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Young Flemish audiences' cinema-going intentions and VOD streamed viewing practices during COVID-19

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Abstract

This article examines the socio-cultural and economic aspects influencing cinema-going behaviour during the COVID-19 outbreak, as well as the relationship between cinema-going and video-on-demand viewing behaviour among young Flemish adults (20-34 years). Results indicate that participants missed the film theatre, however, they were at the same time reluctant to return to cinemas. Participants valued safety, comfort, and accessibility more than the social aspect of cinema-going. The closure of cinemas did not change genre preference, as participants preferred big blockbusters and domestic films over other genres. The study furthermore confirms a positive relation between cinema-going and streamed viewing of films, which could be considered more complementary than substitutive. A major factor in the trade-off between cinema and VOD however remains price, especially if new titles would be released day-and-date. The authors argue that, if cinemas want to retain and attract audiences again to the big screen, they should re-consider price setting choices considering the prices available for VOD streaming services in the market.

Keywords

Cinema-going, streamed viewing, young audiences, Flanders, COVID-19

Introduction

The COVID-19 pandemic has greatly impacted theatrical exhibition, unprecedentedly forcing cinemas to close for an unforeseen time (Vlassis, 2021). As a result, the box office dropped by 72%, to $12 billion globally (MPA, 2020). Meanwhile, the global video-on-demand (VOD) market reached $71 billion in 2020 (Statista, 2021), increasing approximately by 40%. Since COVID-19, motion pictures studios have had to abruptly alter their ways of bringing products to audiences. Similarly, cinemas also had to explore new ways of attracting and retaining audiences within this new context of increased streamed viewing behaviour. Before COVID-19, the cinema window – traditionally considered the primary and most financially beneficial window for a film (Vogel, 2020) – was already shortening. A shortened theatrical window leads to fewer revenues, which also negatively impacts the revenues generated in the consequent windows challenging the economic valorisation of the film's life cycle (EY, 2020; Weinberg et al., 2021). According to the film business trade press, COVID-19 has amplified this challenge, while technological innovation and increased competition in the film market have also been altering consumer behaviour.

It becomes clear, from various studies trying to determine the aspects influencing cinema attendance, movie sales, and cinema-going behaviour, that cinema attendance is a risky business, and the success of specific titles is therefore hard to predict. Studies on cinema demand forecasting models – that have managed to achieve reliability and validity – have already included a vast realm of demographics, socio-cultural and economic aspects of cinema-going. The question then becomes, as VOD streaming services are increasingly becoming an alternative place for film viewing, to what extent VOD streaming behaviour can be considered an influencing factor for cinema-going, and hence a necessary element to be included in studies of cinema demand. While industry professionals, policymakers and state film funds have emphasized the risks of streaming platforms for theatrical release, audience research that specifically correlates movie-going and streaming behaviour is lacking. This study's objective is thus to determine to what extent socio-cultural and economic aspects of cinema-going are important to audiences in COVID-19 times, to what extent cinema is missed by young audiences, and to what extent VOD streamed viewing behaviour and cinema-going can be related. To answer these questions, in March 2021, we distributed an online quantitative survey (N = 400) to young adults (20-34 years). In this study, we investigated cinema demand in Flanders, i.e., the Dutch-speaking region of Belgium.

Belgium and, by extension, Flanders can be considered small film markets in terms of audiences. Between 2010 and 2017, Flemish cinema attendance was quite stable; averaging 10.1 million cinema admissions yearly. In 2018, Flemish cinemas admissions dropped to 9.1 million, and then slightly further down in 2019. However, it was not until 2020 that Flemish cinema admissions dropped drastically by 70.4%, due to the consequences of the COVID-19 outbreak, reaching merely 2.7 million cinema admissions that year (Statbel, 2021). Meanwhile, the Flemish VOD market has seen a substantial increase in demand. In 2019, 40% of the Flemish population had a subscription to Netflix; an increase of 9% compared to 2018

(Vandendriessche & De Marez, 2020, p. 52). In 2020, Netflix was no longer the sole paid streaming platform in the Flemish market as Disney+, Apple TV+ and Streamz were launched (Raats & Evens, 2021). The arrival of these newcomers, together with the outbreak of COVID-19, accelerated the uptake of streaming platform subscriptions in Flanders even more. By the end of 2020, 50% of the Flemish population had a subscription to a paid streaming platform, 9% of which attributed the fact to the COVID-19 crisis (Vandendriessche et al., 2021, p. 10). In light of the simultaneous drop in cinema attendance and the sharp uptake of subscriptions to streaming services (accelerated by COVID-19), we question to what extent streaming platforms should be considered a threat to cinema demand.

When studying small nations, as Puppis et al. (2009) emphasize, attention must be allocated to both national economic and socio-cultural aspects of the market in question, and to the international landscape which affects it. For this reason, when formulating our hypotheses on cinema demand, we considered literature focusing on both Belgian/Flemish and international markets. Our focus, in terms of literature, was on young audiences as they are a primary cinema-going demographic and, thus, are essential contributors to the sustainability of the film market (Silver and McDonnel, 2007). To describe the most relevant aspects influencing cinema attendance, the article draws on theoretical approaches in the fields of cultural economics (Gemser et al., 2007; Irandoust, 2018; Liu, 2006), media sociology (Van de Vijver, 2017; Veenstra et al., 2020a; Veenstra et al., 2020b), cultural participation and media repertoires (Vandenplas & Picone, 2021; Vander Stichele & Laermans, 2006).

The results of our study show that young audiences miss cinemas, but COVID-19 has made them reluctant to return to the big screen and has made them increasingly aware of aspects such as hygiene, comfort and the cinema complex's facilities. We find that hygiene, ticket price and sound are the most critical aspects influencing their cinema-going behaviour. We also find that young Flemish audiences relate cinema-going to watching new blockbusters and new local (i.e., Flemish-language) films. Cinema remains the preferred screen for watching these films, yet cinema-going intentions decrease when VOD streaming services offer these titles at similar prices to cinemas.

The article concludes that: firstly, post-COVID-19 aspects such as hygiene and seat organization are of great potential importance to audiences; secondly, VOD streamed viewing behaviour should be considered when studying cinema demand as these two activities can be related; and, thirdly, young Flemish audiences increasingly consider VOD streaming services as an alternative space for watching films, but VOD streaming services are not substituting cinema-going for them. The results of this paper offer insights on data on perceptions of movie-going in times of COVID-19, which in turn might reveal future cinema-going intentions, and add to the limited research examining patterns of cinema-going and streaming behaviour.

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Theoretical considerations

Which socio-cultural and economic aspects influence cinema-going?

According to historical cinema research, cinema is best understood as a form of socialized experience, which focuses more on the experience surrounding this activity than on the film itself. The cinema-going experience is perceived to be about immersion and a desire to experience a social event (Van de Vijver, 2017; Van de Vijver & Biltereyst, 2013). The sociality of cinema refers to a specific practice of social interaction, hence socialising. Van de Vijver (2017) investigated young Flemish audiences' film consumption patterns and tastes and questioned why young people are still visiting the cinema. Her results showed that young audiences need an excellent cinematic experience but are sensitive to high prices and would not be interested in special events such as 'Opera at the Movies'. However, when granted the opportunity, they would choose the cinematic experience over watching films on a small screen. She concluded that 'going to the movies [i]s a social activity, remembered because of its treasured company or the membership of an imagined community submerged in the eventfulness of blockbuster experiences' (Van de Vijver, 2017:142). While she concluded that eventfulness and the social aspect of cinema-going are most important, she also emphasized that young audiences were explicitly concerned with the price/quality ratio.

Aside from the socialising aspect of cinema, it has been argued that demand is influenced, in varying degrees, by additional factors, such as gender, education level, willingness-to-pay as well as the impact of critical reviews, word-of-mouth and the film's country of origin. Firstly, relating to gender, Irandoust (2017) observed that women in Sweden have a higher tendency to go to the cinema than men. Also, Mar Azcona et al. (2005) found that Spanish women were much more cinema-oriented than Spanish men. For a large number of the female study participants, cinema-going was the most preferred choice of leisure activity, whereas for most of the men who took part in the research, cinema-going came at fourth or fifth place. Additionally, Suarez-Fernandez et al. (2020) confirmed that Spanish women were generally significantly more likely to attend the cinema than Spanish men, but once a study participant was already a cinema-goer, there was no significant difference in terms of cinema attendance frequency between men and women. Similarly, Wühr et al. (2017) found that German men preferred a wider range of movie genres than German women. Nine movie genres were among the ones strongly preferred by men whereas only two movie genres were among the ones strongly preferred by woman. However, the authors did not find a significant difference between men and women in terms of cinema attendance frequency. Ateca-Amestoy and Ugidos (2021) illustrate that cinema-going is the most popular activity that a heterosexual couple does together – which might explain why some studies cannot confirm a significant difference between men and women in terms of cinema attendance frequency. Overall, previous studies indicate that gender has an effect on cinema-going, hence it is a factor that helps to explain cinema-going behaviour. Its influence, however, is more nuanced in the sense that women might be the ones *deciding* or *having the* *intention* to attend the cinema, but not necessarily attending the cinema more *frequently* than men.

Secondly, Veenstra et al. (2020a) consider the education level of viewers as a factor influencing their film genre preference. The results show that higher educated people prefer different (and more varied) film genres. The education level of viewers is also related to broader forms of cultural participation and consumption of media, as demonstrated by Bourdieu's theory of cultural capital, which advances the hypothesis that one's cultural capital (or familiarity with high culture within a given society) can be linked to one's academic advancement (1986). However, Peterson (1992) argued that a link between 'high culture' and 'high education' should not be considered exclusive as he found that higher educated groups not only displayed an interest in high culture but also in more popular cultural genres, thus having a broader cultural taste pattern. As a result, he labelled the higher educated groups 'omnivorous' in terms of cultural participation and taste. This fact served to later explain the results generated by Veenstra et al. (2020a) in a study of the Flemish film-viewing population. Vander Stichele & Laermans (2006) also argued that age and education play a decisive role in cultural participation in Flanders. Similarly, they identified an 'omnivorous group' of people younger than 35 years, in which different forms of cultural participation co-exist. They were well-educated and oriented towards both high culture (i.e., opera, classical music, dance/ballet, theatre plays and museums/exhibitions) and popular activities (i.e., folk/traditional music, jazz/blues, pop/rock, and cinema). Studying the differences in Flemish population's media consumption patterns, Vandenplas & Picone (2021) also confirm the significant role played by age and education. Hence, an increase in education increases a preference for specific high culture and the open-mindedness for other cultural genres.

Various scholars (Arteaga et al., 2021; Irandoust, 2017) have, thirdly, explored willingness-to-pay (WTP), i.e., the maximum price a consumer wants to pay for a product, and pricing (de Roos & McKenzie, 2014) in relation to cinema-going. WTP in turn depends on the characteristics of films and the cinema complex itself, such as the availability of dining facilities, comfortable seating and premium screening formats, such as IMAX, 4DX and 3D, as well as VIP and loyalty offers. Arteaga et al. (2021) measured the audience's willingness to pay above the general ticket price for a certain premium format and exclusive experience. Particularly for premium formats that are hard to replicate at home, the audience was willing to pay more. Similarly, Irandoust (2017) confirmed that audiences are willing to pay a price that is above the general ticket price if they perceive increased utility or satisfaction. De Roos & Mckenzie (2004: 106) confirm audiences' sensitivity to pricing in cinemas and argue that profits could increase by offering more off-peak pricing and employing variable film pricing practices.

Fourthly, critical reviews and word-of-mouth (WOM) are also aspects considered to determine cinema demand. Deng (2020), for example, confirmed the value user and critical reviews have on influencing cinema sales and demand. Gemser et al. (2007) concluded that critical reviews mainly influence consumers' choice of art-house films, but not necessarily consumers' decision on mainstream cinema-going, the latter being mainly influenced by

WOM i.e., the audiences' interpersonal communication about movies (Gemser et al., 2008). Liu (2006) confirms that WOM is a valuable measure to help forecast box office sales, allowing theatres to better plan for screening capacity. In the digital environment, WOM's influence is more nuanced, as online recommenders and online specialized cinema press have a more significant impact than general press or blogs (Alvarez-Monzoncillo et al., 2018). That is why recent research on WOM's effects on cinema demand focuses specifically on electronic or online WOM (e-WOM) (Chen et al., 2021; Deng, 2020; Kim et al., 2019; Elberse & Eliashberg, 2003; Holbrook & Addis, 2008; Liu, 2006; Roschk & Grosse, 2013).

Finally, the film's origin (i.e., Hollywood, European, domestic or other) is an essential predictor of cinema demand. Veenstra et al. (2020b) conducted a sociological analysis of the hierarchies structuring film viewing practices and young Flemish audiences' preferences, mainly measuring taste preferences related to the type of content and screen/device. They concluded that Flemish youngsters prefer to watch Hollywood films (often conflated with big-budget, genre movies) in the cinema and are more inclined to watch Flemish films – which they value less than Hollywood films but more than (the usually art-house) European films – on television. This result shows that the film type (in terms of country of origin and genre links) plays a role in the screen/device preference, as audiences perceive some films as 'cinema films'. This is also clear from American studios' recent dual strategy of investing in a decreasing number of box office franchise films for theatrical release and a significant number of straight-to-VOD releases.

Following the literature above, we formulate the following hypothesis:

- H1: Socialising, special cinematic features, gender, education level, willingness to pay, ticket price, critical reviews, WOM and the film's origin influence the cinema-going behaviour of young Flemish audiences.

To what extent can streamed viewing be considered as an influencing factor of cinema demand?

In recent years, cultural engagement has been studied as part of the notion of an 'experience economy' (Pine & Gilmore, 2011), where people need to decide how to split their finite free time and financial resources between different activities. The experience economy concept relates to peoples' experiences, and 'includes the way in which the use and consumption of goods and services can be experiential' (Sundbo & Sørensen, 2013, p. 1). Hence, going to the opera, to a concert, to a theatre play, or watching a movie in the cinema, are all cultural activities that, to some extent, compete with each other for an audience of limited free time and resources (Sundbo & Sørensen, 2013). As described above, studies on participation in cultural and popular activities confirm that young, well-educated Flemish people take part in both high as well as popular forms of culture. The question is whether consumption of VOD, more specifically in the form of subscription-VOD, should be considered as a form of screen media competing with other home entertainment media types only (such as broadcasting and video gaming) or whether VOD should be considered as competing with non-home-based activities such as cinema-going.

Regardless any competition between cinema-going and other cultural activities, media convergence has significantly changed the film industry, which in turn also affects the role and position of theatrical release as part of the film value chain. Digitalisation processes have altered film production, distribution, exhibition, and reception (De Vinck & Pauwels, 2015). As the film companies' creative and economic strategies expand, film and other media forms converge. Through media convergence the film industry found itself in a transition process, intersecting the realms of old and new media, information and communication technologies and creative arts, blurring the borders of what we call the 'creative industries' (Jenkins, 2006). The 'core cultural industries' now compete for the same resources, including audiences' attention and a share of media budgets (Hesmondhalgh, 2019; Throsby, 2008).

Today, the global cinema industry is particularly concerned about the proliferation of international VOD streaming services such as Netflix, Amazon Prime, and Disney+, which are argued to devalue the cinema-going experience and to fragment audiences even further (Feldman, 2019). Since COVID-19, VOD streaming services have been the primary outlet for watching new movies, further fuelling competition with cinemas (Lilliard, 2021). However, VOD streaming services cannot offer the same experience as cinemas. Cinema industry analysts argue that, to stay attractive to audiences, cinemas prioritize reinventing themselves and the experience they are providing, including exclusive content, additional comforts and social experiences. Cinemas should continue to focus on understanding their specific audiences' needs, interests, and attitudes (Koljonen, 2021: 30). When studying audiences' streamed viewing habits, we argue that streaming platforms are increasingly becoming an outlet for film viewing, which needs to be taken in consideration when researching cinema-going as well.

Based on the literature, we formulate the following hypothesis:

- H2: Streamed viewing complements rather than substitutes cinema-going.

Methodology

Sample and participants

We collected the data by distributing a survey between 17th and 25th March 2021. The sample included individuals aged between 20 and 34 years old living in Flanders. Participants were asked about their cinema-going preferences and streamed viewing habits. Participants filled in the survey when cinemas were closed and other socio-cultural activities, excluding museum visits, were unavailable to the public due to COVID-19 related imposed restrictions. To increase the sample's representativeness, the survey was distributed to a selection of a

Belgian panel from a recruiting office.[1] The data included more female than male participants compared to the population ratio and the age group 20-24 was under-sampled. To address the under-sampling of the male population and the age group 20-24, we weighted the sample by gender and age groups according to Belgian statistics. No data point was given a weight factor, i.e., population percentage divided by sample percentage, higher than 3. The weighted sample included 197 women (50.6%) and 202 men (49.4%). In terms of age, the sample included 125 participants between 20-24 years (31.2%), 137 participants between 25-29 years (34.3%), and 137 participants between 30-34 years (34.2%) (See: Table 1). The overall mean age was 27.5.

	%
Gender	
Male	49.4
Female	50.6
Age	
20-24 years	31.2
25-29 years	34.3
30-34 years	34.2
Living situation	
Living alone	17.0
Living with partner/family/friends (no children)	65.9
Living with family and kids	16.5
Degree	
Primary School	1.5
Secondary School	17.8
Higher education ('hogeschool')	34.9
University	42.6
Professional status	
Employee	74.1
Self-employed	3.1
Student	17.6
Job seeker	2.1
Net personal income (if employee or self-employed)	
Less than €500	1.3

[1] Bilendi (https://www.bilendi.be/) helps researchers complete online survey projects using proprietary panels in 12 European countries. The Belgian panel counts 150.000 panellists.

€501-€999	0.8
€1.000-€1.499	4.6
€1.500-€1.999	27.9
€2.000-€2.499	29.1
€2.500-€2.999	6.2
€3.000-€3.499	1.0
More than €3.500	1.2
I do not wish to answer this	9.5

Table 1. General sample description.

Data

The first part of the survey included socio-demographic variables and the second part measured cinema-going socio-cultural and economic aspects. Cinema-going attendance was measured by the following questions:

1. How many times did the participant visit the cinema in the year before COVID-19?
2. What is the participant's estimation of returning to cinemas? Do they estimate going more or fewer times to the cinema compared to their cinema-going attendance before the outbreak of COVID-19?
3. How many times did the participant visit the cinema in the period between the lockdowns (i.e., July – October 2020)?
4. To what extent does the participant hesitate to return to cinemas upon reopening?

The socio-cultural and economic aspects of cinema-going were measured by 15 items on a 5-point Likert scale (from "very important" to "not at all important"), measuring the importance of the social practice of cinema-going, cinematic features (i.e., the sound) and ticket price. Due to COVID-19, we included aspects related to the cinema complex's facilities, comfort, and hygiene. We assumed these aspects might have increased in importance as COVID-19 forced the population to pay more attention to hygiene and maintain social distancing. The survey included a list of 21 upcoming cinema-releases[2] (a cover photo and a short description) to measure which type of film the participants would prefer to watch in the cinema.

The third part of the survey included measures for VOD streamed viewing. The observations for streamed viewing frequency take two forms: (1) how many episodes of a

[2] *No Time to Die* (Cary Joji Fukunaga, 2021), *The Kings Man* (Matthew Vaughn, 2021), *Ritueel* (Hans Herbots, 2022), *Rookie* (Lieven Van Baelen, 2021), *Red Sandra* (Jan Verheyen/Lien Willaert, 2021), *Zillion* (Robin Pront, 2022), *Dealer* (Jeroen Perceval, 2021), *Dune* (Denis Villeneuve, 2021), *The Conjuring: The Devil Made Me Do It* (Michael Chaves, 2021), *Druk* (Thomas Vinterberg, 2020), *A Quiet Place Part II* (John Krasinski, 2021), *Space Jam: A New Legacy* (Malcolm D. Lee, 2021), *Nomadland* (Chloé Zhao, 2021), *Nobody* (Ilya Naishuller, 2021), *In the Heights* (Jon M. Chu, 2021), *Amonite* (Francis Lee, 2020), *The Reason I Jump* (Jerry Rothwell, 2020), *Ghostbusters: Afterlife* (Jason Reitman, 2021), *The Croods 2: A New Age* (Joel Crawford , 2020), *The Mauritanian* (Kevin Macdonald, 2021) and *Dark Rider* (Eva Küpper, 2021).

series[3] the participant watches on average per week via VOD streaming services; (2) how many movies the participant watches on average per week via VOD streaming services. Participants also had to indicate which outlets (e.g., review sites, TV news, newspaper, etc.) they used to get information about the films on offer. Finally, the survey presented the participants with three hypothetical situations relating to the most recent James Bond film, *No Time to Die*. For every hypothetical situation, the participants had to mention if they would prefer to watch *No Time to Die* in the cinema or via a VOD streaming service, and if the price would influence their decision.

Results

While participants missed cinema-going, they remained reluctant to return

According to Belgian statistics, 8 in 10 Flemish people participate in cultural activities. Participation in core cultural activities (attending concerts, museums, the cinema, stage/plays, and libraries) had remained stable over the past 20 years (1996-2018). According to Statistiek Vlaanderen (2019), in 2018, 62% of the Flemish people (18-75 years) visited the cinema. Based on our survey, 75.6% of the participants went to the cinema in the year before COVID-19 (March 2019-March 2020), 15.6% did not visit the cinema, and 8.9% could not recall visiting the cinema before COVID-19. Thus, on average, in the year before COVID-19, the participants went to the cinema 3.1 times. We conclude that overall cinema is more popular among young Flemish audiences (20-34 years) than the general Flemish audience (18-75 years).

Cinemas in Flanders were forced to close their doors twice during COVID. Once between 14th March 2020 and 1st July 2020 and the second time between 19th October 2020 and 9th June 2021 (UNIC, 2021). Social distancing caused the cinema's capacity in Flanders to reduce on average by 70%. In the period between the lockdowns, 22.4% of the participants went at least once to the cinema, and 2.3% could not recollect going to the cinema. Thus, 74.7% of the survey participants did not visit the cinema in the period between lockdowns. From the subsample of participants who went to the cinema before COVID-19, merely 26.6% visited the cinema between the lockdowns, and 71.8% did not. Furthermore, 89.6% of the participants who visited the cinema in between the lockdowns also went to the cinema before COVID-19. Thus, 10.4% of the participants visiting the cinema in between the lockdowns have not been to the cinema before COVID-19, suggesting that Flemish cinemas were able to attract a new group of young audiences.

We also compared the participants' feeling of missing cinema-going during COVID-19 to other socio-cultural activities they longed for. Out of a list of 10 socio-cultural activities, the participants had to indicate the 3 activities they missed the most (See: Figure 1). The results showed that the participants missed 'going to a bar or restaurant' the most (83.3%),

[3] Series or fiction series are defined here as audiovisual, mainly live-action series with mainly imaginary characters and events, excluding reality TV, sports and entertainment programs, human interest, humour, lifestyle and talk shows.

followed by 'going out or partying' (36.8%), 'cinema-going' (34.0%), and 'going to a music festival' (27.5%) – which was missed slightly more than 'going to a music concert' (25.8%).[4] Interestingly, 'cinema-going' was the core cultural activity that was missed the most by the participants during social confinement. We compared the subsample that missed cinema-going to the general sample in terms of socio-demographics (i.e., gender, age, degree/education level, and professional status) and concluded that the subsample missing cinema-going is similar to the general sample, with the exception of the age groups, as 42.0% of the subgroup missing cinema-going was between 25-29 years old, whereas 34.3% of the general sample was aged between 25-29 years old. Hence, it was primarily participants aged 25-29 that missed cinema-going.

While the participants missed cinema-going, we wanted to determine whether, if cinemas reopened, they would be reluctant to go. Thus, to measure participants' willingness to return to cinemas, we presented them with a series of statements. It is important to specify that the statements did not include information about safety measures. Most of the participants (43.1%) indicated that they would return to cinemas, but they would hesitate to go back immediately upon reopening. 21.9% of the participants indicated that they would not visit the cinema at all whereas 14.8% could not give a clear answer. 12.6% reported that they would return to the cinema despite not being vaccinated for COVID-19. Only 7.6% expressed the desire to immediately return to the cinemas upon reopening but on the condition that they are vaccinated for COVID-19. Hence, 2 in 10 participants showed a solid eagerness to return to the cinema and did not seem reluctant to return, whereas 4 in 10 expressed their eagerness to return to the cinemas but appeared reluctant to do so immediately upon reopening.

[4] 'Going to a music festival' and 'going to a music concert' were included separately as the former is not a core cultural activity according to the methodology, adopted by the Belgian statistical office.

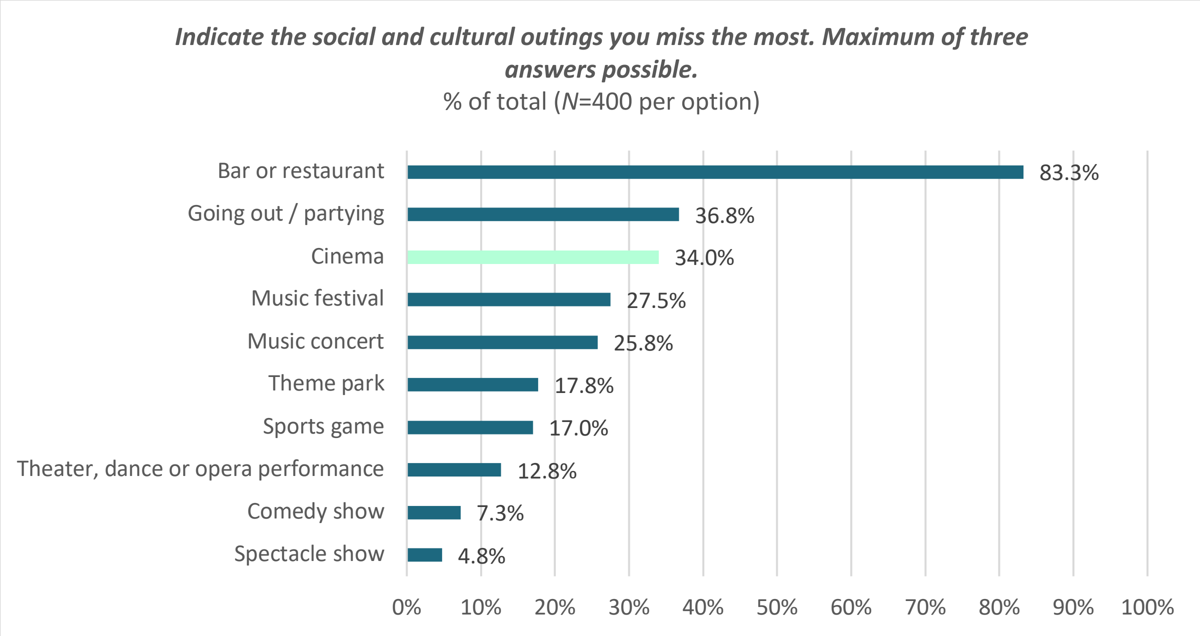

Figure 1. Socio-cultural outings that are missed (% of total per outing).

Having outlined the general attitudes of the participants in our survey sample towards cinema-going during COVID-19, in the following section, we test the evidence found in support of our two hypotheses.

H1: Socialising, cinematic features, gender, education level, willingness to pay, ticket price, critical reviews, WOM and film type influence cinema-going behaviour of young Flemish audiences

To describe the socio-cultural and economic aspects that might influence young Flemish audience's cinema-going behaviour, we provided the participants a list of 15 elements to choose from when describing what influences their cinema-going decisions (See: Table 2). The participants perceived 'clean and comfortable seats' as the most important aspect, followed by 'the price of the cinema ticket' and 'the sound in the movie theatre'. This shows that hygiene was perceived as more important than the social dimension of cinema-going. As no previous study indicated hygiene and comfort as the most important socio-cultural and economic aspects of cinema-going, we assume that this answer was influenced by COVID-19. Additionally, elements such as 'good and easily accessible cinema complex' and 'seat occupation organization' were also considered to be important. On the other hand, aspects such as the 'introductory or final discussion (Q&A) by the filmmaker(s)', 'that the film has won a prize (e.g., an Oscar or Ensor[5])' and 'the presence of a bar or restaurant in the complex' were not perceived as important. Additionally, we found that young male Flemish audiences were more likely to attend the cinema than young female Flemish audiences, χ^2 =

[5] Since 2010, the Ensor Award (in the first two years called Vlaamse Filmprijzen) recognises cinematic achievement in the film industry. It is the highest film honour in the Flemish-speaking part of the country, presented by the Ensor Academy of Belgium.

$4.12, df = 1, p < .05$. However, we found no evidence to support the existence of a link between the level of education of young Flemish audiences and cinema attendance.

Therefore, compared to previous studies (before COVID-19), we find two remarkable differences regarding the socio-cultural and economic aspect of cinema-going. Firstly, during social confinement and cinema closure, participants highly valued hygiene and comfort in the cinema. Secondly, the value given to the social dimensions of cinema-going (i.e., being with friends and having access to a café/restaurant) was lower than expected. The findings on the importance of ticket price and the sound in the cinema (cinematic features) were in line with previous research.

Socio-cultural and economic aspects of cinema-going	**Importance (in %)**
Clean and comfortable seats (hygiene)	96.7
The price of the cinema ticket	90.8
The sound in the movie theatre	89.2
Good and easily accessible cinema complex	89.2
That the seat occupation in the movie theatre is well organized	81.9
That I am in the company of my friends, family and / or other acquaintances	74.2
That the cinema has an extensive film offer	67.0
That I can choose my seat / seat in the hall in advance	55.4
That there is a shop present in the complex	47.0
That famous actors play in the film	23.7
That you are not allowed to eat in the hall (eating ban)	17.1
The possibility to watch the movie in a premium format (e.g., IMAX, 4DX, ...)	16.3
That there is a cafe / restaurant in the complex	11.6
That the film has won a prize (e.g., Oscar, Ensor, ...)	4.1
That there is an introduction and / or completion talk (Q&A) by the maker(s) of the film in the theatre	2.9

Table 2. Socio-cultural and economic aspects of cinema-going (% importance).

As the ticket price was considered the second most important aspect of cinema-going, we measured the maximum price the participants were willing to pay for a standard and for a premium format cinema ticket. Most of the participants (*N*=355, 88.6%) indicated a maximum price for a standard ticket. Two participants indicated a maximum price of €25.0 (0.4%) being the highest and two participants suggested a maximum price of €5.0 (0.4%), being the lowest. Whereas 50% of the participants indicated a maximum price between €8.7 and €12.0, the average maximum price was €10.8 (See: Table 3). Thus, when comparing our findings with the current ticket prices found in the commercial cinema chains of Flanders, we assert that 25% of the participants should be willing to pay the standard ticket price for a screening at a large multiplex theatre such as Kinepolis (€11.95) whereas 75% of the participants would label the standard ticket price at Kinepolis too expensive (Kinepolis, 2021).

Likewise, 50% of the participants should be willing to pay the standard ticket price (€9.9) at a UGC theatre (another large chain) whereas 50% would label UGC's standard ticket price too expensive (UGC, 2021). Our results suggest that to attract most young Flemish audiences, the maximum price for a standard ticket should stay between €8.7 and €12. Interestingly, the standard ticket prices of the Flemish arthouse venues stay well within this indicated price range. For example, Cinema ZED in Leuven has a standard price of €9.5. The newest Flemish arthouse cinema, Cinema Lumière, has a standard ticket price of €10. Also, the Studio Skoop in Gent has a standard price of €10.

Most of the participants (*N*=239, 59.8%) indicated a maximum price for a premium format cinema ticket. The other 41.2% of the participants indicated that they are not interested in watching a film in a premium format. Two participants indicated a maximum price of €30.0 (0.4%), being the highest maximum price provided. The average maximum price for a premium format screening was €13.9, and the maximum price with the highest frequency was €15.0 (15.4%). 50% of the participants indicated a maximum price between €11.0 and €15.0. Compared to the premium format prices of Kinepolis, we conclude that participants should find affordable premium formats such as 3D, Laser Ultra and Atmos, as they are within the limits of €11.0 and €15.0. All the other premium formats − IMAX, IMAX 3D, Screen X, and 4DX − have a price that is higher than €50 per ticket (Kinepolis, 2021) Hence, only 25% of the survey participants would perceive premium formats such as IMAX, IMAX 3D, Screen X, and 4DX at Kinepolis as worth paying for.

Willingness-to-pay for a standard and premium format cinema ticket (*N*=355)			
		Standard cinema ticket price (*N*=335)	Premium format cinema ticket price (*N*=239)
Mean		€10.8	€13.9
Median		€10.0	€14.0
Mode		€10.0	€15.0
Minimum		€5.0	€2.0
Maximum		€25.0	€30.0
Percentiles	25	€8.7	€11.0
	50	€10.0	€14.0
	75	€12.0	€15.0

Table 3. Willingness-to-pay for a standard and premium format ticket.

Previous studies have pointed to the importance of WOM for driving cinema sales. Consequently, we first measured if participants get informed about the films on offer through WOM or other information sources. We presented the participants with a list of information sources (e.g., newspapers, review sites, etc.) available in Flanders, which included news relating to (upcoming) films. The participants were required to indicate which sources they used to acquire information about films. Talking to personal contacts about films (e.g., friends, family, colleagues) was the most common communication form (68.8%), followed by reading about movies on social media (58.0%), reading film news on international film review websites or blogs (38.8%) and turning to Belgian newspapers or magazines (e.g., *De Standaard, Knack, Focus Knack*, etc.) to stay informed (38.0%). Interestingly, only 12.5% of the participants indicated consulting Belgian review websites or blogs (e.g., Vertigo, Filmmagie, Cinenews.be, MoviePulp.be, Streamwijzer.be, etc.). We found that WOM, via personal contacts and social media, seemed more important than critical reviews. In terms of critical reviews, international review websites were considered as equally important as Belgian newspapers or magazines.

We then tested whether there was a significant relationship between the participants who consulted a specific type of information source and their cinema-going attendance in the year before COVID-19. Hence, we tested whether there were differences between cinema-going participants and non-cinema-going participants regarding the sources which they used to get informed about the film offer. The participants that used social media to get their information were more likely to go to the cinema than the participants that did not use social media to get informed, $\chi^2 = 8.396, df = 1, p < .01$. Thus, for young Flemish audiences, social media was an influencing factor in deciding whether to attend the cinema or not. We were unable to find other statistically significant relationships between cinema-going attendance and the other sources of information listed. Interestingly, even though obtaining information about films via their personal contacts was the most popular form of acquiring information about films, we did not find a statistically significant relationship between the participants' cinema attendance and this means of obtaining information, $\chi^2 = .150, df = 1, p > .05$. Thus, we concluded that information on the film offer is acquired through multiple types of information sources, of which input via personal contacts (68.8%) and social media (58.0%) were the most common. Yet, the only significant relationship found was between social media as an information source and young Flemish audiences' cinema attendance.

Thirdly, and in line with the literature indicating that film type also influences cinema attendance, particularly in the case of Flemish audiences, we tested the influence that the film's country of origin had on participants' cinema attendance. The participants showed a somewhat limited interest in watching any of the upcoming films listed (for the full list, see Footnote 2). They were only interested in two blockbusters and all the Flemish-language films (See: Figure 2). Although the list contained films pertaining to all main film genres, mainstream and independent films, and international and local films, the participants showed little interest in them. Most of the participants (36.3%) were interested in *No Time to Die* and slightly fewer participants (33.0%) were interested in *The Kings Man*. On average, 17% of the participants showed an interest in watching Flemish-language fiction films in the cinema (e.g., *Ritueel, Rookie,* etc.) while 17% were not interested in any of the films listed. However, 64% of the participants that were not interested in any of the upcoming films did visit the cinema before COVID-19. Our results partly confirm the findings of Veenstra et al. (2020b), who conclude that Hollywood films are the most preferred type of film to watch in the cinema for

Flemish youngsters. While Veenstra et al. (2020b) found that Flemish youngsters preferred to watch Flemish-language films on television, we found that our participants were actually interested in watching Flemish-language films in the cinema, admittedly with a lesser interest than for the two upcoming blockbusters. Furthermore, we compared the frequency of men and women who were interested in watching upcoming Flemish-language films (i.e., *Rookie, Ritueel, Red Sandra, Dealer,* and *Zillion*) and major blockbusters (i.e., *No Time to Die, The Kings Man* and *Dune*). On average, 39.4% of the participants interested in Flemish-language pictures were male, and 60.6% were female. On average, 65.2% of the participants interested in watching one or multiple of the blockbusters were male, and 34.8% were female. Hence, Flemish-language films tended to be more popular with women than with men, but major blockbusters were more popular with men than with women.

Our results support the insights from Koljonen (2021)'s Nostradamus report – an annual paper presented during the Göteborg Film Festival's Nordic Film Market which looks into the future of the screen industries through research and interviews with industry experts. In it media consultant and broadcaster Alex Stolz stated that cinema should be pursued as an experience, and it should be made high-end and luxurious. If audiences do not show up or show no interest, then the price point might either be too high for the overall experience, or the content might lack relevance. Our results also support the statement of Roberto Olla, Executive Director of the Eurimages Fund, (in the same report) that most young audiences are not interested in European cinema, which has already been identified as a growing problem. Our findings suggest that it is, however, not the case that young audiences do not watch European films, but when they do watch them, they do not select cinema as their viewing method. Hence, we conclude that in times of COVID-19, young audiences show an interest in watching local films in the cinema, yet, major Hollywood blockbusters are still the films which are most preferred.

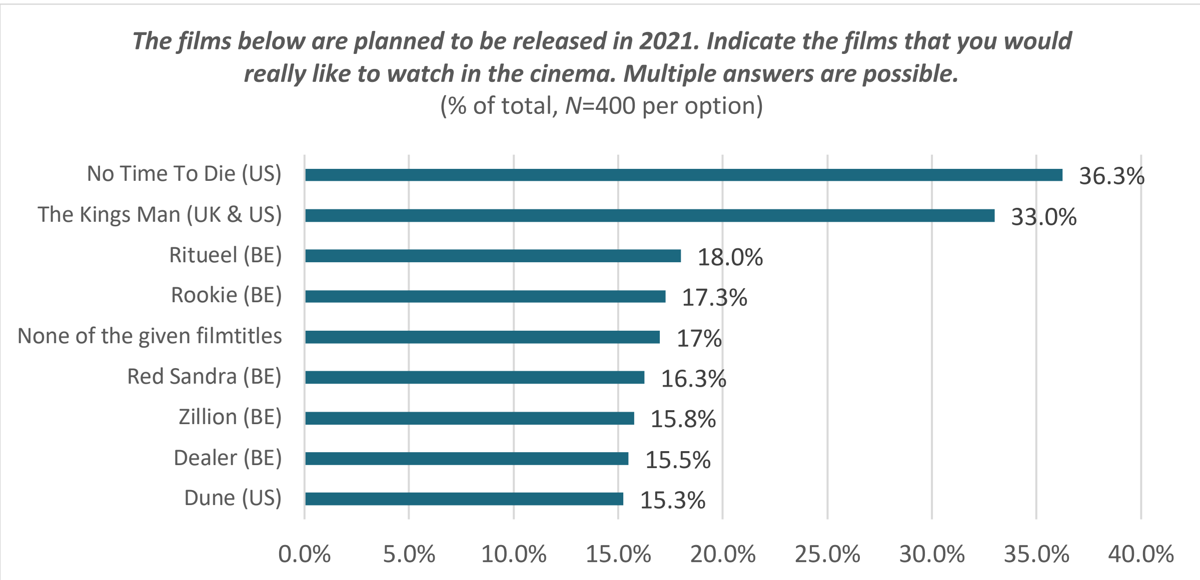

Figure 2. Interest for future cinema releases (% of total).

H2: Streamed viewing complements rather than substitutes cinema-going.

Our second hypothesis dealt with the relationship between cinema-going and streamed viewing. Based on previous literature, we assumed that there might be a relationship between the young Flemish audiences' cinema-going behaviour and the frequency with which they stream films and series via streaming services during COVID-19. To assess whether streamed viewing could be considered an indicator for cinema-going behaviour, we first measured the relationship between the frequency of cinema-going in the year before COVID-19 and the streamed viewing of films and series during COVID-19. We found that the relationship between streaming of films and cinema-going was stronger, $r(154) = .24,\ p < .01$, than the relationship between streaming of series and cinema-going, $r(275) = .14,\ p < .05$, while in both cases the relationships were significant. This result can be generalised to the population. Hence, pre-COVID 19 cinema-going attendance could be considered a predictor for streaming films and series during COVID-19. Therefore, a pre-COVID-19 heavy cinemagoer would also be a heavy streamer during COVID-19.

Secondly, we found a significant relationship between the intention to return to cinemas and film streaming frequency during COVID-19. The results showed that the more the participants intended to go back to the cinema upon reopening, the more frequently they streamed films, $r(341) = .26,\ p < .001$. However, no significant relationship between the intention to go to the cinema upon reopening and the frequency of the series streaming, $r(320) = .01,\ p > .05$ was shown in the results. Furthermore, we found no relationship between the feeling of missing cinema-going and the frequency of series streaming, $r(382) = .03,\ p > .05$. Nevertheless, there was a significant positive relationship between the feeling of missing cinema-going and film streaming, $r(382) = .03,\ p > .05$. It is possible that series streaming meets different needs than those fulfilled by film streaming and cinema-going; whereas film streaming, and cinema-going might meet similar needs. Besides, series streaming does not indicate audiences' future cinema-going intentions, while film streaming behaviour does. Hence, when discussing the complementarity between cinema-going and streaming services, there should be a differentiation made between film streaming and series streaming, as the former indicates cinema-going behaviour, whereas the latter does not.

Thirdly, we compared the frequency of streamed viewing between cinema-going participants and non-cinema-going participants (see Table 4). The results showed that cinemagoers tended to stream more than non-cinemagoers. 78.0% of the participants that attended cinema at least once in the year pre-COVID-19 (i.e., cinema-going participants), watched series via streaming services on a weekly basis, whereas 46.1% of the cinema-going participants watched films via streaming services on a weekly basis. Cinema-going participants watched on average 10.5 episodes and 2.3 films per week during COVID-19. Only 66.3% of non-cinema-going participants watched series, and 26.6% watched films via streaming services during COVID-19. Nonetheless, the streaming frequency of non-cinema-going participants was comparable to that of cinema-going participants; the former streamed on average 10.5 episodes and 2.4 films per week. Additionally, only 67.1% of the group participants that did not stream series weekly went to the cinema before COVID-19, which was less than the group of participants that streamed series weekly (78.5%). Thus, a larger share of cinema-going participants streamed series and films compared to the share of non-cinema-going participants that streamed series and films. Subsequently, the group of participants that streamed films was almost twice as large among the cinema-going participants as among the non-cinema-going participants. Therefore, the results suggest that cinema-going and streamed viewing complement rather than substitute each other.

Lastly, we compared the streaming frequency of the subgroup that indicated missing cinema-going to the streaming frequency of the general sample. Thus, from the participants that indicated missing going to the cinema, on a weekly basis, 75.6% streamed series and 46.4% streamed films. When comparing this to the general sample, on a weekly basis, 75.2% streamed series and 41.0% streamed films (see Table 4). Hence, this showed that participants missing going to the cinema also tended to stream marginally more than the general sample; particularly they streamed more films.

	General sample (N=400)	Cinema-going participants (before COVID-19) (N=303)	Participants missing the cinema (N=136)	Non-cinema-going participants (before COVID-19) (N=62)
Streaming series episodes / week				
Total N	301 (75.2%)	236 (78.0%)	103 (75.6%)	41 (66.3%)
Mean	10.4	10.5	9.4	10.5
Median	8	8	7	7
Mode	10	10	10	10
Streaming films / week				
Total N	164 (41.0%)	140 (46.1%)	63 (46.4%)	17 (26.6%)
Mean	2.3	2.3	2.5	2.4
Median	2	2	2	2
Mode	2	2	2	2

Table 4. % of streamed viewing compared to general, cinema-going, cinema-missing and non-cinema-going participants.

As price was argued to be among the most important factors determining cinema-going, by using the case of a particular blockbuster, *No Time to Die*, we extended the exploration to reveal the roles played by cinema ticket prices and streaming costs in the context of a day-and-date release strategy on the participants' screen/device selection decision. We found evidence to support the assumption that price indeed played an important role in the participants' decision-making to watch this particular blockbuster in the cinema or via a streaming service.

As cinemas around the world were closed due to COVID-19, many films were forced to delay their theatrical release. When cinemas started to gradually reopen, admittedly with limited capacity, some films were released using the day-and-date strategy (i.e., simultaneously in theatres and via VOD) instead of being allocated an exclusive theatrical release. Day-and-date is not a new release strategy. However, before COVID-19, this strategy had hardly any success. It quickly became clear that, as COVID-19 was unfolding, Hollywood entertainment conglomerates would use VOD streaming services as a lifeline (Johnson, 2021). For instance, Universal's *Trolls World Tour* (Walt Dohrn, 2020) and Disney's *Cruella* (Graig Gillespie, 2021) were made available for under $20 each on, respectively, Sky Store, Amazon Prime Video, iTunes/Apple TV, and Google Play, and Disney+ while they were simultaneously released in (often a limited amount of) theatres around the world. Hence, audiences were presented with two different viewing options. Due to the price/quality ratio, as explained by Van de Vijver (2017) and Irandoust (2017), we assumed that the price allocated to each viewing option would influence the participants' screen/device selection. Therefore, we explored this assumption by presenting to the survey participants three hypothetical situations concerning the release of *No Time to Die*. For each situation, they had to indicate whether they would go to the cinema to watch the movie, whether they would watch it via streaming, or whether they would express no interest at all. If *No Time to Die* would be simultaneously released theatrically and via streaming with the same price, 4 in 10 participants indicated preferring to watch it in the cinema and 2 in 10 participants indicated opting to watch it via streaming. If the streaming service price was lower than the cinema ticket price, then audiences were 4 times less willing to see *No Time to Die* in the cinema. Merely 1 in 10 participants indicated choosing to watch it in the cinema, and 6 in 10 participants indicated preferring to watch it via streaming. If *No Time to Die* would be released in cinemas first and three weeks later via a streaming service (at no extra cost), 1 in 10 participants indicated that they would prefer watching it in the cinema and 6 in 10 participants indicated that they would wait three weeks to watch it via a streaming service. Hence, the majority of the participants would forgo the cinema experience for a lower price elsewhere and would not mind the three-week wait. Therefore, supposing that a major blockbuster was made available simultaneously in the cinema and on streaming services, in our given case, the price was likely to influence the decision-making process of visiting the cinema or watching the film via streaming.

Finally, we presented the participants with a list of cinema price promotion strategies and asked them to indicate which ones they found most appealing. Thus 6 in 10 participants were interested in a reduced price for the second ticket purchased, 5 in 10 participants were interested in food and beverage promotions, while 2 in 10 participants showed an interest in a 'cinema and streaming pass' giving unlimited access to the cinema and a streaming service for a monthly price. This suggested pass type does not currently exist in Flanders. Thus far, the pass that comes closest is the UGC Unlimited pass that allows unlimited access to the cinema for €18.9 per month (UGC, 2021). Previous research (de Roos & McKenzie, 2014) has shown that price promotions can improve cinema attendance. Still, these pricing strategies must depend on a solid match between the cinema-going experience and customer needs (Weinberg et al., 2021). Considering our results, we conclude that young Flemish audiences are susceptible to innovative pricing strategies. Thus, to attract audiences to theatres, cinemas should pay attention to both their prices and to trends in the distribution and costs of streaming services.

Conclusion

The COVID-19 pandemic forced cinemas to close for an unprecedented amount of time, posing a significant development threat for cultural industries. The absence of cinema-going as a leisure activity had been worrying theatrical exhibitioners not only because they were closed, but also because of the significant uptake in VOD streaming services and various types of digital content being transmitted online during the COVID-19 lockdowns. This article explored the aspects influencing young audiences' cinema-going practices in Flanders amidst increasing alternatives to entertainment content consumption, screens, and devices. Our objective was to assess to what extent young Flemish audiences missed cinema-going and their intentions to return to the big screen upon cinemas reopening. Additionally, we included aspects of streamed viewing in our study to assess the influence of streamed viewing behaviour during COVID-19 on cinema-going intentions.

To this aim, the first part of the study concluded that cinema-going was a popular activity among young Flemish audiences. While participants missed cinema-going, they seemed reluctant to return when the cinemas would reopen. Some of the results support existing research: (i) our research uncovered the essential role played by the ticket price and the sound in the cinema (cinematic features); (ii) the participants turned to multiple information sources to obtain information about the films on offer, of which personal contacts (68.8%), social media (58.0%) and WOM, were the most common forms and in which social media has become the core instrument; (iii) the participants displayed a clear preference to watch blockbusters (i.e., Hollywood) and domestic-language films (i.e., Flemish films) in the cinema, suggesting that the participants had other preferred screens/devices to watch other film titles on (i.e., European non-national films). One key difference to previous studies was that the participants highly valued hygiene and comfort in the cinema. The second difference was related to the importance allocated to the social dimension to cinema-going (i.e., being with friends and having access to a café/restaurant), which was lower than expected.

The second part of the study explored the relationship between streamed viewing and cinema-going. We found evidence supporting the hypothesis that streamed viewing and cinema-going behaviour complemented rather than substituted each other. Moreover, we found that film streaming is more related to cinema-going than series streaming is. Hence, series streaming might satisfy other consumer needs that are different from cinema-going, whereas the needs fulfilled by film streaming and cinema-going might be more similar. Considering the day-and-date release strategy, we measured whether the participants had a specific preference for watching a blockbuster in the cinema or via streaming when both windows were made available simultaneously. Price, again, plays a significant role, even more than the experience itself, if audiences were given a choice to watch a blockbuster in the cinema or at home. We thus suggest that when cinemas assess prices and set promotional strategies, they should also pay attention to VOD streaming prices.

Through this first, exploratory research, into the impact of VOD streamed viewing on cinema-going behaviour, we managed to answer numerous questions; yet many are still to be addressed. Future research could further investigate the link between cinema-going and streamed viewing to validate the complementarity found in this study between film streaming and cinema-going. While we did find a moderately strong link between films streaming and cinema-going, the link between series streaming and cinema-going was weaker. As previous research on the relationship between series streaming and cinema-going from a consumer perspective was scarce, our study could not fully generate a valid hypothesis built on previous research findings. Further media economic analysis, including business strategy in combination with audience studies, could facilitate bridging the gap between cinema-going behaviour and streamed viewing.

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