



nielsen

AN UNCOMMON SENSE
OF THE CONSUMER™

YOUNG ADULT ADAPTATION FANSHIP

UNDERSTANDING AND
ENGAGING FANS

DECEMBER 2014



BACKGROUND AND METHODOLOGY

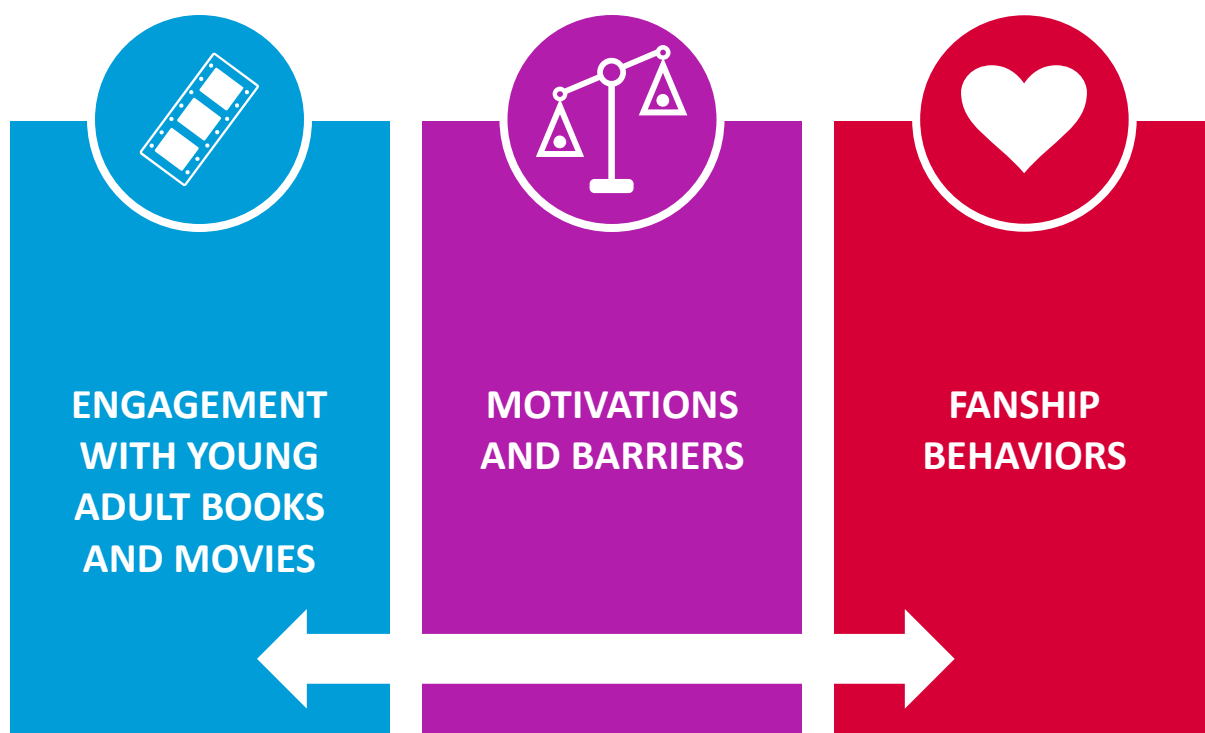
Recently, **movies based on Young Adult books** have emerged as the newest genre in which content creators are investing. To take advantage of this trend, it is important to have a clear view of what is driving moviegoers towards this genre and the implications for the coming years. To this end, Nielsen Content has conducted an in-depth study to uncover the different types of consumers within this genre and how to best engage them.

This study is based on a **quantitative survey among fans of Young Adult (YA) adaptation movies** (defined as those who have seen 3+ recent genre titles).

Approximately **2,000 respondents aged 12-35** took a 20 minute English-only online survey conducted during the week of Nov 3rd (**70% women and 30% men**).

The following pages present a snapshot of key findings from this study.

QUANTITATIVE SURVEY: THE SURVEY BROADLY COVERED THE FOLLOWING AREAS



KEY FINDINGS

The YA Adaptation Genre is Growing: YA adaptations are a growing slice of the box office pie, increasing 6% from 2013 to 2014. These titles span big blockbusters to smaller box office performers, but there is growing interest in seeing these movies.

There is a Symbiotic Relationship Between the Books and the Movies:

The excitement about these movies starts with the books and the fans who are engaged with the property. The movies help the books as well, as the Top 20 Author List, per Nielsen BookScan, is dominated by Young Adult fiction authors whose books are now movies.

These Movies Provide a Unique Experience to Moviegoers: Young Adult adaptation fans first gravitate to the genre because of their experience with the books. They want to see the characters and worlds come to life. Though they are open to both male and female leads, they especially look for strong female protagonists who are overcoming high-stakes situations in unique settings.

Four Fan Segments Emerged from the Data: Based on behaviors and attitudes towards the genre, we identified four key fan segments:



Content Connoisseurs: The “discoverers” are those who find the new books and content and create the “spark” that ignites interest in a property. They are the most engaged with the genre and are seen as experts among their friends.



Trend Ambassadors: This is the group that finds the properties that are “cool” and creates the buzz surrounding the movie. They are passionate and take pride in being part of the next big thing.



Sentimental Dabblers: This is the crossover audience that responds to intense emotion (a key attribute of these movies). They primarily look for escapism and want to feel the intensity of someone else's journey.



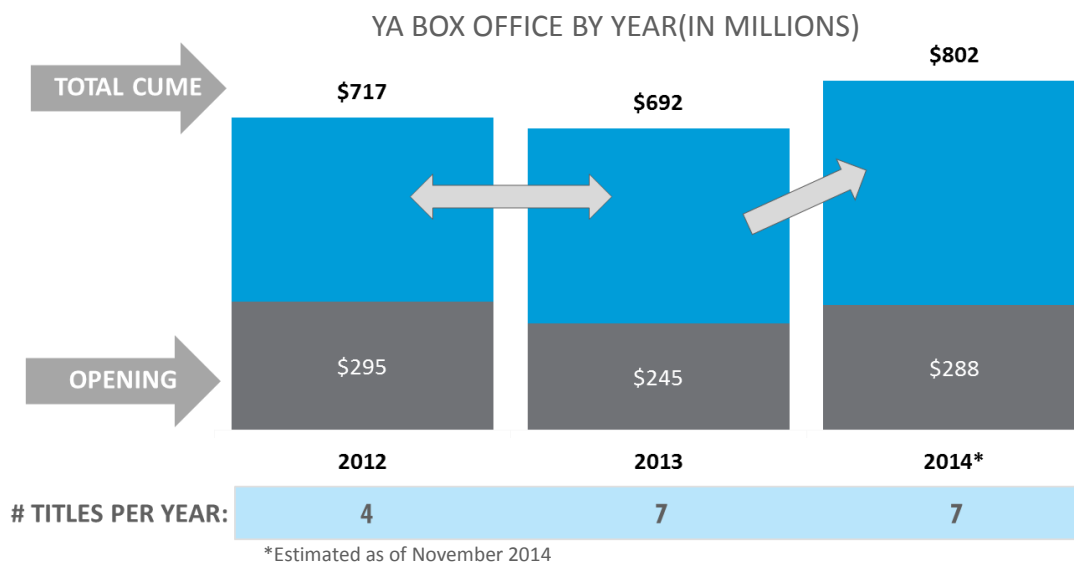
Adrenaline Seekers: This is the crossover audience for movies that have more of an action/sci-fi bent.

GENRE OVERVIEW

YA adaptations are a growing slice of the box office pie, growing 6% between 2013 and 2014.

There is a strong relationship between the books and the movies, and is evidenced by the fact that the Top 20 Author List, per Nielsen BookScan, is dominated by young adult fiction authors whose books are now movies.

YA ADAPTATIONS ARE A GROWING SLICE OF THE BOX OFFICE PIE



THE CURRENT TOP 20 AUTHOR LIST IS DOMINATED BY YA FICTION AUTHORS WHOSE BOOKS ARE NOW MOVIES

AUTHOR RANK BY UNIT VOLUME Q1– Q3 2014

RANK	AUTHOR NAME	RANK	AUTHOR NAME
1	VERONICA ROTH	12	JAMES DASHNER
2	JOHN GREEN	16	MARKUS ZUKAS
5	RICK RIORDAN	17	LOIS LOWRY
9	SUZANNE COLLINS	18	GAYLE FORMAN
10	CASSANDRA CLARE		

Source: Nielsen BookScan. Top 20 fiction authors ranked on U.S. print unit sales (Q1-Q3 2014)

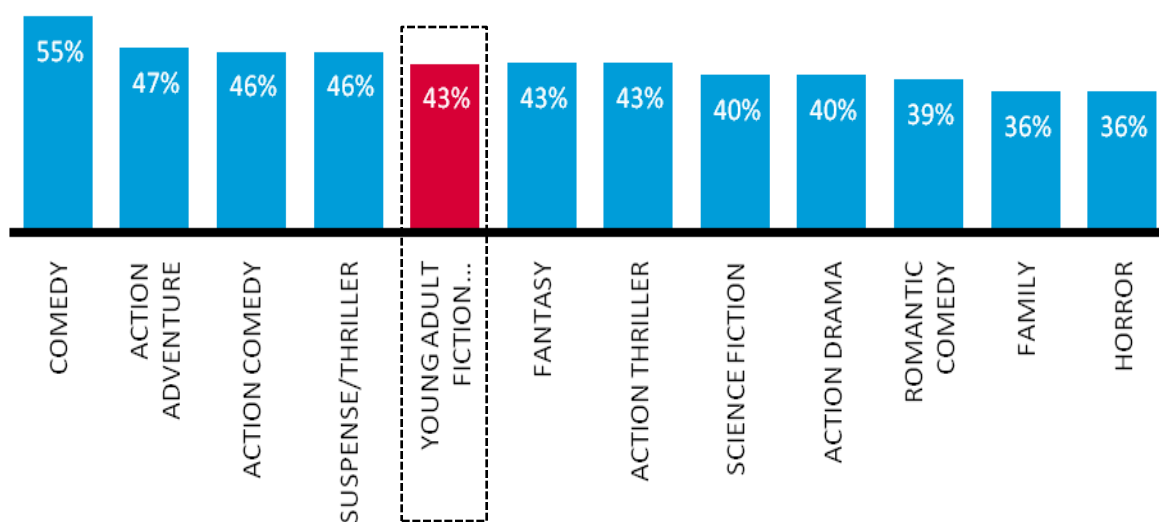
GENRE ENGAGEMENT

Among this audience, 43% choose YA Adaptations as one of their favorite genres to go see in a movie theater, on par with fantasy and action/thrillers.

Three out of five respondents (60%) say that they are definitely a fan of this genre. Not surprisingly, fanship skews towards younger females, but the males aren't far behind. Males 18+ are the second strongest fans and most likely represent the "date night" audience for these movies.

MOVIE GENRE FANSHIP

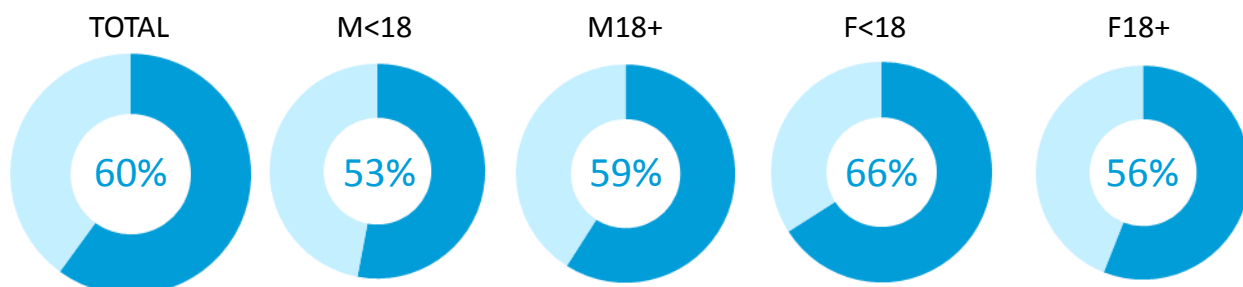
% FAVORITE GENRE TO SEE IN A THEATER (AMONG THOSE THAT WATCH YA ADAPTATIONS)



Read as: 55% say Comedy is their favorite genre to see in a theater

YA ADAPTATION FANSHIP BY AGE AND GENDER

% DEFINITELY A FAN



DRIVERS OF VIEWERSHIP

For these movies, a good story is key, but interesting (and skilled) characters are also important. While the stories follow an archetype, it is important to highlight what is different/original about each tale.

Fans are looking for a movie that brings to life the worlds in which they are already familiar and an emotional experience. The cast is also important to this audience. The actors don't have to be well-known, but it is particularly crucial for fans that the cast fit the book - both in terms of characteristics as well as looks.

DRIVERS OF VIEWERSHIP (MAX-DIFF RESULTS)

IT ALL STARTS WITH GOOD SOURCE MATERIAL THAT INTRIGUES...

Good Story
(238)

Interesting Characters
(173)

Cast Fits Characters
in the Book
(164)

Different/
Original
(141)

Stays True To
Book
(138)

...AND TAKES YOU ON AN EMOTIONAL RIDE

Characters Beating
Challenges
(131)

Action-Packed/
Suspenseful
(124)

Emotionally
Moving
(120)

Thought-
Provoking
(119)

Intense
(116)

...AND IS WORTH SEEING ON THE BIG SCREEN

Believable
(106)

Interesting Settings
(105)

Visually
Striking
(100)

Read as: YA fans say that "interesting characters" are driving their interest in viewing a YA movie almost twice as often (1.73x) as the average of all drivers studied in the analysis.

YOUNG ADULT ADAPTATION FAN SEGMENTS

WE UNCOVERED FOUR SEGMENTS WITHIN OUR DATA...



15%

CONTENT CONNOISSEURS

- These are the **explorers who actively chase information** about YA novels and their adaptations
- **Heavy readership** (average 10+hrs/ week)
- **Highest viewership of YA movies** released in past 3 yrs



28%

TREND AMBASSADORS

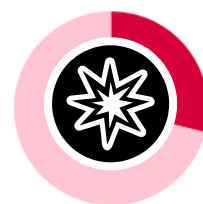
- These consumers do not actively seek out new properties but when they find something they like, they **showcase their passions**
- **Moderate readership** (between 3 and 6 hrs/ week)
- **Viewership** of YA movies released in past 3 yrs is **strongest for** the most **popular titles**



28%

SENTIMENTAL DABBLERS

- These are the casual fans who are less likely to be readers and **most drawn towards intense emotion** (like romance and drama)
- **Low readership** (less than 3 hrs/ week)
- **Viewership** of YA movies released in past 3 yrs is **highest for romantic/ sentimental** movies



29%

ADRENALINE SEEKERS

- These are also casual fans who **prefer sci-fi and action movies featuring a male lead**
- **Low readership** (less than 3 hrs/ week)
- **Viewership** of YA movies released in past 3 yrs **skews towards sci-fi/fantasy** and those with a **male lead**

OPPORTUNITIES TO ENGAGE

CONTENT CONNOISSEURS



The search for new books and material starts with Content Connoisseurs. They are constantly exploring new worlds and pursuing content that's fresh and new. **These are the fans to tap into before the movie is made to access the depth of knowledge and to generate buzz.**

TREND AMBASSADORS



Trend Ambassadors find things that are deemed “cool” and then make it their own. **These fans respond to the buzz created by the CONTENT CONNOISSEURS and will expand the audience by creating excitement and heat around a property.**

SENTIMENTAL DABBLERS



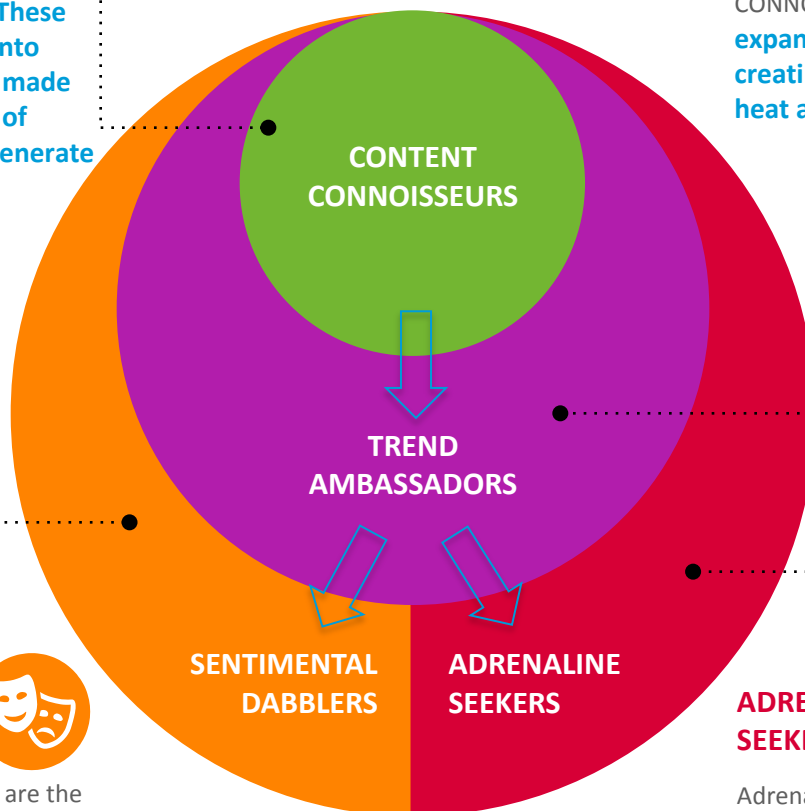
Sentimental Dabblers are the additional set of moviegoers who **will respond to romance and drama to bolster attendance at the theater.**

They respond to the “must-see” event status that is created from the excitement created by the Trend Ambassadors.

ADRENALINE SEEKERS



Adrenaline Seekers represent the **crossover audience who can be tapped into for action-oriented sci-fi/ fantasy movies.** They also respond to the eventization of the property.



ADDITIONAL INFORMATION

For more information or to purchase the full report, which includes detailed genre and segment insights, please contact:
NielsenYAMovieStudy@nielsen.com.

ABOUT NIELSEN CONTENT

Nielsen Content provides consumer research to film, TV and digital content creators and marketers to help optimize the execution and promotion of their properties.

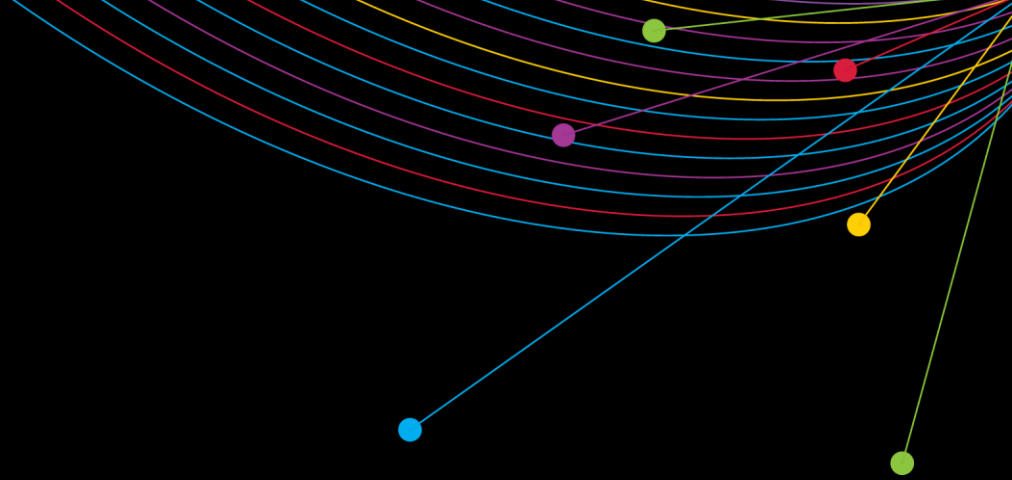
ABOUT NIELSEN

Nielsen 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, mobile measurement. Nielsen has a presence in approximately 100 countries, with headquarters in New York, USA and Diemen, the Netherlands.

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