A profile of current and future audiovisual audience

Executive Summary - EN

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Executive Summary

The Film Audience Survey is based on an online survey of 4,608 Europeans aged 4-50 in 10 countries (Croatia, Denmark, France, Germany, Italy, Lithuania, Poland, Romania, Spain and the United Kingdom). It took place between 28th March and 15th April 2013. Respondents were recruited from Harris Interactive's online access panel.

Where people are watching films: Offers and Platforms

97% of respondents watch films at least sometimes (film viewers) and 54% say they do so every day, as against 56% for TV series. Across the 10 European markets virtually 100% of respondents own at least one device that enables the consumption of video and film at home. Outside the home, 14% of respondents have no access to cinemas within 30 minutes of their homes. This figure goes up to 37% in Romania, 27% in Lithuania and 16% in Croatia.

Film viewers watch films on a wide array of devices and venues: cinema (87%, with more attending multiplexes than smaller venues), television (90% altogether, 79% on free TV) and DVD (67%) are widely used platforms on which to watch films. Children and young adults go to the cinema and use VOD more often than adults. They also watch more films on home video, especially DVD. Though the TV is the device most often used to watch films (41% of viewers use a TV often), the computer is now widely used to watch films (36% often, 85% in total). 40% of smartphone owners watch films on them and 62% of tablet owners use them to watch films too. 36% of respondents subscribe to pay TV services, while 27% subscribe to cinema services such as discount cards.

28% of film viewers watch films in festivals. Festivals (including festival attendance as part of a school or university activity) are most used in Poland (43%), Romania (36%) and Lithuania (35%).

Nearly half of respondents are or have been reached by film education programmes. 43% of respondents 'watch or have watched films as part of a course of study at school, university or in adult education' (10% 'currently' and 33% 'in the past'). In addition, 25% 'watch or have watched films in an after-school film society, locally or at University', 15% are or have been 'involved in community filmmaking' and 13% are or have been 'members of a film association'. The highest reach for these programmes can be found in Romania (63%), Italy (53%) and Spain (50%) while the lowest reach is in Germany (24%), the UK (27%) and Croatia (36%).

The majority of those who experienced film clubs or training programmes recognise their benefits, agreeing that it 'raised their curiosity for other types of cinema' and led them to watch more diverse films (40% 'strongly' agree), 'raised their interest in cinema' and led them to watch more films (37% 'strongly' agree), 'improved their film culture' and strengthened their film knowledge (43% 'strongly' agree). Children's interest in film literacy is even stronger: 85% said it helped raise their interest in cinema. Among children who have not attended film clubs or training programmes, 63% say they would like to take part. Parents' interest was strong as well.

68% of film viewers said they downloaded free files for storage on personal drives and 56% said they streamed films from free websites. 50% of those who do so say 'cinema tickets, VOD and DVD are too expensive', 37% think 'some films are interesting but not worth paying for the cinema experience'. Other motivations include ease of access (31% consider that 'many films are available online and they don't see the point in paying'), lack of availability (30% say that 'many films they want to see are not available in their country'), missed opportunities (28% say that 'they didn't go when the film was on in the cinema and they can't wait for it to be available on DVD or on TV' while 23% say they 'don't have time to go to the cinema'). 11% of free downloaders say they stream and download because 'cinemas are too far away'. The heaviest users of free files from the internet are the 16-25's.

62% of film viewers feel the volume of foreign language films dubbed and subtitled in their own languages or in another language they speak (primarily English) is too limited. The lack of access to foreign films via dubbing or subtitling was less critical in large film markets such as France, Germany or the UK.

Why people are watching films: Social media and Marketing

Reasons for watching films are to 'entertain oneself and have fun' (96%), to 'spend some nice time with family or friends' (96%),'to discover and learn about people and cultures' (90%) and to 'experience strong moments and emotions' (91%).

The majority of film viewers generally look for information about films either 'when the films are released in theatres' (37%) or 'right before deciding to watch a film' (23%). The two most important criteria are genre and story -- which enable viewers to weigh up the film's promise and potential interest. After these come cast, familiarity with the protagonists and setting. Women pay more attention to genre or type of film and whether or not it is adapted from a book. The director and production values are more important to men while the setting and lead character are more important to young adults.

Film preference criteria vary by platform, though positive word of mouth by friends and family and joint decisions are central on every platform (TV, cinema and VOD). Young adults 16-25 are the most sensitive to film advertising (theatre, TV, outdoor, print media, online, social networks) and to social recommendations from friends. For television prior knowledge and scheduling play a big role in choosing films, while, with VOD, 'films I have already heard about' and the ability of search by genre are important.

Film-related social media activities are widespread, and 5-10% of the respondents regularly engage in them. 60% of film viewers say they follow film-related accounts on social networks -- 48% on Facebook, 24% on Twitter and 20% on other social platforms. The most popular Facebook accounts are those devoted to films (34%), actors/actresses (31%) and film characters (26%).

A majority of social network users pay more attention to a film when a friend 'likes' it on Facebook: 62% are likely to watch the trailer or other promo material and 55% to search for more information about the film online (cast, synopsis, etc.).

The most common way of researching films online is to watch trailers on video sharing platforms (YouTube, Dailymotion, etc.). Young adults 16-25 are the most 'connected' to digital sources for obtaining information about films. 92% of them watch trailers online (vs. 81% on average).

Marketing campaigns involving big budgets and exclusive content, fully-fledged social media strategies, games, contests, etc. have the strongest impact (e.g. *The Impossible* and *Cloud Atlas*).

Support for new marketing initiatives include 'more promotion of European films on TV' (18% of film viewers are 'very interested', 36% 'interested') and 'An online database with complete and detailed information about European films' (16% 'very interested', 34% 'interested').

Reaching film audiences: Profiles and Preferences

One of the key projects of the Study was to correlate key characteristics of films with the preferences of different parts of the audience and in particular their awareness of these different characteristics.

Children are most aware of animated films, comedies, adventure films and franchises. They are most aware of productions with budgets over 15M€ and like them more. They favour films with a single main character, particularly a child, teen, young adult or even an animal. They go for heroes and superheroes where the main character goes on a quest or needs to restore a situation.

Young adults naturally show higher awareness for teen movies and know most about films shot in English. They enjoy action, crime, fantasy and adventure. They also know a lot about franchises. Young adults also tend to know about films with budgets over 15M€ and films that have a wide multi-country release, with medium to high festival visibility.

Adults know more about (and enjoy more) films shot in their national language and dramas. They value genres like war, history and biography and know more about films with a budget below 15M€. They are the most aware of films where the lead character is female. Objectives like preserving the family or more complex objectives play well with them. They enjoy films set in the past, and films with a dark tone and medium or slow pace, with national stars.

Male respondents are more interested in blockbuster movies, franchises, action and sci-fi, while female respondents preferred mid-budget movies about romance, comedies, biographies or animation. Men and boys enjoy superhero and antihero stories, based on comics with a male adult as main character, but girls and women are more interested in heroine stories, based on novels, with a female lead, and they are more open to children or seniors as main characters.

Respondents with a primary education prefer animation and adventures, with big budgets. Graduates, on the other hand, are more interested in dramas and films with small budgets, and are more sensitive to films with high festival visibility. Respondents with a primary education like superheroes, fantastic worlds, escapist movies with fast pace and special effects, whereas graduates are more interested in films set in the past and slow-paced, realist and dialogue-driven movies.

Audience Profiles

A process called behavioural segmentation was used to create pan-European profiles of particular types of film viewer, using the sample from the EU10:

Hyperconnected movie addicts (24% of European film viewers) are the heaviest viewers of media and films, and thus a primary target audience for European films. They are typically 'digital natives': this profile contains more males and young adults than the others. They live mainly in urban areas close to local cinemas, are highly engaged in media and culture and well-equipped with all sorts of media devices and services. They watch all sorts of films.

Rushed independent movie selectives (22% of European film viewers) are the second largest group in terms of film consumption, especially European films. They are typically working adults with few or no children, women 26-50 earning average incomes but with a fairly high level of education and working in intellectual professions such as academia and teaching.

Mainstream blockbuster lovers (16% of European film viewers) are the third largest group in terms of film consumption but, unlike movie addicts and movie selectives, they mainly watch US blockbusters and only few European films. Their socio-demographic profile and media equipment are average. They live in less urban areas and have more limited access to cinemas especially theatres.

Occasional hit grazers (21% of European film viewers) watch fewer films, and take less notice of media and culture in general: they watch television, read some books, listen to music and surf the internet including social networks. They are typically younger, semi-urban or rural women going to school or in the middle of their studies. Despite watching fewer films, their interest in European films comes through as relatively strong.

Movie indifferents (16% of European film viewers) watch the fewest films by far, and, in general, they are remote from most cultural activities other than TV and video games. They are typically either young or older men, less educated, poorer, living in the most rural and semi-urban areas and the least equipped with media devices and services. They are little interested in film apart from action and comedy, and mostly watch US blockbusters.

These groups and the films they prefer are analysed in detail in a way that should help targeted marketing. For instance the Study proposes that for Movie addicts it could make sense to strengthen traditional VOD both for big European titles and smaller art-house productions to favour easy and legal access. Where Movie selectives are concerned, on the other hand, the identity and diversity of European cinema should be stressed and online databases with detailed information about European films and trailers could prove highly useful.

Blockbuster lovers need big entertainment and simplicity and clarity in genres, themes and stories while, for Hit grazers, the social aspect of the film watching experience needs to be emphasized because they favour films with high social values. Movie indifferents will respond only to conventional advertising, standing at the opposite extreme from Movie addicts for whom rich social media content could be a powerful motivator.

To gain further insights both into these groups and into certain key questions a series of secondary profiles were commissioned: Free-downloaders, Europhiles, Film-influencers, Film-literates, and Cinema-enabled.

Free-downloaders tend to be young, urban and educated, heavy film viewers interested in the diversity of films but frustrated by the cost, the delays and narrow catalogues of legal offers (lack of availability is the main motivation to stream-download European films for 44% vs. price for US films for 55%).

Europhiles (European film fans) tend to be young, educated women living in medium-sized cities with easy access to theatres. They are mainly 'movie selectives' who find European films more interesting and less stereotypical than big US productions. They are eclectic film viewers, who regard cinema as more than just entertainment.

Film-influencers are primarily 'movie addicts' and partly 'movie selectives'. They are mainly young, urban, and well educated film literates interested in movies from all genres and origins. They are familiar with digital film resources and social networks and look actively for film information and material. They have a very positive opinion of cinema as a platform and European films as content.

Film-literates are mainly media- and tech-savvy students and young adults living in urban areas, very active in the digital world. They are heavy film viewers, interested in a diversity of productions and very keen on discovering about films, discussing them and interacting on social networks.

Cinema-disabled (with no film venue less than 30 minutes away from their home) do not make up for the lack of a nearby cinema by using other viewing platforms. They have a more distant relationship with film in general, whatever the film type, genre, origin and platform.

What are people watching: Genre and Perceptions

Film audiences watch a diverse mix of film genres. Among the 24 genres proposed by this study, a minimum of 67% of film viewers say they watch nearly all genres but some only 'rarely'. This relates to niche genres (67% western, 69% for horror or 71% for musical. Comedy, action and adventure are the most popular genres, watched by over 95% of film viewers (around 40% 'often').

When asked which types of films they would continue to see in cinemas if all films where available on any platform, audiences mentioned a variety of genres. ‘Comedy’ and ‘action’/’blockbusters’ come top, followed by ‘science-fiction’, ‘horror’, ‘adventure’, ‘fantasy’, ‘thriller’ and ‘animation’, genres featuring strong visual settings and/or narrative dynamics. ‘Drama’, ‘romance’, ‘historical films’ and ‘documentaries’, were the least cited.

When asked about the type of stories they ‘do not see enough in films’, audiences primarily mentioned ‘historic films’ and ‘biographies’. They also cited stories with strong escapist dimensions (‘science-fiction’, ‘fantasy’, ‘horror’), comedies and real-life features. Very few respondents mentioned ‘drama’, ‘psychology’, ‘social’, ‘action’ and ‘adventure’.

An analysis of a group of recently successful European films showed that many films that travelled were animation, family entertainment or action movies. Critically acclaimed European movies (especially Academy Award winners) also travelled successfully.

Respondents were asked about European films. They praised the originality, creativity, innovation and diversity ('show new cultures and customs in other countries'), liked 'the variety of movies and genres', and appreciated the quality of content. When asked what they disliked about European cinema, film viewers primarily pointed to a language issue ('foreign language', 'subtitles'). They also criticized stories ('boring', 'slow', 'heavy'), actors, production ('poor quality', 'low budget') and pointed to weaknesses in the promotion and distribution of European films. They generally agreed that European films are 'less stereotypical than US films', 'feature diverse and complex characters' and are 'original and thought-provoking', that they 'deal with dark characters and issues', are 'slow-paced and intimate' and 'feel close to their world and reality', 'are too focused on social topics' and don't 'feature clear, easy to follow' plots.

The reasons given for liking National films were, first, the actors, then content -- 'amusing, entertaining or funny', 'scripts' and general 'quality', and familiarity.

Respondents liked US films primarily for their production values, ('special effects', 'super productions' and 'big budgets', 'good quality', 'dynamic', 'full of action') and actors. When asked about what they disliked about US productions, respondents primarily mentioned 'violence'. Other terms or expressions used were 'too commercial', 'predictability', 'special effects', 'exaggeration', 'propaganda' and 'patriotism', 'stereotypes' and 'superficiality'.

In each country respondents were offered a list of selected films including National films, European films and US films. Respondents were asked if they knew each film (awareness), if they had seen it (viewing) and if they had liked it (satisfaction). Recent National films, including both commercial hits and smaller art-house movies, had typically been seen by 10-25% of film viewers in their respective domestic markets. Recent European films had typically been seen by 10-15%, while recent US films had typically been seen by 30-50% of the population in each country. American films had the highest awareness, followed by National films, with European films ranking last (estimated awareness averages were around 80%, below 70% and around 50% respectively).

A comparison between awareness and viewing enabled insights into the relative appeal of different films and film types. The most successful National films had a very high level of awareness in their own countries: *Welcome to the North*, *Tadas Blinda* and *The Parade* had awareness levels of 98%, 96% and 82% respectively and were seen by 68%, 63% and 53% of local populations. However the majority of National films, while achieving high awareness, were less attractive to mainstream audiences in their domestic markets. European films, on the other hand, had lower average awareness, but the gap between awareness and viewing was less. The top performing European films were *Intouchables* (78% awareness, 38% viewing), *Asterix and Obelix: God Save Britannia* (76% awareness, 34% viewing) and *Taken 2* (64% awareness, 25% viewing).

In general awareness and viewing tend to have a positive correlation. The greater the awareness, the more likely the film is to have been seen. There is also a strong correlation between the budget of the movie and the level of awareness. There is a similar correlation with the number of countries where the movie is released: that is, the "bigger" the movie is in terms of budget, the more aware people across Europe are, and the more people watch it. The percentage of screens when released is a weaker indicator of the awareness of the movie.

Presence in festivals and prizes usually have no correlation with the general awareness of a movie (movies with high festival presence may fall into a specialist niche where the average viewer is concerned) though they can impact specific audiences (in particular film viewers with a higher education level and film expertise).

This Study raises many issues for the European film industries and for film policy. These are discussed under the headings Availability, Visibility and Understanding Audiences in the Report.

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