Haute Ecole

« ICHEC – ECAM – ISFSC »

Higher education of the long type at university level

The decline in cinema attendance by young people aged 18 to 24 in Belgium

Thesis presented by :

Léopold DE DONNEA

To obtain the diploma of:

Master's degree in Business Management

Academic year : **2022-2023**

Promotor :

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Summary

The behaviour of young Belgians has changed a lot in the last few years, especially with the arrival of the digital era. This behaviour change caused a steady decline in cinema attendance among 18-24-year-olds in Belgium in recent years.

To better understand this phenomenon this thesis conducted two different studies, a qualitative and a quantitative study among young people between 18 and 24 in Belgium. The qualitative study includes two different focus groups. A group of 5 people living in Flanders (3 boys, 2 girls) and a second group of 5 people living in Wallonia-Brussels (3 boys, 2 girls), all aged between 18 and 24 years old with very different degrees of attendance. The quantitative study is a digital survey targeting young people between 18 and 24 years old from Flanders, Wallonia and Brussels.

Several factors were identified, including ticket price, perceived experience, organisation, low visibility of small theatres and films on social networks, streaming platforms, film piracy, distance and organisation and competition from other forms of entertainment.

The results show that the price of cinema tickets is often considered high by young people. With the increasing popularity of streaming services and access to piracy on the internet, young people may be less inclined to spend money on an admittedly superior cinema experience. Multiplexes, which often offer higher prices than independent cinemas, may also play a role in this trend. In addition, the low visibility of small and independent cinemas may also contribute to the decline in attendance by young people. Larger cinemas are often more visible and have a greater impact on social networks, while independent cinemas are less known and have a limited reach.

In addition, the cinema experience can also influence young people's decision to go to the cinema. The social aspect is important in young people's decision-making when they go to the theatre. Less than 1% of young people go to the cinema alone. The lack of a social aspect may influence young people to go less often. Furthermore, most young people prefer to watch a film at home than to watch a film in the cinema. The comfort and new technologies available at home mean the cinema's immersion is insufficient. The comfort, the social aspect and making the cinema more immersive are important elements for young people. Finally, the lack of visibility on social networks can also be an important factor. Young people are often very active on social media and if cinemas and film distributors are not present enough on these platforms, they may miss an opportunity to reach their target audience. This is true for films with a smaller budget.

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22/05/2023

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Introduction

Cinema in Belgium is a cultural activity that has been appreciated by Belgians for a very long time. The big screen in Belgium dates back to the 1900s. French, American, English and some other European films such as German and Italian films have always managed to find a place for themselves for the Belgian audience in the cinemas. Thanks to the linguistic and cultural differences between different regions, Belgium has always been an important country for foreign films. But Belgium itself has, both in Wallonia and in Flanders, an important film history. Some films have been very successful and have been included in prestigious award ceremonies such as the Cannes Film Festival in France or the Oscars and the Golden Globes in the United States. Belgium may not have a film culture like France, the United States or the United Kingdom, but it is certainly not to be ignored (Biltereyst, 2010).

The young Belgian population between 15 and 24 is the age group that goes to the cinema the most. They represent approximately 24.3% of the population who go to the big screen. Unfortunately, this age group is going to the cinema less and less, to the detriment of the over 50s who represent 22.4%. The public of the cinema in Belgium is getting older and this could be problematic in the future. If the active cinema players do not manage to reach the younger generation, the big screen could die. If young people decide not to go to the cinema, they will probably not go in the future because they have found substitutes or alternatives to the cinema. Therefore, cinema could disappear in the coming years if nothing changes (Vertigo, 2019).

To avoid this, Film Matters Belgium and the Federation of Cinema in Belgium (FCB), two organisations that fight for the rights and protection of cinemas and distributors in Belgium, will protect the theatres at all costs. Through their analyses, they raise issues related to the different actors in the sector. In particular, they have identified the steady decline linked to young people, which deserves to be analysed in greater depth. This age group is a source of future opportunity if the causes of the problem are properly identified and different solutions are put in place to remedy it (Film Matters Belgium, 2023).

Moreover, the big screen is the biggest source of revenue for the film industry. If cinemas were to disappear, it would be more difficult for studios to recoup their investment and this could reduce the number of films produced each year. In addition, the film industry brings in between $70 and $100 billion of revenue each year. In the new digital era, streaming platforms cannot produce big films such as blockbusters, hence the importance of cinemas for the film industry (Elad, 2023).

The decline of young people in cinemas is a real threat and may have consequences for cinema. It is therefore important to understand the phenomenon that has been going on for some years. Why do young people go to the cinema less? It is important to identify the different factors that affect this trend to make it easier for distributors and cinemas to reach their target audience, i.e., young people aged between 18 and 24 living in Belgium.

This thesis aims to provide insights into the root causes of the decline of young people in Belgium and how to counteract this trend. Our neighbours the Netherlands have reversed the trend and have recently experienced a growth in the number of young people (Kamer & de Groot, 2020). It is entirely possible to do the same in Belgium by finding the causes and responding with solutions.

To answer this problem, several steps are to follow. Firstly, it is important to describe the current situation of cinema in Belgium and the related factors and to give different analyses that prove that young people go to the cinema less often. In addition, other data on different markets is collected via a literature review. Secondly, it is important to answer to the research question:

What are the main reasons for the decline in cinema attendance by 18-24-year-olds in Belgium?

Some hypotheses will give a temporary answer to the research question. The hypotheses are based on the results of previous studies. The hypotheses will then be confirmed or refuted in subsequent.

Next, it is essential to conduct a primary analysis that answers the research question for the Belgian market. This information is necessary in order to know the different factors that are the cause of the decrease in frequency.

The primary analysis is composed of two different studies. The first study will be qualitative and the second quantitative. The qualitative study will be important as it will be the exploratory phase of the young Belgian market. The study will only include young adults between 18 and 24 years old who go to the cinema regularly or very rarely. The questions asked during the study will be wide-ranging to get to know the source of the problem in greater depth and to allow participants to express themselves freely and give their views.

After analysing factors from the literature review and the qualitative study, a quantitative study will be conducted. The quantitative study will be essential to quantify the analyses carried out beforehand. This study includes an online survey for young Belgians between 18 and 24 years of age about their film consumption habits, film preferences, budgets, expectations of the film experience, etc. The results of this study can also be used to formulate recommendations.

Finally, the results of these studies will be analysed to determine the factors that contribute to the decline in young people's attendance at the cinema in Belgium. Recommendations will be made for the film industry, particularly in terms of marketing. Acknowledging the limitations of this thesis and future challenges for the Belgian film industry is also important.

Chapter 1: Cinema in Belgium

1.1: Cinema culture in Belgium

The Belgian people have always been people who like to go to the cinema. Belgium has developed a film culture over decades and this since the end of 1900.

The Belgian population quickly discovered cinema screenings (1896) and this medium quickly became an important part of the entertainment scene. In 1913, there were already about 650 cinemas (Biltereyst, 2010). Film production in Belgium dates back to 1914. However, film production in Belgium has always been relatively small, mainly concentrated on short films and commissioned films. Until 1940, only the private industry was involved in this limited production, with the state intervening only very rarely, as there was no official body to support film production. Most of the films produced in Belgium then were intended to be shown in Belgian cinemas and not to be exported abroad (Kusrini, 2016).

Since the 1980s, the Belgian state has put in place mechanisms to support film production to promote and develop the Belgian film industry. One of these mechanisms is the Centre du Cinéma et de l'Audiovisuel de la Fédération Wallonie-Bruxelles and Vlaamse Audiovisuele fonds which are public bodies in charge of supporting and promoting cinema and audio-visual in Belgium. Their mission is to encourage the creation of quality films, develop the Belgian film industry and support the distribution of Belgian films internationally (Kusrini, 2016).

Following this, the third period in the history of Belgian cinema extends from the 1990s to the present day. This period is characterised by a new wave of Belgian directors who have been recognised by the Cannes Film Festival and have brought their films to the international stage. Many Belgian films won awards at Cannes during this period, attracting the global public and critics' interest. This recognition highlighted Belgian filmmakers' talent and creativity and internationally raised Belgian cinema's profile (Kusrini, 2016).

Cinema became very popular in 1981. People went there regularly and it became a habit. Because of the great popularity of the cinema at that time, Ghent was the very first city in Europe to introduce a large multiplex. It was the birthplace of Kinepolis, the largest cinema operating company in Belgium. The Ghent Kinepolis is still the smallest of all Kinepolis multiplexes, but it marks the beginning of a company that accounts for 48% of cinema revenues today in Belgium (Van De Vijver, 2017).

Although Belgium has established a fine film culture, the number of filmgoers in Belgium is not the highest in Europe. France, the UK, Germany and Italy, are clearly above the top, but the country has a vibrant film culture and a strong tradition of cinema-going. In recent years, the Belgian film industry has produced some critically acclaimed films and has been recognised for its contributions to the film world. In addition, there are several cinemas and film festivals in Belgium, suggesting that the country has a vibrant film community. Thus, while Belgium is not the country with the largest number of cinephiles, it can certainly be considered a country of cinephiles because cinema is an important part of the country's cultural landscape (Van De Vijver, 2017).

Moreover, in 2015, France had the most frequent movie-goers in the European Union, with 29.3% of the population claiming to have been to the cinema at least four times. Luxembourg (26.4%), Belgium (22.7%) and the Netherlands (21.9%) were close behind. In the EU as a whole, only 17.7% of the population had been to the cinema at least four times in the same year (Eurostat, 2017).

But it is complicated to say with certainty that Belgium is a country of moviegoers, as this depends on several different factors. These include the availability of cinemas in different parts of the country, the popularity of cinema among different age groups and demographic segments, and the level of cultural commitment to cinema as an art form. In addition, factors such as the cost of cinema tickets, the quality of films available and the attractiveness of other forms of entertainment may all play a role in determining how often Belgians go to the cinema. Ultimately, the answer to this question is complex and multi-faceted, and would probably require detailed research and analysis to provide a more informed answer.

But to conclude, Belgium has a population that is going to the cinema more than other countries in Europe and the world, so to say, Belgium can be considered a country with moviegoers and cinephiles.

1.2: Importance of the cinema

It is important to find the causes of the problem before it gets worse. If cinemas cease to exist, this could lead to a decrease in the number of films produced. Cinemas play an important role in the financing of films and their distribution. Without cinemas, it would be more difficult for studios to recoup their investment and this could reduce the number of films produced each year (Elad, 2023).

Film studios, production companies, film production, animation, pre-production and post-production, film festivals and distributors are all part of the film industry. The film and cinema industry is no longer limited to cinemas for revenues, OTT (over-the-top) platforms also play an important role in increasing overall film revenues (Elad, 2023).

But as cinemas are no longer the only place to see films, going to the cinema is now seen as an outdated form of entertainment in the digital age. Indeed, VOD (video on demand), a technology that allows for an instant delivery of video material, such as movies and TV shows, is a new digital form of watching a movie. Streaming platforms or social networks such as YouTube are forms of VOD (Van de Vijver, 2017).

However, cinema admissions remain the most important source of revenue for the film industry. Over nine billion dollars in revenue were made by movie theatres in 2021 in the United States, of which 4.5 billion dollars came from ticket sales alone. (Statista, 2023) Streaming platforms allow for visibility and financing of lower-budget but would not be able to make a film like Avatar 2 profitable (Elad, 2023). Thanks to the cinema, the sector can achieve cinematic prowess so that it can offer even crazier films in image and sound.

1.3: Actual situation of cinema in Belgium

Several studies conducted by Film Matters Belgium and FCB have been carried out to give clear and precise insights into the current situation of cinema in Belgium.

But beforehand, the Belgian film industry is divided into two entities. Film matters Belgium, a distributors' organisation and FCB, an organisation that includes exhibitors in Belgium. They work hand in hand to tackle the existing problems related to cinema in Belgium. Film Matters Belgium actively represents the interests of film distributors in Belgium. Its members range from Hollywood studios to independent exhibitors and are responsible for most theatrical releases in the territory. Within Film Matters Belgium, film distributors are organized into a dynamic and agile association and act collectively to promote their interests and values at all levels. The association defends the interests of distributors who show films in cinemas in Belgium. It represents both Studios and Independents. It defends the interests of film distributors with political, administrative, and cultural authorities in Belgium. The aim is also to provide the best possible information to members in areas such as anti-piracy copyright policy, the digital single market (EU), film marketing and, of course, contacts with other industry associations and stakeholders. Film Matters Belgium is a member of FIAD. International Federation of Film Distributors' and Publishers' Associations. To best serve the interests of its members, Film Matters Belgium implements a program made up of three main interrelated work streams (Degreef, 2023).

- Community: Improve the exchange of information and best practices between film distributors.
- Politics: Present a coherent and positive discourse for the distribution sector to political power, the press, and local and international organizations to develop among political decision-makers and stakeholders a better understanding of the sector and the economy of film distribution.
- Audience development: To better understand, excite, and inspire audience habits (Degreef, 2023).

To achieve its objectives Film Matters is organised around several work groups, namely: lobby, consumer insights, marketing, independents, anti-piracy and data collecting (Degreef, 2023).

The Film Matters board is composed of 6 members: the representers of the following entities: Imagine Film Distribution, Lumière Film Distribution, Kinepolis Film Distribution (KFD), Sony Pictures Releasing, The Walt Disney Company, Warner Bros and the Secretary-General, Alain Degreef (Degreef, 2023).

FCB on the other hand is founded in 1991 (after ADTCB). This group is a professional association of Belgian exhibitors in Belgium. Managed by a Secretary-General (Thierry Laermans) under the direction of the CA (Groups, Independents, A&E), represented by 19 members and 313 screens. Moreover, they represent more than 85% of annual visitors. The purpose of the association is to defend the Belgian cinema culture and cinema operators from the state and other entities (Laermans, 2023).

In Belgium, film distribution is largely dominated by four major international distribution houses: Universal Pictures International, Sony Pictures Releasing, Walt Disney Motion Pictures, and Warner Bros Pictures. In addition to these major players, about 25 smaller distributors are operating in the Belgian market, some working in a subsidised context (Vlaamse audiovisuele fonds, 2022).

The American dominance in the film industry is well known, and this is reflected in the market share of distributors in Belgium. According to statistics, 77% of films distributed are American, with the other 23% represented by releases from Belgian and foreign companies such as Belga, Kinepolis film distribution and other cinema distributors (Sony Pictures Releasing, 2023).

Among the American distributors, there is Sony Pictures with a market share of 13%, closely followed by Sony Paramount Pictures with 15%, Disney with 18%, and Warner Bros with 12%. The leading US distributor is Sony Universal Pictures, with a market share of 19%. These figures underline the American domination of the Belgian film industry, despite the presence of some local distributors (Sony Pictures Releasing, 2023).

In Belgium, Kinepolis Film Distribution, part of the Kinepolis group, is the most important operator for film distribution. Cinéart, Lumière and Imagine are also among the main distributors of art films (Vlaamse audiovisuele fonds, 2022).

As far as exhibitors are concerned, three major groups dominate the market, with the rest being represented by small independent cinemas or groups of small independent cinemas. Kinepolis is the largest group with a total revenue of 48% of the Belgian revenue, followed by Pathé with 14% and UGC with 10%. The remaining 30% is divided between independent cinemas. These figures show that there is less competition between exhibitors than between distributors and that large chains such as Kinepolis have a dominant position in the Belgian exhibition market (Vlaamse audiovisuele fonds, 2022).

Some distributors receive financial support because of the cultural interest in their audio-visual works, even if these works are less economically profitable. In Belgium, this includes distributors such as Dalton Distribution, JEF Distribution and MOOOV Distribution. Certain festivals and networks, such as Anima, Film Fest Gent and Africa Film Festival, can also play a role as distributors for specific films that do not have a distributor in Belgium but still deserve an audience (Vlaamse audiovisuele fonds, 2022).

Finally, some filmmakers have created distribution platforms, such as Avila, to distribute their films and those of other like-minded filmmakers (Vlaamse audiovisuele fonds, 2022).

1.3.1: Belgian market

Film Matters Belgium has collected two studies by Vertigo and CIM Press on the current situation in Belgium. These studies show that there is a decline in attendance among young people and that there is a potential to grow among the Flemish.

1.3.1.1: Fleming audience

Market research conducted by Vertigo in 2019 shows that Flemings are under-represented compared to their proportion in the Belgian population. Although Flemings represent 57.76% of the Belgian population, they only account for 48.71% of cinema admissions in Belgium. This means that they are about 10% less present in cinemas than their number in population would suggest (Vertigo, 2019).

The inhabitants of Brussels are the most overrepresented in terms of cinema attendance. Despite representing only 10.35% of the Belgian population, they represent 16.60% of cinema admissions. This means that they are the most active in terms of cinema attendance in relation to their population size. The Walloons are also over-represented in terms of cinema attendance. They represent 31.89% of the Belgian population but account for 34.68% of cinema admissions. This means that their cinema attendance is higher than expected based on their population size (Vertigo, 2019).

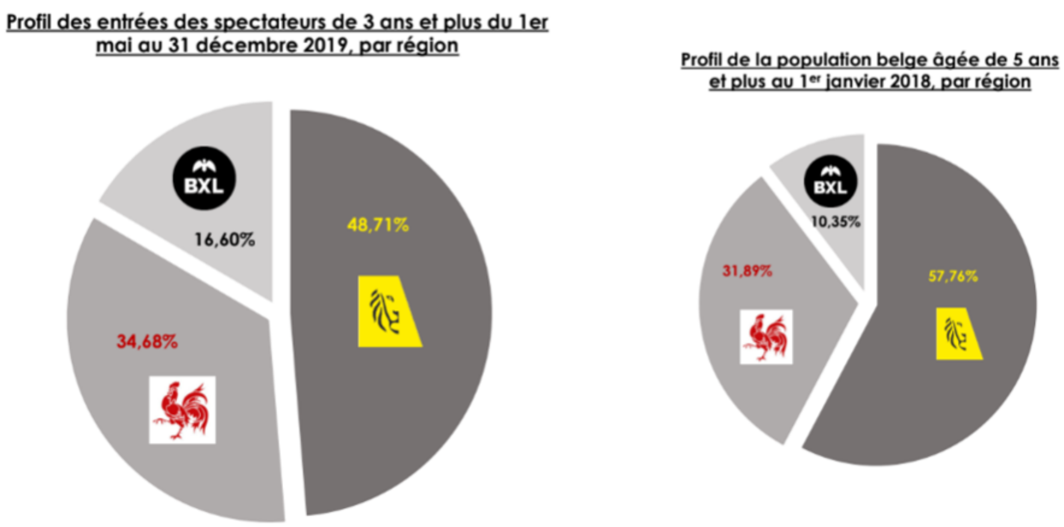


Figure 1: Profile of Belgian spectators' entries (Vertigo, 2019)

The data shown in the pie graph prove that the inhabitants of Brussels and Wallonia are more active in terms of cinema attendance than the Flemings. There is an unequal distribution of cinema admissions in Belgium according to the regions. This under-representation of Flemings can be explained by several factors such as the cultural differences between the regions of Belgium, the leisure habits of the inhabitants of these regions, the cinema opportunities available in each region, etc. It is important to note that these trends may evolve and may vary according to changes in society and the film industry (Vertigo, 2019).

The "CIM" study examined cinema attendance in Belgium between 2013 and 2020 according to region, language, age, and gender, as well as the frequency of cinema attendance (never, rarely, occasionally, sometimes, regularly, and always). In the graph below, the results show that the Brussels population has increased its attendance, which confirms the conclusions of the Vertigo study. Indeed, the proportion of Brussels residents who never go to the cinema decreased by 8% between 2013 and 2020, while the proportion of people who occasionally go to the cinema increased by 3% (CIM PRESS, 2020).

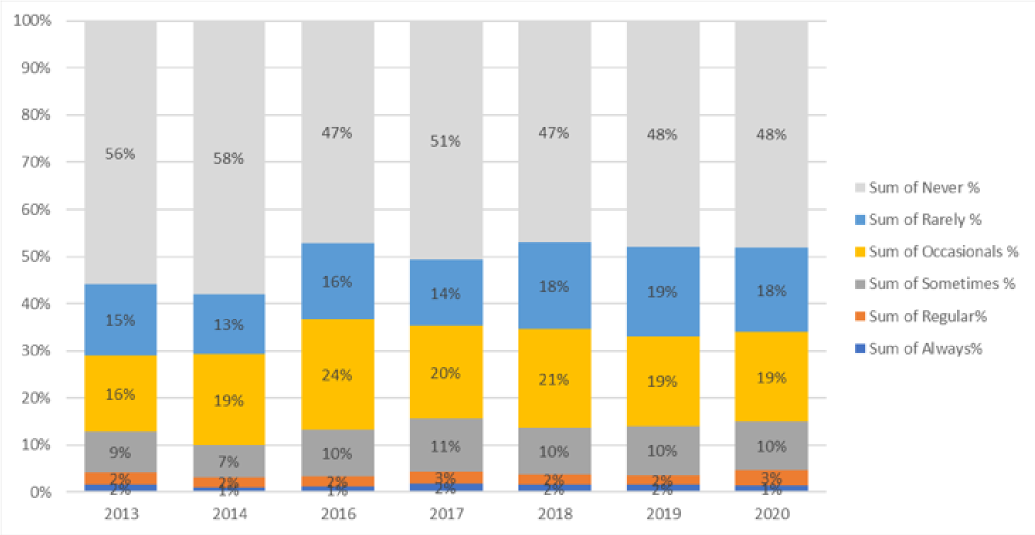


Figure 2: evolution profile moviegoer BRUSSELS (CIM Press, 2020)

The "CIM" market study also showed on the graph below that Walloons closely follow the trends observed in Brussels. Indeed, the number of people who never go to the cinema has decreased by 5%, while the number of people who go rarely has increased by 5%. However, the fluctuations are not as obvious as in Brussels (CIM PRESS, 2020).

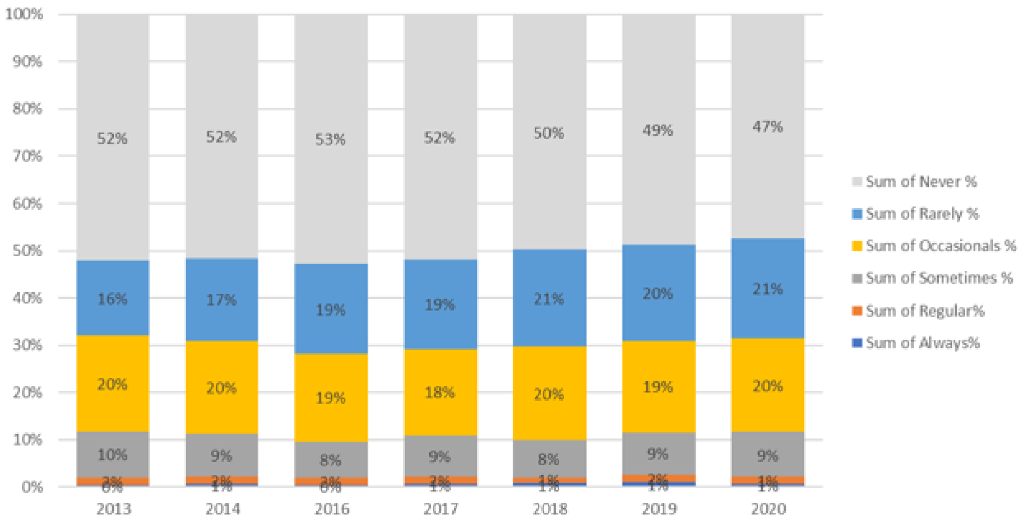


Figure 3: evolution profile moviegoer WALLONIA (CIM Press, 2020)

The situation in Flanders is different. Between 2013 and 2020, the number of people who never go to the cinema remained stable, with over 50% of the population concerned. The number of people who rarely go to the cinema has also remained stable, with approximately 23% of the population concerned. Finally, the number of occasional cinemagoers also remained stable, with 17% of the population concerned. The number of occasional users represents only 6% of the Flemish population. In 7 years, there has been no evolution (CIM PRESS, 2020).

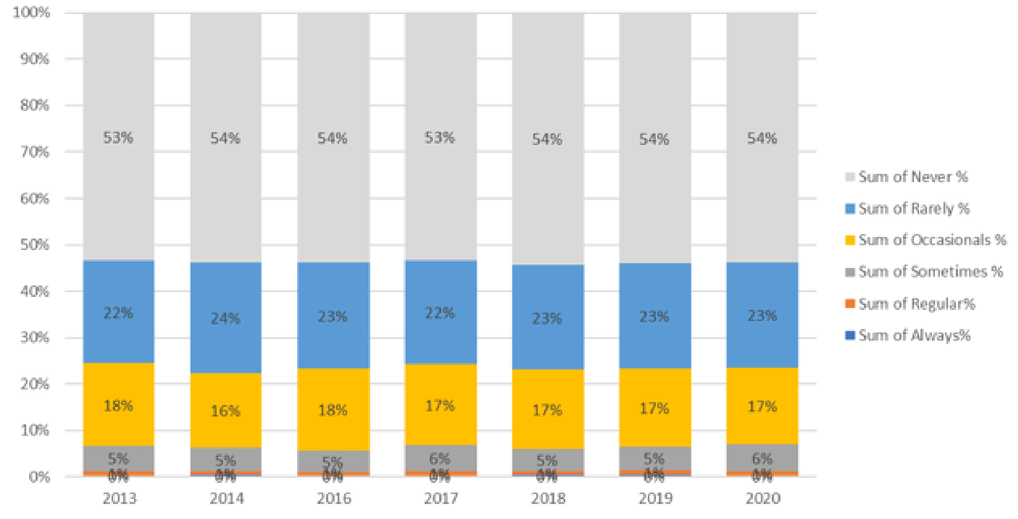


Figure 4: Evolution profile moviegoer FLANDERS (CIM Press, 2020)

Another interesting statistic is that Flemish people go to the cinema less frequently than in Brussels and Wallonia. In 2020, moviegoers who go once a month and those who go very regularly (once a week) are underrepresented in Flanders compared to the rest of Belgium. Indeed 58% of the Belgian population is Walloon (39%) and Brussels (19%) and 42% is Flemish (Figure 5) (CIM PRESS, 2020).

However, the study shows that the trend is reversed for occasional cinemagoers, i.e., those who go once every 2 or 3 months and those who only go twice a year. In 2020, Flemings represent 56% of the population, Walloons 33%, and Brussels 11% (Figure 6) (CIM PRESS, 2020).

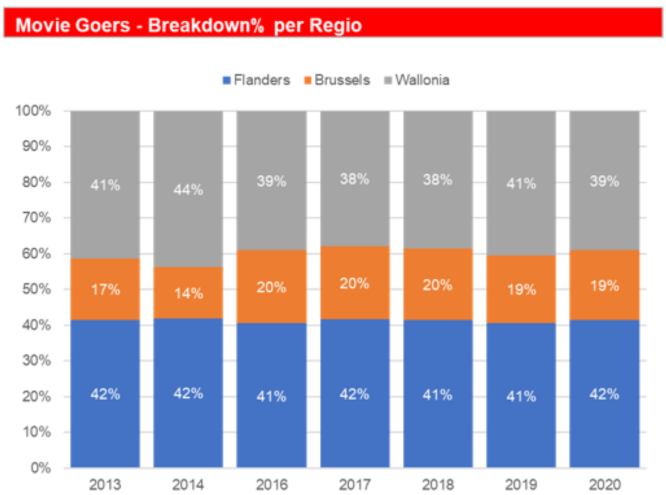


Figure 5: regular moviegoers per region (CIM Press, 2020)

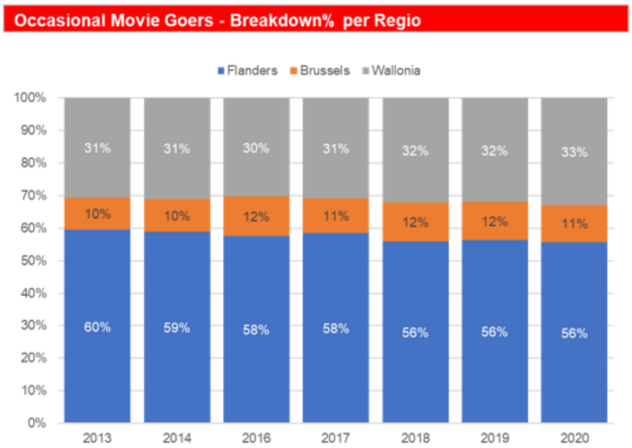


Figure 6; occasional moviegoers per region (CIM Press, 2020)

To conclude, there is a real difference in Belgium between Wallonia, Brussels and Flanders. There is a real market potential for cinema to grow in Flanders and to convert occasional moviegoers to loyal moviegoers.

1.3.1.2: Young audience

Figure 7 demonstrates the evolution of the 18–24-year-old audience. It shows that there is a clear decrease of 5% in the frequency of occasional young people and an increase of 8% in young people who rarely go to the cinema between 2013 and 2020. Furthermore, the difference between those who never go to the cinema has increased by 2% in Belgium and those who often go to the cinema have decreased by 3%. So, there is also an evolution in the behaviour of young people. Young people go to the cinema less than in previous years (CIM PRESS, 2020).

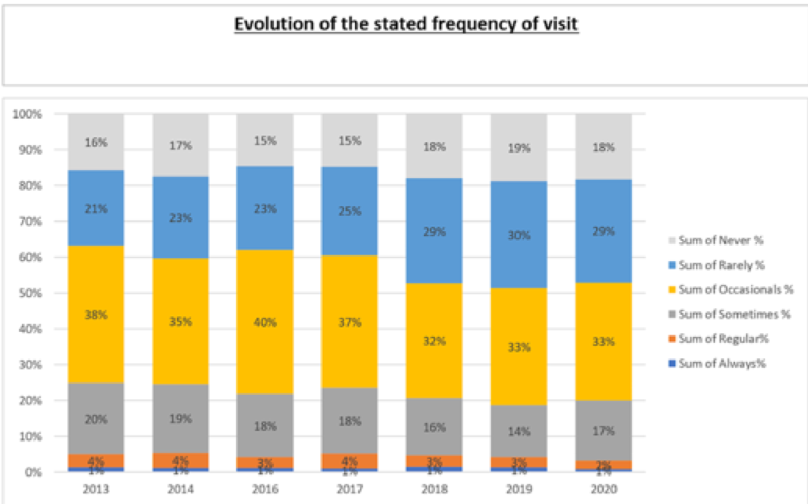


Figure 7: Frequency of Belgium's audience of young people between 18-24 years old (CIM Press, 2020)

Another important statistic is the frequency in young people and elderly people (Figure 8). The frequency of young people between 18 and 24 years old decreased and the 55+ increased. Indeed, in Belgium, the population of older people, i.e., 55+, rose by 10% between 2013 and 2020 while young people between 18-24 years have dropped by 12% during the same years (Figure 8) (CIM PRESS, 2020).

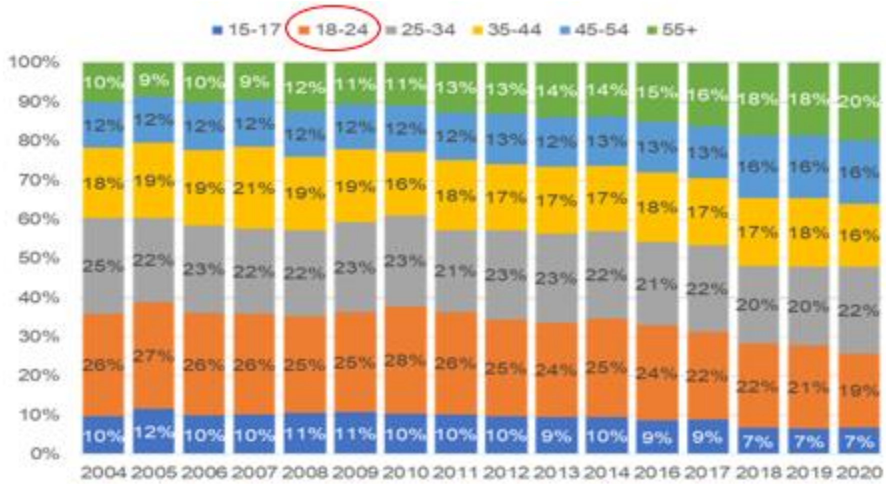


Figure 8: Frequency of Belgium's audience of young people between 18-24 years old (CIM Press, 2020)

In 2019, Vertigo collected data on the profiles of spectators aged 3 and over between 1 May and 31 December, by age. Young people between 15-24 years old represented the largest age group in Belgium with 24.3%. They are ahead of those over the 50s who represent 22.4%. The cinema is therefore facing a decrease in the frequency of young people, who represent the largest age group that goes to the cinema. This can be problematic in the long term (Vertigo, 2019).

But the decrease in the frequency of young people is not due to Flanders, it is a national problem. This paper will analyse four different situations. Firstly, the loyal moviegoers who go once or twice a week. Secondly, it will analyse the once-a-month moviegoers, thirdly the once every 2 months, 3 months and twice-a-year moviegoers. Finally, the people that never go to the theatre.

The statistics for very loyal moviegoers who go once or twice a week represent 5% of the youth population. But this population of moviegoers is likely to decrease in the coming years. Nationally, between 2013 and 2020, the number of loyal young people aged between 18 and 24 has drastically decreased by 12%, shown in the graph below (Figure, 9). This drop is accentuated in Brussels and Flanders but much less in Wallonia. The figures describe that loyal young people in Brussels have decreased by 17% and by 16% in Flanders. Brussels and Flanders clearly show that the frequency of loyal young people has drastically decreased compared to the national average. The Walloon region performs much better than the other regions with a small decrease of 3% of the loyal young people in these cinemas (CIM PRESS, 2020).

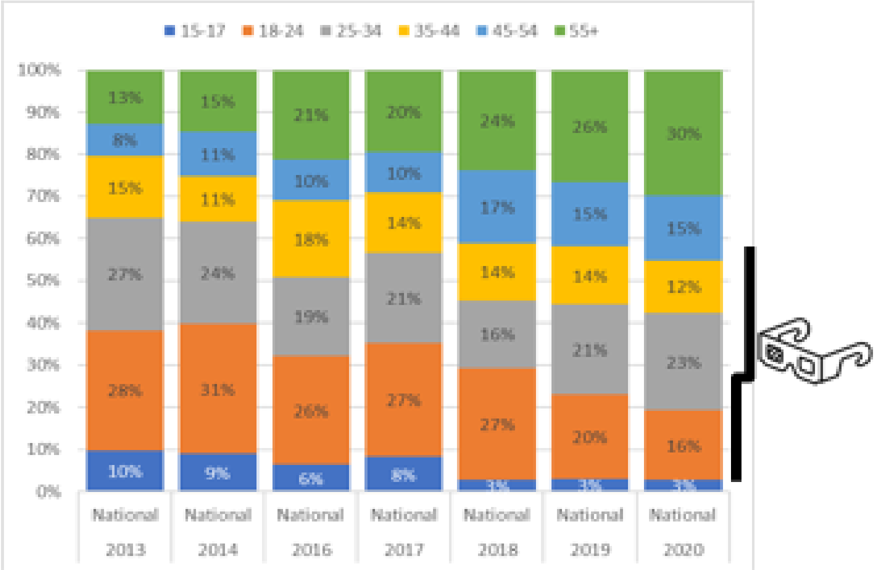
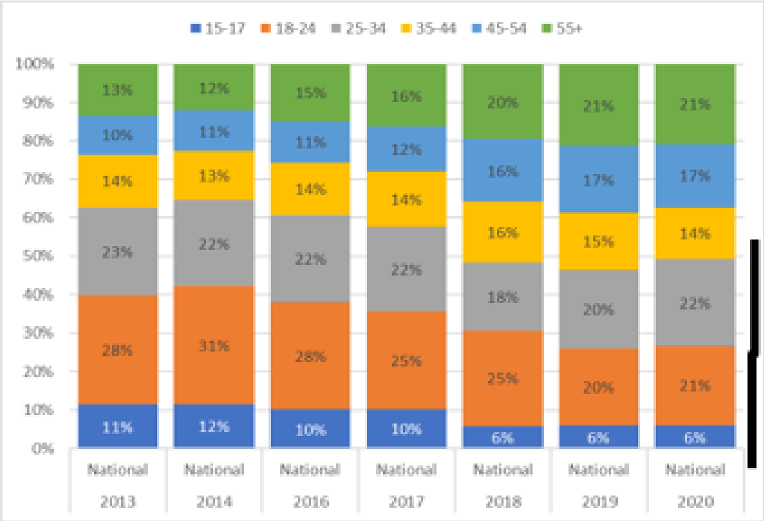


Figure 9: moviegoers: once or twice a week (CIM Press, 2020)

While the frequency of young people between 18 and 24 decreased by 12%, the population of older people (55+) increased by 17% (CIM PRESS, 2020). This shows that older people are more and more interested in movies. This can be explained for example by the fact that four Belgian cinemas, “cinéma Galleries” "le Palace", "le Vendôme" and "Aventure" in Brussels have introduced a monthly subscription called "arthouse cinema pass". This type of subscription was created because according to a study made by cinéma palace (Poiroux, 2021), the inhabitants of Brussels like to go to the cinema to discover new films, even if they have never heard of them. For a monthly fee of about 20€, the cardholder can see as many films as he or she wants, in one of the four participating cinemas, and then in all the cinemas that are members of the subscription. This pass has had a very positive impact on the elderly. Unfortunately, this subscription has not significantly impacted the young population, who has little interest in art house films. Nevertheless, the four arthouse cinemas try to find a way to captivate younger to go to the theatres (Poiroux, 2021).

Then those who represent 17% of the population of young people between 18 and 24, the once-a-month moviegoers. The trend of once-a-month moviegoers follows the same course as the once- to twice-a-week moviegoers. However, the difference between 2013 and 2020 is smaller. From a national perspective, there is a loss of audience attendance of 7% of 18–24-year-olds, which can be observed in the graph below. As with the most loyal, young people in Brussels and Flanders are experiencing a steady decline. Between 2013 and 2020, Brussels went down by 12%, while Flanders by 7%. Wallonia this time has decreased more than the loyalists. With 6% (CIM PRESS, 2020).



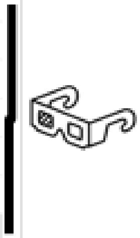


Figure 10 : moviegoers: once a month a week (CIM Press, 2020)

However, the trend is rather different for the third category, young people between 18 and 24 who go once every two or three months and those who go twice a year. This category represents 62% of young people between 18 and 24. The graph above shows that the audience has remained rather stable in each generation, and therefore also in the 18-24 age group. In 7 years, occasional moviegoers have only decreased by 1%. Looking at this by region, Brussels has increased the attendance of these young occasional filmgoers by 7%. This is not the same for Flanders, which decreased by 1%, and Wallonia, which decreased more than the others by 4% (CIM PRESS, 2020).

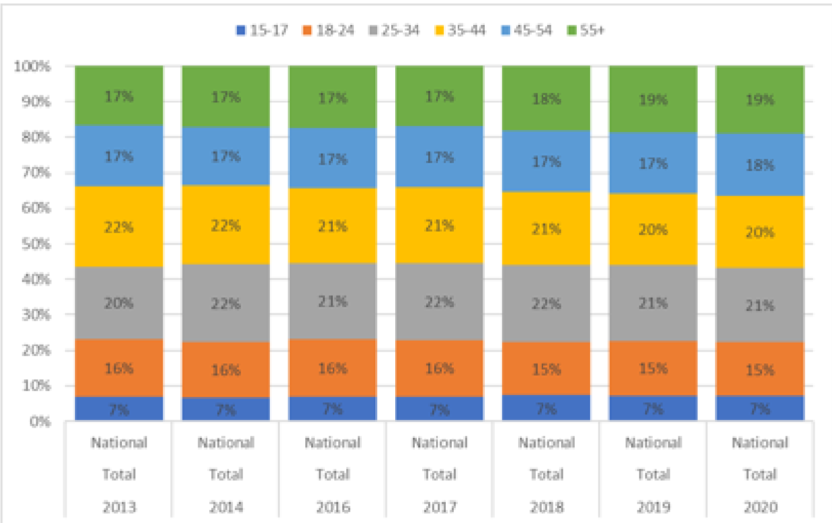


Figure 11 : moviegoers: once every 2,3 months and twice a year (CIM Press, 2020)

18% of the youth population never goes to the cinema and they represent only 3% of the whole population in 2020 and have not moved since 2013. The Brussels youth decreased by 3% while Wallonia increased by 2%. Flanders remained stable and is equal to the national average (CIM PRESS, 2020).

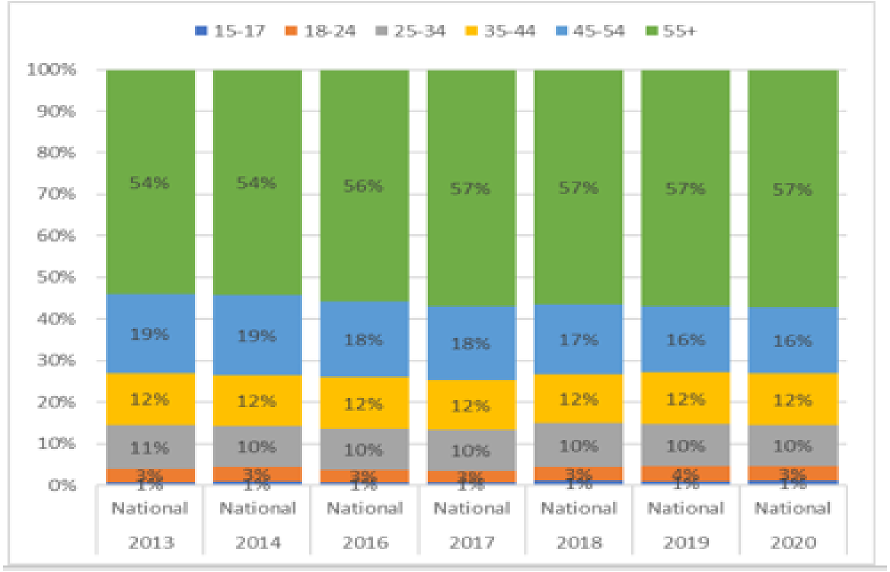


Figure 12:moviegoers: Never (CIM Press, 2020)

In several categories, the population over 55 years old has increased but at the expense of young people. The cinema is getting older or at least the population that goes there is getting older. This may be a hindrance for the future, and a problem in the long run. There is a steady decline from the loyal and regular moviegoers but the occasional moviegoers stay stable. However, the problem needs to be tackled at its source in order to keep this trend ongoing.

Chapter 2: Youth Frequency Decline

Using the information gathered in chapter 1, Belgium has a potential market among Flemings and young people. Because these are the two groups that go to the cinema less and less in the Belgian market.

The fact that the Flemings go to the cinema less than the Walloons and the inhabitants of Brussels proves that the market can grow. Several questions can also be asked. *Why do Flemings go to the cinema less? Why do Flemings prefer to go occasionally?* However, this thesis will not try to solve these questions due to a lack of recent scientific information. It will try to answer the second problem, developed above, namely the decline in the young audience (cf. supra p. 12).

The decline in young people's attendance at the cinema in Belgium is an important issue for the film industry. To address this, it is necessary to examine the root causes of this downward trend.

It is important to note that in Europe and Belgium, the primary priority for distributors (Warner Bros, Sony Pictures, Universal Studios, Disney, etc.) is to reconnect young people to the cinema. According to Europe Cinema Innovation (2019), young people are the biggest source of revenue in Belgium and Europe. However, young adults are not the biggest age group in Europe and Belgium (Eurostat, 2023). So, the fact that the frequency of young people going to the cinema is decreasing is not only a threat for Belgium but for the whole of Europe.

For the time being, the older generation is compensating. And if this continues, seniors will represent more than half of the admissions. And that's a problem, say the professionals. Because the people who go to the cinema are the elderly and this habit is not passed on from generation to generation. If young people decide not to go to the cinema any more, the cinema will slowly die out because they will not go with the children, nor when they are old in their turn (Bégot, 2019).

In 2015, the Wallonia-Brussels Federation conducted a study on cinema-going habits in the French-speaking part of Belgium, in partnership with Dedicated. Although the data from this study is old and pre-COVID, it reveals some interesting information about why some people go to the cinema less often (Dedicated, 2019).

According to the study, 59% of those under 35 years who go to the cinema about eight times a year find the price of cinema too expensive. This suggests that the cost of cinema tickets may be a deterrent to cinema-going for some people. In addition, 26% of respondents felt that they lacked the time to go to the cinema because of busy schedules and tight deadlines. This time constraint may also limit cinema attendance for some audiences. Amongst other reasons mentioned by respondents, 15% said that some people in cinemas are disrespectful, while 12% said that cinemas are sometimes too far from their place of residence. These factors may also limit cinema attendance for certain audiences (Dedicated, 2019).

The study also revealed that 17% of respondents prefer to download films for free from illegal websites rather than pay to see them in the cinema. This practice, although illegal, may be a way for some people to circumvent the high cost of cinema tickets or other barriers to cinema attendance (Dedicated, 2019).

Publicis Imagine conducted a study for Disney Belgium and has revealed that the cinema experience is crucial for young people between 15 and 34, with 43% of respondents in the 18-24 age group. According to the study, 27% of young people go to the cinema to enjoy the superior picture and sound quality, while 16% appreciate the unique atmosphere of the cinema, with its 3D glasses, popcorn and comfortable seats. For 15% of the young people surveyed, cinema is a social activity shared over a good film with friends. Finally, 5% of respondents indicated that they go to the cinema to watch the film in preview (Publicis Imagine, 2022).

The study also reveals that the distance to the cinema influences the frequency of visits. Indeed, cinemas near residential areas tend to be more frequent, and those in more remote areas are less visited. This can be explained by the ease of access for cinemas located nearby, but also by the additional cost of travel for cinemas located further away (Publicis Imagine, 2022).

The cinema experience is important and elements such as picture and sound quality, the unique atmosphere of cinemas, the social nature of the activity and geographical proximity are factors that influence the frequency of visits.

Belgium in Europe is a medium-sized market for cinema compared to France or the UK, which are the largest European markets. But in each of these markets, there has been a decline in the number of young people between 18 and 24 (Europe Cinema Innovation, 2019). Recent studies in France and the UK show with reliable statistics that young people are going to the cinema less. Quickly, some similarities in the behaviour of young people are visible in both markets.

According to a study in the United Kingdom, the population of young people between 15 and 24 years of age has declined for various reasons (Follows, & Michelin, 2019). Between 2011 and 2017, cinema admissions in Britain remained close to stable, while admissions for 15-24-year-olds dropped by 20.6%. Young people are the largest demographic group for cinemas, accounting for 28% of UK admissions in 2017, even though they represent only 12% of the population (Follows, & Michelin, 2019).

Factors that drive cinema-going among young people include the appeal of a specific film, the social experience, the excitement of going out soon after the film is released and the idea that cinema-going is part of a wider outing. However, the price of cinema tickets and the concessions are major barriers to going to the cinema, with 52% of teenagers citing this as a reason for not going to the big screen more often. When they were asked how they prefer to watch movies, cinema came as first. But when they were asked how they prefer to spend their time or money, cinema came lower. In addition, the cinema experience does appeal to young people but it can require a lot of effort and planning. Indeed, cinema is the cultural experience that ticks most of these boxes: entertainment, immersion into another world, reward, and relaxation. Unfortunately, the experience offered before, during or after the film is not unique or memorable. (Follows, & Michelin, 2019).

The immersive experience of the big screen is one thing that young adults value. Due to younger generations' dependency on technology and their shorter reaction time, exhibitors have in the past misinterpreted this notion. For instance, young people have reacted with disdain to recent contentious attempts to implement phone-friendly movie screenings at a theatre. Although there is a lack of knowledge regarding other potential interventions to combat the decline in the UK, one way to improve immersion is to maximise comfort and technological experience to compete with the continually improving technologies at home. Nevertheless, the prospect of renting a "private cinema" and theme nights were both viewed favourably (Follows, & Michelin, 2019).

Another factor is piracy. It affects young people's consumption of films and devalues the content. Indeed, in the UK, 50% of young people admit to downloading films illegally from film pirate sites. Cinema tickets, DVDs, and streaming platforms would cost too much because pirating films costs nothing at all. Every week more than 40% still download films illegally. And few people know that it is illegal (Follows, & Michelin, 2019).

Young people are addicted to technology and have high expectations in terms of user experience. Technology is not complete without social media, and two-thirds of Generation Z like to see brand material on social media. Young folks watch a lot of videos. They spend 40% more time online watching videos than Millennials do (33%). Gen Z views 68 videos on at least five different platforms on a normal day (Follows, & Michelin, 2019).

In France, studies conducted by the CNC lead to the same conclusions as in the UK: young people go to the cinema less. In ten years, the rate of attendance is half as high among 20-24-year-olds. Among young people, it is a lack of interest in the offer

(33% of 15-19-year-olds and 31% of 20-24-year-olds) and a loss of habit for the youngers (30% of 15-19-year-olds) (Danard, 2021).

There are several reasons for the decline in cinema attendance among young French people, some of which are directly related to the health crisis. Firstly, there is a simple loss of habit, with 31% of respondents stating that they go to the cinema less often or not at all. Secondly, the rise of streaming platforms is also an important factor, with 36% of respondents believing that these services are a good and much cheaper substitute for cinema. In addition, the price of cinema tickets is also an important criterion for young French people, with 32% of respondents stating that cost is a reason why they go to the cinema less often (Lacoue, 2022).

Streaming platforms have seen considerable growth in France since the pandemic, with Netflix growing from 6% to 11% of users, Amazon Prime from 1% to 6% and Disney+ from 0% to 4% between 2019 and 2021. However, even the streaming platforms in France have lost young users after COVID. Young people aged 15 to 24 are in decline, falling below 20% since January 2022, whereas they represented 33% of users in April 2020 (Lacoue, 2022).

In summary, the decline in the frequency of young people going to the cinema in France, the UK and Belgium can be attributed to a number of factors, including the health crisis, the rise of streaming platforms, the cost of cinema tickets, piracy, distance to the cinema, the experience that a cinema gives and a lack of time and loss of habit. Streaming platforms have grown considerably in Europe, but even they lost young users after the pandemic. The figures show that young people have changed their consumption behaviour of audio-visual content, and this may have implications for the future of the film industry.

In other markets, the case is the same, in Canada and the United States. Between 2009 and 2016, cinema ticket purchases among young people decreased by 5%. So, the problem is not just European but also affects other countries outside of Europe (Follows, 2021).

Finally, according to a survey conducted by Europa Cinemas, which includes several European cinemas in 26 different countries, 80% say that reconnecting with young people has become their biggest concern (Europa cinema innovation survey, 2017).

2.1: Impact of COVID-19

The coronavirus pandemic (COVID-19) has had a major impact on the Belgian film industry. With a 74% drop in turnover, culture is the worst affected sector in Belgium after hotels and restaurants (Scope Invest, 2020). As in many other countries, the pandemic led to the closure of cinemas in Belgium to stop the spread of the virus. This has hurt cinemas' revenues, as they could not operate and generate income during this period (Scope Invest, 2020).

The closure of cinemas in Belgium has also had a knock-on effect on the film industry, especially in Hollywood. Many new films had to be delayed or released online instead of in cinemas, disrupting the usual distribution and marketing strategies of films. This led to a decline in the film industry's revenues, as cinemas are a major source of income for the industry. The Hollywood film industry's financial losses are estimated at two billion dollars (Antonov, 2020).

In 2021, 75 establishments in Belgium operated a cinema as their main business. Despite challenges due to the ongoing coronavirus pandemic (COVID-19), these establishments were able to attract a total of 7,453,797 viewers in 2021, up 35% from the previous year's 5,538,934. However, it is important to note that this figure is still a significant drop compared to the number of spectators in 2019, which was 19,877,878. A 63% drop, therefore, compared to 2019 (Statbel, 2022).

At the end of the first half of 2022, the Belgian film industry was still about 20% below the average for the years 2016 to 2019. Although 2021 was a relatively dramatic year for the industry, it has not yet returned to pre-pandemic levels. The ongoing impact of the coronavirus pandemic (COVID-19) and other global events such as the war in Ukraine and rising energy and food prices have all contributed to the challenges facing the industry. Some cinemas have managed to maintain their success through the release of popular US blockbusters, such as Top Gun Maverick, but overall, the industry still faces major challenges (Trio, 2022).

The below statistics are specific to Flanders unfortunately similar statistics on Brussels and Wallonia have not been made. It is therefore important to underline that the below statistics only concern Flanders.

According to Belgian statistics, eight out of ten Flemings participate in fundamental cultural activities, such as attending concerts, museums, cinemas, theatres and libraries. This participation has remained stable over the past 20 years, from 1996 to 2018 (Tintel Raats, 2022).

In 2018, according to Statistiek Vlaanderen, 62% of Flemings aged 18 to 75 went to the cinema. Another poll carried out before the COVID-19 epidemic, revealed that 75.6% of respondents had visited a movie theatre at least once in the previous year (March 2019 to March 2020). 8.9% of participants were unable to recall whether they had visited the movies or not, while 15.6% of individuals had not gone. In the year before the pandemic, participants visited the movies 3.1 times on average. The study also shows that cinema is more popular with the young Flemish public aged 20 to 34 than with the general Flemish public aged 18 to 75 (Tintel Raats, 2022).

Between the two closures, a survey was conducted and the results showed that 22.4% of the participants had been to the cinema at least once and 2.3% did not remember going. Thus, most of the participants (74.7%) had not been to the cinema in the period between lockdowns. It's interesting to note that 10.4% of those who went to the movies between lockdowns hadn't attended before the outbreak, which suggests that theatres may have been able to draw in a new generation of young viewers (Tintel & Raats, 2022).

Another relevant piece of data from the study by Stephanie Tintel and Tim Raats (2022) was a comparison of the socio-cultural activities that participants missed most during the pandemic. According to the findings, most participants (83.3%) missed going to a bar or restaurant, which was followed by going out or partying (36.8%), seeing a movie (34.0%), and attending a music festival (27.5%). Going to a concert was also regretted, but to a lesser extent (25.8%) (Tintel & Raats, 2022).

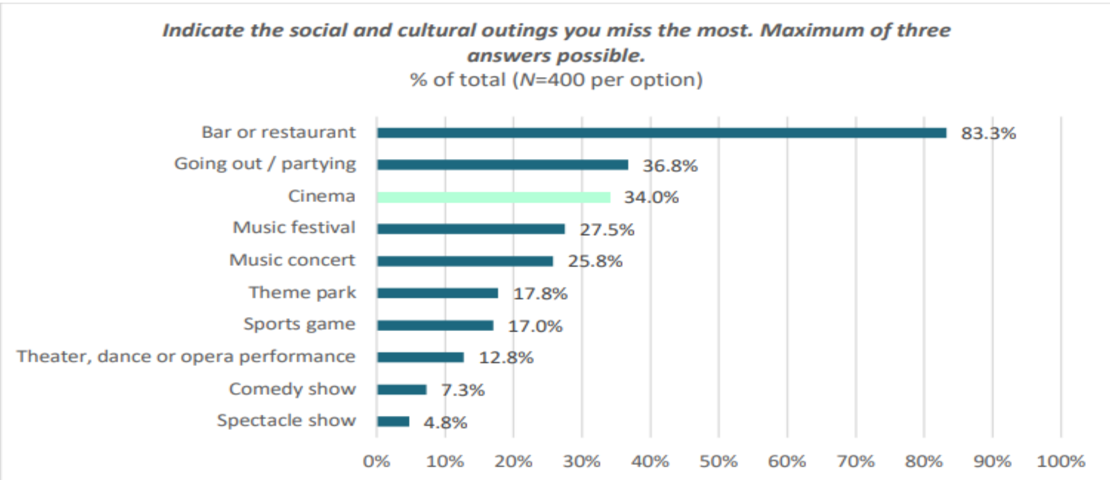


Figure 13: Socio-cultural outings that are missed (% of total per outing). (Tintel & Raats, 2022)

Through a series of statements, the study also assessed the participant's propensity to visit theatres again. It is significant to note that the remarks omitted any details about security precautions. Most participants (43.1%) said they would go back to the theatres again, but they would be hesitant to do so once they reopened. 14.8% of participants were unable to provide a clear response, and 21.9% said they would never attend the movies. Despite not having received a COVID-19 vaccination, 12.6% of respondents said they planned to visit the movies again. Only 7.6% of respondents indicated they would like to visit the theatres as soon as they reopened, but only if they had received a COVID-19 vaccination. As a result, just 2 out of 10 participants demonstrated a strong wish to visit the big screen again and did not appear hesitant to do so, while 4 out of 10 participants stated a willingness to visit the cinema again but appeared hesitant to do so as soon as they reopened (Tintel & Raats, 2022).

Although the COVID-19 pandemic may have lost its urgency today, its impact on the film industry continues to be felt. There are still many unknowns, but the current challenges that stand out are: how physical and online film experiences complement each other; how vulnerable cultural projection is to various factors; the importance of film dissemination and education; and how consultation and cooperation can strengthen the sector (Vlaamse audiovisuele fonds, 2022).

Of course, there are other challenges facing the sector, but this picture also highlights the strengths of the different actors: their passion for film and their audiences, their desire to create added value around films, their close links with the world of art and culture, their resilience and creativity in the face of crisis. These actors have strong links with each other, but also with other actors and practices in other fields. They are locally based and/or internationally attractive (Vlaamse audiovisuele fonds, 2022).

Unfortunately, in addition to the pandemic, the sector faces other challenges such as inflation, rising staff costs, high energy prices and limited government resources. Players are therefore not only having to consider how to maintain their current operations in these circumstances but are also considering downsizing scenarios. All of this has implications for the decisiveness and growth opportunities of the sector (Vlaamse audiovisuele fonds, 2022).

The pandemic crisis has been a severe test for the film industry. The film industry has suffered great losses and is still suffering. However, the frequency of young people was not so much affected by COVID. They were forced to stop going to the cinema to limit the spread of the disease, but as soon as it reopened, they were the first to go to the big screen. Unfortunately, some young people did not return because of price increases or for health protection reasons (Peddington, 2022).

COVID has had an impact on young people indirectly. To make up for the hole caused by the closure, cinema prices had to increase. The post-COVID price increase has discouraged some young people from returning to cinemas (Watling, 2021).

The above data shows that the cinema was strongly affected in Belgium but that young people were willing to return. The biggest drag in Belgium for Belgians to return to the theatres was getting COVID. But, according to other more recent French (see above p.20) and English studies, COVID had an impact on the price that affected the consumer (Watling, 2021).

2.2: Streaming platforms (Netflix, Amazon Prime, Disney+, ...)

Streaming platforms have indeed seen strong growth during the COVID-19 period. Netflix has more than 220 million subscribers, while Disney+ has surpassed Netflix in popularity with more than 235 million subscribers if all the group's platforms are considered. Amazon Prime Video has about 200 million subscribers (Quoistiaux, 2022).

Today, these streaming platforms play a major role in the film and series industry, becoming major production studios. They have become indispensable. However, this does not mean that their activities are profitable. According to a recent study by Morgan Stanley, these platforms were expected to make a combined loss of $10 billion by 2022, with Disney+ alone expected to make a loss of $4 billion. Only Netflix seems to be doing well with over $5 billion in projected profits (Quoistiaux, 2022).

Nevertheless, streaming platforms are still growing in frequency attendance. But this growth does not mean that cinemas are doomed to fail. The two industries are complementary and can co-exist. They are feeding into the same sector, namely the cinema sector (Taryn, 2021).

Moreover, according to another study conducted by Europa cinema innovation survey (2017), streaming platforms are not a threat to cinemas. 49% of cinemas interviewed across Europe do not agree that VOD is a threat. However, it is important to note that 24% of respondents are unsure and the remaining 27% agree that it is a threat.

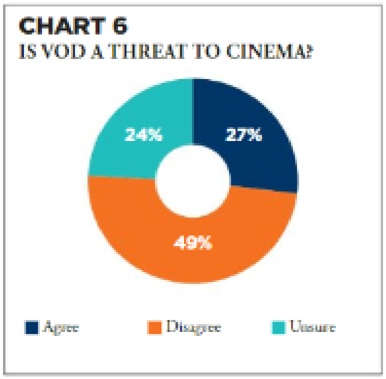


Figure 14: Europa cinema innovation survey: is VOD a threat (Europa cinema innovation survey 2017)

The study shows that if streaming platforms rise too quickly and cinema does not have time to adapt, VOD will indeed become a threat to the cinema, especially for young people who will pay less to access a platform (Europa cinema innovation survey 2017).

Indeed, according to the survey, From Live-to-Digital (2016), conducted among an English audience, younger respondents are more likely to attend platforms than to go to the theatre or cinema in person. In fact, 71% of respondents aged 16-24 said they preferred streaming platforms, compared to 55% of respondents aged 25-44 and less than 30% of respondents aged 45+ (AEA Consulting, 2016).

In addition, a similar study conducted in France by IFOP shows that OTT platforms have had an impact on cinema attendance. 29% of respondents said they were going to the cinema less often and 12% no longer went to the theatre at all. However, the majority (54%) continue to go at the same rate and only 5% more often, which may prove that the streaming platform can be a threat to people's cinema attendance (Vulser, 2022).

Then, the English audiences interviewed by the survey Live-to-Digital do not believe streaming platforms to be a substitute for the theatre. Indeed, consumers are motivated by platforms for economics and convenience, but not their experience. 64% of respondents answered because it takes less time to organise and 33% said that it was less expensive. But none answered for the experience. The immersive situation that you can get from the cinema is different and unachievable at home. People consider the cinema more as a substitute for platforms than a concurrent (AEA Consulting, 2016).

Streaming platforms have effectively helped to give a chance to smaller or independent films and series that do not have the marketing and distribution budget to reach a large audience. Indeed, these platforms can offer a potentially huge audience due to their global reach, accessibility and ability to recommend similar content to users based on their viewing history (Taryn, 2021).

However, it is important to note that the visibility offered by streaming platforms does not necessarily guarantee the success of a film or series. Recommendation algorithms can sometimes be unpredictable and audiences can be quite volatile in their preferences. That said, there are many examples of how streaming platforms have made lesser-known films and series successful, as was the case with "Stranger Things" on Netflix or "The Handmaid's Tale" on Hulu (Taryn, 2021).

As far as cinema is concerned, it is true that the superior quality of the experience is a key element that still attracts viewers. The huge screen, surround sound and comfortable seats offer an immersive experience that can't quite be replicated at home. In addition, for some moviegoers, seeing a film in preview or first run is an event that can be very exciting (Publicis Imagine, 2022).

Finally, the gap between theatrical release and availability on streaming platforms is an important factor to consider. A six-month gap may seem long, but it can encourage people to go and see the film in the cinema, as they have the opportunity to preview it or see it soon after its release. If the gap is too short, people might decide to wait to see it on a streaming platform rather than pay to see it in the cinema. This is a complex issue for the film industry, which has to find the right balance to maximise revenues while meeting consumer expectations and preferences (Taryn, 2021).

But in the US, the trend in cinema VS OTT platforms preferences has changed between 2018 and 2020. In 2018, 28% of respondents had a strong preference for cinema while 15% preferred OTT platforms. In 2020, US respondents who preferred to watch movies in the cinema decreased by 13%, from 28% to 15%. While people who preferred streaming platforms increased by 21% from 15% to 36%. It is important to note that during these years COVID has had its impact and may have influenced respondent confidence due to a potential fear of being infected by the virus in cinemas (Statista Research Department, 2023).

According to Taryn (2021), streaming platforms offer advantages over cinema. Even though streaming platforms come after the cinema, some people now prefer to watch the film at home instead of going to a cinema.

The advantages of streaming platforms are cost, and control, i.e., the control to pause or rewind the film. The film can be watched in private, without being potentially disturbed by people talking in the cinema. It's also more accessible because you can use it at home whenever you want and don't have to travel to see a film. Lately, the number of choices, there are many more films available on streaming platforms than in the cinema (Taryn, 2021).

COVID also proved that the experience that cinema offers cannot be replaced by blockbuster films. According to several studies, the cinema remains the first place to watch a film and especially blockbuster films. Moreover, the cinema with the previews for big films remains the ideal place to release a film (Peddington, 2022).

If the film does well in the cinema it will do well on streaming platforms, some films that are released exclusively on streaming platforms perform less well than those that were previously released in the cinema. Cinema and streaming platforms are more partners against piracy than competitors of each other (Peddington, 2022).

According to Warner Bros' CEO David Zaslav (2022), "The bigger a movie succeeds in the cinema, the bigger it is on the auxiliary markets".

2.3: Film Piracy

The different methods for downloading films illegally are streaming, direct download, torrenting and ripping. Streaming is the most common method, as it allows you to watch a movie without having to download it to your computer. Direct downloading involves downloading the film from a server, while torrenting uses a network of peers to download files. Ripping is the process of extracting content from a DVD or Blu-Ray and putting it on a computer or other storage media (EUIPO, 2021).

A recent study by the analysis company MUSO found that the number of visits to pirate sites increased by 20% in 2022 compared to the previous year. The study considered several sectors such as film, television, music, software and publishing. Unfortunately, the film sector remains particularly affected by piracy, with 12.4% of films watched illegally worldwide (Jay, 2022).

The European Union Intellectual Property Office (EUIPO) also conducted a study on piracy in Belgium, which revealed that this problem is still rooted in Belgian habits. According to the study, Belgians, especially in the 15-24 age group, tend to visit pirate sites more often than in other European countries. Around 30% of young Belgians admitted to visiting pirate sites in the last 12 months, compared to 21% in the rest of Europe. Films are the most frequently accessed type of illegal content in Belgium, with 64% of visits to pirate sites (Jay, 2022).

Although the practice is on the rise worldwide, Europe has seen a decrease in this trend. For example, streaming went from -11% in 2017 to -55% in 2020, illegal downloading from -34% to -45%, and Torrenting from -29% to -45%. Even though film piracy increased slightly at the beginning of the COVID-19 pandemic, it decreased again afterwards (EUIPO, 2021).

As far as Belgium is concerned, the country ranks seventh in Europe and first in Western Europe for film piracy (figure 15), which is worrying for the Belgian film industry, both distributors and exhibitors. Indeed, in Belgium, the average number of accesses to pirate sites per user per month is almost two times higher than the European average, with average access per user per month of 1.2 in Europe against almost 2. Streaming is the most widely used method of piracy, which can have a significant impact on the revenues of distributors and exhibitors in Belgium (EUIPO, 2021).

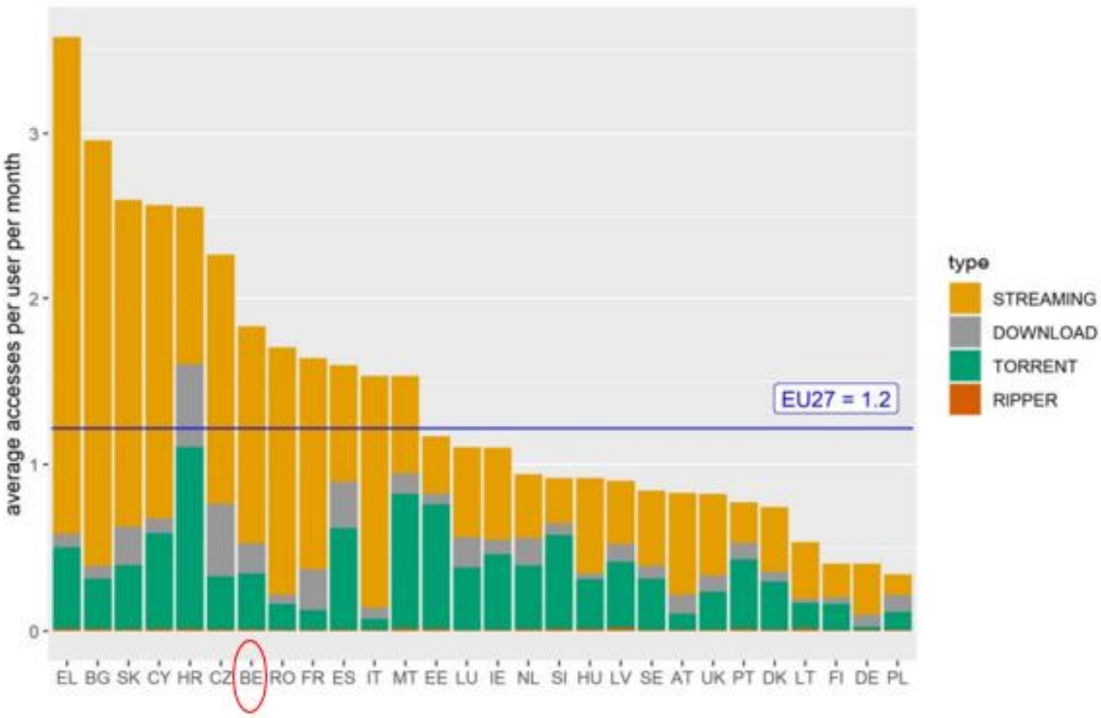


Figure 15: Film Piracy by Country and by access type, 2020 (EUIPO, 2021)

Film piracy has multiple impacts, including two main effects: the cannibalisation effect and the promotional effect. The first effect, cannibalisation, reduces legitimate sales of films by encouraging viewers to opt for pirated versions rather than paying for the film. The second effect, promotion, is related to the word-of-mouth generated by viewers who have seen the pirated version, and who can thus recommend the film to their friends and family (Ma, et al. 2015).

These two effects have been theorised in the literature, but until now it has been difficult to measure them separately. Researchers estimated that if piracy could be eradicated from the theatrical release window, box office receipts would rise by 16%, or $1.3 billion annually, using data from all US movies released between 2006 and 2008 (Ma, et al. 2015).

When piracy was broken down into its separate effects of cannibalization and promotion, it became clear that the drawbacks of piracy brought on by cannibalization outweighed the advantages of promotion. In other words, piracy hurts box office revenues more by discouraging viewers from paying for the film than by inducing additional sales through promotion (Ma, et al. 2015).

However, the study also found that in rare cases (less than 3% of films), pre-release piracy can increase revenues compared to post-release piracy. This is due to the promotional effect of piracy, which can create a positive buzz around the film before its official release. But in general, piracy hurts box-office revenues, and its reduction could help to increase revenues for the film industry (Ma, et al. 2015).

These studies show that piracy remains a major problem for the film industry in Belgium and worldwide. Films, in particular, are highly prized by pirates, which harms the revenues of producers and distributors.

But some solutions can be put in place. According to Pennington (2022), the film window can also decrease piracy. If the film is quickly on the streaming platforms, i.e., the window is rather small, piracy will decrease. If the window is too large and the film remains exclusively in theatres, piracy could syphon 20% of the film's potential box office revenue. This is a real headache for distributors and cinemas in order to reduce piracy as much as possible and keep the cinemas alive (Pennington, 2022).

Piracy remains a huge problem for the film industry. But films that are in theatres are much more difficult to access than films that are already in theatres. Films that are in the cinema for a long time are more likely to be pirated than films that are in the cinema for a short time. But this can be explained by the theatrical window. Films in the cinema are generally less pirated (Peukert & Claussen, 2017).

Piracy in Belgium is a problem. Young people take advantage of it because it is free and easily accessible. Although piracy has decreased in recent years, piracy in Belgium is still very present. Indeed, with the price of cinema tickets rising, access to piracy can be a substitute, albeit illegal, but favourable.

2.4: Price

According to data collected by Sony Pictures in 2023, cinema prices have been rising steadily since 2015. Indeed, the average price of a cinema ticket was €7.91 in 2015, while today it is €9.89, which represents a 25% increase in the space of eight years. Furthermore, it is interesting to note that prices have increased more than usual between 2020 and 2021, probably due to the COVID-19 health crisis (APPENDIX 1). In the graph below there is a steady evolution in the price of ticket cinemas.

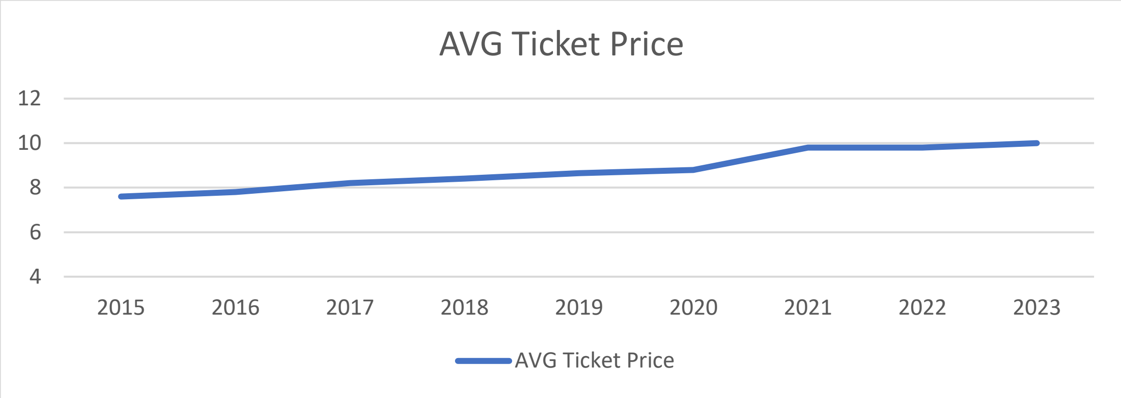


Figure 16: AVG ticket price 2015-2023 (APPENDIX 1)

It is important to note that the COVID-19 health crisis had a significant impact on cinema prices between 2020 and 2021. Indeed, the pandemic led to a significant reduction in the number of spectators in cinemas, which led some cinemas to increase their prices to compensate for the drop in revenue (cf. supra p.21).

Another notable statistic concerns Kinepolis, which has over 48% of the cinema complex market. In 2017, the average price of a seat in a Kinepolis cinema was €9.5, whereas today it is €11.9. As a result, the largest cinema complex in Belgium has prices that are €2 higher than the average price in cinemas (see APPENDIX 2).

Young people in cinemas receive a discount. All young people under 25 pays on average €1 less than the average ticket price. So young people are also experiencing an increase in the price of cinema tickets (APPENDIX 2).

Numerous studies conducted in the UK have shown that young people believe movie tickets are too expensive. In fact, according to a survey, 52% of teenagers see the cost as the biggest deterrent to going to the movies more frequently. This trend is similar among young people of all ages. In addition, almost 20% of young people aged 15 to 25 said that price was the reason they did not go to the cinema, even after planning a visit. The cost of watching movies on TV or the Internet is another factor that young people report more frequently than those of other ages. The fact that young people have substitutes for watching films for free online or via streaming platforms makes price an issue for young people (Follows, & Michelin, 2019).

The frequency of going to the cinema is strongly influenced by the budget that teenagers spend on their leisure time. Furthermore, the results show that cinema is considered an expensive activity, as when teenagers have £10 to spend on what they want, cinema comes third, behind games and clothes. The cinema ranks eighth, behind viewing movies at home when the same youngsters are asked to rank activities in order of their preferences. This distinction is crucial because 64% of teenagers responded that watching movies at home was their preferred method of seeing movies (Follows, & Michelin, 2019).

Cost is likely a factor influencing the ranking of cinema as a free-time activity, as teenagers tend to prefer less expensive or free activities. This may explain why trips to the cinema are focused on films that are of high interest because if cost is a barrier, teenagers will only go to the cinema for films they consider 'worth watching' (Follows, & Michelin, 2019).

But according to Rotberg (2016), price is not an issue because young people like to spend money on leisure activities. And cinema is not an expensive activity. The concern is not the price but the value. They are prepared to spend large amounts of money on a concert for example, so young people feel that the costs are in line with the perceived value. If the perceived value of the cinema was worth €10, young people would go to the cinema. Nevertheless, this is now not the case because the perceived value of the theatres is not what the young audience wants (Rotberg, 2016).

2.5: Distance

According to a study commissioned by Disney in 2022 and carried out by Publicis Imagine, young people aged between 15 and 34 who live some distance from cinemas and who go to the cinema on average once a month are less likely to go to the cinema than those living nearby. Indeed, the study found that people living near a cinema complex attend cinemas 15% more than those living more than 15 kilometres away (Publicis Imagine, 2022).

However, for those who only go to the cinema once every three months, the trend is reversed. People who live more than 15 kilometres from the cinema tend to go to the cinema more often than those who live nearby (Figure 18). It is important to note that these results can be influenced by several factors such as access to public transport, entertainment consumption habits and personal preferences (Publicis Imagine, 2022).

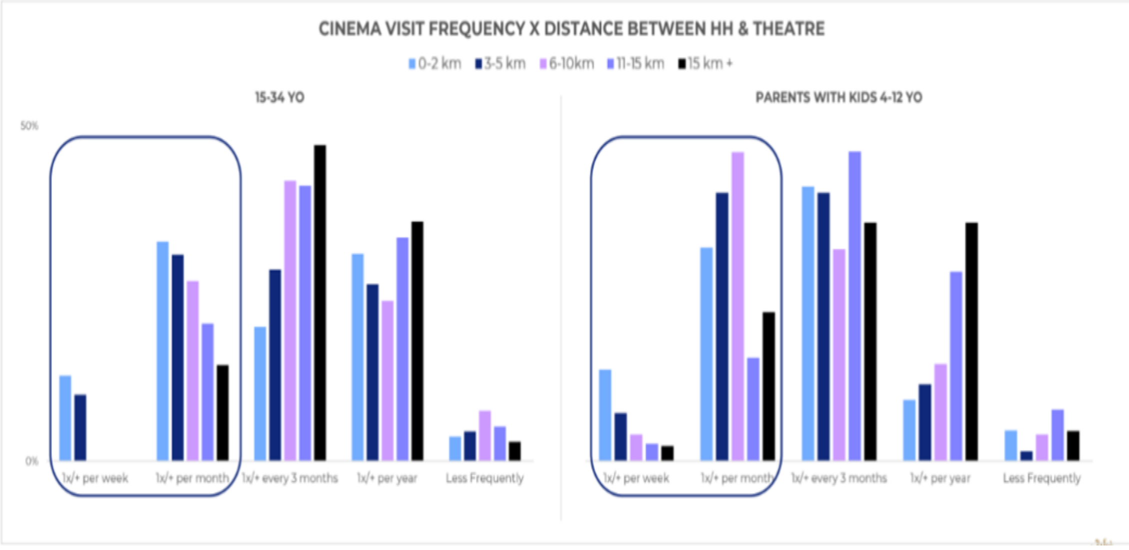


Figure 17: cinema frequency and distance (Publicis Imagine, 2022)

According to another study, logistical factors such as transport or parking may play a role in whether people attend cinemas, but they are often less mentioned than financial factors or personal preferences. Geographical travel to see a film can be a barrier for many potential moviegoers, especially those who live far from urban centres or who do not have access to reliable and affordable transport. Nevertheless, the geographical distance to see a film is not cited as a deterrent or disincentive (Van de Vijver, 2017).

Despite the above information, the graph below indicates that the proximity of the cinema still plays an important role in the choice of cinema. 53.10% choose their cinema for the proximity while 35.90% chose their theatre for the showtimes. Even if other studies show that distance is not an important constraint, it is still important to note that distance can be a constraint for young people (Loria, 2017).

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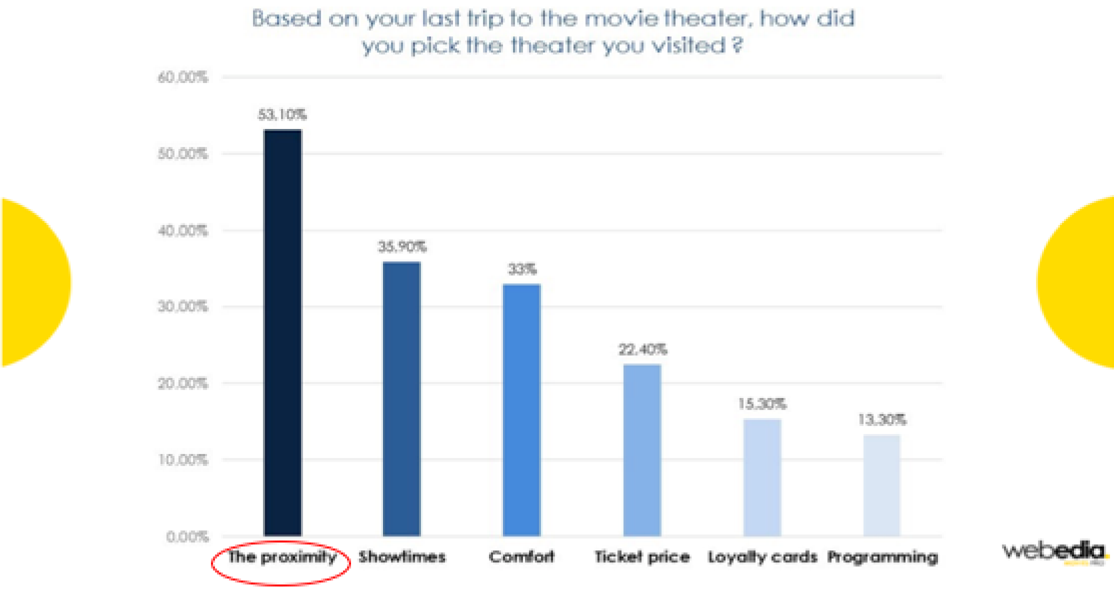

Figure 18: Proximity of the theatre plays an important role (Loria, 2017)

The distance plays a role for those who go there regularly, as the transport is short. Those who go occasionally tend to live further away. Distance also plays a role in the choice of cinema, but distance is a secondary factor to the problem of this thesis. Distance does not improve the decline but is not the primary cause.

2.6: Experience

With the advent of streaming platforms and high-end TVs or even sound boxes that offer quality sound, the consumer experience of cinema has changed. This chapter deals with the perceived experience or desired experience of consumers, especially young people. *How do young people perceive cinema and what experience does cinema bring to them compared to a film at home?*

A cinema experience is a social event that offers a unique experience that home streaming platforms cannot replicate. Movie theatres provide an immersive environment that allows viewers to immerse themselves in the world of the film. The large screens, the enveloping sound quality and the darkness of the theatre allow viewers to focus on the film and get caught up in the story (Taryn, 2021).

Moreover, the movie experience in the cinema is a shared experience with other people. The laughter, screams and emotional reactions of other viewers add an extra dimension to the film experience. This can even lead to lively discussions after the film (Taryn, 2021).

In addition, cinemas also offer concession options, allowing viewers to enjoy popcorn, drinks and snacks while watching the film. This experience is often associated with moments of relaxation and fun. Despite the growing popularity of streaming platforms, cinemas continue to attract a loyal audience. Cinemas are adapting by offering new experiences to attract viewers, such as even bigger screens, more comfortable seats and state-of-the-art sound and image technologies (Taryn, 2021).

Another study, described above (cf. supra p.18) also shows that it is the immersive experience of the film in cinemas that makes people go to the cinema. The experience is, therefore, more than important (Publicis Imagine, 2022).

According to Cremin et al (n.d.), 16–34-year-olds are 20% more likely than the average cinemagoer to go in a group of 3 or more people. Furthermore, young people are more interested in the choice of film and cinema and the atmosphere in the complex.

The cinema has thus become a social activity for young people, unfortunately unlike other cultural activities, it is difficult to discuss things in the cinema. Moreover, in Belgium, large complexes offer few activities before or after the film. This can be an obstacle to the cinema experience that young people want to have.

In order for the perceived experience of cinema to be superior for young adults, cinema should be integrated into their social life and the social aspect of cinema should play an important role (Rotberg, 2016).

On the other hand, even if cinema is a social activity, the spectator does not want to be disturbed by his friend or by the other spectators in the room. This is more important for young adults than for other age groups such as children. To fully experience the immersion of the film, silence in the room is important for the spectator (Bredewold, 2016).

A pre- or post-film activity is mostly required when going to the movies. The top five things to do after going to the movies include eating at a fast-food joint, dining out, shopping, drinking at a bar, or seeing friends (Follows, & Michelin, 2019).

The experience of young people going to the cinema does not stop at just going to the cinema. The most watched film genres at the cinema are films where the quality of the sound and image are necessary to fully immerse the viewer. Avatar 2, Spiderman: No Way Home and Top Gun: Maverick are examples of films that have worked well with young people. These films provided a higher quality of technology than the average film (Sony Pictures, 2023).

But the film or the social aspect of cinema is not enough to attract young people to the cinemas because it is now quite possible to do so at home. Technologies that offer a more immersive experience such as 3D, 4DX, IMAX, laser ultra, or different cinematic experiences such as drive-in cinemas or secret cinemas are now more than ever important. The expected experience should offer something unique and different from what they can do at home. It can be about the technological and immersive aspects but also about offering a different cinema event (Hancock, 2016).

Another experience that divides consumers is the loss of control over the film when you see it in the cinema. You can't pause it, you can't rewind it and speed it up when the scenes are slower. But consumers are divided. Some prefer it because they are disconnected from reality and can be immersed in the film. Others prefer to be able to control the film because they want to have the power of when to go to the bathroom or get something to consume without having to wait for the interval or the end of the movie (Wilkinson, 2021).

The experience of the film itself is also important. If the perceived experience of the cinema is important, so is the experience of the film. It is therefore up to the director to consider these new technologies and create films for the big screen (Buckingham, 2016).

Young adults in Europe especially value the big screen experience, for watching films properly. According to studies by UNIC, the International Cinema Union (2023), young people in most European countries, including Belgium, prefer to watch a film for the first time on the big screen, as the experience is better and more enjoyable in front of the big screen, but also when films are seen without much distraction (APPENDIX 3).

James Cameron understood this well with the film Avatar 2, which did a spectacular box office in theatres. According to him, the film experience in the cinema is sacred because the streaming platforms lack this quality (Cameron, 2023).

2.7: Notoriety of low-budget films on social networks

Social networks are the source of information for most young people. Instagram, Facebook, Snapchat, and Twitter, … have become real marketing tools. And the cinema is using these tools to promote its films. Network users are no longer passive actors but active actors who can share, like, and comment on publications and thus give visibility to films (Akyol, 2014).

Finally, it should be kept in mind that each film is unique, and calls for its own strategies and creative ideas. Each film is a different challenge because each film is different. The awareness phase is therefore essential for the release of a film, even if this is not always obvious, as most low-budget films do not have a sufficiently large budget to run an engaging marketing campaign to attract a young audience (Dietrich, 2019).

In order to reach a young audience, a strong marketing presence on the Internet is essential, which implies a necessary multiplication of costs. Not all small films have the necessary financial sources to convince a young audience to go to the cinema. Moreover, a digital campaign has a cost that distributors and exhibitors should not ignore (Dietrich, 2019).

It has become a challenge for distributors on digital platforms. There is too much competition between films, the one released in the cinema in addition to the others released on streaming platforms. Some films have not even had the exposure that the film should have. Moreover, it is complicated to have control over the promotion of the film on digital platforms, especially when the competition is too strong. Low-budget films can be drowned out by higher-budget films. Young people can have a wide variety of content online. This can be at the expense of videos or trailers of certain films (Johnson, 2023).

The attendance of young people between 15 and 25 years of age has been reached especially among people who go there regularly. Low digital campaigns due to a small budget can indeed be a source of discouragement for the new generation. Young people prefer to go more occasionally with bigger budget films (Dietrich, 2019).

2.8: Competition from other forms of entertainment

Indeed, young people now have a multitude of ways to entertain themselves without having to leave their homes, such as video games, social networks, streaming or even watching sporting events, which can be considered direct competitors to cinema. Young people have more entertainment options at home. All of this is easily accessible at home, so there is no need to go out to be entertained (Corbo, 2022).

Video games, for example, offer an interactive and immersive experience, allowing players to fully immerse themselves in a fantasy world and to have unique experiences. Gaming is a very human thing, and video games have connected the world so that humans can play with each other without leaving their homes. The experience and technological innovation of games compete with the world of film and therefore also with cinema (Corbo, 2022).

Young people have shifted their consumption to the video format with shorter videos such as series or YouTube rather than just watching a movie for 2 hours in the cinema. Indeed, young people have grown up with shorter, interactive formats because they have lived with technologies that allow them to consume content quickly and easily. In addition, video games offer more interactive and personalised experiences because young people have grown up with technologies that allow them to communicate and interact more directly with others (Corbo, 2022).

Concerts and sporting events also offer exciting social experiences, different from the cinema, where young people can gather to share entertainment (Corbo, 2022).

But cinema in Belgium is one of the least expensive activities when it comes to sitting and watching a scene, film or show. This can be theatres, concerts, opera or even major sporting events. The average price of a cinema entrance is much lower than the price of a theatre entrance which varies between 15€ and 75€ or concerts which can go up to 150€. The cinema remains the most affordable in terms of the stage. Moreover, thanks to its low price, cinema remains one of the favourite activities of Belgians (Laurent, 2016).

The Belgian entertainment and media sector declined by 7.8% in 2020 in terms of turnover, which can be explained by COVID but also by a new entertainment area. Streaming and video games. But this is at the expense of TV and leisure activities at home. The cinema has been little or not at all affected by this loss of turnover because the cinema itself has increased the price of cinema tickets. But this new area of entertainment may have reduced the frequency of attendance of young people at the cinema (Oreglia, 2021).

Furthermore, according to another study, young people are going to the cinema less and less because they can watch films at home or in the metro. Moreover, when they are with friends, some young people prefer not to go back to the screens, including the cinema, because they want to get rid of the screen for a moment. Computers, television, the birth of video games, VOD, and social networks such as YouTube have increased the frequency of screens considerably. This excess of screens is to the detriment of cinemas (Milot, 2019).

In addition, the costs associated with going to the cinema, such as tickets, drinks and snacks, can be quite high for a young person's wallet. This can also deter young people from going out (Milot, 2019).

2.9: Organisation

Young people consider going to the cinema to be a considerable undertaking that requires a lot of organisation. In particular, older teenagers now like planning their outings with friends rather than going with their families. Older teenagers go less frequently to the cinemas, because of a lack of availability and companionship. On the other hand, it appears that young people often prefer simpler and less expensive activities, such as watching films at home, rather than going to the cinema. In contrast to other forms of movie-watching that are simpler and can be done from home, cinema is regarded as an activity that involves a lot of work and is more likely to be considered as an alternative when young people pick other activities 'away from home'. Cinema is regarded as an activity that needs a lot of organisation like any out-of-home activity and is more likely to be chosen as an option. But it is rather less chosen than other forms of film watching that are simpler and can be done from home (Follows, & Michelin, 2019).

Cinema is not even included in the top ten list of young people's favourite pastimes, but watching movies at home comes in at number four. However, when asked to rank their top out-of-home activities, cinema comes in fourth place. In comparison to other age groups, young people are more likely to claim "relaxing" and "socialising" as reasons for viewing movies online or on TV, which may indicate a shift in this age group's attitude toward going to the movies (Follows, & Michelin, 2019).

But beyond the organisation, the cinema's agenda is not always in line with the agendas of potential consumers. Showtimes restrict consumers from time to time and even more so young people who will be more tempted to watch a film at home. Moreover, cinema has become a social activity for young people (cf. supra, p.33) so if the agenda does not suit young people, the film may never be seen in the cinema by this potential audience (Ormanli, 2019).

Cinema is perceived as a relaxing activity. Young people prefer to stay at home and relax by watching films at home. Young people prefer to go out for more interactive and stimulating activities (Ormanli, 2019).

Cinemas should also consider that young people aged between 15 and 30 consume much more video than other age groups. Whether on TV, phone or computer. Because of this, young people can be caught in the so-called "sofa trap". This is a tipping point that everyone can relate to, a point where you sit back and relax and have no desire to get up and do an external activity, such as going to the cinema. This phenomenon is more prevalent in young people. The showtimes are therefore an important element that can also play a role in the organisation of cinema outings (Rotberg, 2016).

2.10: Conclusion of the factors

The impact of COVID-19. The period has and is having still a big impact on the cinema as the complexes had to be closed. Indeed, due to the recent events and the rise in energy prices, the cinema had to higher its prices. Moreover, it impacted the attendance habits of young people in France. But the English study shows that young people were the first to return to cinemas (cf. supra p.21).

Streaming platforms have indeed had an impact on young people's attendance at the cinema, but the experience that cinema offers remains premium to streaming platforms and cannot be replaced by them. Moreover, the post-Covid period showed that young people returned to the cinema because they wanted to spend time outside and not be at home in front of a streaming platform. But OTT platforms have had an impact on young people's attendance because it is easy to access and cheaper. In addition, the digital area, which facilitates access to video, makes cinema old-fashioned. This results in a decrease in young people at the cinema (cf. supra p.24).

Belgium is a country that pirates many more films than the average European country, which can cause problems for the film industry and cinemas in Belgium. Piracy remains a huge problem for the film industry because it can syphon up to 20% of a film’s box office and it is free. Films that are on the big screen for a long time are more likely to be pirated than films that are in the cinema for a short time. This can be explained by the theatrical window. Films in the cinema are generally less pirated if they stay less longer but it goes to the detriment of the cinema because they will potentially generate less revenue. Easy access to piracy trivialises the price of cinema tickets and reduces the frequency of young people going to the cinema in Belgium if the theatrical window is too big (cf. supra p.27).

The price has been increasing in Belgium since 2015. This can be explained by the increase in the price of energy-prices and COVID. But this is to the detriment of young people who are not satisfied with the high prices. According to several studies, the price of cinema tickets is too high, whereas cinema is ultimately a leisure activity that does not cost much. The problem is perhaps due to the perceived value of cinema. If streaming platforms offer such low prices for watching films, why are cinemas so expensive? The perceived value of cinema plays an important role in the decreasing frequency of young people that are going to theatres (cf. supra p.30).

Distance from the cinema can also have an impact on young people's attendance. Young people who go to the cinema regularly are more likely to return if they live closer to the cinema. On the other hand, young people who go more occasionally tend to live further away. Proximity to the cinema is important in the choice of cinema but another study shows that logistical factors are less important than other factors such as financial factors. Moreover, if people live further away from the cinema, they would be too lazy to move and watch a film, because they can watch a film at home (cf. supra p.31).

The experience of watching a film at home has changed drastically over the last few years. High-definition television and speakers are factors that make the home experience of a film superior to the past. Therefore, Cinema is perceived differently by young people today than in the past. It has become more than important to recognise that it is a social activity. But the activity takes place before or after the screening. In addition, the cinema must offer an immersive experience with state-of-the-art technology, so a little popcorn noise in the room may disturb the young audience. If the perceived experience of cinema is in line with the perceived value of cinema, then young audiences would go more often and youth attendance would increase (cf. supra p.33).

Social networks are crucial to attracting young people to the cinema. Young people aged between 15 and 25 are the most likely to use social networks. Unfortunately, not all films have a big enough budget to attract young people to the cinema. A social campaign is expensive and every film has to go through the notoriety phase. Films such as blockbusters have a big budget and can do big digital campaigns, unfortunately, this is not the case for low-budget films (cf. supra p.35).

The entertainment sector is big in Belgium and has always existed, but indeed with video games and streaming, the entertainment sector is experiencing a new era. It is becoming very present at home. The fact that entertainment has changed era in the last few years can play on the frequency of young consumers going to the cinema. In addition, the costs associated with going to the cinema and the technologies present at home deter young people (cf. supra p.36).

The organisation of young people and cinemas may also be a cause of the decline in attendance. Streaming platforms offer a panoply of film choices while cinemas offer much less, and you can't watch a film whenever you want in the cinema. The organisation of cinemas does not always appeal to young people. Moreover, going to the cinema has become a social activity and a social activity often requires organisation (cf. supra p.38).

There are many reasons for the decline in youth attendance. But to cut a long story short, cinema needs to reinvent itself to attract young people back to the cinema by offering a unique and social experience at a price point that meets young people's expectations and competes with its substitutes, OTT platforms and piracy. Giving as well maximum visibility on social networks to the films that are shown in theatres. Distance and organisation are also factors to be considered, as going to the cinema requires organisation and is not a home activity. Moreover, with the arrival of the new digital era, young people prefer to stay at home and play video games or watch streaming movies.

Chapter 3: Research Question and Hypothesis

3.1: Research Question

The above information has provided some insight into the decline of 18-24-year-olds at the cinema. But consumer behaviour is specific to its market. Most of the information gathered in chapter 2 is mainly foreign or dated information. Most of the studies about consumer behaviour were conducted in France, the UK and other countries outside Europe, such as the United States. Indeed, the problem of the decline of the youth in cinema is not local and Belgian, but global. Nevertheless, consumer behaviour is linked to its market. The sources are right for some markets but may be different for the Belgian market. Certainly, there may be similarities, but there are certainly also differences due to social and cultural differences. Furthermore, this thesis will only focus on the Belgian market and will check with a primary analysis if there are similarities or differences with the studies in chapter 2.

COVID, streaming platforms, piracy, lack of awareness on social networks, the price of the cinema ticket, competition from other forms of entertainment, distance, etc. are factors that may play a role in the decline of 18-24-year-olds in Belgium. It is necessary to understand the behaviour of young and Belgian consumers in order to run effective marketing campaigns and reverse the trend.

The thesis aims to understand the behaviour of the Belgian youth between 18 and 24. To understand why they go to the cinema less and what are the root causes of the decline of young people.

This thesis will attempt to answer the following question:

What are the main reasons for the decline in cinema attendance by 18-24-year-olds in Belgium?

3.2: Hypothesis

The assumptions were deduced from chapter 2 to check whether the above studies are correct for the Belgian market. There are several plausible hypotheses to explain the decline in cinema attendance by 18-24-year-olds in Belgium.

Hypothesis 1:

- Rising prices, easy access to piracy, the loss of habit due to COVID and the arrival of streaming platforms are the main causes for the decline in young people's attendance at the cinema.

Hypothesis 2:

- The immersion that cinema offers is not enough for young people. It lacks the social aspect and the comfort of being at home.

Hypothesis 3:

- Going to the cinema requires organisation because you need to take transport to get there. Moreover, it is quite possible to watch a film at home without much organisation and travel. These aspects reduce the number of young people going to the cinema.

Hypothesis 4:

- The lack of awareness on social networks for low-budget films reduces the frequency of young people going to the cinema.

Chapter 4: Primary Data Analysis: Youth Frequency Decline in Belgium

Most of the above data are foreign, i.e., data and studies that have been conducted in countries other than Belgium. There is only very little Belgian data that focuses on why young people go to the cinema less in the last few years. These few Belgian studies cite some problems, such as distance and experience, but the problem is broader and deeper than that. Moreover, the other data are pre-COVID and do not consider the potential change of habit of young users. It is therefore necessary to conduct a primary study.

Firstly, several points have been made above (cf. supra p.17) about why young people go to the cinema less and what are the potential causes of this problem. The sources are mainly European, English and French. The UK and France are the two most important countries in terms of income and film culture in Europe compared to the population (cf. supra p.18). It is therefore important to compare these data with the Belgian population.

Prices, experience, competitors in entertainment, distance, organisation, low-budget films, piracy, the rise of streaming platforms and COVID have all played a part in the decline in young people's cinema attendance. Certainly, some issues are more important than others such as price and experience VS COVID which has had a lesser impact.

This thesis contains several primary data, firstly a qualitative study in order to elaborate an exploratory phase with rather broad questions. This qualitative study will consist of two focus groups of 5 people. The groups will be divided by region. The first group is composed of 5 people living in Flanders, 2 girls and 3 boys, all aged between 18 and 24. The people are regular or occasional consumers or even 1 person who goes to the cinema very rarely. The second group is almost identical, 2 girls and 3 boys, all aged between 18 and 24. The people are regular or occasional consumers with 1 person who very rarely goes to the cinema. The only difference is that these people live in Wallonia or Brussels, 2 people are from Brussels and 3 people live in Wallonia.

It is important to note that this qualitative study is only an exploratory phase and that their answers are not universal. The exploratory phase will enable the problem to be explored and better understood. However, it should be borne in mind that qualitative research is often less representative and non-probabilistic. Nevertheless, through this qualitative study, there are more elaborate answers than in a quantitative study, which could lead to potential explanations for the problem. The answers are deeper and it may lead to a more complex issue.

Secondly, this thesis will include a quantitative study to prove or disprove the views expressed in the focus groups. The quantitative study will be useful for establishing cause and effect. The study will be representative and probabilistic. This quantitative study has not been produced by a polling company or professionals in the field. The quantitative survey is digital.

The number of respondents was 117. It is therefore important to note that this is a study conducted for a thesis that tries to find an answer to a potential problem. It is necessary to take this study with caution. 46% of respondents are women and 54% are men. All of them are between 18 and 24 years old. 79% of the respondents are still students while the other 22% are either young workers (19%) or people other than students and workers (3%). Most of the respondents were from Brussels, representing 42% of the respondents, while Flanders represented 26% and Wallonia 32%. 36% of the respondents are occasional consumers who go to the cinema once every 3 months. 26% go once a semester and then the third largest group represents two groups, 14% are those who go once a month and once a year to the cinema (APPENDIX 4).

4.1: Impact of COVID-19

COVID had a significant impact on the entertainment sector, including the cinema, which had to close its doors for a time (cf. supra p.21). Nevertheless, 71% of young people aged between 18 and 24 who responded to the survey confirm that COVID has not changed their cinema consumption habits (APPENDIX 4). According to the Wallonia-Brussels focus group (2023), COVID had no real impact on the frequency of consumption before and after COVID. But COVID has shown that it is possible to enjoy a film at home with friends or family without having to leave the house and go to the cinema.

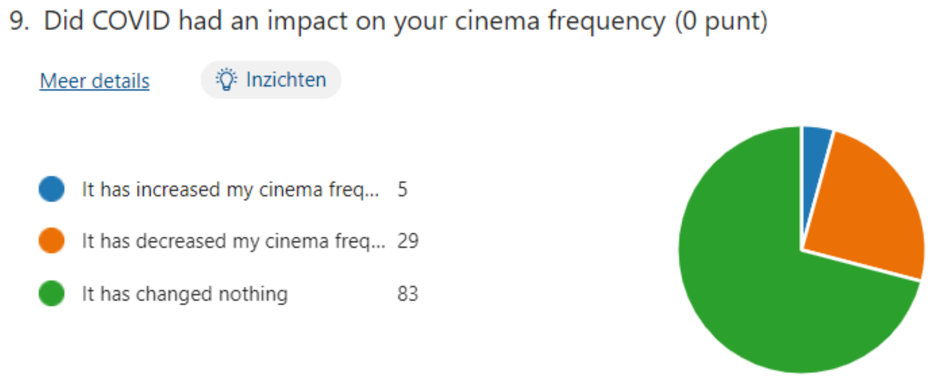

Figure 19: COVID impact on the frequency (Appendix 4)

Indeed, the survey shows that 50% of respondents prefer to watch a film at home with friends and family. According to Lucie, from the focus group in Flanders (2023), she prefers to stay at home because she and her family have invested in a new sound box with a nice flat screen to enjoy watching films together or alone. Indeed, the new technologies available to cinema make it less popular nowadays. She said that the cinema is good but that she has to travel to see a film when they have everything they need at home. Moreover, 15% of respondents to the survey prefer to watch films alone at home. According to Arthur, from the Wallonia-Brussels focus group (2023), watching a film alone gives the feeling of freedom, namely being able to pause and rewind it as one wishes without disturbing others around.

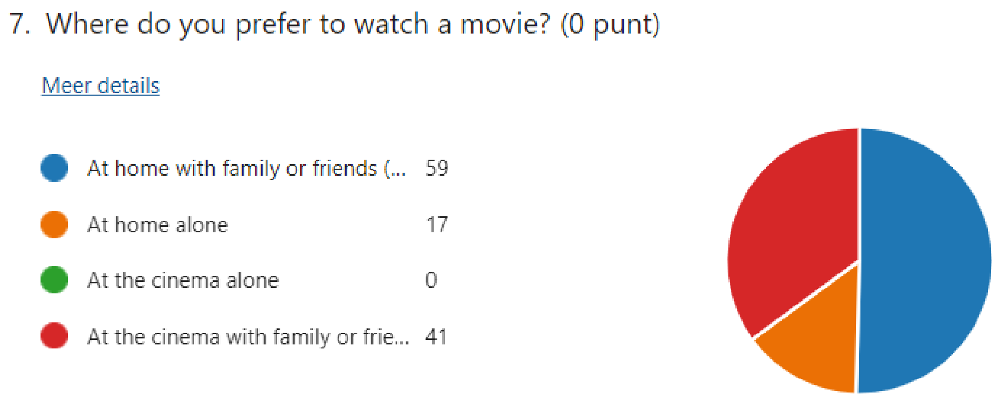

Figure 20: A preferred place to watch a movie (Appendix 4)

Nevertheless, 35% prefer to watch a film in the cinema with friends or family. (APPENDIX 4) A film in the cinema is still a nice change from the usual. Staying at home cosy under the blankets remains a comfort that the cinema does not offer. Cinema remains an experience with sound, image and the big screen. The immersive experience is something that home does not offer (Focus group Flanders, personal communication, 2023).

25% of the respondents to the survey confirm that COVID has had an impact on their frequency of cinema consumption. They confirm that they go to the cinema less often (APPENDIX 4). Réginald, from the Wallonia-Brussels focus group (2023), explains that this is not due to a loss of habit but because of the arrival of streaming platforms, and because cinema is more expensive than before. As a student, cinema now requires a small additional budget. This has led to a reduction in cinema consumption, especially as the proposed substitutes cost almost nothing.

The remaining 4% show that COVID has increased the frequency of young people going to the cinema (APPENDIX 4).

4.2: Streaming platforms (Netflix, Amazon Prime, Disney+, …)

According to the digital survey, 86% have access to a legal streaming platform such as Netflix, Disney+, Amazon Prime or others. This shows that most young people like to consume films at home. The survey reveals another interesting statistic: whether having a streaming platform has changed movie-going habits. 57%, i.e., more than half of the respondents who answered positively to having access to a streaming platform, answered that having access to a streaming platform has had no impact on their movie-going (APPENDIX 4).

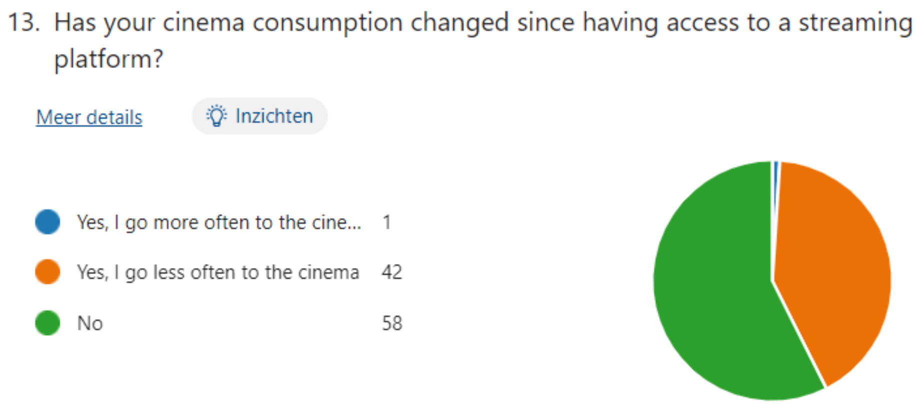

Figure 21:Streaming platforms' impact on the frequency (Appendix 4)

From the point of view of Adrien and Jules from the Flanders focus group (2023), streaming platforms are a complement. Indeed, the platforms allow access to other films that are not necessarily shown in the cinema or that are dated. Moreover, films in the cinema are released later on the streaming platforms. So, if the film is awaited, people will prefer to watch it in the cinema instead of waiting for the film to arrive perhaps on the streaming platform. Finally, streaming platforms will never replace the experience of seeing a film in the cinema. The cinema offers a much better sound and image quality than television, a smartphone or a computer.

But this does not apply to the other 42% of young Belgians, who believe that streaming platforms have indeed reduced their cinema consumption (APPENDIX 4). The main reason, according to the Wallonia-Brussels focus group (2023), is that young people often have a limited budget and that young people like to watch films in general, but not enough to go to the cinema regularly because it costs a certain amount of money and that streaming platforms offer a cheaper alternative to watching movies.

4.3: Film Piracy

According to the survey, piracy remains a problem for the film industry. Only 25% admit that they do not pirate films. Piracy includes torrenting, illegal piracy and watching a film on a free and illegal streaming site. 75% of the remaining respondents fully admit that they still pirate films. Those who answered positively to the question are divided into two groups. 44% say they pirate films often and 31% occasionally (APPENDIX 4).

According to both focus groups (2023), everyone still assumes they pirate because it is easy to access and open to everyone. Moreover, all films are accessible on illegal sites and some are even accessible in good quality. It has also become commonplace to have to pay for a film on the internet when you can access it on an illegal streaming platform without being caught by the law. Piracy is not controlled and many people take advantage of it because it is free. This can be problematic for the film industry that wants to promote movies in Belgium.

But *do young people pirate films that are still in the cinema?* The trend is reversed, with 67% of respondents stating that they do not pirate films in the cinema. (APPENDIX 4) While 33% say they do pirate films. Most young people do not pirate films in the cinema because if they wanted to see a film, they would watch it in the cinema. They assume that if they pirate a film, it is because it is either not in the cinema or not on the streaming platform they have (Focus group Flanders, personal communication, 2023).

Nevertheless, according to Arthur from the Wallonia-Brussels focus group (2023), he assumes that he pirates films that are playing in the cinema. He explains with the example of Avatar 2, that the movie has been in the cinema for a very long time and that it is still there. So, in order not to wait any longer and not have to go to the cinema because he didn't want to pay for it and he was lazy, he preferred to pirate the film. Arthur doesn't regret it and did it because it's free and no one is going to turn him away.

The survey also highlights the fact that people with a streaming platform pirate less or no longer at all. 59% of respondents say that they pirate fewer films since they have access to a streaming platform. 16% have never pirated films and 23% confirmed that they have stopped pirating since they have access to a streaming platform. The remaining 2% pirate more often even if they have access to a platform (APPENDIX 4).

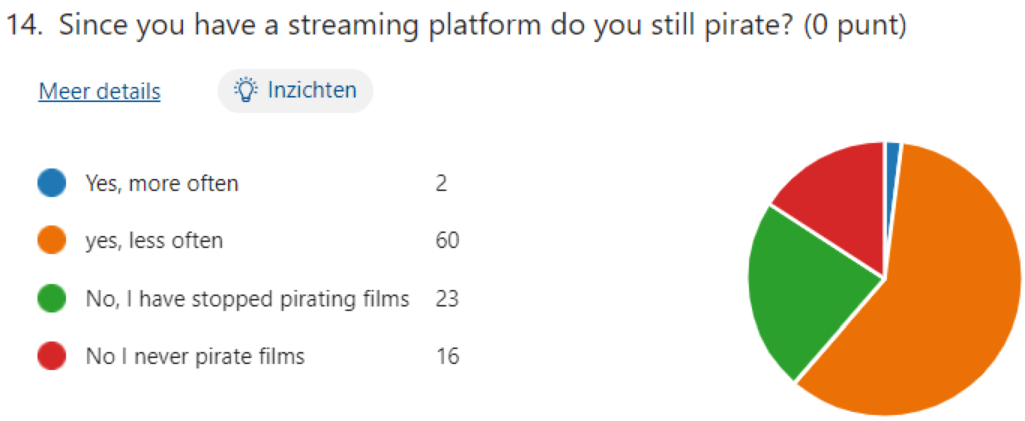

Figure 22: impact of streaming platforms on piracy (Appendix 4)

Young people pirate less since they have access to a streaming platform because they know that OTT platforms are legal and that they have a wide range of films and series to watch on the streaming platform. Nevertheless, if they continue to pirate it is because they don't want to consume for each streaming platform or for the particular film they want to watch. Moreover, streaming platforms guarantee a higher picture quality and do not offer pop-ups and advertisements before watching a film. Streaming sites can also be full of viruses, which can be harmful to the computer (Focus group Wallonia-Brussels, personal communication, 2023).

4.4: Price

Regarding the price of a cinema ticket, the survey shows that most consumers do not know the average price of a cinema ticket for independent cinemas. The average price of cinema tickets is more expensive in the big complexes, with Kinepolis in the lead (12€90), than in the smaller independent cinemas, which offer prices between 6€ and 8€. Respondents were asked two different questions about price; *According to you, what is the average price of a cinema ticket in a big cinema complex (Kinepolis, UGC, Pathé, Imagix)?* And *according to you what is the average price of a cinema ticket in a small independent cinema? (Cinema Lumière, Wellington, Palace, Stockel, ZED, ...).* Prices depend on the cinema, so they were able to choose between a range of prices. The lowest prices were between 6€ and 8€ and the highest prices were between 18€ and 20€ (APPENDIX 4).

Firstly, the respondents to the first question, i.e., the average price of a cinema ticket of the big complex. 45% of the respondents answered between 12€ and 14€ while 38% answered that the price varied between 9€ and 11€. 16% of respondents felt that the price was above or below the other two answers (APPENDIX 4).

Respondents did answer the question of the average price of a large cinema complex rather well. The average price of a large cinema complex is €11.50. The highest price of Kinepolis at 12.9€ and the lowest at Imagix at 10.50€. However, when asked if this average price is expensive, 78% said it was, while only 22% thought the price was not (APPENDIX 4).

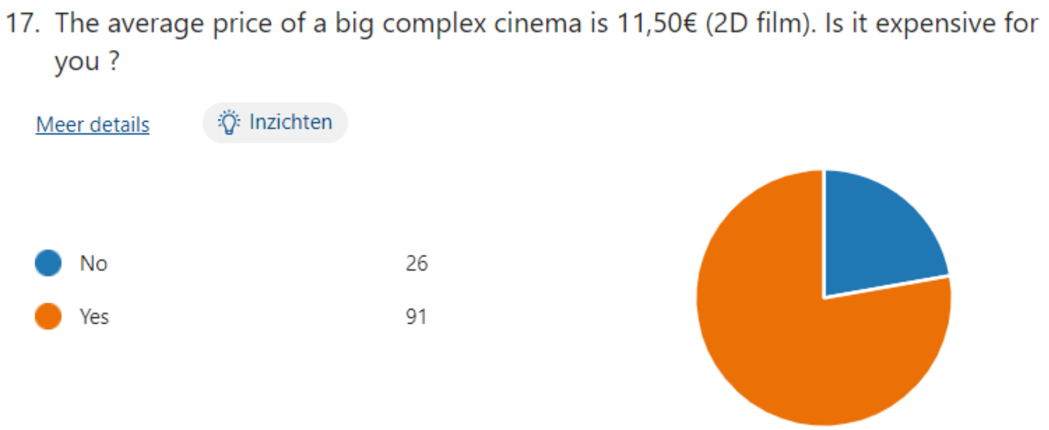

Figure 23: Average price: big complex (Appendix 4)

According to the focus group in Flanders (2023), the price of a large complex, in this case, Kinepolis, is expensive. Young people understand that the price is going up because prices have gone up everywhere. The cinema has also been heavily impacted by COVID and is an energy-consuming sector. On the other hand, it's just the ticket that costs 12.9€ for a 2D film lasting less than 2h15 and without snacks. So often the price for a film is between 15€ and 20€. According to Adrien (2023), if you had to spend 20€ every week to see a film to live a superior immersive experience, it would not be worth it because some films are just as good on the small screen.

Secondly, the respondents to the second question. The majority of the respondents' estimates are contrary to the first question. The price range is the same as the big complexes. Most respondents estimated a higher price between 6€ and 8€. 63% estimated the price to be higher, while only 37% answered the question correctly (APPENDIX 4).

But still, the average price of a movie ticket in a small independent cinema is lower than in the big complexes and is on average 7,5€. The respondents found the price to not be expensive. 91% of the respondents found 7.5€ to be not expensive while 9% found the price for a movie at the cinema to be expensive. There is therefore a large majority of young people who find the price of a cinema ticket at an independent cinema not expensive (APPENDIX 4).

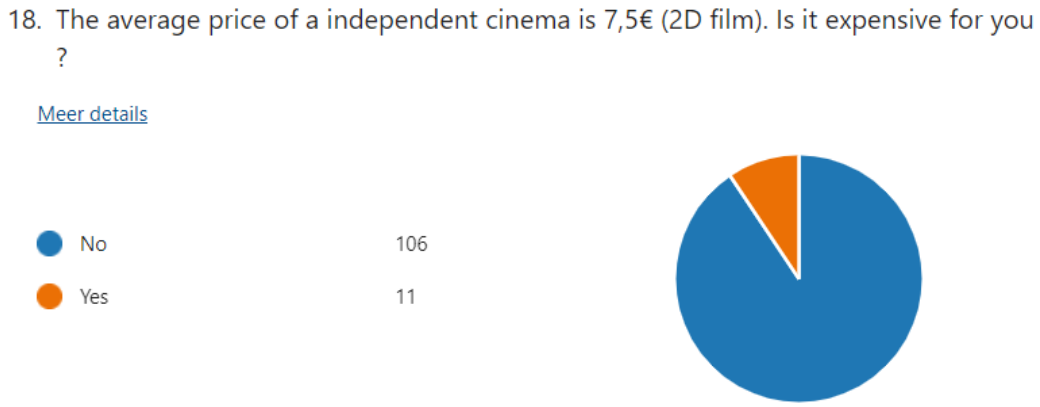

Figure 24: Average price: independent cinema (Appendix 4)

According to the focus group Wallonia-Brussels (2023), when they think about cinema, they think directly about big complexes such as Kinepolis. The focus group did not think enough about small cinemas. Young people don't have much income and when they work, they don't often have much time. On the other hand, the focus group was interested in a 7€50 cinema ticket. Marie and Arthur (2023) denounced the fact that small cinemas do not make enough ads or do not promote their cinemas to their audience. Some young people don't even know the local cinemas in their area and this may be the cause why they don't know the exact prices. The big cinemas are much more active on the networks and do marketing campaigns to the detriment of the small cinemas that offer films at low prices but have little notoriety among their potential young audience (Focus group Wallonia-Brussels, personal communication, 2023).

4.5: Distance

To see if distance was a problem in Belgium, it was necessary to know how far away the youth population lived from the most frequented cinema. 30% live between 0 and 5 km from a cinema, 36% live between 5 and 10km, 21% live between 10 and 15km and 13% live beyond 15km. The young people surveyed were generally close to a cinema in Belgium. In addition, most of the young people answered (68%) that if they lived further away from 15km or closer to 15km, they would not change their cinema consumption habits. On the other hand, 32% think that they would go to the cinema more often if they lived closer or further (APPENDIX 4).

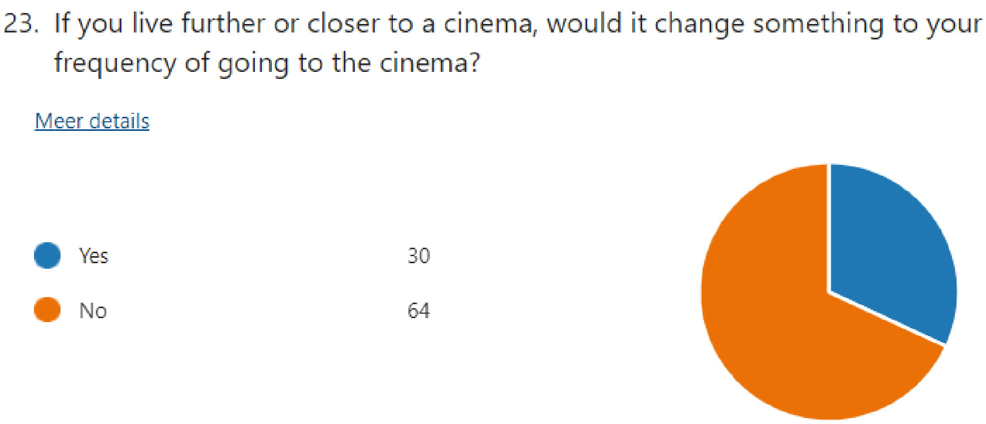

Figure 25: distance impact on the frequency (Appendix 4)

Young people compare the cinema with an opportunity to do something one night. Doing a nice activity to have fun and spend a good time with friends or family. So having a movie theatre 5 km away or 5 km closer doesn't make much difference to the frequency of 18-24-year-olds going to the movies (Focus group Flanders, personal communication, 2023).

Moreover, going to the movies is comparable to other activities where you also have to travel, like bowling or going to a bar. Compared to other activities, the cinema is more accessible than other leisure activities, so the distance does not bother young adults much (Focus group Wallonia-Brussels, personal communication, 2023).

However, some people think that their consumption has changed if they lived further or closer to a cinema. Indeed, some people will prefer to stay at home without having to travel to watch a movie. Indeed, the movie at home can be very good too. So, distance can play a role in the decrease in attendance (Focus group Flanders, personal communication, 2023).

4.6: Experience

Respondents were asked to answer different questions regarding the experience delivered by the cinema and the lived experience of cinema. The first question was: *What is your top 3 cinema experience?*

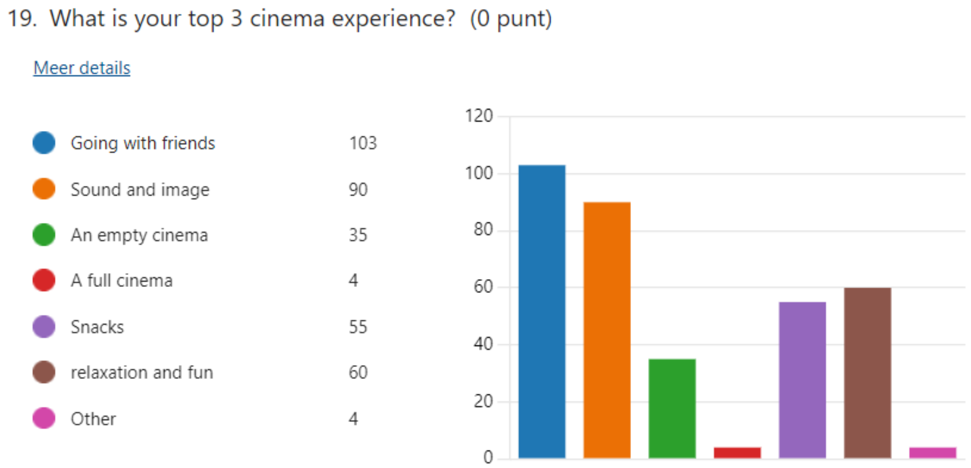

Figure 26: TOP 3 cinema experience (Appendix 4)

The top 3 responses were, going out with friends, sound and image and relaxation and fun.

Cinema is an activity that young people do not do alone. 75% of the young people answered that it is a social activity while 24% answered that cinema itself is not but that cinema is an activity to do with people. Less than 1% answered that they go to the movies alone (APPENDIX 4).

Cinema is an out-of-home activity to spend with friends and family. The cinema remains social even if people don't talk about it. Another very important point was the experience of sound and image. The technology and the big screen are great pluses that the cinema offers that computers or television can't. Moreover, the cinema is a relaxing activity. Young people go to the movies because it is an experience that does not require much energy. Few out-of-home activities offer a relaxing activity (Focus group Flanders, personal communication, 2023).

Then, a second question. *Why are you going to the cinema?* The answer that was chosen the most was the immersive experience that the cinema can offer (APPENDIX 4). The two focus groups gave two rather different answers on the fact that the immersive experience of the cinema is a great plus.

The cinema is superior to other substitutes because of its large screen, its comfortable seats and the quality of the image and sound. If the movie is good and engaging, time flies in the cinema and the fact that you can live it to the fullest without a phone offers a different experience (Focus group Flanders, personal communication, 2023).

The cinema brings a different experience because it's a whole experience with the room, it's an activity to go there and it put yourself in a certain state of mind. The fact that the film has just been released, brings an experience that the house cannot offer (Focus group Wallonia-Brussels, personal communication, 2023).

The second answer that was most chosen by the respondents was that friends suggested a movie theatre and that they joined. As mentioned above (cf. supra p.52), going to the movies is a social activity and the fact that most people want to experience it with friends proves it once again (Focus group Wallonia-Brussels, personal communication, 2023).

In third place, people wanted to go and see a film that they had been waiting for in the cinema. Eliott, from the Wallonia-Brussels focus group (2023), explains for example the experience he had with Marvel movies. He was looking forward to the films in the cinema because the special effects, the action and the new technologies used to make the film are so much better delivered in the cinema. Moreover, recent big movies such as Avatar 2 and Top Gun: Maverick have been successful with young adults because the experience the movie offers and the hype of the movie on social networks have had a positive effect on increasing the frequency of young people (Focus group Wallonia-Brussels, personal communication, 2023).

But special effects and action do not attract everyone, the most important thing for young people is an engaging film. A film for example based on a real story or a well-scripted story that attracts young adults to the cinema. Films that are ultimately created for the big screen and offer an exceptional cinematic experience. But for this to attract young people, the film needs to be known on social networks, because that is where young people are mainly aware of film releases in the cinema (Focus group Wallonia-Brussels, personal communication, 2023).

The experience of watching a film in a cinema does not live up to young people's expectations. Watching a film at home with friends or family remains the favourite place for most young people. As described above (cf. supra p.46), 65% of respondents prefer to watch a film at home. Watching a movie in a cinema is preferred by only 35%, even out of the 65%, 15% prefer to watch films alone at home (APPENDIX 4).

The film at home offers a different experience. The comfort, the ease, the opportunity to control the film, etc. There is this feeling of freedom and ease of watching a film at home that the cinema does not offer (Focus group Flanders, personal communication, 2023).

4.7: Notoriety of low-budget films on social networks

91% of respondents see ads on social networks for films and this is positive for the film industry. On the other hand, of the 91% of positive respondents, 56% confirm that they receive ads but only for blockbuster films with big budgets. 57% of the young people surveyed do not receive ads on the smaller film networks. Nevertheless, 35% of the respondents receive a lot (12%) or little advertising (23%) but of all film releases (APPENDIX 4).

26. On social networks (Youtube, facebook, Instagram, TikTok, ...) do you often see trailers or videos about movies currently in theaters or about to be released in theaters?

Figure 27: Impact of Social network (Appendix 4)

Moreover, social networks are more than important in attracting young people to the cinema, as according to the survey social networks are the main source of a film release in the cinema. Followed by word of mouth and posters (APPENDIX 4).

According to Marie, from the Wallonia-Brussels focus group (2023), small films do not receive enough notoriety compared to big films. This is quite logical due to a smaller budget but sad. Because in the end there are maybe 5 good big blockbusters coming out and 20 great little films coming out. Few young people know that these smaller films are coming out because those movies don't have the budget to promote them as good, unlike the big films.

64% of respondents know roughly when films are released but only the big films. 33% of the respondents believe that they do not know when films are released while only 3% confirm that they know roughly when most films are released. The lack of awareness of smaller films is at the expense of larger films (APPENDIX 4).

The videos or the film trailer have an impact on young people. 51% of respondents agreed that the trailer has an impact on them but not all the time. 33% confirm that trailers and videos have a significant impact on them before watching a film. 16% find that videos and trailers have no impact on them (APPENDIX 4).

This statistic shows that watching a small piece of the film can have a significant impact on the young audience. Distributors and cinemas could use social networks such as Instagram, Facebook, YouTube or TikTok to promote big and small films.

4.8: Competition from other forms of entertainment

As seen in the chapters above, watching a film at home is preferred, while the cinema is secondary. (cf. supra p.46) Activities at home are criteria to be observed. But when respondents choose their favourite outdoor leisure activity, the cinema comes second after having a drink in a bar. Having a drink with friends is the favourite activity of young people, with 91% of respondents saying that a bar is in their top three favourite out-of-home activities. The cinema comes second with 51% and then nightclubs and watching sports events come third with 28% (APPENDIX 4).

Before and after a film at the cinema, going for a drink is appreciated. According to Jean-Baptiste and Emma, from the focus group in Flanders (2023), it is always nice to discuss a film after the film or if the film is playing later, to have a bite to eat or a drink before the film starts.

Cinema itself is a relaxing activity and requires little energy. Moreover, most young people prefer to watch a film in the early evening between 7 and 9 pm (APPENDIX 4).

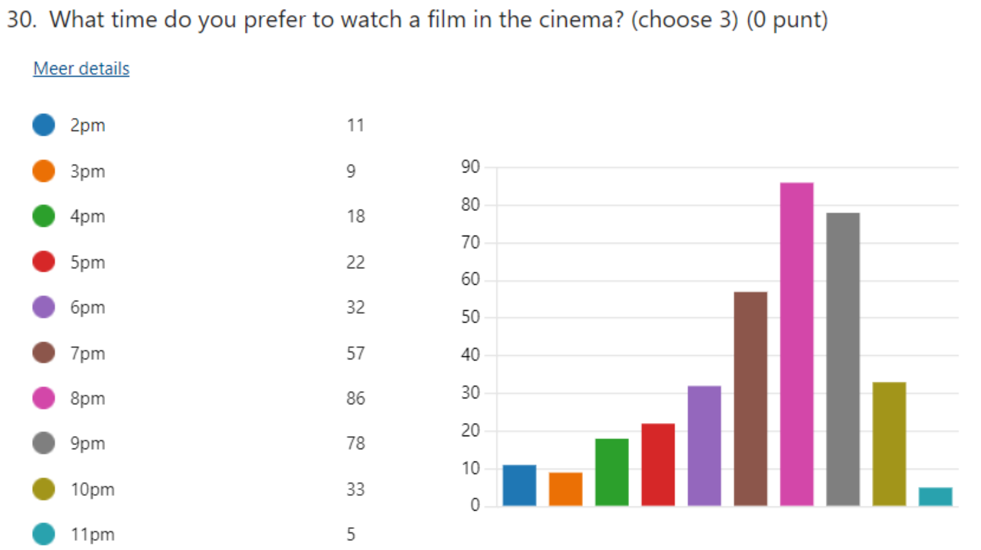

Figure 28: preferred showtimes hours (Appendix 4)

73% put 8 pm in their top 3, 9 pm was next for 66% of the audience and then 7 pm came third with 48% of respondents choosing this option in their top 3. The big screen is a favourite early evening activity followed or preceded by a drink or a restaurant (APPENDIX 4).

According to Jules, from the focus group in Flanders (2023), going to the cinema is a rather nice and relaxing activity. There are no other activities outside the home that offer this kind of alternative except maybe having a drink with friends in a quiet bar or theatre and opera.

In a nutshell, the cinema is seen as an outing with friends but its biggest competitor is not out-of-home but at home. Indeed, home screens are a threat to the future of cinema.

4.9: Organisation

Does going to the cinema require organisation? 50% said yes and 50% said no. (APPENDIX 4) But this is highly dependent on the situation. The Wallonia-Brussels focus group discussed organisation to decide between yes and no (Focus group Wallonia-Brussels, personal communication, 2023).

Going to the cinema does not require organisation because it is a spur-of-the-moment decision. It is that the evening is free and there is a good film in the cinema. The organisation is not a problem because there are often sessions available and the cinemas are never full, so going to the cinema does not require any organisation (Focus group Flanders, personal communication, 2023).

Going to the cinema requires organisation because you must organise the evening with friends and family. You need to be free or clear your schedule in order to plan a movie night. You need to plan the time of day and the film you want to see. You can't just do it spontaneously, because you have to plan a night out, even if it is a movie outing (Focus group Wallonia-Brussels, personal communication, 2023).

Chapter 5: Results

What are the main reasons for the decline in cinema attendance by 18-24-year-olds in Belgium? Thanks to the primary analysis, which was able to trace the potential causes of the decline in attendance of 18-24-year-olds in Belgium, it is possible to answer the research question. This chapter will describe the results in order to confront the answers with the hypotheses. This comparison between the results and the hypothesis will take place in the next chapter.

COVID did not have a real impact on young people's attendance at the cinema but it did make them realize that comfort at home is something precious. In addition, COVID has been an eye-opener for the streaming platforms that have been growing in Belgium (cf. supra p.45).

Most young people have access to a streaming platform which is a substitute for the cinema. OTT platforms have decreased the frequency of young people going to the cinema but the young generation claims that it is more of a complement than a competitor. However, the platforms are so affordable and easy to access that cinema in return has become expensive (cf. supra p.47).

But thanks to streaming platforms, piracy has decreased and young people are consuming less. Piracy has not decreased the frequency of the young generation between 18 and 24 because most of them don't pirate movies that are playing in theatres. The majority pirate movies that are already dated or are no longer shown in the cinema. But since piracy is free and so little controlled from a legal point of view, the cinema looks absurdly expensive next to it. Besides, it has become easy to watch movies for free and it is effortless to find quickly an illegal streaming platform (cf. supra p.48).

Most of the respondents go to the Kinepolis, i.e., 44%, and only 19% watch movies in small independent cinemas. According to the young respondents, the price of the big complexes is expensive while the price of the small independent cinemas is not. There is therefore a lack of awareness of small cinemas because the price has often been cited as the source of the decrease in attendance. However, with the technological extras (3d, 4DX, IMAX, etc.) and the snacks a ticket is quickly expensive and the frequency of the young people decreases because the monthly budget is less high for a student or a young worker than a grown adult (cf. supra p.49).

Distance is not a problem because young people like to do activities and like to get out of their homes. However, the main activity of the cinema is to offer the possibility to watch a movie. It is an activity that can be done at home. Furthermore, young people prefer to watch a movie at home with friends and family than to have to travel to the cinema. The comfort at home is preferred over the immersive experience that the cinema can offer (cf. supra p.51).

The cinema offers something that the substitutes do not. The immersive technology of sound, image, the black room and the big screen can't be replicated at home. This makes the cinema unique. Cinema is relaxing and social and few leisure activities offer this kind of activity. In addition, young people like to go to the theatre because according to the respondents, cinema is the second most popular outdoor activity. However, watching a movie with low-budget, control, comfort, and being 100% at ease at home with friends and family is preferred by young people instead of watching a movie on the big screen. If cinema is to regain its popularity it has to offer something crazy, social and immersive. Make it more attractive than the sofa at home (cf. supra p.52).

Social networks are the main sources of information for young people about film releases. Unfortunately, if the frequency is decreasing, it may be because most young adults only receive posts about big movies or movies with a budget. Young people know the release date of big movies and are hyped by trailers and videos but may go to the cinema less often because small movies receive very little notoriety on the networks due to strong competition from big movies at the cinema and on streaming platforms (cf. supra p.55).

The competition in the entertainment sector is not with out-of-home activities but with leisure activities at home. Indeed, the cinema offers a relaxing and fun activity. Few out-of-home activities offer relaxation, or at least they are less favoured than cinema (cf. supra p.56). The competition is at home as described above (cf. supra p.58).

Finally, the organisation cannot give an inside due to a very divided response between the respondents. Nevertheless, it demands little organisation with friends to organise the outing. (cf. supra p.57)

In conclusion, some cinemas and films lack awareness on social networks. In addition, cinema substitutes ridicule the price that cinemas offer because watching a movie can be free or cheap. The comfort of the home is an asset to consider as most young people are better off at home and not at the cinema despite the immersive experience offered.

Chapter 6: Confrontation: Results VS Hypotheses

The results provide interesting information. However, some points turn out to be more important than others. It is important to know the source of the decline in the frequency of young people between 18 and 24 years old, to conduct effective marketing campaigns. With this comparison, it will be possible to verify the 4 hypotheses described in chapter 2.

Hypothesis 1:

- Rising prices, easy access to piracy, the loss of habit due to COVID and the arrival of streaming platforms are the main causes for the decline in young people's attendance at the cinema.

Denial: In recent years the price of cinema has been increasing, in order to meet their post-covid costs and the ever-increasing energy bills. This is true for both the big complexes and the small independent cinemas (APPENDIX 2). In contrast, the prices of streaming platforms remain low and piracy remains easily accessible. The perceived value of watching a film is therefore relatively low. A cinema ticket at Kinepolis costs about the same as a standard 1-month subscription at Netflix. Nevertheless, cinema is an out-of-home leisure activity that does not cost much. It is therefore important to note that cinema itself is not an expensive activity but the perceived value of the cinema ticket is low due to substitutes that offer much better prices. This is one of the most important factors to be examined for the decrease in the frequency of young people.

In addition, most young people feel that the average price of small cinemas is affordable in contrast to the prices of larger cinemas. This lack of awareness may also play a role in the decrease in frequency among young people.

Secondly, COVID-19 is not the source of the youth decline but it has acted as a double-edged sword for cinema. On the one hand, it underlined the fact that any television, computer with good picture quality and a good sound box is no substitute for the immersive experience of cinema. Besides, young people were the first to reopen the cinemas. However, it has also made an impression on young people that staying at home where comfort is king, is more attractive than the immersive experience, which confirms hypothesis 2.

Thirdly, streaming platforms affect the depreciation but they are not the main cause of the decline. The comfort of staying at home has become more important with the growth of streaming platforms. OTT platforms offer a range of films that are no longer in the cinema or have never been in the cinema. Besides, they have a financial advantage in the cinema. To cut a long story short, streaming platforms are a complement to the cinema, offering other films at a very affordable price accessible via the Internet at home or elsewhere. But it has not been consequent in the decrease of young people between 18 and 24 in the cinema.

The OTT platforms have reduced film piracy in Belgium but have not stopped it. In Belgium, piracy is easy to access and is little controlled by the law. This easy access trivialised the price of a cinema ticket for youngers. *Why do you need to pay if you can watch it for free?* Nevertheless, a large proportion of young people do not pirate films that are in the cinema unless the film stays there for 'too' long. Piracy is not the source of the problem but the free and easy access has not limited the decline in cinema attendance by youngers.

Hypothesis 2:

- The immersion that cinema offers is not enough for young people. It lacks the social aspect and the comfort of being at home.

Confirmation: The cinema offers a unique experience. Around 75% of young people confirm that sound and image are one of their top 3 experiences at the cinema. The immersive experience that cinema offers is the main reason why young people go to the cinema. On the other hand, the social aspect of cinema is becoming more and more important. About 90% of young people put the social aspect in their cinema experience and going with friends and family is the second most important reason for young people to go to the cinema. Despite the unique experience that cinema offers, it is no longer the preferred place for young people to watch a film. Watching films at home with friends or family is the preferred place for most young people. The perceived value of the experience offered is no longer up to expectations. This lack of innovation is a problem that is causing the decline of young people and it is one of the main sources.

Moreover, the cinema is the second most popular out-of-home activity for young people after the bar. But the threat of cinema is at home. Young people prefer to relax at home in front of the television or another screen (smartphone, computer) than to watch a film in theatres. Additionally, the costs of going to the theatre compared to what is accessible at home and the technology available at home discourage young people from going out. Competition from other forms of out-of-home entertainment is not a cause for the decrease of young people at the cinema. Nevertheless, the new era of entertainment at home is a threat to theatres.

Hypothesis 3:

- Going to the cinema requires organisation because you need to take transport to get there. Moreover, it is quite possible to watch a film at home without much organisation and travel. These aspects reduce the number of young people going to the cinema.

Denial: Distance is an important consideration when young people go to the cinema. But it does not play a role in the decline of young people at the cinema. Indeed, going out is something that young adults do much more than the other generations. Proximity plays a crucial role in the choice of a cinema, but in Belgium, more than 80% of young people live less than 15km from the cinema where they go most often. Moreover, if young people live further away or closer to a cinema, around 70% confirm that they will not change their habits.

Besides, cinema requires organisation for 50% of young people and not for the other 50%. So, the third hypothesis cannot be judged as right or wrong for the organisation. Nevertheless, young people prefer to watch films in the evening. In addition, the majority going to a cinema were looking forward to watching a film there. The organisation can be part of the lowering in young people going to the cinema but not the main cause.

Hypothesis 4:

- The lack of awareness on social networks for low-budget films reduces the frequency of young people going to the cinema.

Confirmation: Social networks are the main source of information about film releases and films currently in theatres. However, the majority of young people receive advertisements and posts from high-budget films. Each film is unique and in order to promote a film, each film must go through the notoriety phase. For films with smaller budgets targeting the right audience is complicated. This can be explained by the strong competition from big-budget films and the fact that the streaming platforms also promote the films that arrive on the platform. Most young people say they have an impact on a film after watching the trailer or videos about the film. The lack of awareness of certain films on the networks is a factor in the drop in attendance of loyal young people. These young regulars become occasional consumers of the cinema. Hypothesis four is therefore correct.

In conclusion, all the hypotheses were used to better understand and analyse the source of the problem. Some of them are more insightful and some are less. The final result leads to three conclusions.

"The perceived value of cinema tickets is trivialized due to low prices of streaming platforms and piracy. The price of cinema tickets is lower or equal to other out-of-home activities and appeals to young people. The problem is not the price but the perceived value of a cinema ticket."

"The cinema must renew itself and offer a comfortable, friendly, social and unique experience. Young people prefer to watch a movie at home where comfort, sociability and affordability prime.”

"A lack of notoriety on social media. The cinema is losing loyal customers because small films are not represented enough on social networks. In addition, the notoriety of small independent cinemas on social networks is low as well. Although they offer cheaper and affordable prices that would appeal to young people, they have little notoriety compared to large complexes."

Chapter 7: Recommendations

After the results of young consumers between 18 and 24 years of age at the cinema, it is possible to make some recommendations for the different actors active in cinemas. The actors are the distributors, the big complexes but also the independent cinemas. These recommendations are intended to advise cinema-related businesses on the results of the thesis.

First recommendation: Increase the social experience of cinema. Cinemas could combine offers with bars or restaurants, to increase the social experience. These bars can be set up right outside the cinema for example, so that young people can discuss the film. These bars or restaurants can be decorated according to the theme of a certain film. Cinemas with the cooperation of distributors could offer a combined ticket for the film with a drink representing the film, available after the film at the bar. Let's imagine a vampire movie, the drink offered at the bar could be tomato juice or a Manhattan for those who prefer an alcoholic cocktail.

Eric Wold opened the AMC Dine-In Theater in the US. The special feature of this cinema is that it offers a restaurant menu to people during a movie. Since then, these theatres have experienced positive growth in revenue because the cinema concessions business is the biggest money-maker for a cinema (Scheidlower, 2023). Furthermore, Wold adds: "If you can create better food while someone is already there and give them an added reason to why they want to go to a theatre to see a film ... that is a draw and can be an added revenue source." (Wold, 2023). Setting up bars at the cinema exit is therefore a win-win situation. Customers have a good and social time while the cinemas increase their revenue streams in order to invest in technology and comfort in the long term. Other cinemas have followed suit and seen their numbers increase: Everyman Cinema London, and Alamamo Drafthouse Cinema Texas.

Second recommendation: Film matters Belgium and FCB could promote cinemas on social networks. Reconnect young people to the cinema and make them aware of the affordable price of a cinema ticket. Inform young people about the cost of producing a film and justify its price by raising awareness about piracy. The awareness campaign could also open the doors to educational events. Organise backstage tours and film workshops. This can help young people understand the importance of a film and the complexity of film production.

Raising awareness works well if the problem is tackled at the source. Before 2012, Algeria was one of the countries with the most piracy, which resulted in the decline of artists, actors, etc. in Algeria. The government as well as some entities signed an agreement to raise awareness with anti-piracy awareness campaigns. Since then, Algeria has seen a blossoming of artists and the art sector, including the cinema. It has become a growing business. (Chabane, 2013)

Third recommendation: The cinema is no longer the favourite place for young people to watch a film as the comfort of home and being at home has become superior to the cinema. The cinema could offer a unique, comfortable and friendly experience. Cinemas continue to develop the immersion side, offering unique experiences that young people cannot find at home. Cinemas can improve the comfort of their rooms to offer a similar experience to that of a sofa at home. This can include more comfortable seats, cushions and blankets, and quality drinks or snacks. Cinemas can create a friendly atmosphere by organising events, meetings, quizzes or competitions. This can help create a community around the cinema and encourage young people to go out and enjoy themselves.

A study done in Vietnam found that offering better comfort and higher-quality accommodations boosts consumer loyalty. Managers of movie theatres who need to comprehend the connection between service quality, customer pleasure, and customer loyalty may find these data helpful. Additionally, they can increase customer loyalty and satisfaction if they improve the quality of their services (Cuong, 2020). Therefore, comfort can improve the loyalty of young people.

Fourth recommendation: Low-budget films have less visibility than big-budget films simply because they have less budget to invest. Unfortunately, the majority of young people are not aware of the release of lower-budget films and miss out on the opportunity to see a great film in the cinema if they were potentially interested. Low-budget films do not have the budget to organise events such as previews. However, they could use influencers who have a significant impact on young adults to watch and promote the film. Influencers can also organise competitions to attract the attention of young people to small films.

The digital area of social media is huge and is the most powerful medium, especially in the field of marketing in the current era of modernisation. Many marketing methods in social media can attract consumers, especially young people. When young people get past the stage of notoriety for a film, it is easier to convince them to go to the cinema and watch it. Young people are receptive to videos and trailers. The more it becomes a trend, the younger people will want to see it in the cinema (Suvattanadilok, 2021). This is also the case for the fifth recommendation.

Fifth recommendation: Small independent cinemas lack awareness among young people. 30% of cinemas' revenues in Belgium are independent and only 20% of young people go to them. These theatres could share regular updates about upcoming films, schedules, prices and events to raise interest and keep young audiences informed. They could use relevant and popular hashtags in their publications to increase reach and exposure on social networks. Finally, they could use paid advertising. Paid advertising on social networks can help increase reach and reach the audience they want to target. Small independent cinemas can target ads based on age, location and user interests for greater effectiveness.

These few recommendations would help increase awareness of small and independent cinemas. In addition, improving cinemas into more friendly, comfortable and unique spaces while offering social activities after or before screenings. Moreover, raise awareness of the cost of a film to make the seemingly expensive prices of cinemas affordable. This is also necessary to reduce piracy.

Chapter 8: Limitations and next steps

This thesis is the first step in demonstrating the decline of 18-24-year-olds in cinema. Nevertheless, there is still room for improvement, given the decline in the young audience. Moreover, it is a first step to answer other research questions related to the problem. The thesis has some limitations that should be considered.

The first limitation was related to the poor literature resource on cinema in Belgium. Indeed, in Belgium, there are only two studies, CIM PRESS 2020 and the study conducted by Vertigo, which gave insights into the Belgian cinema audience with numerical data. The databases of the cinemas are not public and it was complicated to confirm the claims of the studies. Nevertheless, these studies are used by the FCB and Film matters Belgium which makes the studies reliable. However, the cinema literature resource lacks diverse sources and analyses.

After the research question was answered, other limitations were added. The data collected for the consumer behaviour of young Belgians in chapter 3 are mainly foreign and few of them are Belgian. This may limit the generalisation of the results since they are not Belgian. It is important to consider social, cultural and contextual differences when interpreting the data, as the Belgian market can be very different from other markets. It was, therefore, necessary to carry out a primary study with qualitative and quantitative research in order to analyse the behaviour, opinions, or even expectations of the Belgian market of young people between 18 and 24 years old. The qualitative study allowed us to give more precise answers to the problem and the quantitative study allowed us to quantify the phenomenon.

In the case of this thesis, the quantitative study collects a limited number of responses, 117 respondents, which may limit the scope of the results. It is important to consider this limitation as these results do not allow for the generalisation of the responses from the quantitative study in Belgium for future studies. The small sample size should be regarded in future studies. Furthermore, the proportion of people per region does not represent the Belgian population. 44% of the respondents are from Brussels while 26% are Flemish. But to strengthen the survey, it was supported with a qualitative study of 2 separate focus groups. The qualitative study was able to demonstrate the choice of respondents and to give an answer to the analysis of the survey.

A final limitation of the thesis is the restricted group of young people between 18 and 24. Indeed, as the Belgian data is rather small and most Belgian analyses include the 18-24-year-old group, it was preferable to keep this group for the thesis. Furthermore, at the age of 18 most young people leave secondary school and enter the labour market or continue their studies in higher education. At the age of 24 young people finish university and also enter the labour market. As a logical consequence, the age group between 18 and 24 was kept, in order to make sense in future analyses.

Despite these limitations, this thesis addresses a problem that has persisted for some years in the film sector. Now that the potential answers are known, it is possible to run effective marketing campaigns to attract young people back to the cinema. The companies involved, students and researchers in the field are in the process of taking the following steps. *How to attract young people between 18 and 24 in Belgium to the big screen?*

Conclusion

The decline in cinema attendance by 18-24-year-olds in Belgium is a phenomenon that requires special attention. This thesis conducted a study to better understand the factors that contribute to this trend and identified several key elements that need to be considered.

Indeed, the decline of young people between 18 and 24 is a threat to the film industry. The arrival of the digital age has changed the habits of young consumers. Cinema must reinvent itself or at least innovate to remain attractive to future generations.

The results describe the causes of the decline and the change in habits of the young consumer. The perceived value of cinema tickets is skewed due to low prices on streaming platforms and film piracy, which may discourage the younger generation from attending the cinema. Nevertheless, the average price of cinemas is lower than or equal to the prices of other out-of-home activities. Moreover, cinema is an activity that is still appreciated by young people. Unfortunately, the value of the ticket is perceived as too expensive and may cause problems in the coming years.

In addition, the visibility of small and independent cinemas is limited, which may also have an impact on attendance. The average price of small independent cinemas has been misinterpreted. This threatens small cinemas because their prices are on average lower than those of large complexes. Moreover, the average price of small cinemas is not considered expensive by young people.

Young people are also attracted by the new technologies available at home and prefer to watch films in the comfort of their own homes rather than going to a cinema. Despite the film experience itself, this can also influence young people's decision to go to the cinema. The social factor is important to consider, and the absence of this aspect may lead the young audience to go less often.

Finally, the lack of visibility of small films on social networks can also have an impact on attendance. Young people are often very active on these platforms, and the insufficient presence of smaller, lower-budget films compared to blockbusters may cause them to miss opportunities to reach their target audience. This may explain the decline of loyal viewers into occasional viewers.

The factors that contribute to the decline in cinema attendance by 18-24-year-olds in Belgium are varied. The recommendations described in the thesis develop different ways to give marketing solutions to the above-mentioned decline problems. Firstly, cinema operators and film distributors must consider taking these key elements, in particular by raising young people's awareness of the production of a film and its costs. But also, piracy and its negative effects on the sector.

Secondly, to improve the cinema experience, by developing a comfort level equal to or better than at home. For example, by providing an additional comfort in terms of seating or concessions. Furthermore, enhancing the social and unique aspects that cinema can offer. For example, by offering bars or restaurants at the exit or entrance of the film

Thirdly, improving the presence of small independent cinemas on social networks, for example by adding information regularly and increasing the visibility of small films or independent cinemas.

By working together, it is possible to make cinemas more attractive to young people and to stimulate their attendance again.

It also offers the possibility of answering research questions such as: *How can cinema reconnect young people to increase the frequency of young people in theatres?* This thesis offers the possibility to follow up on several theses. Moreover, the Flemish audience has the potential to grow and to represent the audience that it should be. I invite future researchers and students to support a sector that represents a magical seventh art which, through its moving images can capture the essence of humanity and transport us to imaginary worlds, offering beauty beyond the limits of reality.

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Figure 19 : APPENDIX 4

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