but perceived value.
- Increased spending money is strongly correlated with increased cinema attendance, but special offers alone on tickets or food/drink aren't what motivate young people to go and see a film in the cinema. The incentives need to relate to what these young people want to get from the cinema, which is a group socialising experience that can last beyond just the film.

APPENDIX 1: METHODOLOGY

The online survey was conducted between 10th and 20th September 2019.

Young people were recruited to the questionnaire through parents/guardians. Parents/guardians answered the key demographic questions prior to the questionnaire.

Respondents were weighted to be nationally representative by:

- Age
- Gender
- Ethnicity
- Region
- Social grade

Predictive models of cinema attendance

We used logistic regression to identify the key drivers of cinema attendance, both attitudinal and demographic, when all other factors are controlled for.

Logistic regression is a form of generalised linear model used when the target variable is binary. In this case, our aim was to infer the effect of each driver/barrier on cinema attendance vs non-attendance in the past month. Our input variables were all binary, allowing us to interpret their coefficients consistently. Models were fitted multiple times over different subsets of the dataset, using k-fold cross-validation to estimate out-of-sample performance - accuracy and R-squared scores are out-of-sample estimates.

The likelihood of cinema attendance for each driver/barrier (odds ratio) is the exponent of the logistic regression coefficient.

We corroborated the logistic regression model using a non-linear, tree-based predictive model to check whether the same drivers held up under different assumptions. The non-linear model handles interactions and is less sensitive to overfitting than the traditional regression model. However, it is less suited to inference than the traditional model - we can measure the importance of each driver within the model, but we cannot quantify the overall effect (besides basic positive / negative directionality).

Driver/barrier	Direction	Importance
Word association: "Expensive"=Yes	Negative	24.14%
Pocket money: >£10 per week	Positive	23.97%
Cinema within 15 mins proximity: Yes	Positive	13.72%
SEG=ABC1	Positive	12.73%
Dwelling: City	Positive	12.25%
Part time job: Yes	Positive	9.89%

Out of sample accuracy: 72.4%

We found that the same key drivers were present in the data, with the same positive/negative directionality for each driver. This suggests that this model is robust, and has not been overfit to the data.

APPENDIX 2: WHO WE SAMPLED

Region	Actual	Weighted
London	16%	14%
South excl. London	26%	32%
Midlands	18%	17%
North	27%	23%
Scotland	5%	8%
Wales	5%	5%
Northern Ireland	2%	3%

Age	Actual	Weighted
11	20%	21%
12	20%	20%
13	21%	20%
14	19%	19%
15	20%	20%

Gender	Actual	Weighted
Male	52%	51%
Female	48%	49%
Other	0%	0%

Ethnicity	Actual	Weighted
White	82%	77%
BME	18%	23%

Social grade	Actual	Weighted
ABC1	55%	49%
C2DE	45%	51%