



LIGHTS, CAMERA, ACTION!

STATE OF THE LGBT MOVIEGOER

nielsen
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AN UNCOMMON SENSE
OF THE CONSUMER™

GAY, LESBIAN, BISEXUAL AND TRANSGENDER MOVIEGOERS

Going to the movies is an American pastime. But as with any pastime, going to the movies is not the same for everyone. According to Nielsen's National Research Group (NRG) American moviegoing report, those who identify as part of the LGBT community* showed that their preferences at movie theaters are different from that of their heterosexual counterparts. These differences – from preferred genres and replay value, to the use of online and mobile – offer a clear opportunity for studios and theaters alike to bolster box office sales by meeting the LGBT Moviegoer's entertainment needs.



SIX OF ONE, A HALF DOZEN OF THE OTHER?

Overall, LGBT moviegoers aren't drastically different from any other moviegoer. They saw roughly the same number of movies as their heterosexual counterparts – roughly 6.8 a year. They were only slightly more likely to have seen a movie on opening weekend or to have seen a movie because someone else they knew wanted to go see it.

That's not to say there aren't things that make the movie-going experience different for the average gay, lesbian, or bisexual individual.

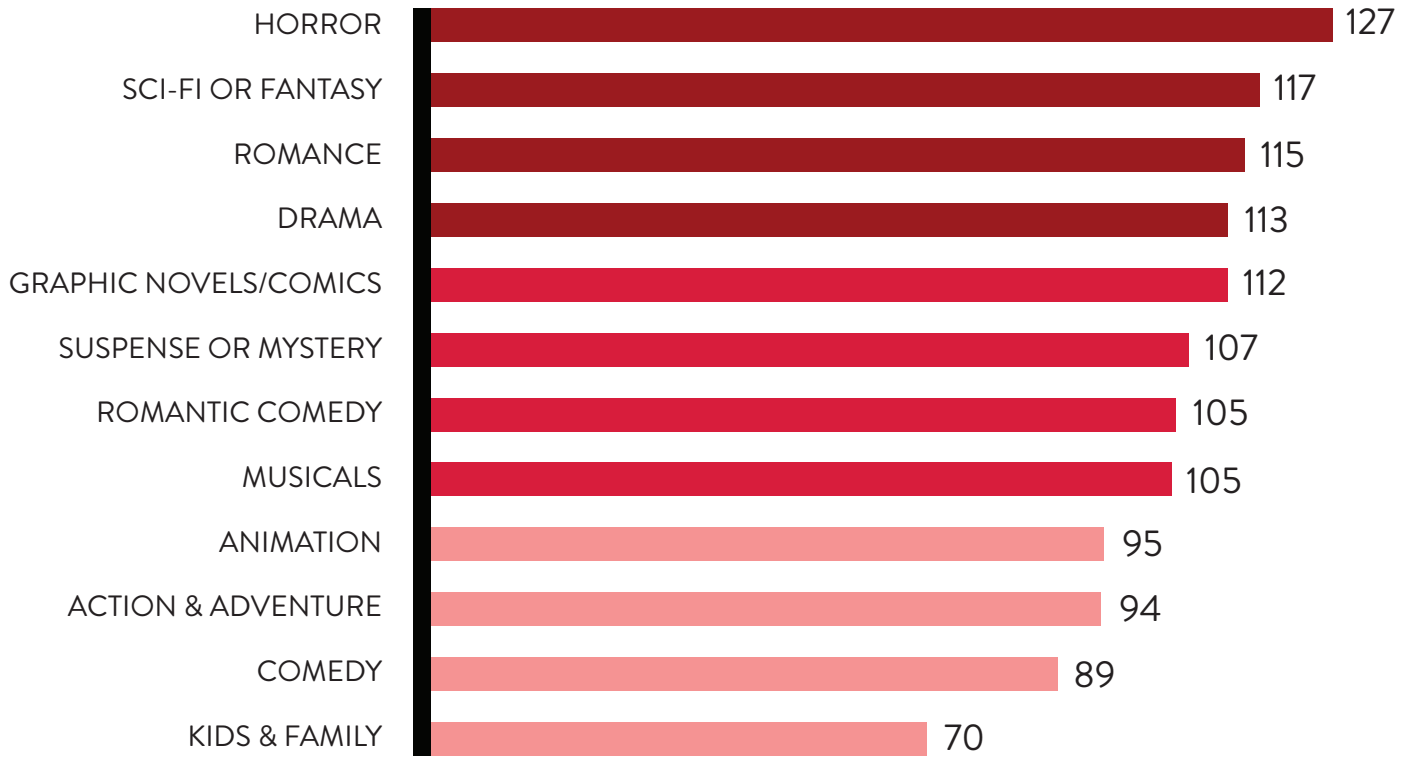
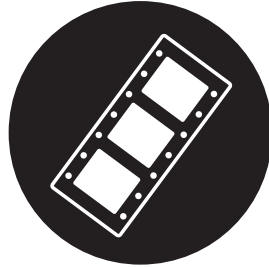
A FEW OF THEIR FAVORITE THINGS

LGBT moviegoers were more likely to go back to the theater for their favorites. Three out of every 10 LGBT moviegoers reported seeing a new-release film in theaters more than once over the past year, making them 22 percent more likely to do so than heterosexual moviegoers. They were also 9 percent more likely to buy the DVD, Blu-ray, or digital download of a film they had seen in theaters. LGBT moviegoers also were 22 percent more likely to have a subscription to a streaming service. Considering their repeat movie viewing habits in the theater, home video, and streaming, it is clear that LGBT moviegoers see a higher replay value in the movies they love.

Looking more closely at favorites, LGBT moviegoers showed a definite preference by genre. By and large, they were more likely than their heterosexual counterparts to like more niche categories of movies. When asked to identify their favorite genres, they were 27 percent more likely to select Horror and 17 percent more likely to select Sci-Fi. They were also more likely to say that these two genres were always worth the added ticket price to see in 3D (47% and 24% respectively). More broad-market or "four quadrant" genres like Action/Adventure or Comedy were still among the top responses (first and third, respectively), but were not as preferred among the LGBT movie-going community as they are among heterosexual moviegoers.

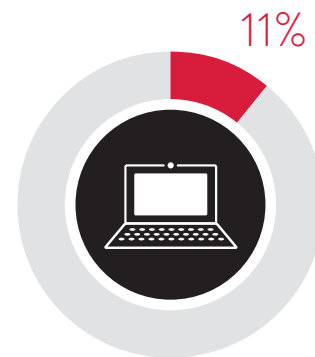
LGBT MOVIEGOERS' FAVORITE GENRES

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ONLINE AND MOBILE ARE KEY

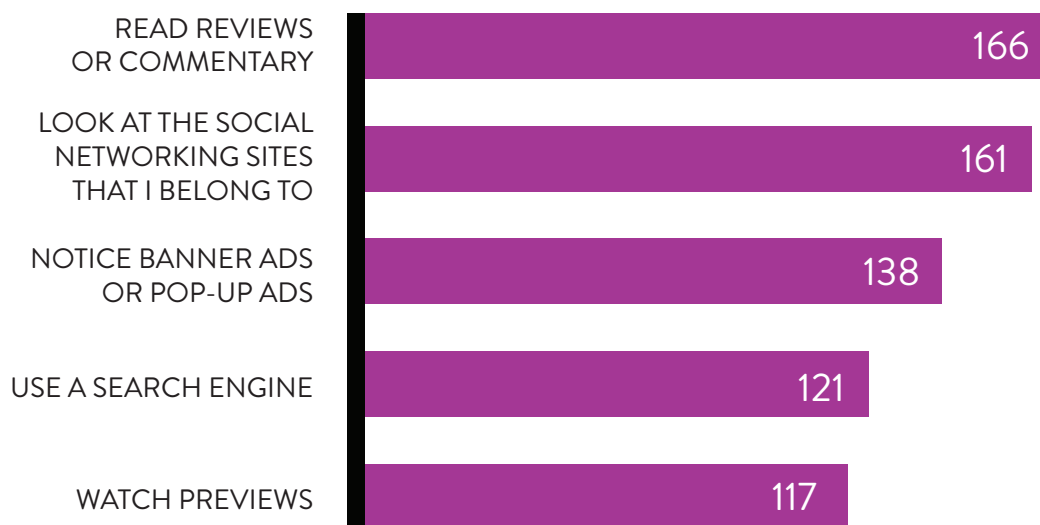
When it comes to the experience surrounding going to the movie theater, it would appear tech trends are catching on quicker within the LGBT community. This engagement with technology begins with how LGBT consumers even hear about new movies; they were 11 percent more likely than heterosexual moviegoers to have learned about a new film using the Internet, either using a computer or mobile device. They also did so more regularly. When asked how frequently they go online to find out about movies they're interested in seeing, LGBT moviegoers were 23 percent more likely to say "often" or "very often". This increased online preference spans a variety of online sources, including above average use of online reviews, trailers, and social networking sites. LGBT moviegoers were also 21 percent more likely to purchase their tickets online, and those that did buy online did so more frequently (19.1% of movies, vs 16.4% for heterosexual individuals). They were also 50 percent more likely to have seen a movie where they selected their seating ahead of time, something that could potentially drive online purchase.



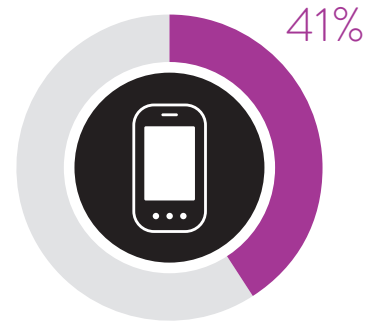
LGBT MOVIEGOERS WERE 11% MORE LIKELY TO HAVE LEARNED ABOUT A NEW FILM USING THE INTERNET

HOW LGBT MOVIEGOERS HEAR ABOUT MOVIES ONLINE

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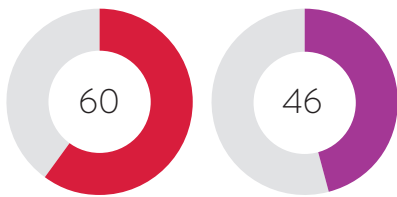
Mobile appears to be one of the key drivers of LGBT moviegoers' propensity for using the Internet to interact with movies. Forty-one percent of LGBT individuals who said they used the Internet to find out about movies, used a mobile phone to do so – compared to only 31 percent of heterosexual moviegoers who found out about movies online. Part of this was driven by higher smartphone adoption among LGBT moviegoers, who were 11 percent more likely to own one. These smartphone owners were also asked what movie-related activities they had used the device for over the past year. Those who were LGBT were not just more likely to find movie times, locations, or trailers, but also to text their friends or post to social media about a movie. These social recommendations were also likely to be very timely; 49 percent of all LGBT moviegoers said they had texted, tweeted, or posted about the movie the same day they saw it (as compared to only 34% of heterosexual moviegoers). This stresses both the power and potential of word of mouth recommendations and social media buzz for films with an LGBT audience.



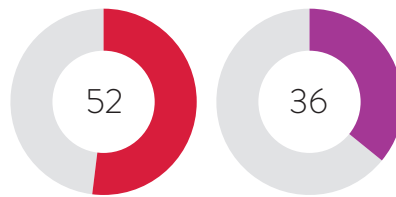
41% OF LGBT INDIVIDUALS WHO SAID THEY USED THE INTERNET TO FIND OUT ABOUT MOVIES, USED A MOBILE PHONE TO DO SO

MOVIEGOERS' MOBILE ACTIVITY

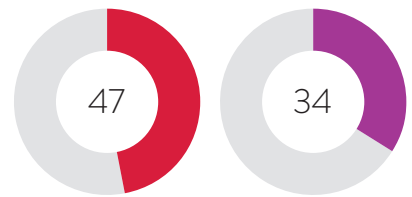
% OF THOSE WHO OWN SMARTPHONES



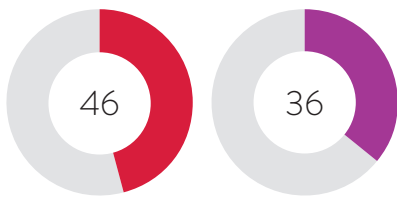
FIND SHOWTIME OR LOCATION



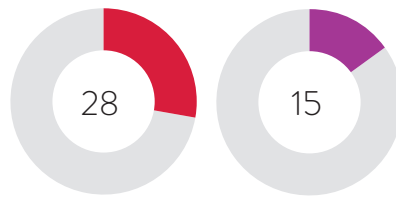
TEXT A FRIEND ABOUT MOVIE



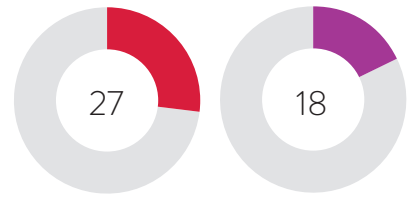
WATCH PREVIEWS



SEARCH FOR INFO ON MOVIE



POST ABOUT IT ON SOCIAL MEDIA



BUY TICKETS

● LGBT ● HETEROSEXUAL

Other activities surrounding the movie experience also showcase LGBT moviegoer's mobile preferences. Cell phone apps are finding favor in the community as well. Fandango, Flixster, and MovieFone all have a higher rate of use by LGBT moviegoers than among heterosexual moviegoers. These apps all have the ability to drive LGBT moviegoers' heightened preference for finding out about films online through reviews and trailers. And it's not just apps related to content that are popular; LGBT moviegoers were 22% more likely to have Yelp installed on their smartphones. A movie with strong LGBT following might find the inclusion of online and mobile touch-points a more productive way to reach this audience.

IMPLICATIONS

LGBT moviegoers' preferences show a clear inclination towards the adoption and frequent usage of new media and technologies. Whether it is downloading movies to own at home or using a smartphone to buy a movie ticket, LGBT moviegoers are helping drive the use of online and mobile in the movie industry. Studios should take note of these trends, especially when promoting and advertising their titles that have a large LGBT audience. Theaters can meet the needs of their LGBT patrons and secure more box office sales by making sure their information and ticket sales are readily available online and accessible through a smartphone, whether through a mobile-formatted website or a smartphone app. This would be particularly crucial for theaters in areas with a significant LGBT population.

METHODOLOGY

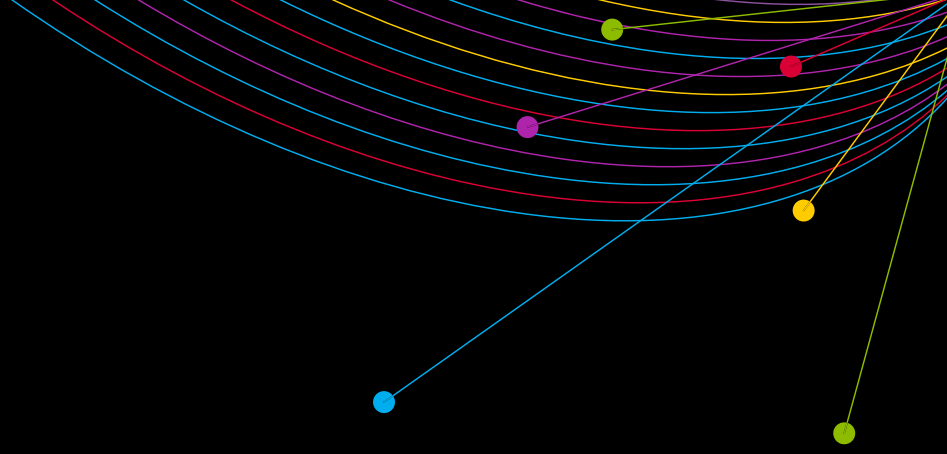
* The Nielsen NRG 2012 American moviegoing report does not balance its sample for representation of the LGBT community. To identify LGBT moviegoers, the survey asks respondents to indicate if they are heterosexual, gay, lesbian, bisexual, or prefer not to answer. As such, the total sample of Lesbian, Gay, and Bisexual moviegoers - referred to in the article as LGBT moviegoers - is not weighted to represent the makeup of the total LGBT community. The LGBT population in the moviegoer sample is "natural fallout" and happens to be more ethnically diverse (Hispanic especially), more in the 18-34 age range, and more urban.

ABOUT NIELSEN

Nielsen Holdings N.V. (NYSE: NLSN) is a global information and measurement company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence and mobile measurement. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands.

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