

Tuesday, 22 March 2022

Cinema attendance improves but down on pre-pandemic

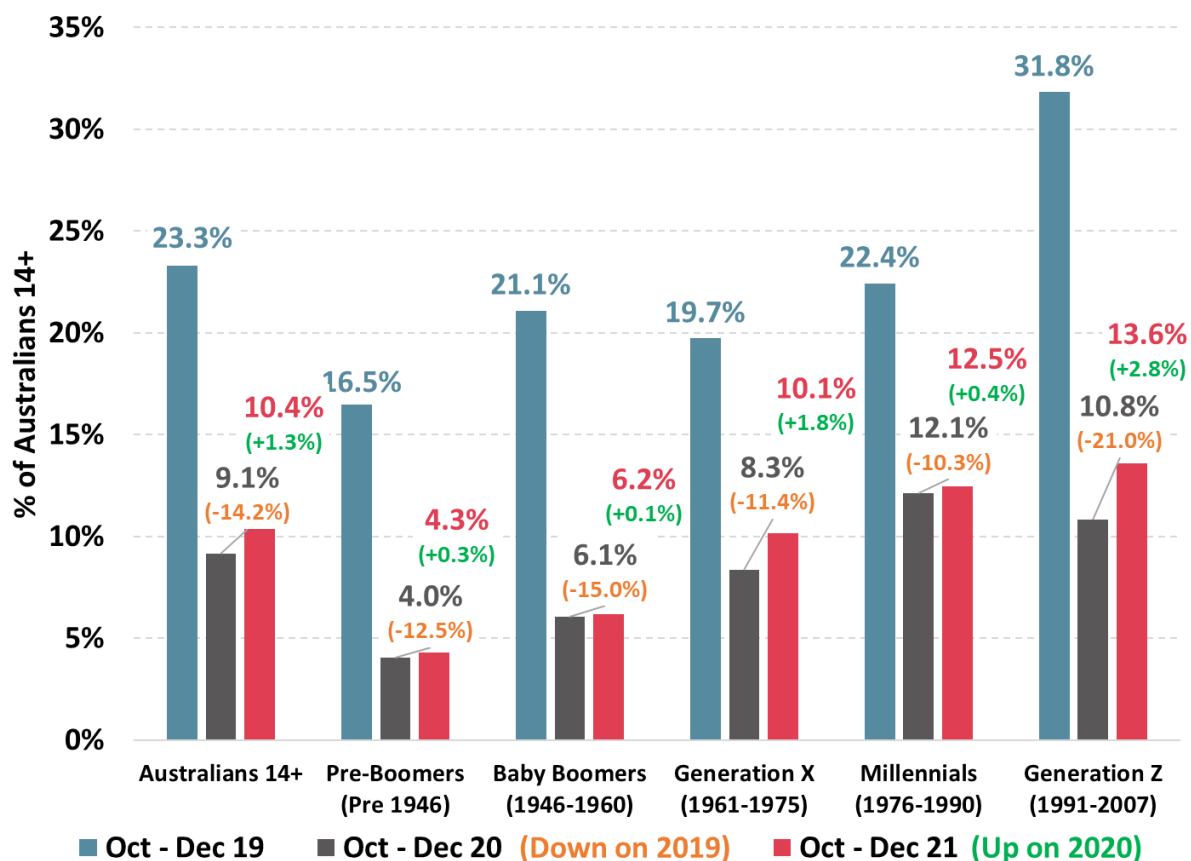
Cinema attendance in Australia increased during the final quarter of 2021 compared to a year ago but was still at less than half of pre-pandemic levels in the final quarter of 2019.

2.2 million Australians 14+ (10.4%) went to the cinema in an average four weeks in the October-December quarter of 2021 as Australia opened up and lockdowns ended in NSW, Victoria and the ACT. This was up from the 1.9 million (9.1%) that attended the cinema in the final quarter of 2020 during the midst of the pandemic, but fewer than half the 4.9 million (23.3%) who attended in the final quarter of 2019.

Cinema attendance in the final quarter of 2021 was directly correlated to age with younger Australians in Generation Z (13.6%) the most likely to attend ahead of Millennials (12.5%) and Generation X (10.1%). In contrast, only 6.2% of Baby Boomers and just 4.3% of Pre-Boomers attended the cinema.

Nevertheless, despite being the most likely to attend the cinema in the final quarter of 2021, Generation Z are still down more on cinema attendance compared to pre-pandemic than any other generation, down 18.2% points from the final quarter of 2019. This reflects the fact that pre-pandemic Generation Z were easily the largest cinema going generation with around a third (31.8%) attending in an average four weeks.

Cinema attendance in an average four weeks: Dec qtr. 2019 vs. Dec qtr. 2020 vs. Dec qtr. 2021



Source: Roy Morgan Single Source, Oct-Dec 2019, n= 13,526, Oct-Dec 2020, n=16,641, Oct-Dec 2021, n=16,762.
Base: Australians 14+.

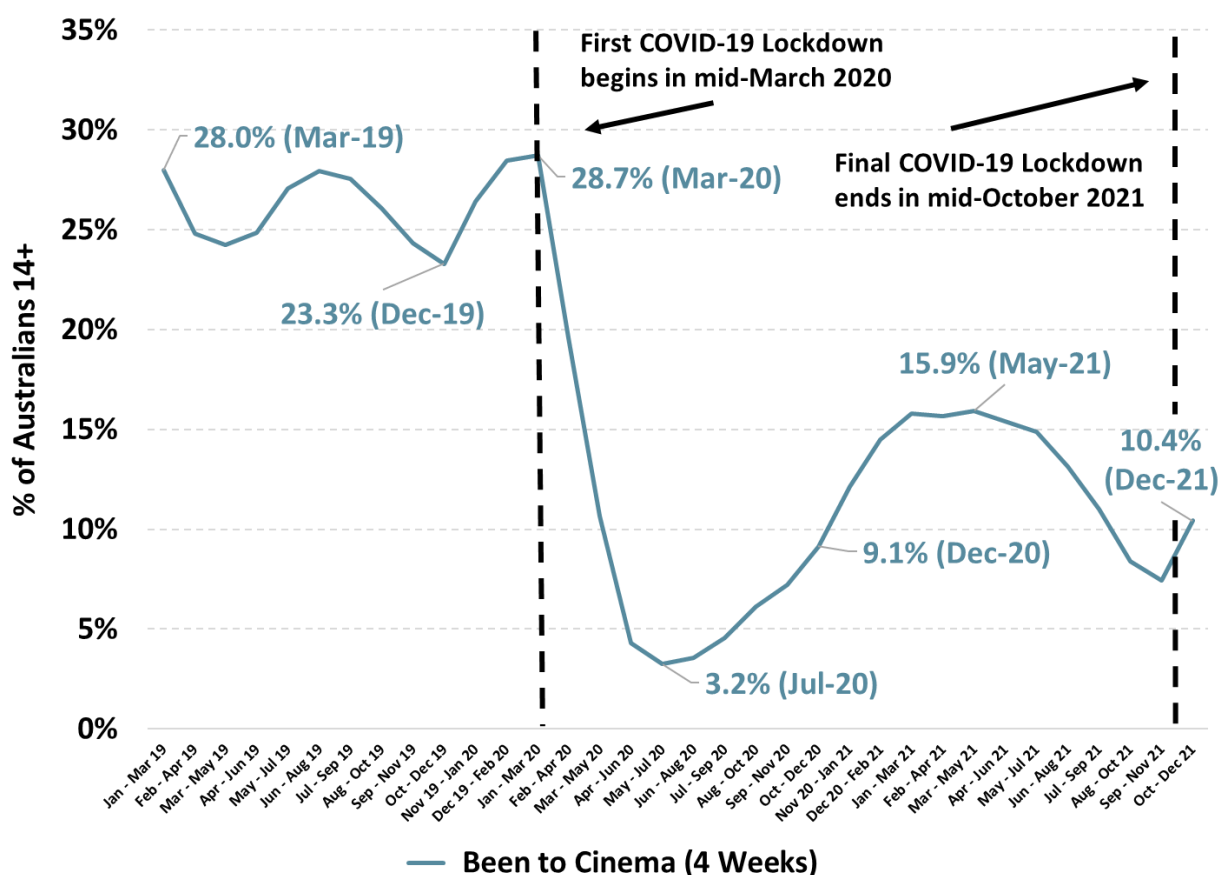
Cinema attendance was down in 2020-21 and is still under pre-COVID levels

Cinema attendance fell during the COVID-19 pandemic as cinemas were forced to close for long periods starting with the initial nationwide lockdown in late March 2020. During the first quarter of 2020 over a quarter of Australians, 28.7%, were attending a cinema in an average four weeks.

The nation-wide lockdown which began in late March 2020, and continued for around six weeks until early May 2020, forced the closure of Australian cinemas. In the three months to July 2020 only 3.2% of Australians were attending cinemas in an average four weeks – the lowest level of the entire pandemic.

Attendance at cinemas gradually increased from the low point of mid-2020 and reached a mid-pandemic high of 15.9% in the three months to May 2021 when most of the country was out of lockdown and just before the Delta-wave forced extended lockdowns in NSW, Victoria and the ACT from June 2021.

Cinema attendance in an average four weeks: 2019-2021



Source: Roy Morgan Single Source, January 2019 – December 2021, average quarterly interviews, n=14,734.
Base: Australians 14+.

Michele Levine – CEO, Roy Morgan Research, says:

“Australia’s cinemas have been amongst the hardest hit businesses by the COVID-19 pandemic with attendance plummeting during the first half of 2020 as the country went into a nation-wide lockdown and still yet to recover to anything like pre-pandemic levels.

“Over a quarter of Australians, 28.7%, attended a cinema in an average four weeks in the March quarter of 2020 – just before the COVID-19 pandemic hit and forced a nationwide closure for around six weeks. During the next few months attendance plummeted and in the three months to July 2020 only 3.2% had recently been to a cinema.



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“As Australia opened up during 2020 cinema attendance gradually recovered to as high as 15.9% in mid-2021 before plunging again as the Delta wave caused renewed lockdowns in Australia’s largest cities of Sydney and Melbourne.

“By the December quarter of 2021 just over one-in-ten Australians (10.4%) were reporting having attended a cinema recently. New movies including Daniel Craig’s final outing as James Bond, ‘Die Another Day’, and blockbusters ‘Spider-Man: No Way Home’ and ‘The Matrix Resurrections’ helped attract people back to the cinemas in the closing months of 2021 although attendance remained well below half of the level prior to the pandemic.

“Younger Australians are the keenest cinema goers led by Generation Z. Although only 13.6% of this generation attended a cinema in the final quarter of 2021 – this was up 2.8% points on a year earlier and higher cinema attendance than any other generation. Despite this, it was still less than half of the 31.8% that attended a cinema in the final quarter of 2019 prior to the pandemic.

“These results indicate that even for Generation Z, the generation least directly at risk from a potential COVID-19 infection, there is still a long way to go for cinema attendance to return to pre-pandemic levels although attendance should grow strongly throughout this year.”

Contact Roy Morgan to learn more about our detailed cross-media and cinema research:

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About Roy Morgan

Roy Morgan is Australia’s largest independent Australian research company, with offices in each state, as well as in the U.S. and U.K. A full-service research organisation, Roy Morgan has over 80 years’ experience collecting objective, independent information on consumers.

Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
10,000	±1.0	±0.9	±0.6	±0.4
20,000	±0.7	±0.6	±0.4	±0.3
50,000	±0.4	±0.4	±0.3	±0.2



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