

A Profile of European Film Viewers

European Commission Study EAC/08/2012 Ref. Ares (2012) 701765 – 12/06/2012

http://ec.europa.eu/culture/library/index_en.htm#_years=_2014#_doctype=study

21st August 2014





4,608 Europeans 4-50 y.o.

from Es, De, Fr, It, Pl, GB + Cr, Dk, Li, Ro

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)



attentional an instinct for entertainment headway

National (6) European (20) US Studio (6)

BO hits - arthouse recent - old





Survey Facts

Film most widespread medium



attention

internationa

29% film fans, 49% film likers





Film a social entertainment time

- 99% watch films to 'entertain themselves and have fun'
- 96% to 'spend some nice time with family or friends'



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Top-of-mind 3 preferred films



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nct for entertainment

international

US films the most watched





Many Some Few None

EU film: distribution and promo!

They feature diverse and complex characters They are original and thought provoking They are less stereotypical than US films They have visual and artistic qualities They are, on average, as good as US films They deal with dark characters and issues They are slow-paced and intimate They feel close to my world-my reality They are too focused on social topics They feature clear plots, easy to follow They are sufficiently available on screens in my area They are well promoted in my area



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international

National films heard-seen-liked



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international

US films heard-seen-liked





EU films heard-seen-liked





Need for dubbing/subtitling



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Platforms used to watch films



attention

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Platforms frequency of use





Reasons for free downloads



I do it because ...



Platforms per film (1st screening)



European films from 5 years ago - On which platform

Irina Palm	Cinema; 36 %			VHS or DVD; 27 %			Free TV; 19 %		Pay	r V; 16 %	2 %
4 Months, 3 Weeks, 2 Days	34 %			23	8%		23 %		16 %	1	5 %
Volver	3	33 %			28 %		28 %			9 %	2 %
The fox and the child	31 %			28 %			19 %		19 %	1	3 %
Persepolis	31 %			34 %			20 %			1%	5 %
Katyn	29 %			26 %			30 %			13 %	3 %
The Lives of Others	28 %		32 %			26 %			11 %	4%	
The Queen	26 %		31 %			26 %		12	2 %	4 %	
Perfume: The Story of a Murderer	26 %			31 %			29 %			11 %	3 %
Lissi and the Wild Emperor	25 %			29 %			26 %		16 %	0	4 %
Flushed Away	24 %			43 %			21 %			12 %	5 1 <mark>9</mark>
Arthur and the Minimoys	23 %			30 %			32 %			12 %	2 %
Donkey Xote	<mark>20</mark> %		43 %				16 %		16 %		5 %
Mr Bean's Holiday	17 %		25 %			40 %			1	6 %	2 %
0 %	10 %	20 %	30 %	40 %	50 %	60 %	70 %	80 %		90 %	100
	Cinema		VHS or DVD		Free TV		Pay TV				

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Starting to research film

I look for information...

...when the films are released in theatres

... right before deciding to watch the films

...during the production-shooting stage of films

I don't actively look for information about films





Criteria to choose films





Online sources for film





Interest in marketing innovation

Being able to watch films on Video on Demand services from the day they are released in cinemas instead of having to wait several months

Having the opportunity to watch films in cinemas associated with a broader experience including special guests, a cocktail or a party

Being able to watch films on Video on Demand services before they are released in cinemas

Being able to reserve tickets for films I would like to see in a cinema and wait until enough tickets have been reserved to be able to play the film

Having the opportunity to go to the cinema without knowing in advance which film will be shown to me

Being able to participate in the financing of films by spending a few euros on film project I would like to support, before it starts shooting



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Interest in European initiatives



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international

Viewer profiles



• MOVIE ADDICTS (24%):

young tech savvy urban people (digital natives), watch and like all sorts of films

• **MOVIE SELECTIVES** (22%):

well educated working middle-aged adults, especially like European films

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• **HIT GRAZERS** (21%):

young women who will go for a film that "speaks" to them incl. European

• **MOVIE INDIFFERENTS** (16%):

hard to get them interested in films at all, watch some commercial films though



Discussion

Marketing strategies...



	Objective	Content	Distribution	Promotion	Price	
Movie addicts	heavy-users, ambassadors	diverse	online, easy, fast, cheap	engaging, online, social, buzzy	cost-efficient	
Movie selectives	heavy-users, loyal supporters	distinctive	theatre, DVD, PPV	informative, self- service, online, deep	club	
Blockbuster lovers	light-users, likers	commercial	multiplex, TV, online	mind-blowing, mainstream, online	affordable	
Hit grazers	medium-users, friends	accessible	online, TV	human, online, social, radio, TV	cheap	
Movie indifferents	light-users, discoverers	blockbuster	TV	mind-blowing, mainstream	free	





editorial

keep European film different and diverse, with a bit more European blockbusters





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distribution

get European films easily accessible at affordable prices on new platforms, turn older platforms into premium experience





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promotion

social networks for viral-early buzz, information websites for search and selection



Thank you!