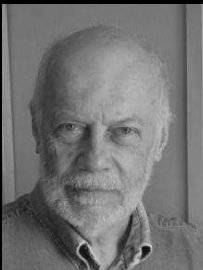


European Film Study: a Current and Future Profile of European Film Consumers



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A Study in Progress...

'data and knowledge at European, national and international level on audience preferences and ways of marketing and consumption, in particular with young audiences'

What do film consumers like/want?

Which films satisfied their needs?

Which platforms do they favour?

How do they learn about films?

landscaping

(industry data and expertise)

consumer survey

(4,500 Europeans from Es, De, Fr, GB, It, Pl + Cr, Dk, Li, Ro)

film database

(coding films 'viewed and liked': top of mind + assisted)

Landscaping

For all countries:

Overview: population, urban population, currency, internet users...

Production & distribution: # films, # cinemas, # screens...

Consumption & preferences: price of a ticket, total admissions...

Top 5 films

Awarded films

National festivals

GERMANY
Film consumption and preferences

Film consumption

Average ticket price in euros (2012)	7.85
Cinema attendance per capita (2012)	1.6
Overall cinema admissions (2012)	135,100,000
Gross box-office revenues in euros (2011)	1,033,000,000

Germans are low film consumers with the country's cinema attendance standing at 1.6 per capita. While the US industry solely aims for entertainment, meaning money, the German industry is obliged to serve a certain cultural purpose. German films fulfil an educational, informative and artistic purpose. Plenty of German films are being developed for TV, backed with TV-money.

Box office is dominated by American blockbusters (74.7% of admissions in 2012) followed by other European titles (25%) and German films with a fifth of all admissions. The biggest success of all domestic films produced in 2012.

Source: EAC European Film Consumer Study 2013

Film preferences

German viewers show preference for family films (61%), comedy (59%), documentary films (32%), children's films

GERMANY
Major film festivals

- Berlin International Film Festival**
Berlin, 10 days, early February
The Berlinale is the leading festival in Germany and one of the most important competitive festival in the world. Attendance is around 300,000.
- Cologne Conference TV & Film Festival**
Cologne, 6 days, early October
Festival focusing on programs that provide an above-average contribution to the development of form language in film and television, and/or are based on an unusual journalistic or historic contribution, and/or
- München International Film Festival**
München, 9 days, early July
After the Berlinale, the second biggest German film festival. The international sections showcase high-profile gala screenings as well as debut films and independent cinema. Around 70,000 attend this event.
- Oberhausen International Short Film Festival**
Oberhausen, 6 days, early May

GERMANY
TOP 5 Domestic films

- The Lives of Others (2006)**
Drama/Thriller, Florian Henckel von Donnersmarck
In 1984 East Berlin, an agent of the secret police, conducting surveillance on a writer and his lover, finds himself becoming increasingly absorbed by their lives. Won the Oscar of the Best Foreign Language Film of the Year and a BAFTA both in 2007.
- Good Bye, Lenin! (2003)**
Comedy/Drama/Romance, Wolfgang Becker
In 1990, to protect his fragile mother from a fatal shock after a long coma, a young man must keep her from learning that her beloved nation of East Germany as she knew it has disappeared. Won notably a César, a Bambi Award, 3 European Film Awards, as well as the Blue Angel at the Berlinale.
- Nowhere in Africa (2001)**
Biography/Drama, Caroline Link
A German Jewish refugee family moves to and adjusts to a farm life in 1930's Kenya. Won the Best Foreign Language Film Oscar in 2003, 5 German Film Awards, and the Special Prize of the Jury as well as the FIPRESCI Prize at the Karlovy Vary International Film Festival in 2003.
- Run Lola Run (1999)**
Action/Thriller, Tom Tykwer
A young woman in Germany has twenty minutes to find and bring 100,000 Deutschmarks to her boyfriend before he robs a supermarket. Won a Bambi Award and a Oscar Award in 1999 and 7 German...

For the 10 countries in our survey:

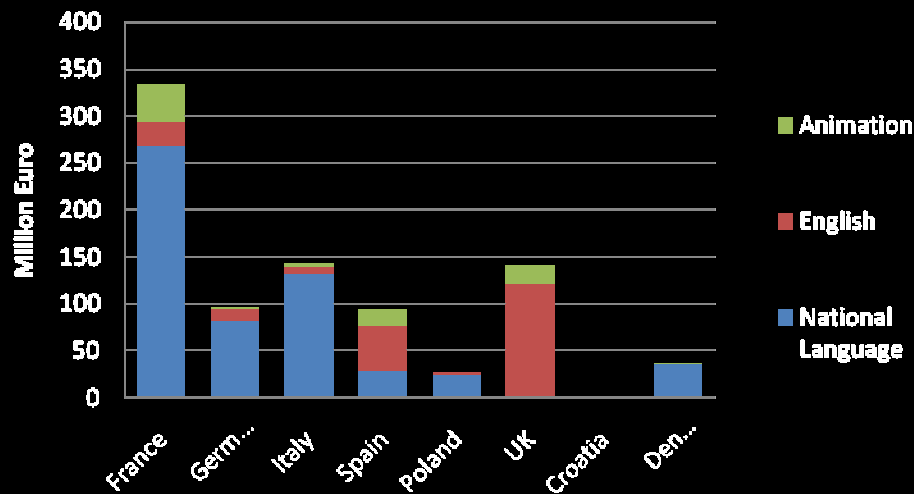
Identification of the top 100 films in the yearly box office

Categorisation of these films by:

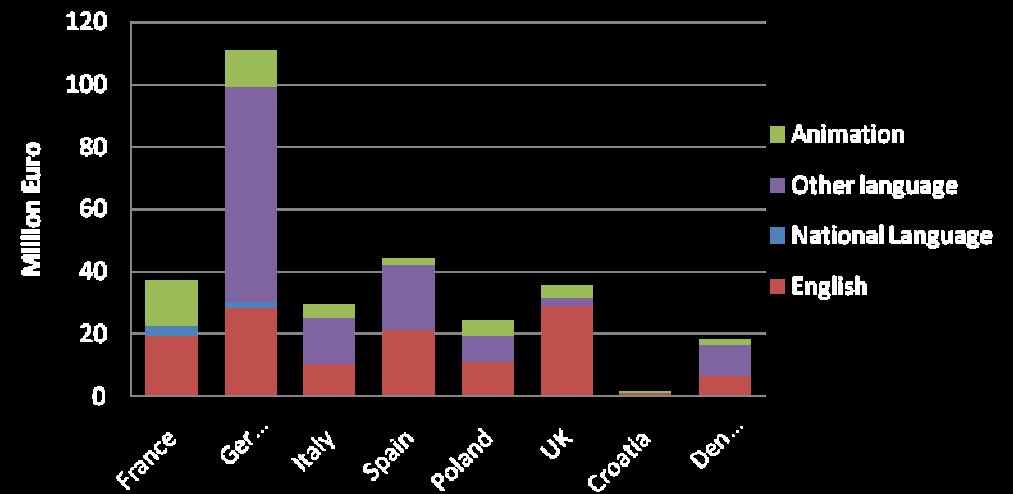
- Origin (US, National, European, Other)*
- Genre (Drama, Comedy, Family...)*
- Language of production*

Landscaping: top 100 films

National Productions in the top 100



European Productions in the top 100



Most of the successful national cinema is shot in national language, except in some rare cases (like "The Impossible" in Spain)

When considering how European productions travel, it is noticeable that some countries (like Germany) watch cinema shot in another language (mostly French), while countries like France do not watch a lot of European cinema shot in another language.

Consumer Survey

demographics (age, gender, education, etc.)

equipment (devices, telco/media/film services)

habits (entertainment, film consumption)

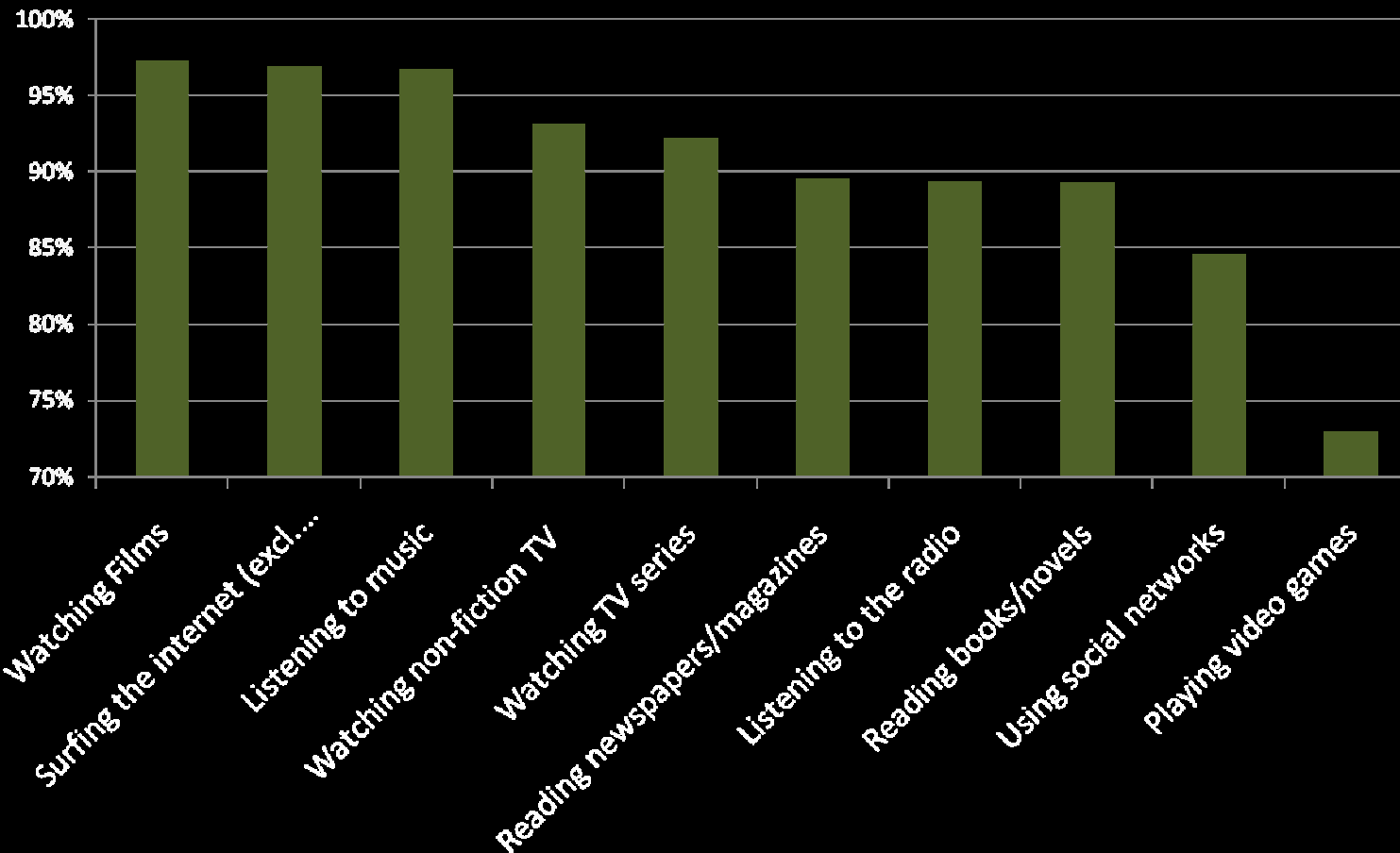
editorial preferences (genre, theme, origin, titles)

marketing preferences (distribution and promotion)

opinion (open questions, prospective proposals)

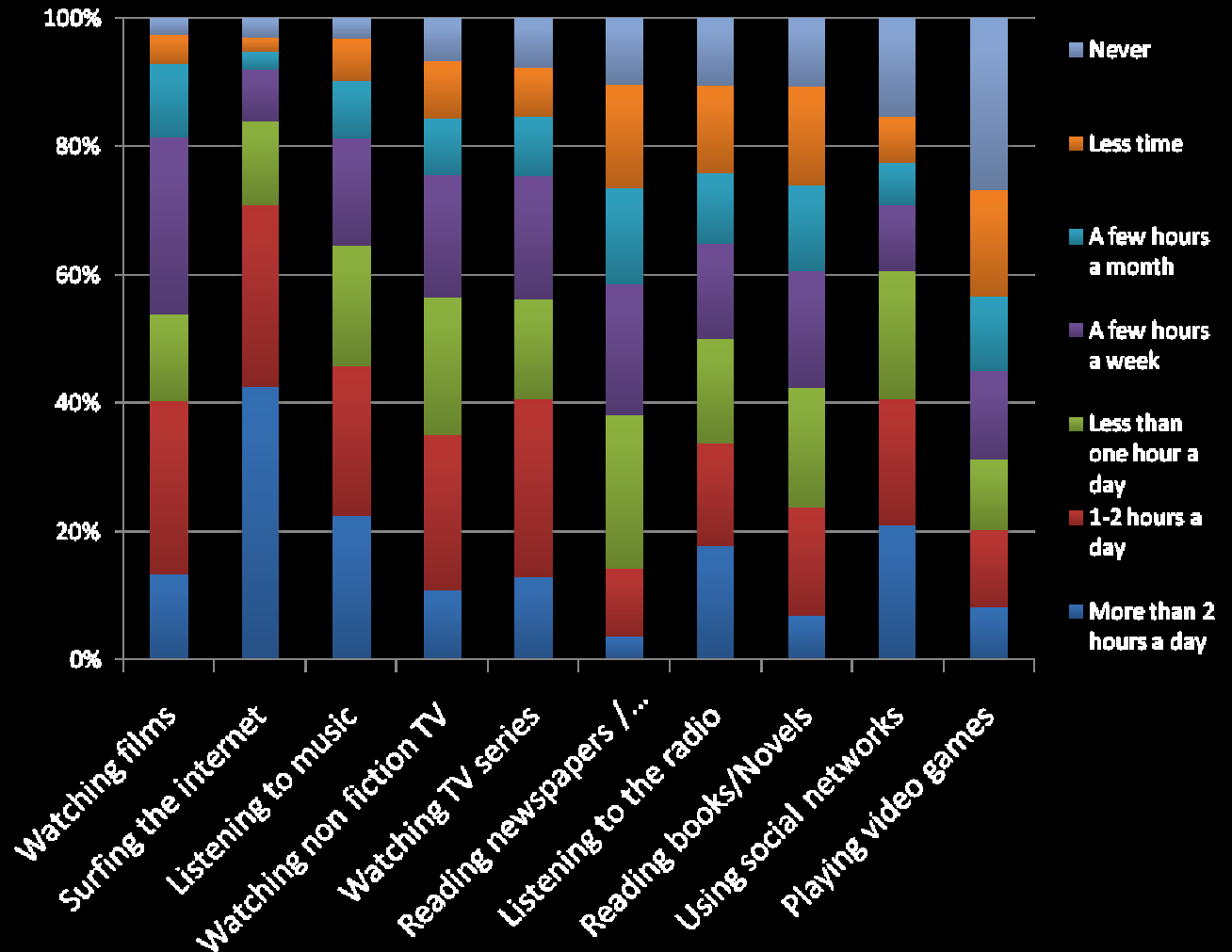
Film #1 media content

- **97% of Europeans <50 y.o. consume films** (#1 with music listening and Internet surfing).
- **85% use social networks** and **73% video games** (the 2 least common activities).



Film in content diet

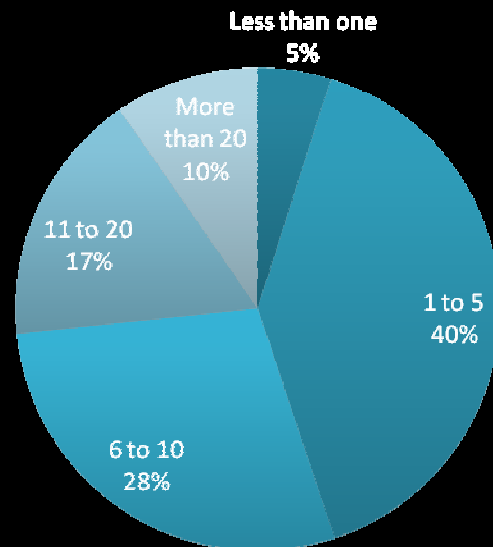
- **Film is as popular as TV non-fiction and TV series:** 50-60% consume film, TV series and non-fiction TV on a daily basis.
- **Internet-surfing and music are top daily activities:** 84% surf at least once a day (42% for > 2 hours) and 64% listen to music (22% for > 2 hours).
- **60% use social networks at least once a day** (21% for > 2 hours).



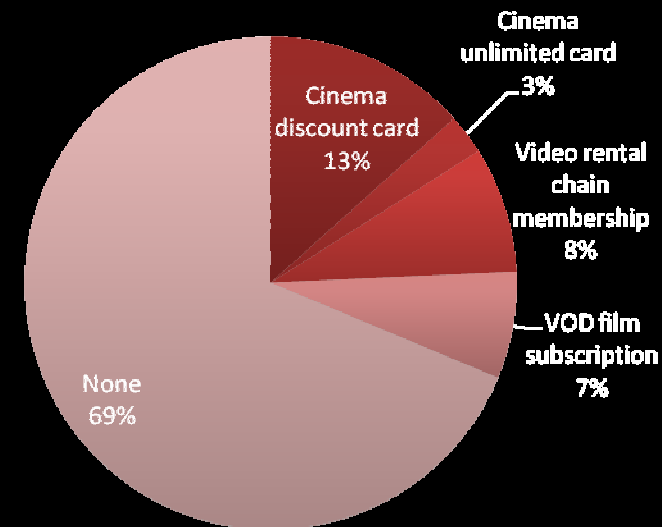
Heavy film consumers

- **27% of Europeans watch > 10 films a month** and 55% watch > 6 (> one every 5 days). Poland, Lithuania and Romania at the top, the UK, Denmark and Croatia at the bottom.
- **21% subscribe to pay TV cinema/fiction channels** (highest genre on Pay TV).
- **27% of Europeans subscribe to film services other than Pay TV.** 14% have a cinema discount card (3% have a cinema unlimited card), 9% are members of a video rental chain and 7% subscribe to a film VOD service.

Film Watching per month



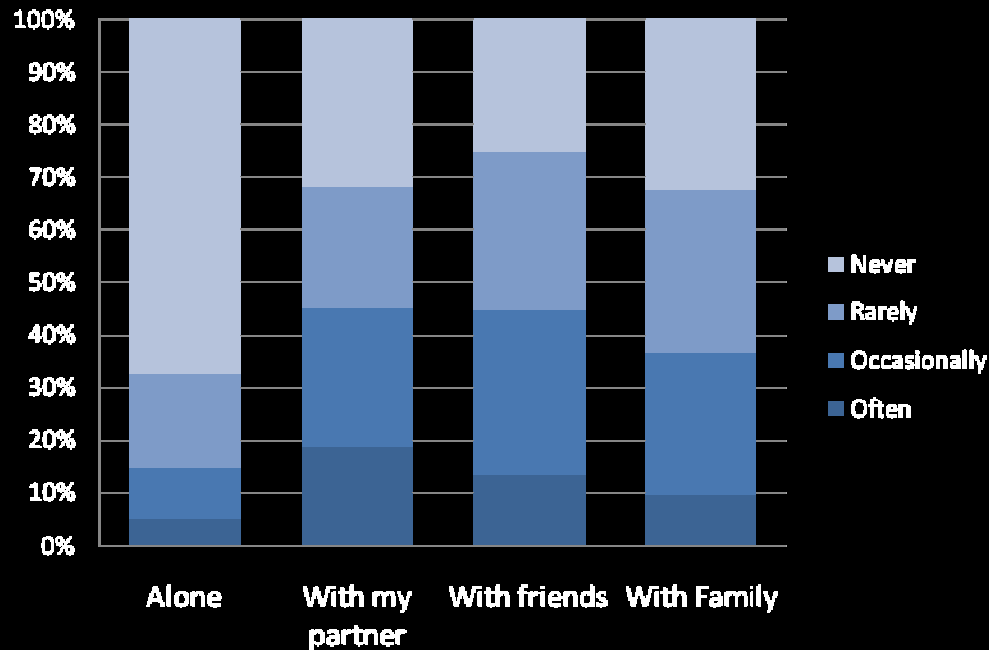
Cinema services



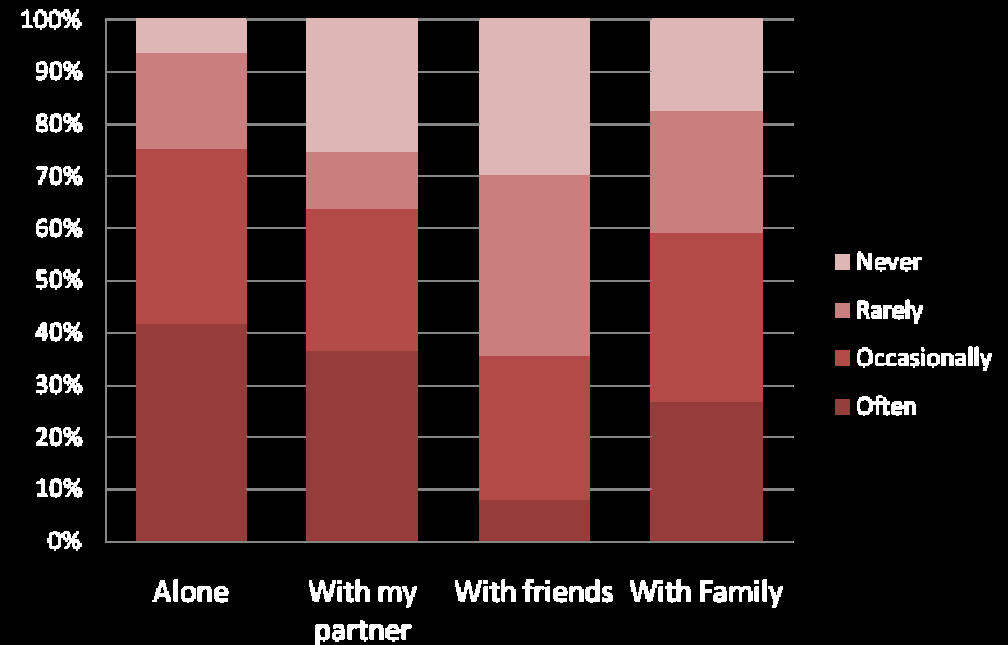
Watching in group and alone

- **91% of Europeans usually go to the cinema in groups** (75% with friends and 68% with their family or partner), **33% go alone** (half of them do so 'rarely').
- **94% watch films alone at home** (41% 'often'). When watching films at home together, this is mostly with the family.

Going to the cinema

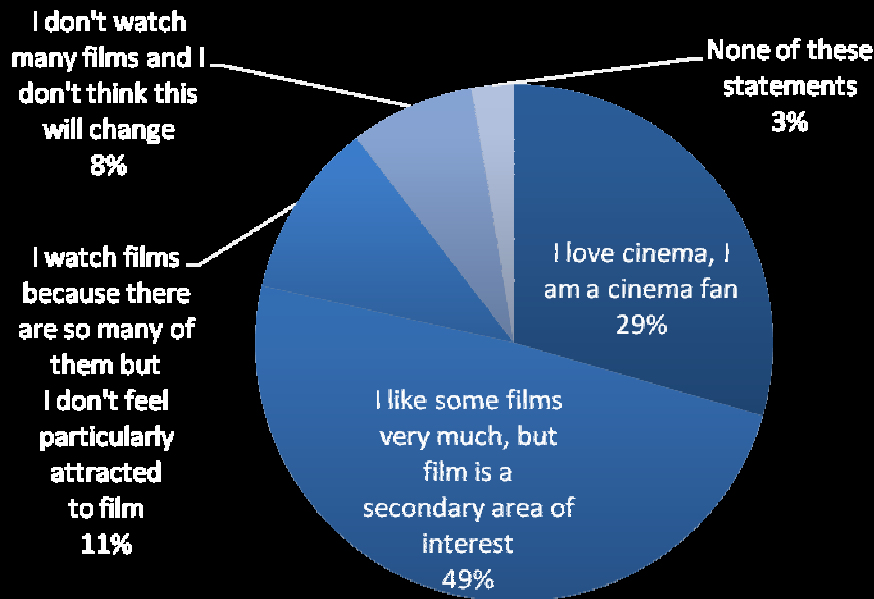


Watching movies at home

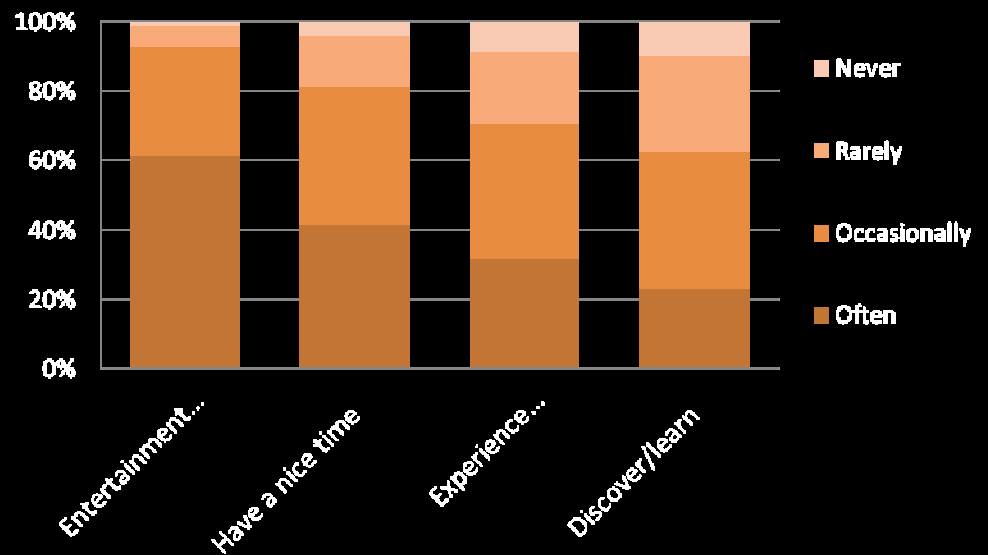


- **29% of Europeans define themselves as 'cinema fans'**, 49% have cinema as 'a secondary area of interest'. Largest communities of 'cinema fans' are in Spain (40%), UK (36%), Denmark (33%), Germany (32%) and Romania (32%). But only 13% of 'cinema fans' in Lithuania.
- **Europeans watch films primarily for 'entertainment and fun'** followed by 'have a nice time with family-friends'. 'Discover and learn new things' is the lowest motivation.

Attitude to film

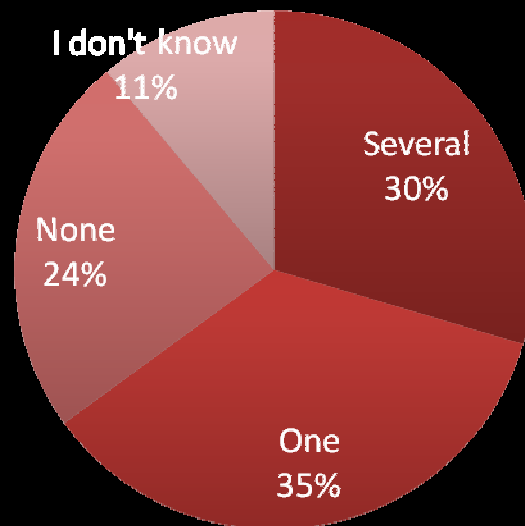


Reasons for watching films

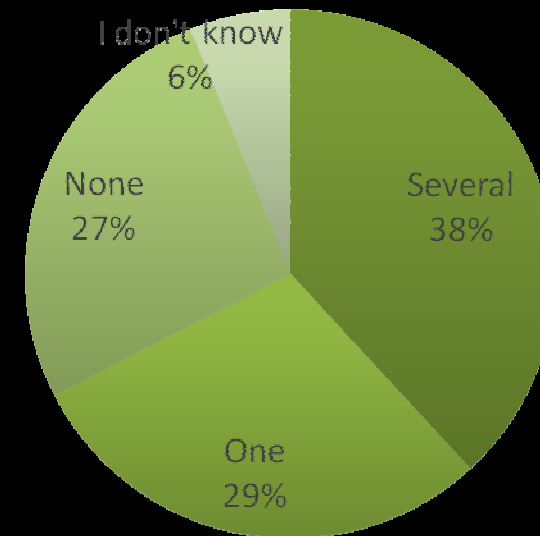


- **86% of Europeans have at least one cinema theatre (1-3 screens) or one multiplex (4+ screens) within 30 min from their home.**
- **30% have several cinema theatres, 38% several multiplexes (<30 min from home).**
- **14% have no access to cinemas (<30 min from home).** This is up to 37% in Romania, 27% in Lithuania, 16% in Croatia and 11% in Denmark (all other countries < 10%).

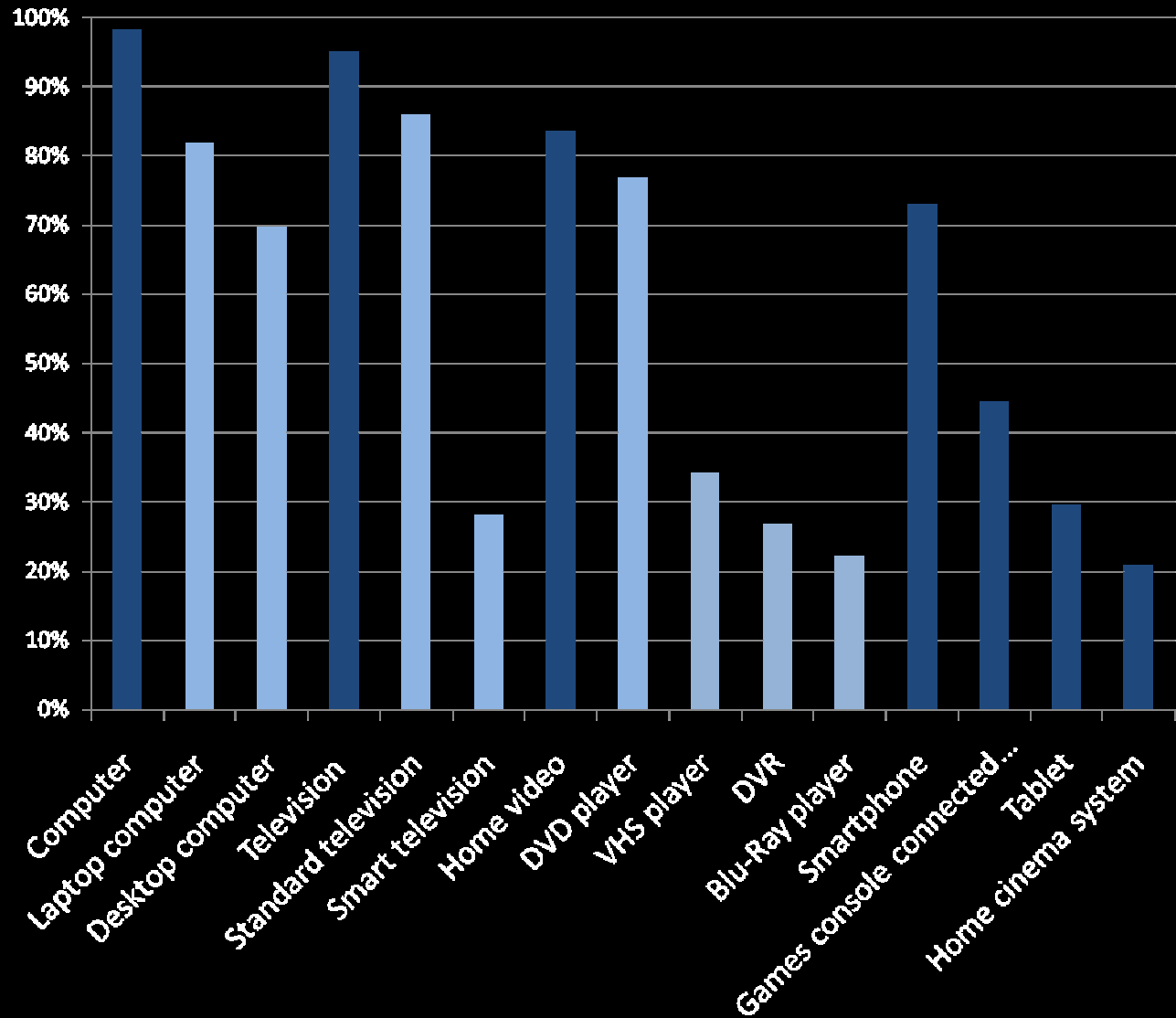
Theatres: 1-3 screens in 30 min

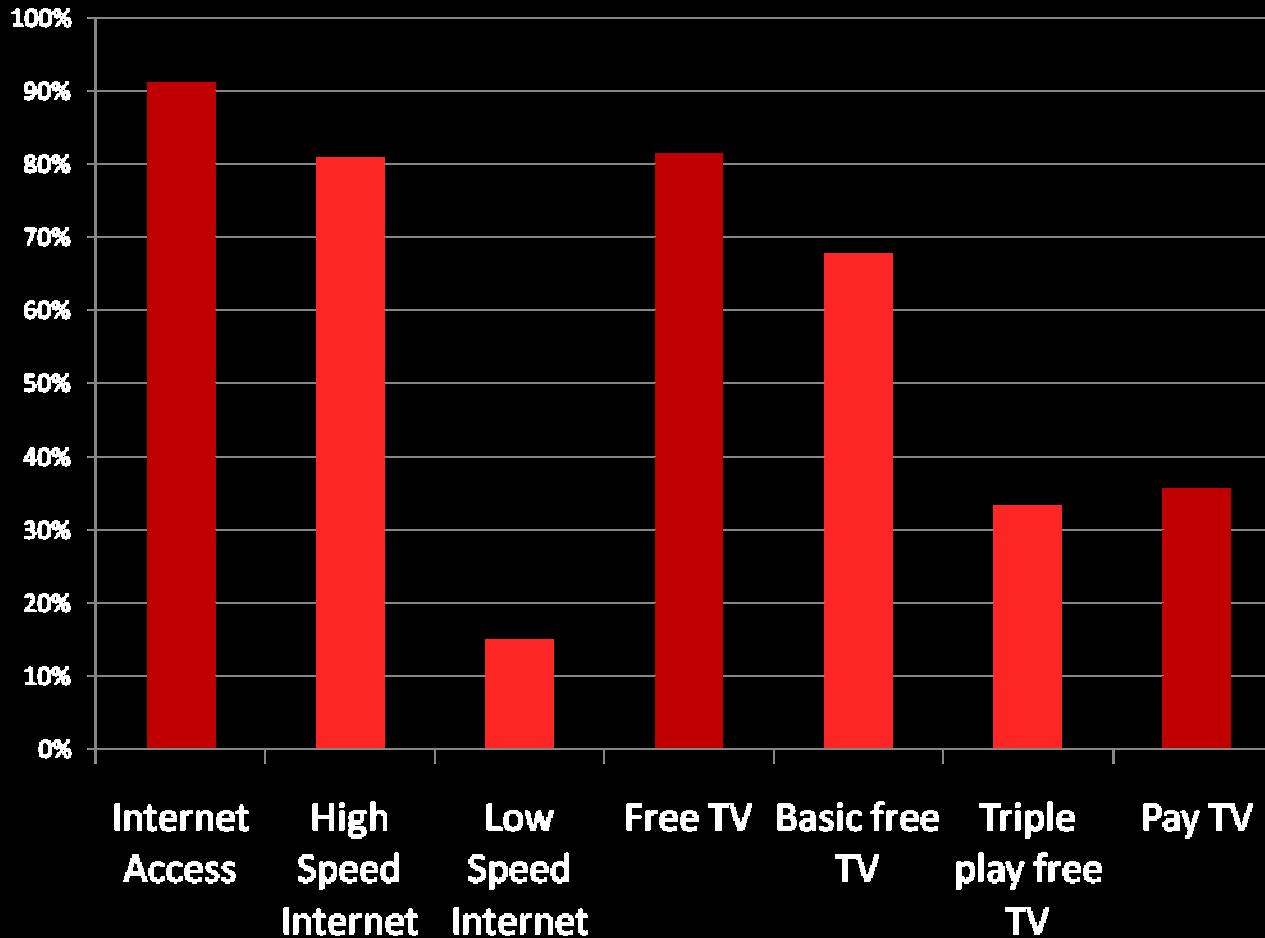


Multiplexes: 4+ screens in 30 min



- **98% Europeans own a computer and 95% a TV** (mostly laptops and standard TVs).
- **77% own a DVD player** and 1/3 own a VHS, DVR or Blu-Ray player.
- **73% own a smartphone** and 45% a game console plugged to their TV.
- **30% own a tablet** reach and 20% a home cinema system.



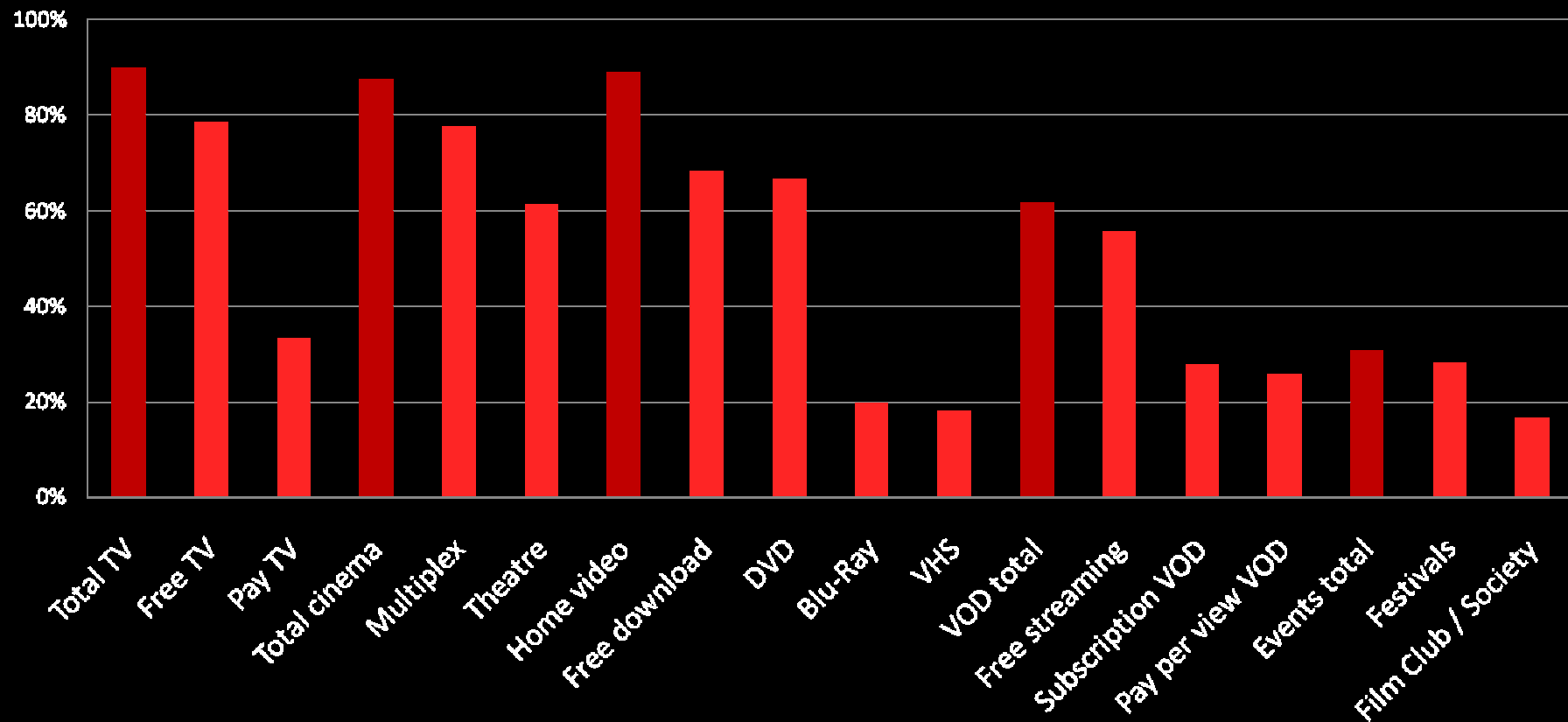


- **91% of Europeans have internet access** (mostly high-speed).
- **82% have access to free TV** (mostly through standard free TV with a third through triple play services).
- **36% subscribe to pay TV services** (of whom 59% have access to movie and TV series channels, followed by sports channels at 38%, children channels at 26% and VOD channels at 19%).

Film consumption platforms

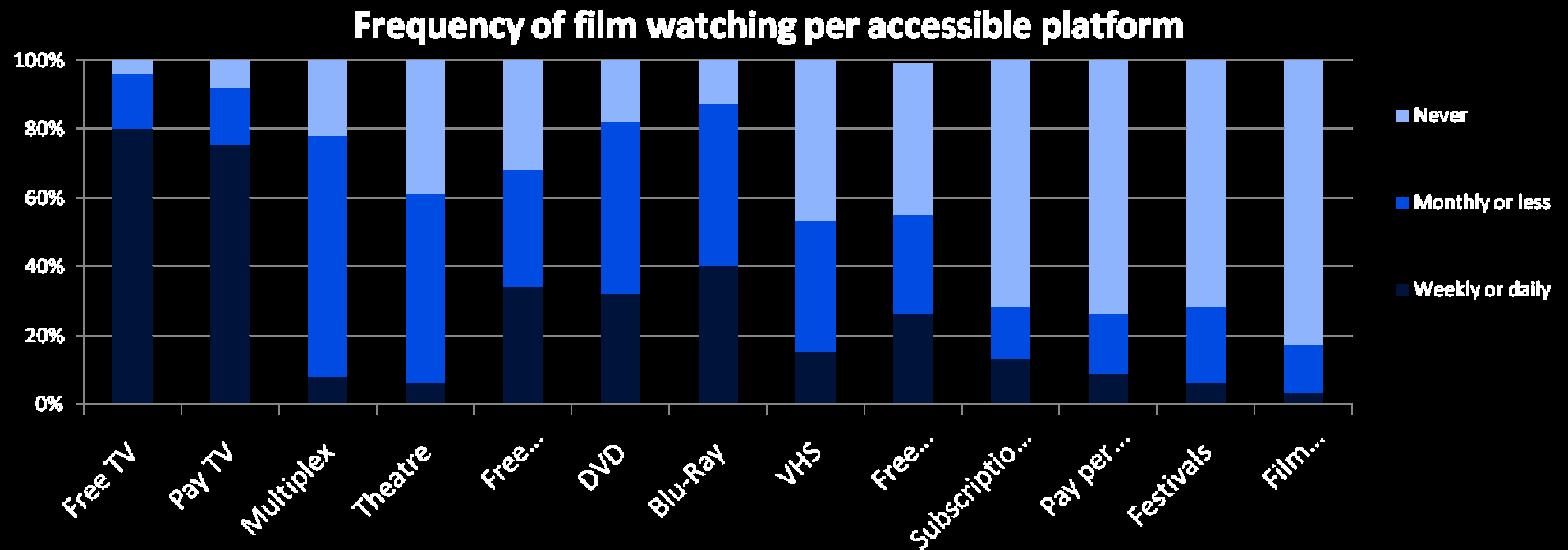
- Europeans watch films on free TV, cinema (mostly multiplexes) and DVDs.
- Piracy seems widespread (through both downloads and free streaming).

Platform used to watch films

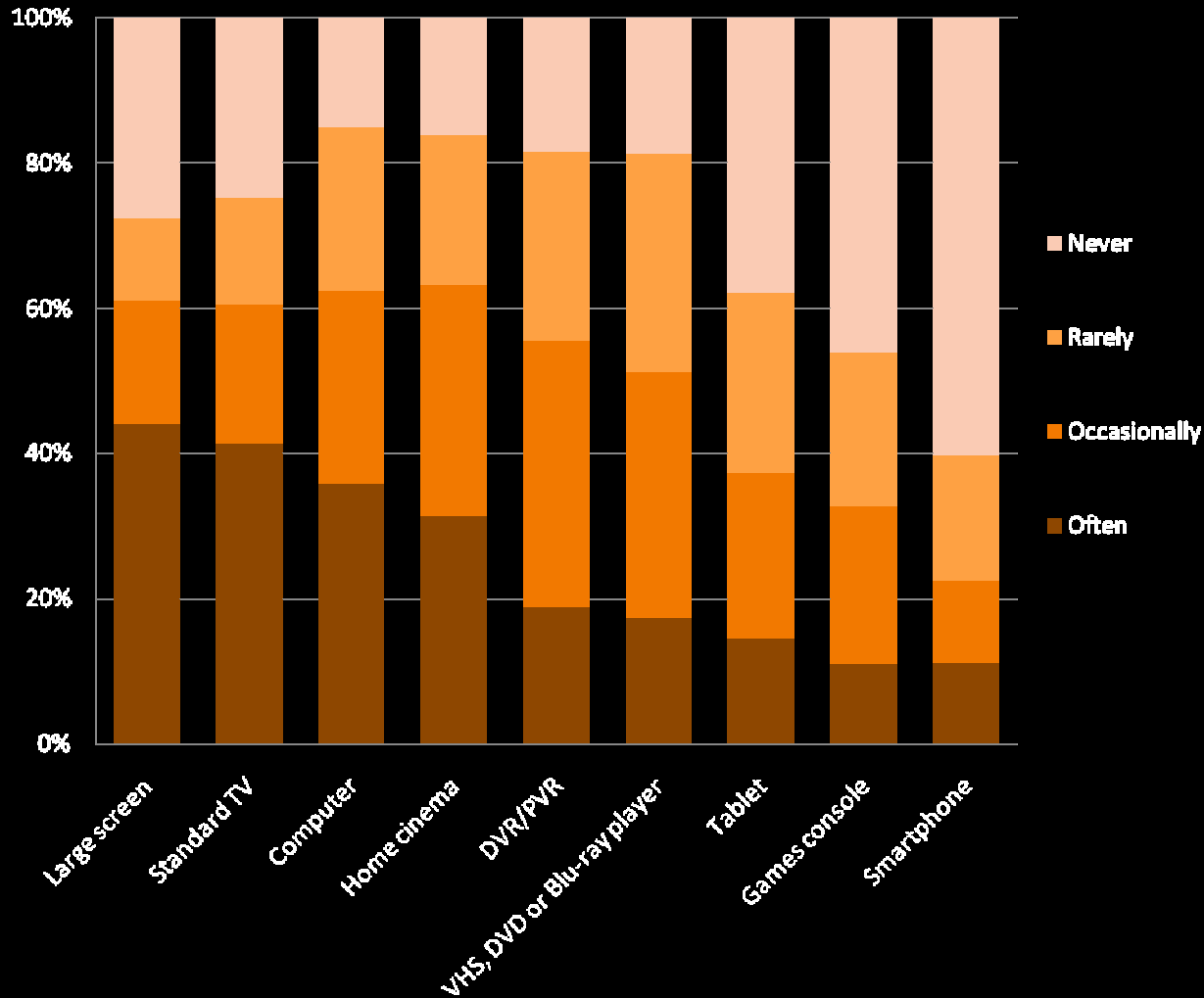


Film consumption platforms

- **Free TV is #1 platform for films:** 96% watch films on free TV (80% weekly or daily). Pay TV is used in similar frequencies but by 1/3 of people.
- **Cinemas are generally attended < once a month** (44% for theatres and 49% for multiplexes) or 'never' (39% never go to cinemas and 22% never go to multiplexes).
- **DVD, VHS and Blu-Ray are used on a monthly basis or less.**



Frequency of use to watch films



- Most film consumption at home happens on the TV, but the computer is used occasionally by most people.
- Devices like home cinema or games console are used regularly (but few people have them).
- Smartphone is rarely used to watch films.

- **55% of respondents admit using piracy sites to watch films** (highest in Lithuania, Poland, Romania and Spain, lowest in Germany, UK and Denmark).
- **Price is the main reason.**
- **55% of ‘pirates’ watch ‘all kinds of films’, 34% watch ‘mostly US films’.** Only 7% pirate ‘mostly national films’ (higher in UK, Denmark and Italy) and only 4% to watch ‘mostly European films’.

Reasons for using piracy

50%	“I can’t afford all the films I want to watch”	28%	“films I missed on the cinema and I can’t wait for the DVD”
37%	“Some films are interesting but not worth paying for”	27%	“films are too slow to arrive to my country”
31%	“I don’t see the point in paying”	23%	“I don’t have time to go to the cinema”
30%	“To watch films not released in my country”	11%	“cinemas are too far away from me”

Film education programmes reach almost half of the European population.

- 43% of respondents have attended courses at schools and universities.
- 25% of respondents take part in or have been involved in an after school film society.
- Community film making (15%) and film associations (13%) are less popular.

A vast majority of those who have experienced film clubs or training programmes recognise their benefits:

- 86% agree that it raised their curiosity for other types of cinema, 84% agree that it raised their interest in films and that it improved their film culture and 83% think that it helped them better understand films.
- 45% think that it did not change their film culture and habits.

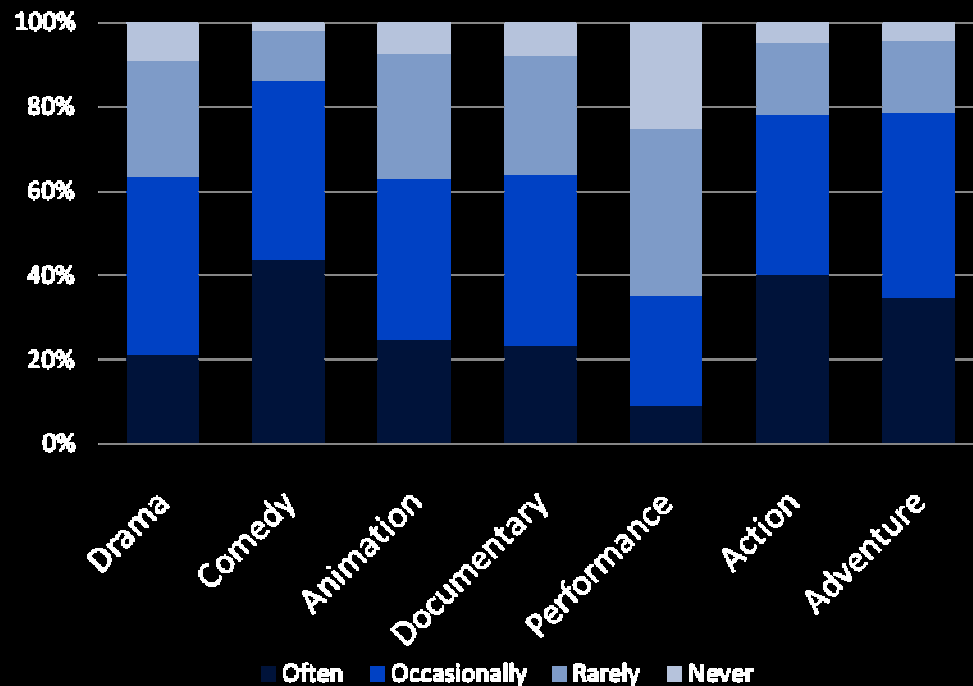
Kids' interest in film training programmes is very strong: among the children who have not attended film clubs or training programmes, 63% say they would like to take part. Main motivation is to watch and discuss films (57% of cinema-uneducated children) and nearly half wish to learn how to make films (44%).

Parental interest is even stronger: 86% of parents would like their kids to attend such programmes whether to watch and discuss films (82%), make films (77%) or learn about European film history (69%).

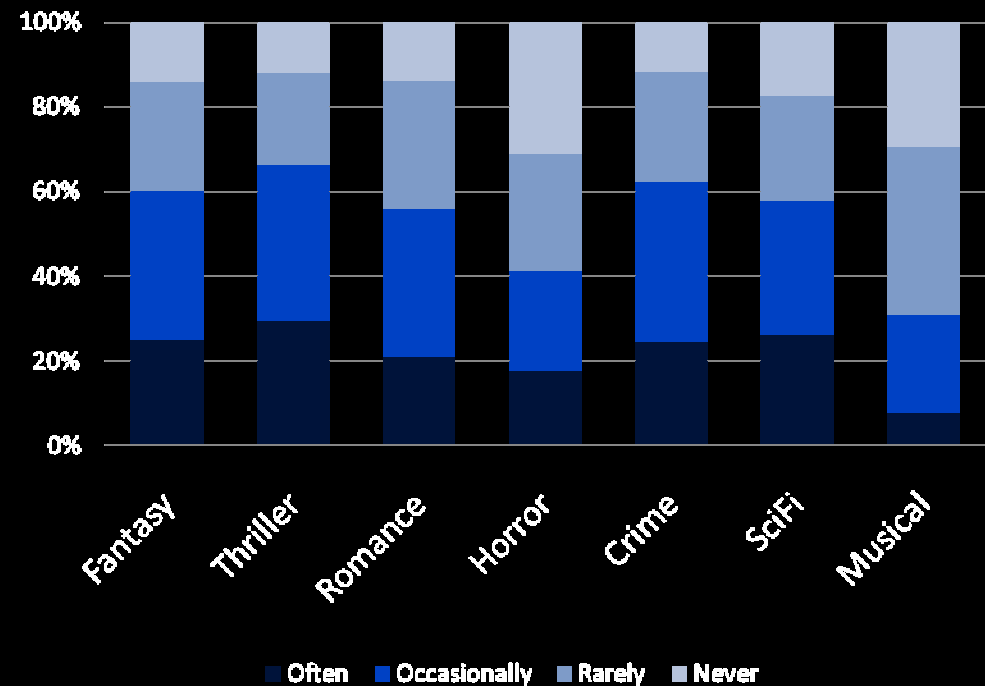
Preferred film genres

- **Comedy, action and adventure are the most popular genres:** > 95% of film consumers watch such films (around 40% 'often').
- Drama, animation and documentary follow. Horror, performance and musical are less popular.

Film Viewing by Genre

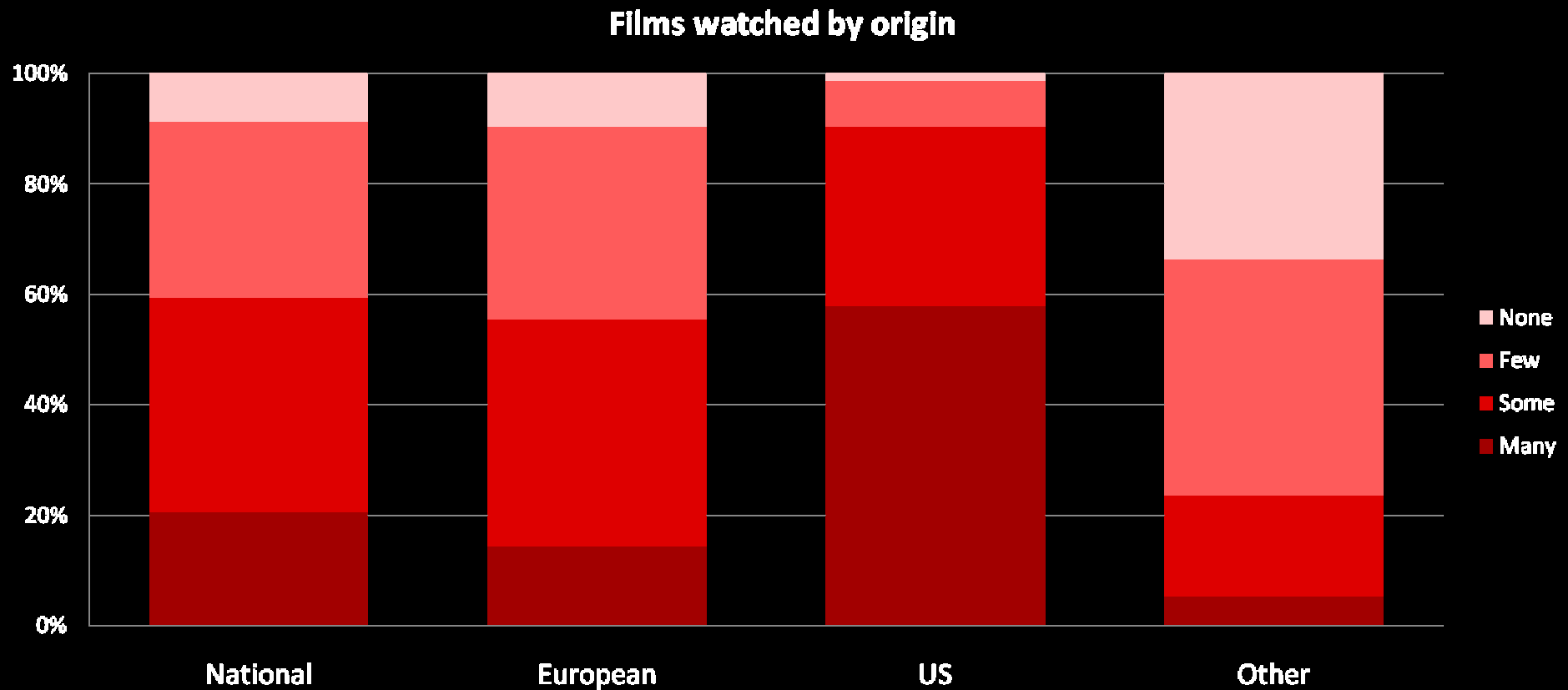


Film Viewing by Genre



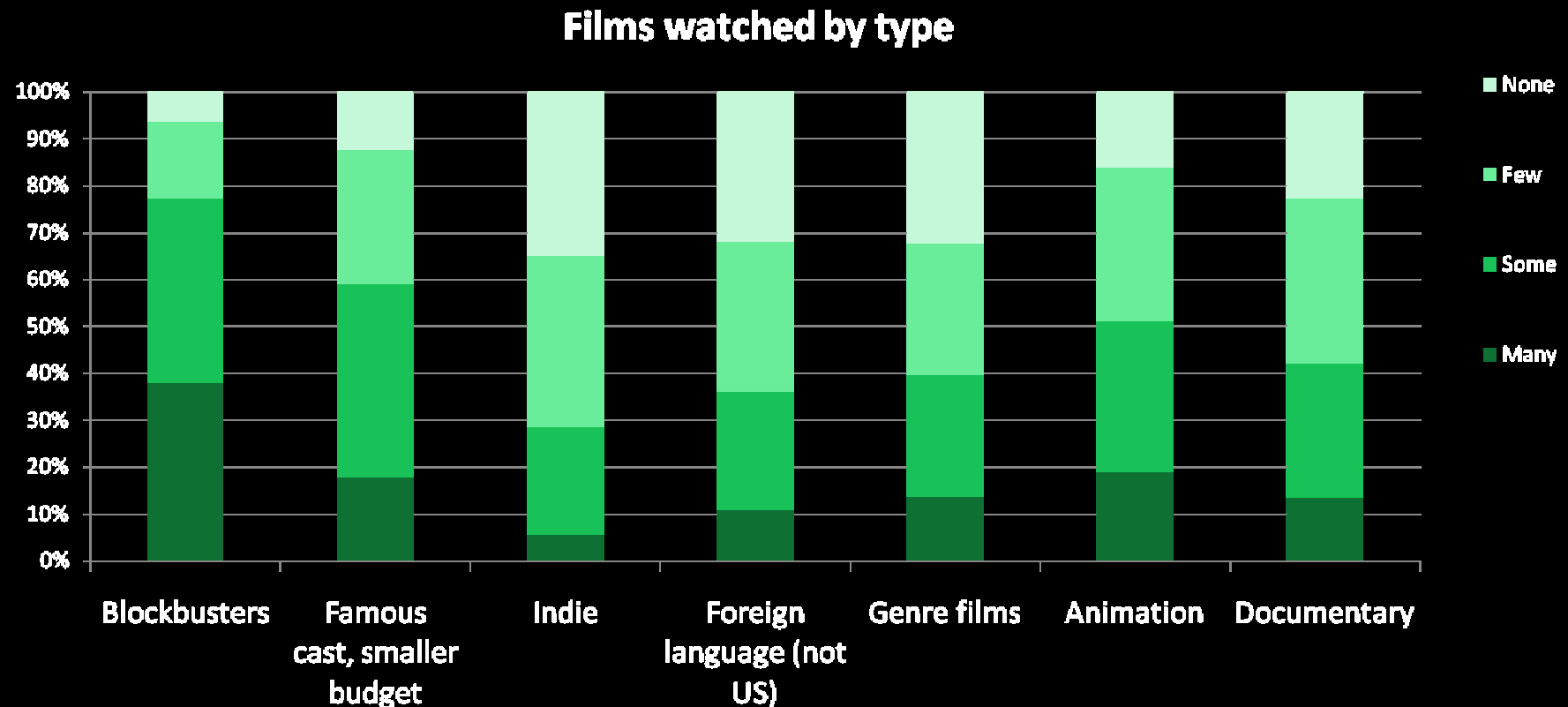
Preferred film origins

- **Europeans favour US films:** 98% of film consumers have seen at least one in the last year (58% 'many' and 32% 'some')
- **National and European films are watched less frequently.**



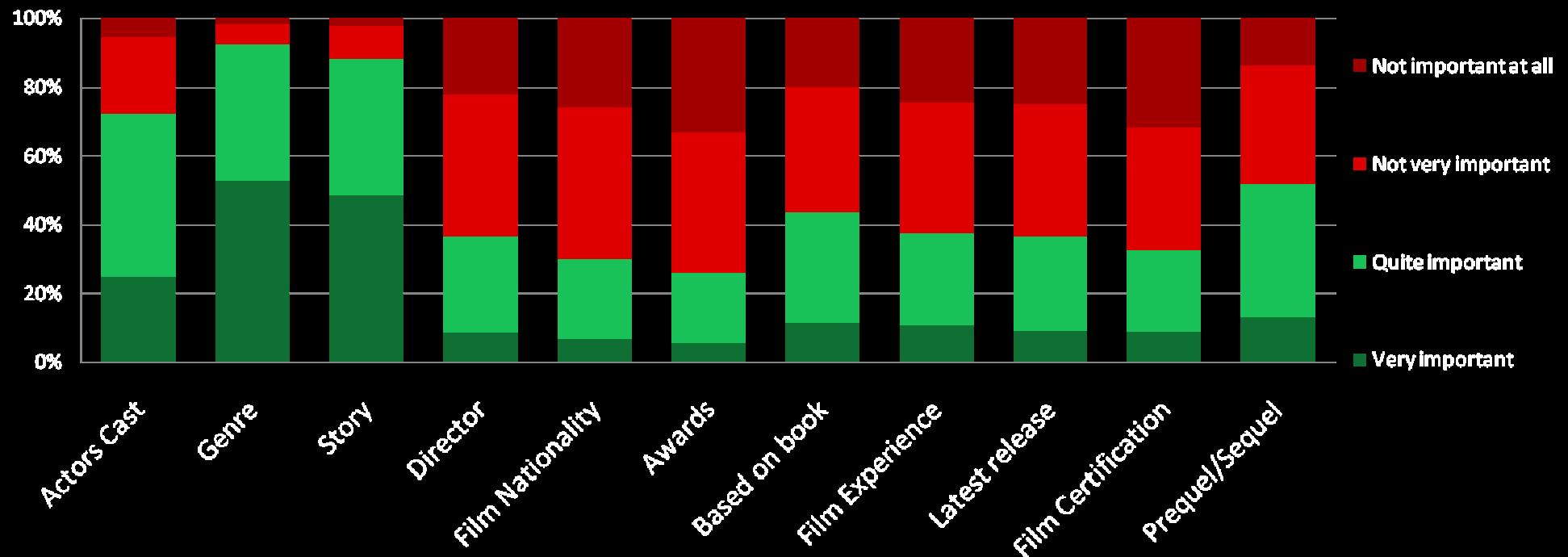
Preferred film types

- **European film consumers prefer blockbusters with star casts, big budgets and visual effects (93% have seen at least one in the last year) followed by films with famous casts but not necessarily big budgets (87% have seen at least one), animation and lastly documentary.**

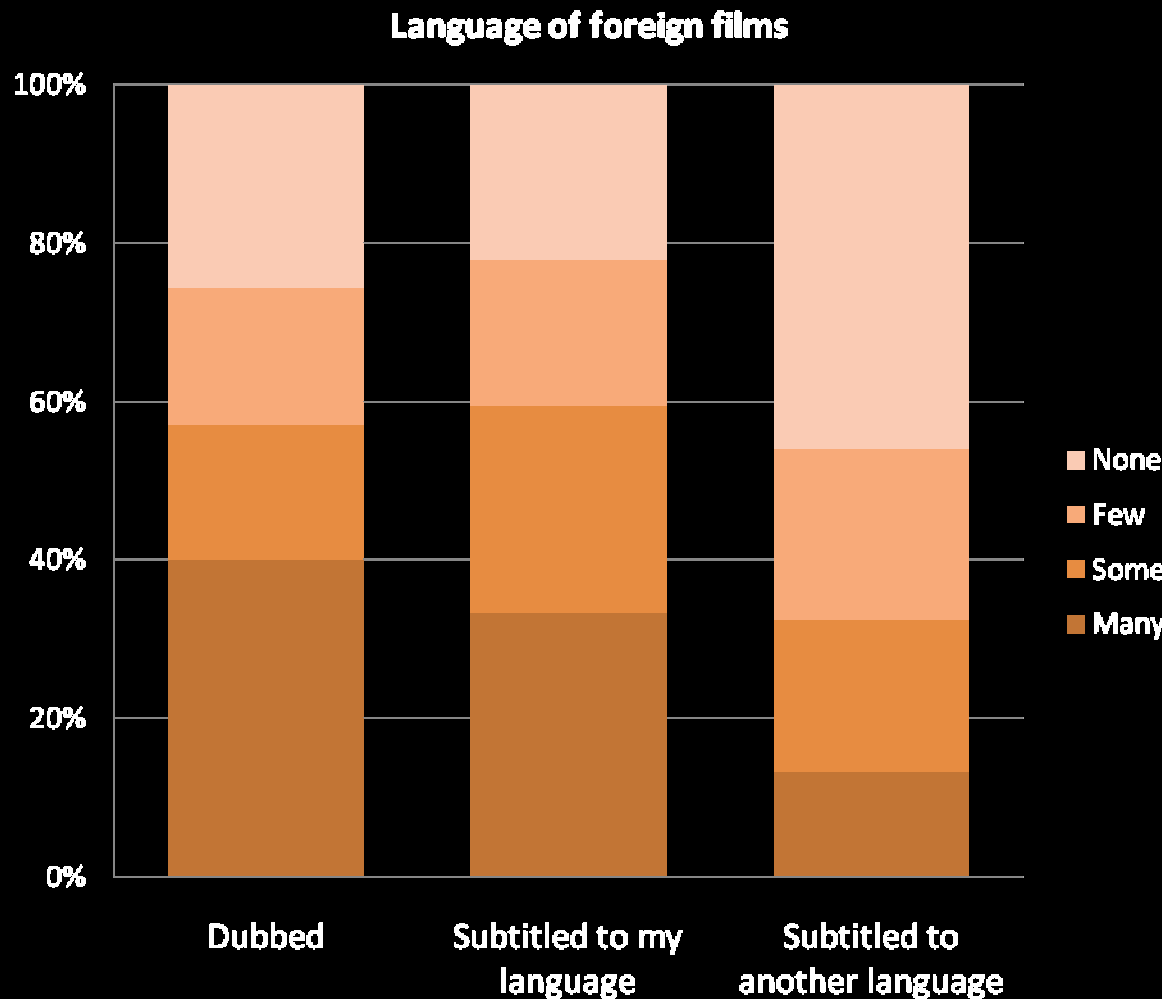


- **Genre and the story are top 2 criteria for choosing a film** followed by actor cast and familiarity with the film (part of a saga, a prequel/sequel or a book consumers enjoyed).
- **They give more limited value to several other criteria**, notably the film's technical experience (HD, 3D, Imax, etc.), film ratings (certification for suitable audiences), awards won by the films, film nationality or even the film director.

Criteria for film choice



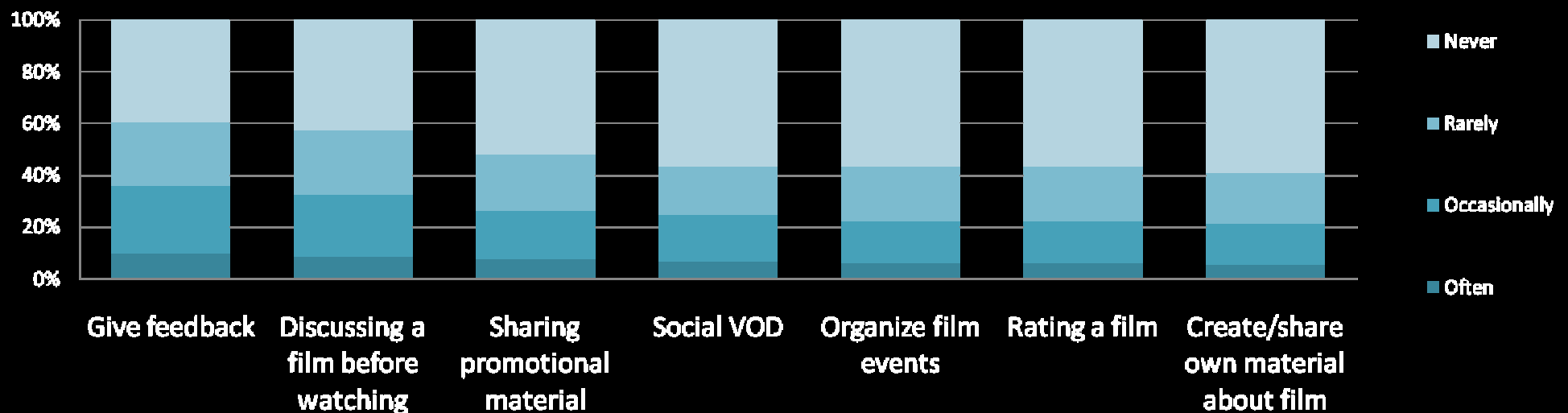
Preferred film languages



- **Film consumers most often watch foreign language films dubbed and subtitled.** Watching foreign-language films subtitled in a foreign language is much less common.
- **Consumers from larger countries** (Germany, France, Italy, Spain, Poland) usually watch films dubbed to their native language. Lithuania falls within this group.
- **Consumers from smaller countries** watch films in original languages subtitled to their national language: Croatia, Romania and Denmark. The UK falls within this group.

- **45% of European social network users use it to comment on and discuss films:** Italians, Poles and Romanians at the top, Lithuanians and French at the bottom.
- **42% follow a Facebook film-related account:** mainly film and actor accounts.
- **62% are likely to look at a trailer a friend 'likes'** and 55% to search for more info about it.
- **10% often give feedback online after watching a film** (60% have done so at least once)
- **57% have discussed a film online at least once before watching it.**

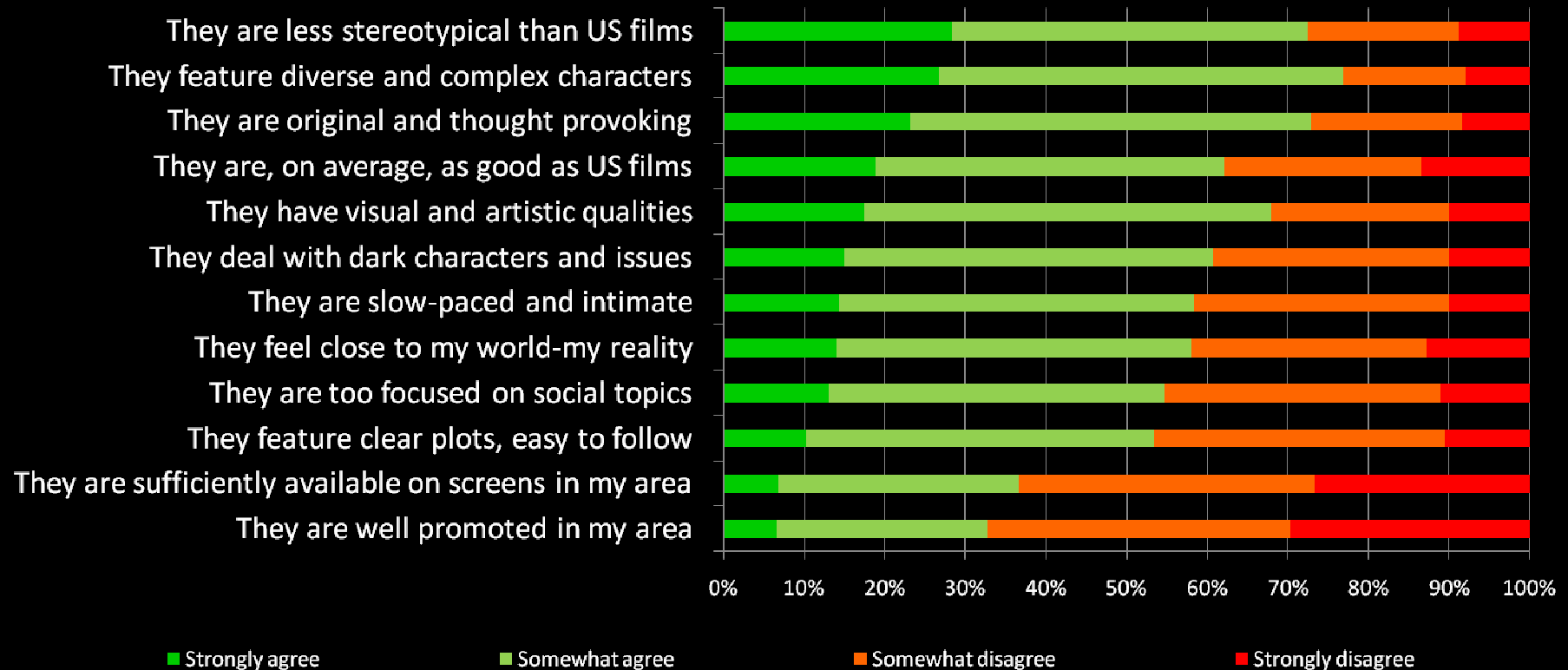
Frequency of social network activities



Opinion about European film

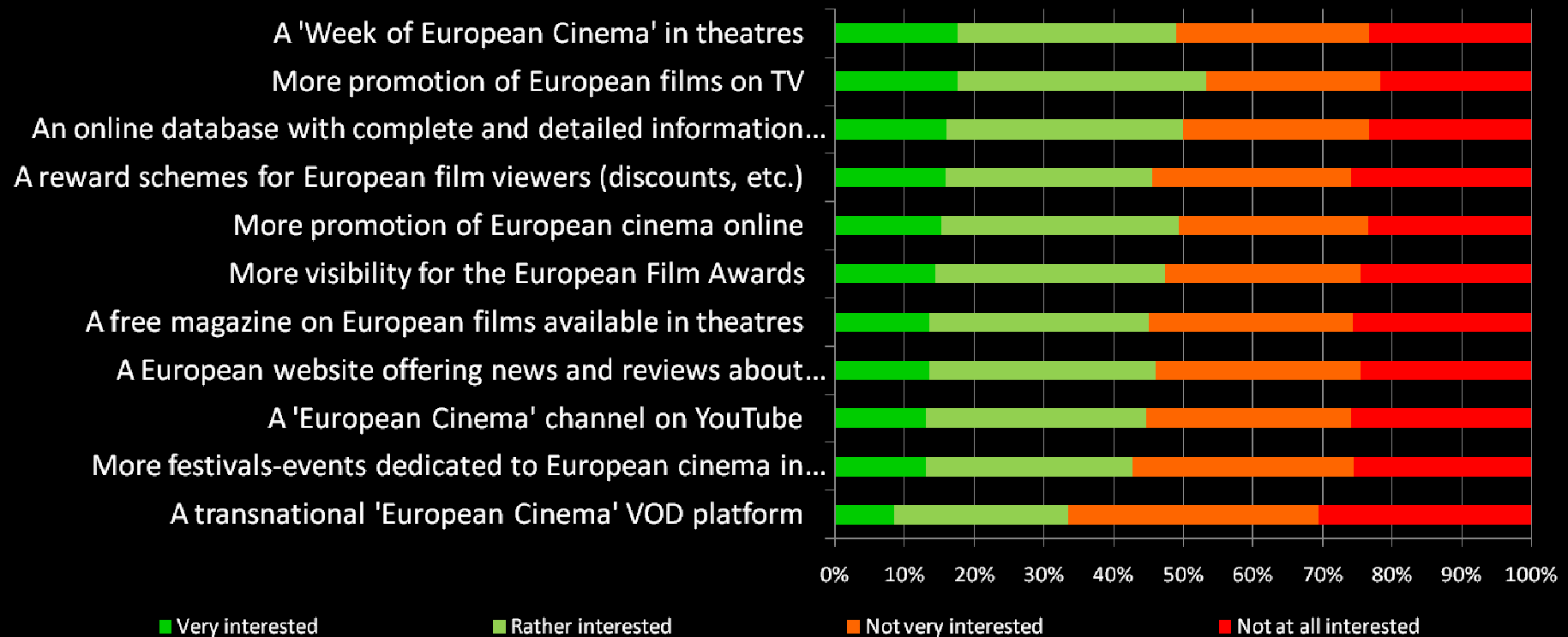
- Film consumers value the quality and originality of European films, may find them a bit too dark and complex, and think they are neither well promoted nor well distributed.

Opinions about European cinema



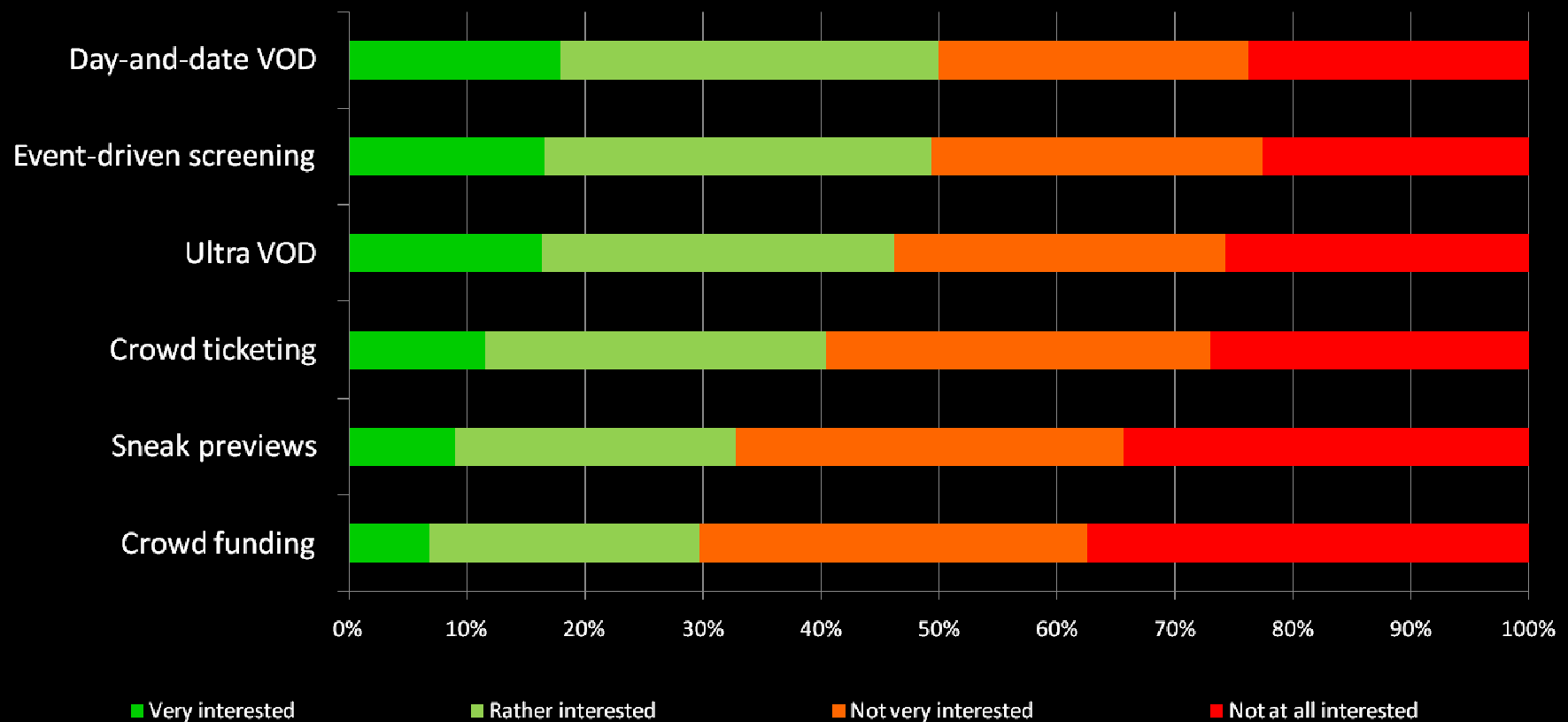
- Europeans would favour traditional tools to support European cinema (week of European cinema, TV promotion or online databases rather than a Youtube channel or a transnational VOD platforms).

Propositions to Support European cinema



- 50% of Europeans support 'day-and-date VOD', 50% support 'event-driven screening' and 46% support 'ultra VOD'.

Alternative cinema distribution



Opinions about National cinema

attentional
an instinct for entertainment

headway
international

harris
interactive

- I like the **actors** (9%).
- It is amusing, **entertaining** and fun (6%).
- The story is **close to my reality** and speaks to me (5%).
- I want to **support the cinema** from my country (5%).
- **Actors** are talented (4%).
- It is **realistic** (4%).
- It **reflects our culture** and society (4%).
- It is of **good quality**, well-made (4%).
- I like our national **comedies** (4%).

*...12% don't like their national cinema in general...
...up to 22% in Croatia and 19% in Spain.*

- They have good **special effects** (17%).
- They have **super-productions** with big budgets (11%).
- It is **full of action** (9%).
- I like the **variety of movie genres** (8%).
- I like the **actors** (8%).
- It is of **good quality**, well-made (6%).
- **Actors** are talented (5%).
- It is **mind-blowing, big, spectacular** (3%).

...5% don't like US cinema in general...

...up to 11% in Croatia and 11% in Romania.

Opinions about European cinema

attentional
an instinct for entertainment

headway
international

harris
interactive

- It is **different, quirky** (6%).
- It shows **other cultures and other countries** (6%).
- It is **creative, innovative, original** (5%).
- It is of **good quality, well-made** (4%).
- I like the **actors** (3%).

*...9% don't like European cinema in general...
...up to 16% in France and 14% in Italy.*

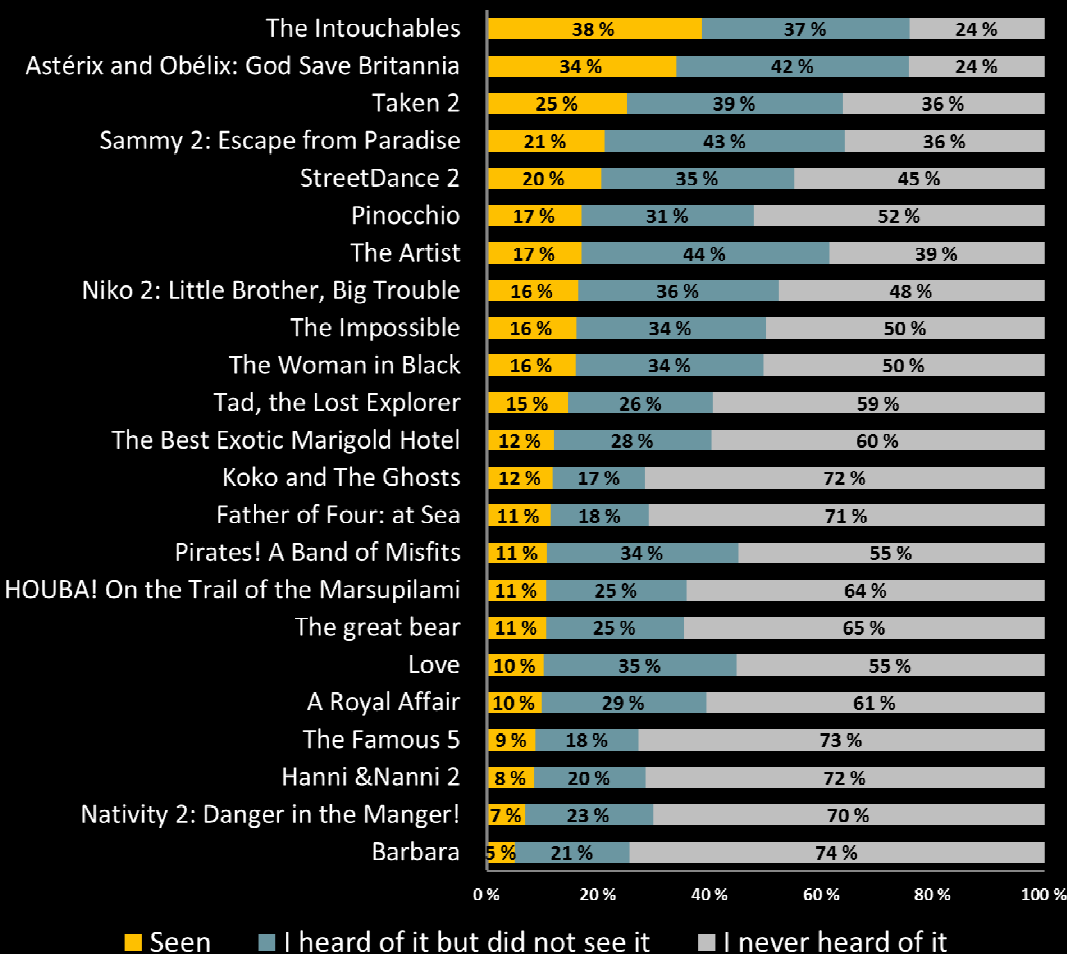
Film Database

National films
US studio films
European films
(BO hits & 'arthouse',
recent & 'old')

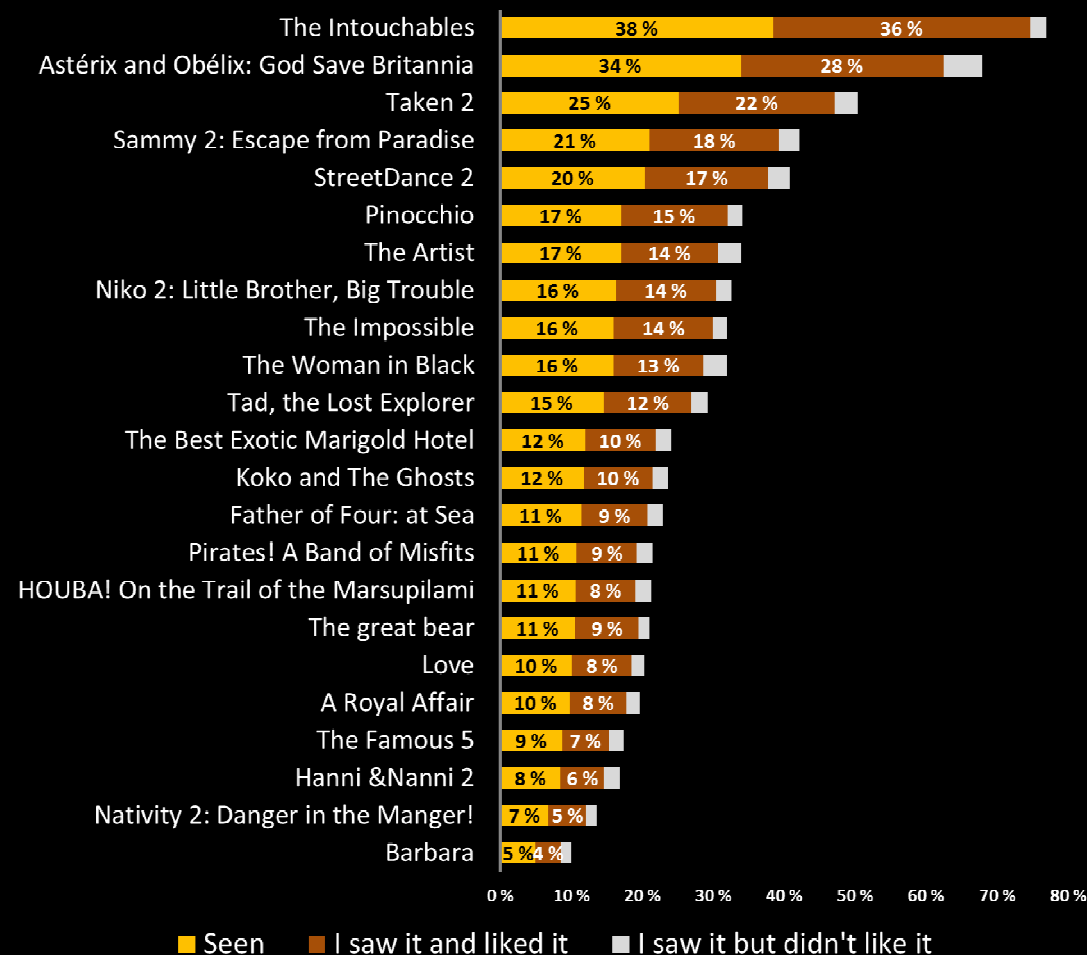


Films I know, I saw and liked

Recent European films

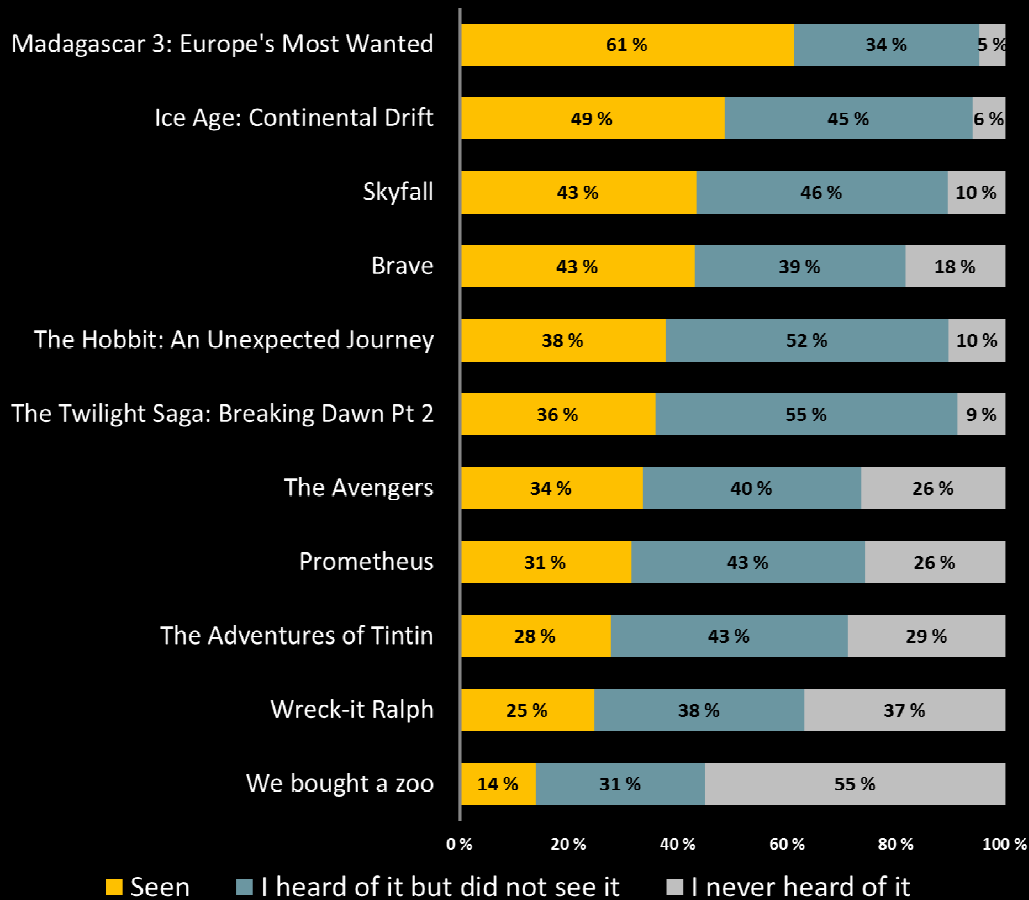


Recent European films

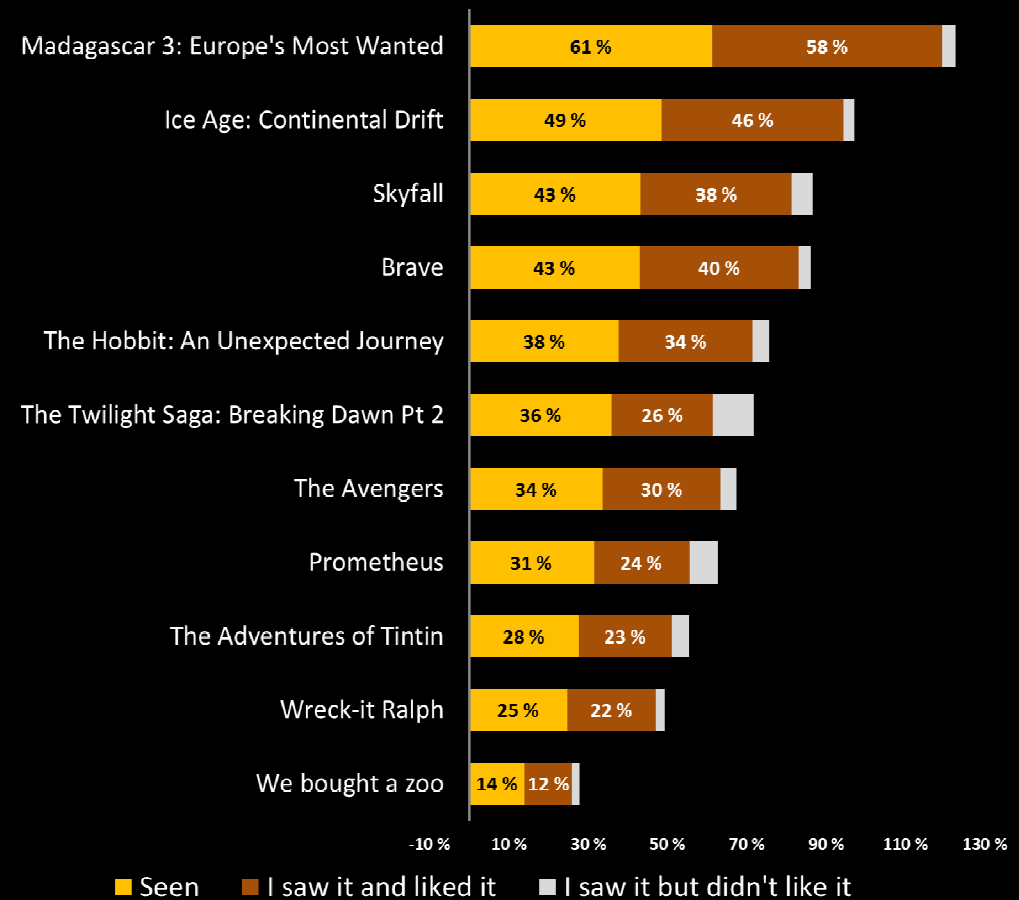


Films I know, I saw and liked

Recent US films

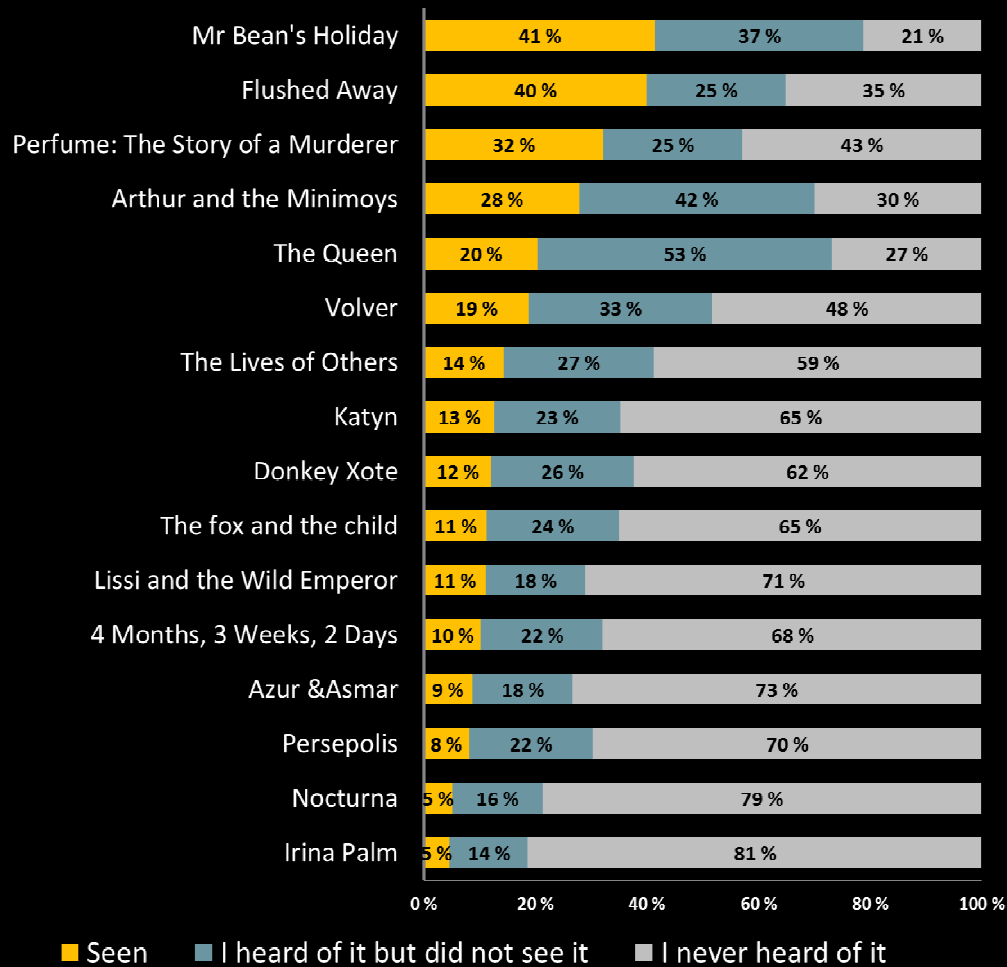


Recent US films

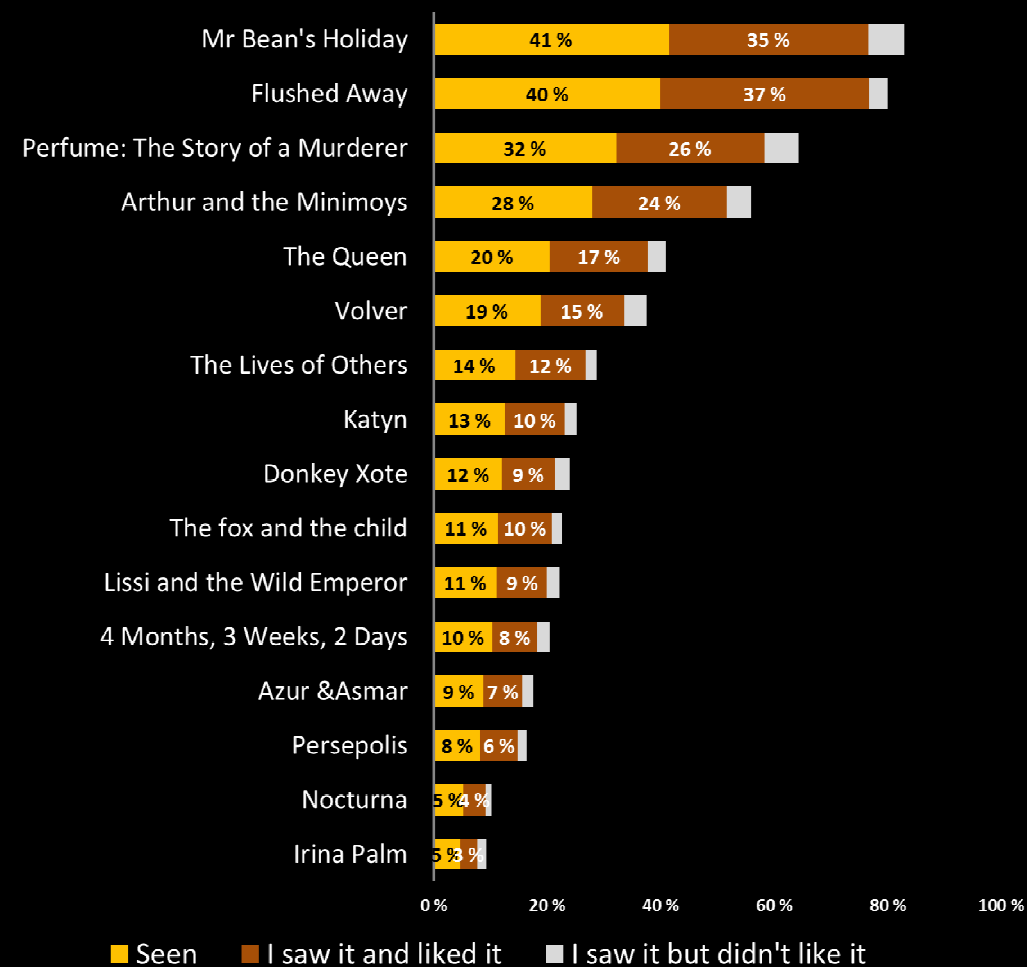


Films I know, I saw and liked

European films from 5 years ago

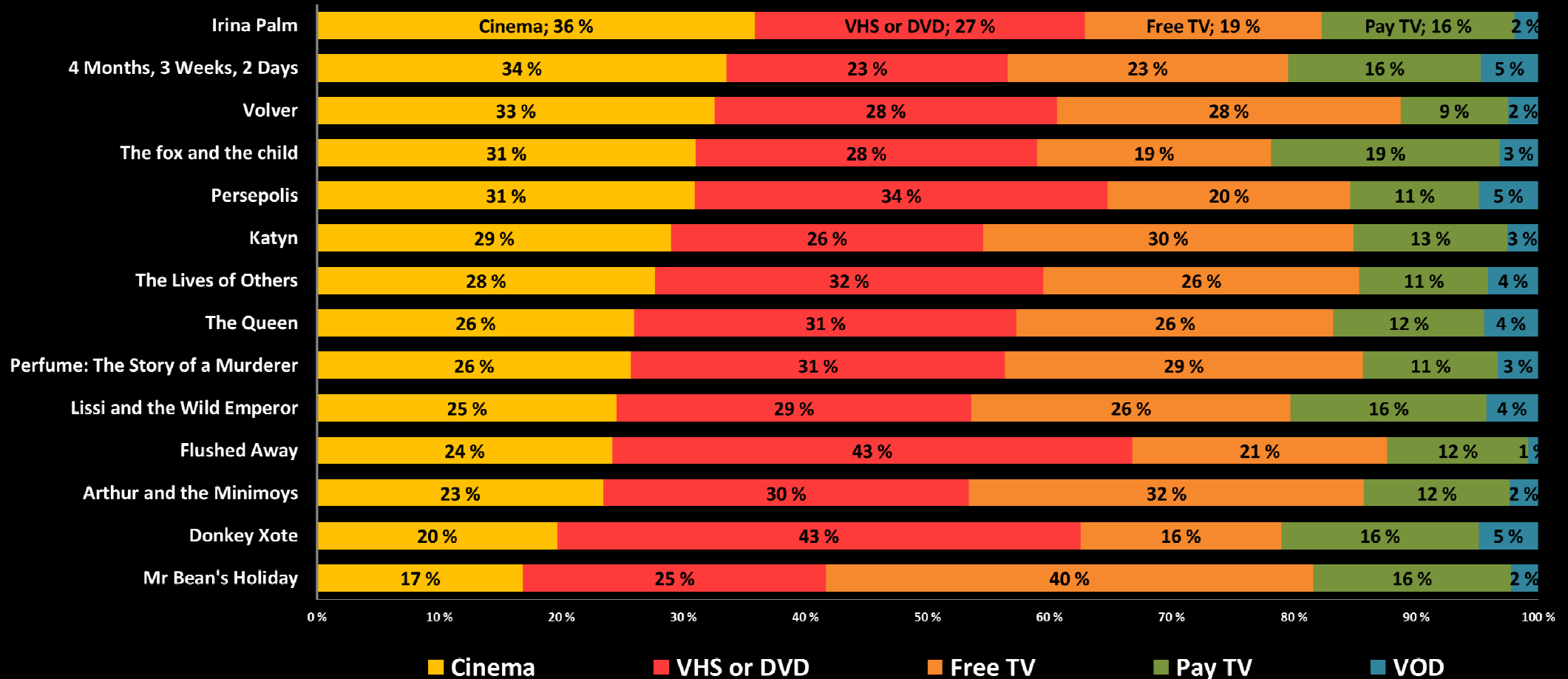


European films from 5 years ago



'Old' European film platforms

European films from 5 years ago - On which platform



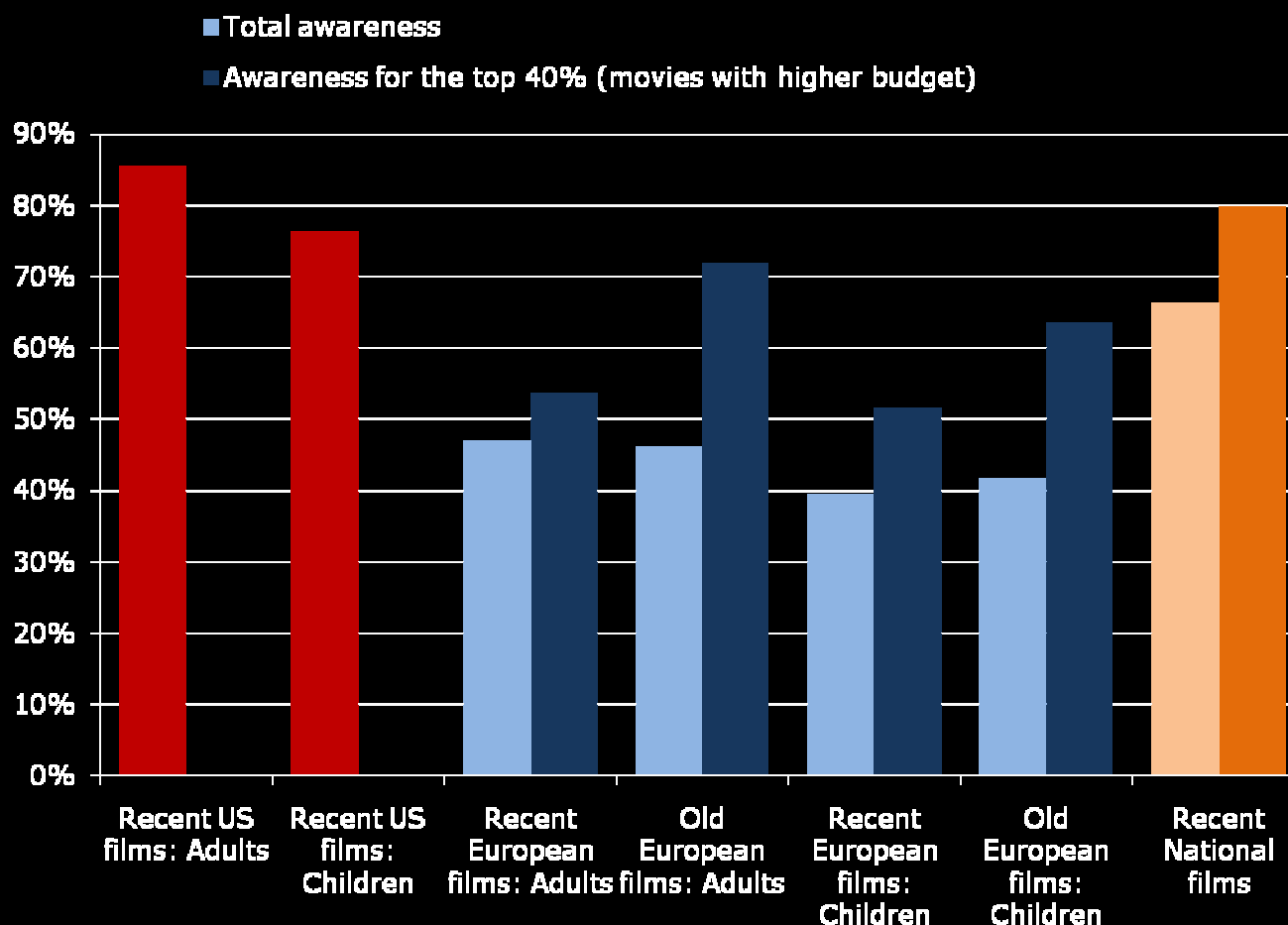
- **In summary:**
- **Recent European films have been seen by typically 15% of European film consumers.** For recent US films in our survey this number is about 35%
- **Figures are very similar for ‘recent’ European films vs. ‘older’ films**
- **Around 80% of ‘old’ European film legal consumption is equally balanced between cinema, home video and free TV**
- **European children’s films travel very well through DVD/VHS**

Awareness of films among survey respondents

European film consumers are more aware of US films (red) than European films (light blue). National films (light orange) show a lower awareness than US films, but higher than European.

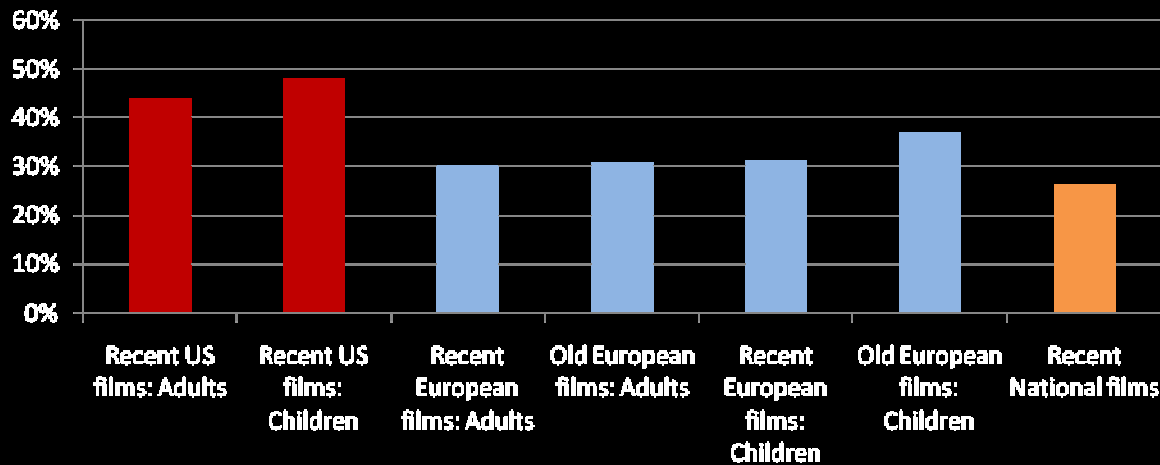
When selecting only the top 40% in budget, awareness increases (dark blue and dark orange), following the pattern US>Nat>Eu

Old films have higher awareness, possibly due to TV distribution



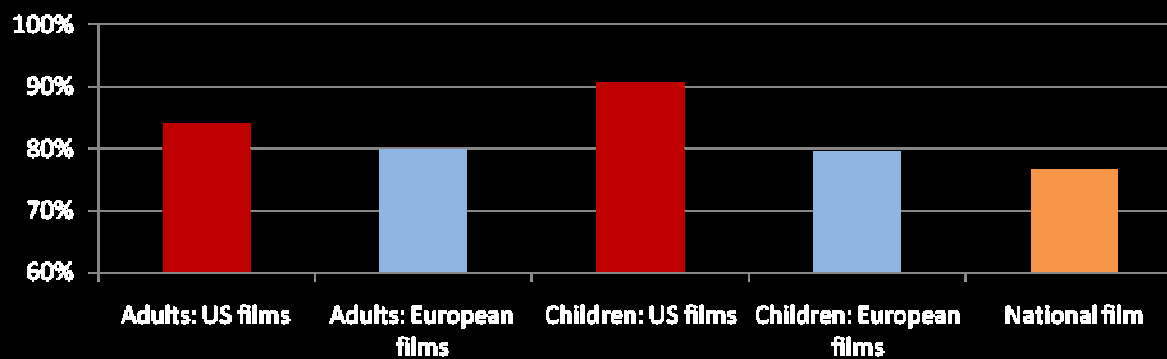
Film viewing and satisfaction

Viewing



*Respondents are more interested in watching US films than European films.
National films rank last, suggesting a bias against national films*

Satisfaction



*Public find US films more enjoyable than European.
National films again rank last.*

More conclusions

Awareness for EU films is higher if they are shot in the respondents' national language.

Viewing and satisfaction are consistent across languages.

Awareness, viewing and satisfaction seem to be consistent among genres.

Correlations

- The higher the film budget is and the more countries where the film is released, the more aware the public is and the more they want to watch it
- The relationship between strength of release and awareness is weak (possibly due to seasonal factors)
- There is no relationship between the prizes and the awareness of a movie
- The more festivals a movie is in, the less the public seems to be aware of it (falls into specialised niche?)

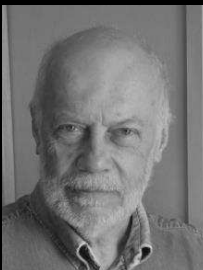
	Awareness	Viewing
Budget	Strong	Strong
# countries where it's released	Strong	Strong
% of screens over the first weekend	Weak	Weak
# Prizes	None	None
# Festivals where the movie is present	Negative, weak	Negative, weak

A Study in Progress...

To Come:
Portraits of Key Consumer Groups
Analysis of Country Variations
Marketing with the most Impact
More on the key characteristics that
enable European films to travel

Merci Beaucoup!

European Film Study: a Current and Future Profile of European Film Consumers



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