

THE AUDIENCE SPEAKS

QRIOUSLY SURVEY REVEALS
FRAGMENTED GLOBAL MARKET
AND GROWTH OPPORTUNITIES

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METHODOLOGY

In a special report for *BOXOFFICE* magazine, research and consumer-insight firm Qriously carried out its largest ever international moviegoer-habits survey across the United States and eight major overseas markets: the U.K., France, Russia, Japan, India, Mexico, and Brazil. Qriously surveyed respondents in these nine countries from February 26 to March 9, 2016, interviewing a total of 13,500 respondents above the age of 13. Nearly 7,000 of them responded via their mobile devices using Qriously's programmatic sampling platform. Results were weighted to be represen-

KEY SURVEY HIGHLIGHTS

The growing number of home-entertainment options is the No. 1 threat for movie theaters, especially in Russia and Mexico.

Higher ticket price is driving down moviegoing frequency in Western countries. Discounts could drive attendance up (especially for younger audiences) but are still uncommon.

American, Mexican, and Brazilian moviegoers are the biggest consumers of food and drink.

The overwhelming majority of sessions are still standard, except in China and Russia where 3D and IMAX are very popular.

Almost half of moviegoers in the U.S. decide on their movie of choice on the day. Mexican, Brazilian, and Japanese moviegoers are especially prone to deciding at the theater.

U.S. theaters could drive additional foot traffic by offering more comfortable seating and food delivered to seats, while U.K. audiences responded favorably to last-minute seat discounts.

Overall, people think the movie experience has gotten slightly better over the last five years. Russians, Mexicans and Brazilians are the most positive.

tative of gender, age, and region in each country.

MEXICO AND FRANCE TOP MOVIEGOING FREQUENCY

More than half of Americans, French, and Mexicans have been to the movies at least once over the last six months. Women tend to go to the movies more frequently than men. Over the last six months, Chinese, Russian, Mexican, and Brazilian moviegoers are the ones who went the most frequently to the theaters.

QUALITY OF MOVIES REMAINS A CRITICAL FACTOR

"Better movies" is cited as one of the top reasons moviegoers have been more often to the movies over the past year, but lack of good movies is also a top reason to go less often. Movie quality seems to be a highly subjective matter depending on movie genre preferences. Taking a deeper look, it appears that action/adventure fans are the most likely to be relatively satisfied with the increasing movie quality over the last year, and thriller/suspense and animation/kids fans are the most likely to complain about a lack of good movies. From a demographic perspective, men tend to complain more about the lack of good movies, whereas women tend to complain about price.

Besides better movies, the main reason moviegoers went more often to the theater over the past year is if they have someone to go with. This stresses the impact of social context on moviegoing habits. Going to the movies is a social experience for many people. We can also see some interesting regional drivers: more discounts on tickets in the U.K., more 3D/IMAX movies in Japan, and more convenient locations in Mexico.

ACTION/ADVENTURE IS TOP GENRE

On average, action/adventure is the genre that is most enjoyed, followed by comedy. (Thriller/suspense is a distant third, along with romantic comedy and other genres).

Some countries show a preference for particular genres, relative to other countries:

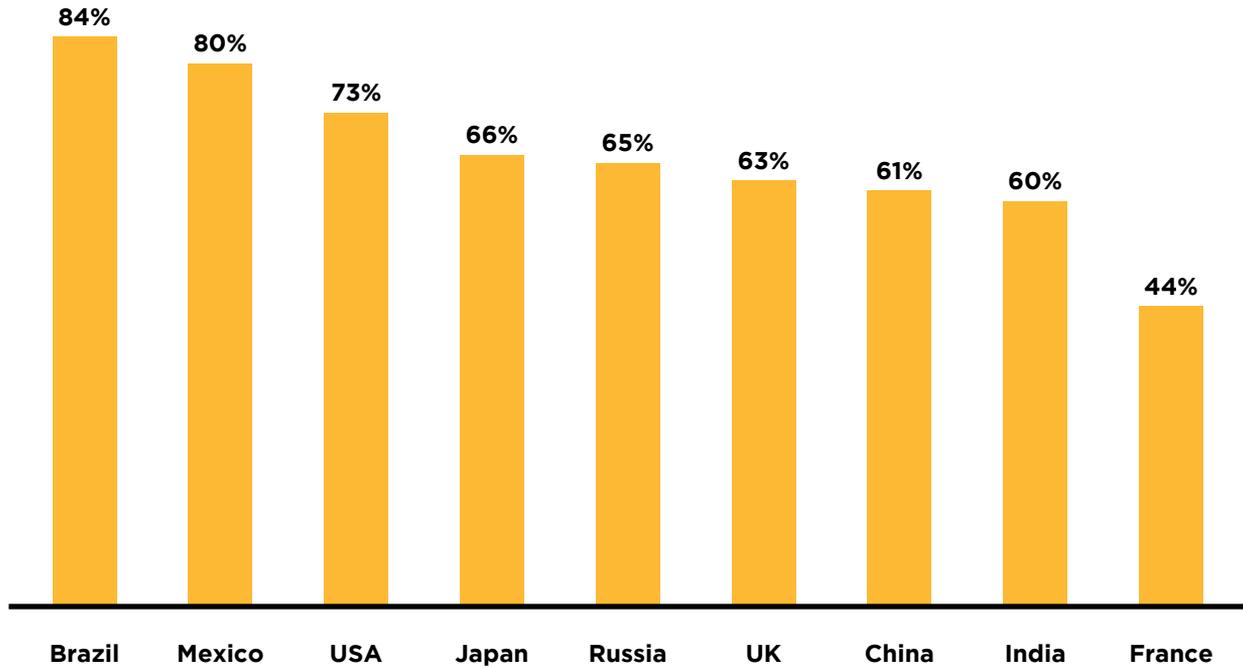
- U.S.: comedy, action/adventure, drama
- U.K.: comedy, drama, thriller/suspense
- Japan: drama, documentary
- China: romantic comedy
- India: romantic comedy, musical
- Mexico: action/adventure, horror, animation/kids
- Brazil: action/adventure, horror

MOVIEGOING IS PRIMARILY A SOCIAL ACTIVITY

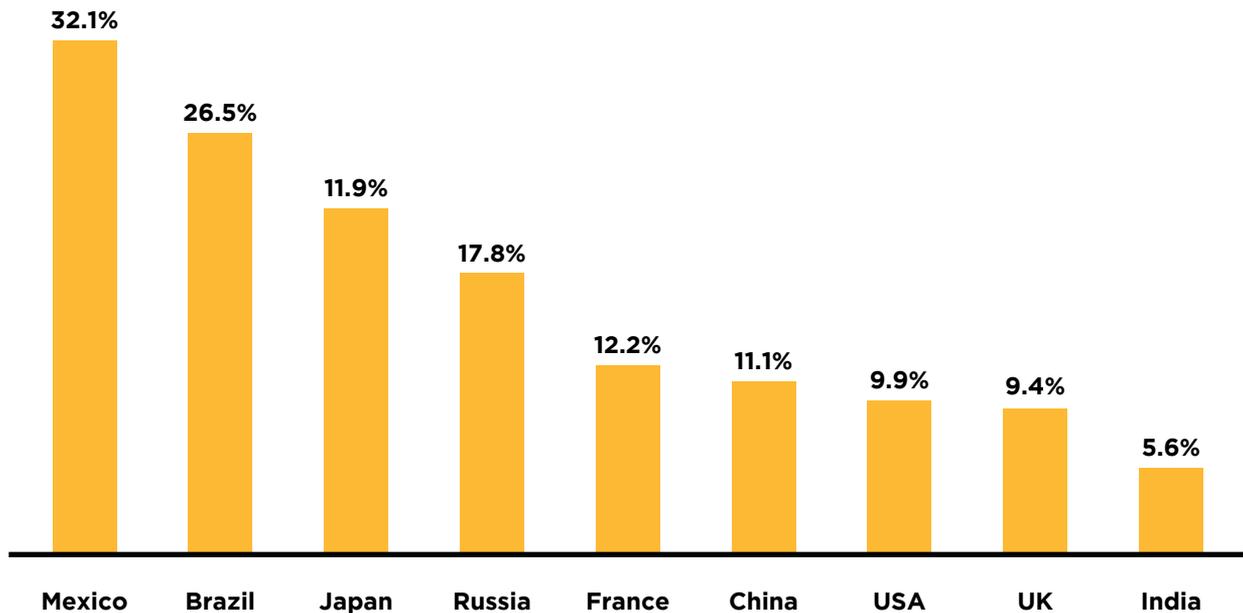
Going to the movies is a highly social activity. More than 90 percent of moviegoers were accompa-

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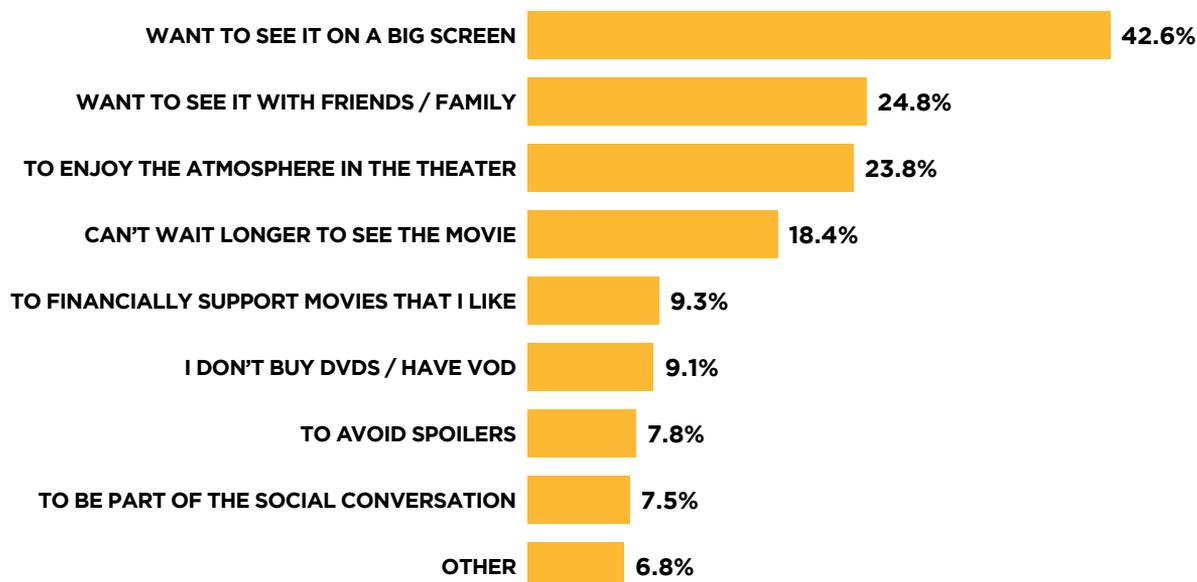
% MOVIEGOERS WHO BOUGHT FOOD / DRINK DURING LAST VISIT



% MOVIEGOERS DECIDED ON THE MOVIE ONCE AT THE THEATER (LAST VISIT)



TOP REASON FOR GOING TO THE MOVIES VS DVD/VOD



nied during their last visit to the theater. Two countries stand out: Japan has the highest percentage of solo moviegoers (15%) and India has the lowest (5%).

Moviegoers mostly go with their partner/spouse (especially in China, where nearly half of respondents had accompanied their partner/spouse during their last visit to the theater). Going to the movies with friends is also very common (especially in China and India). Large parties (4+) are more commonplace in India as they tend to go more often with friends, siblings, and co-workers.

On the other hand, France seems to have a very specific pattern for family visits (highest proportion of parents with their children, as well as a high proportion of sibling groups).

Overall, men tend to go more frequently by themselves or with friends. Women tend to go more often with their children.

TWO IN THREE MOVIEGOERS BUY CONCESSIONS AT THE THEATER

On average, during their last visit, two in three moviegoers bought some food and drink at the theater. Brazil, Mexico, and the U.S. are the top three countries, with the highest proportion of in-theater food and drink consumption. On the other hand, France has a strikingly low proportion with just 44 percent having bought food or drink during their last visit. Men are more likely to buy food or drink items. Customers 25 to 44 years old are the most likely to have bought food or drink items during their last visit at the theater, whereas moviegoers 45 and older are the least

likely to have purchased concession items.

As one would expect, popcorn and soft drinks top the list of most popular concessions bought at the movie theater. Additionally, there are very strong regional trends, and some foods tend to be particularly popular in specific countries:

- Popcorn: U.S., Brazil, Mexico
- Chocolate bar: U.K., Brazil
- Ice cream: U.K.
- Nachos/chips: Russia, Mexico
- Candy: U.S., U.K., France
- Hot food: U.K., India
- Soft drinks: U.S.
- Hot drinks: U.K., China, India
- Alcoholic drinks: U.K., Japan

Women tend to enjoy hot drinks at the theater more than men. Young people (<25) are the most likely to pick candy, whereas older people (45+) are the most likely to pick chocolate bars, hot food, hot drinks, and alcoholic drinks.

In terms of discounts, France, Japan, and China have the highest proportion of moviegoers who enjoyed a discount on their ticket price during their last visit (30–40%). Combo ticket plus food discounts are more frequent in Russia and China.

Less than 5 percent of moviegoers have an unlimit-

ed subscription. It's more common in China and Japan (8%) and less common in the U.S. (2%).

HALF OF LAST THEATER VISITS IN CHINA WERE 3D OR IMAX

When it comes to 3D/IMAX, China is by far the most advanced with 52 percent of last visits in 3D and 25 percent in IMAX. Russia and Brazil are also strong on 3D and India on IMAX. 3D is definitely not very popular in India and the U.S., and IMAX is especially unpopular in France and Brazil.

MANY MOVIEGOERS DECIDE ON MOVIES THE SAME DAY

The majority of moviegoers decided which movie to see either on the same day (47%) or three-plus days before (28%). The fact that almost half of moviegoers only decide on the movie at the last minute might explain why it's sometimes hard to predict the box office based on stated intentions one or two weeks ahead of the release.

Some countries show a specific decision pattern:

- Last-minute decision makers (at the theater): Mexico, Brazil, Japan
- Early decision makers (same day): India
- Early decision makers (before the day): U.K., Japan

THE REAL STRENGTH OF THEATERS OVER DVD/VOD IS THE SOCIAL EXPERIENCE

As we know, for each new movie, consumers face the hard choice of going to see it at the theater earlier or waiting to see it later on DVD/VOD. We wanted to figure out what motivates moviegoers to see movies in theaters, rather than choosing to wait.

The main driver is not so much the movie theater experience (big screen) but the social aspect of going to the movies (sharing). Moviegoers want to see it with friends and family and share it with a bigger crowd (atmosphere). The time factor is usually not a key reason, except for some in Japan and China, where roughly a quarter of moviegoers indicate that they don't like waiting longer to see a movie. Younger audiences are also significantly more time sensitive.

CHOOSING A THEATER IS ALL ABOUT PROXIMITY, SHOW TIMES, AND PRICE

Assuming a movie is available in several theaters, we wanted to better understand what made moviegoers pick a specific theater. We found that convenience is the main criterion (distance to theater and ease of parking), especially in the U.S., U.K., France, and Japan. Movie show times (23%) comes in second place and is particularly strong in France and Japan. Ticket price is next (20%).

The number of movies showing at a theater is an important factor in India, which makes sense as 60 percent decide on the movie on the same day. Enhanced seating options and variety of food and drink are also key factors in India.

A higher proportion of Chinese moviegoers (22%) tend to choose a theater based on their 3D or IMAX viewing capabilities. Onsite entertainment offerings are also taken into account in Russia and India. Brazilian moviegoers seem more sensitive to the price of food and drinks.

THEATERS CAN DRIVE ADDITIONAL FOOT TRAFFIC WITH NEW OFFERINGS

When asked what new offers could drive them to go more often to the theaters, respondents chose price-related offers first (57%) followed by better service (36%) and better comfort (32%).

Offer preferences were very specific to each market:

- Double-feature promotions are in high demand in Brazil, France, and Mexico but not at all in the U.K., India, or Japan.
- Bundled deals from nearby entertainment venues is appealing in Mexico and France.
- Unlimited monthly subscription would be a good driver in France but not in Japan or India.
- Last-minute cheap seats would be very popular in the U.K. and Russia but not in China or India.
- The ability to select a specific seat is appealing to Japanese moviegoers.
- Food delivered to seats gets strong interest in Mexico and the U.S.
- Homelike seating (recliners, sofas, etc.) is very popular in the U.S. and Japan.
- Greater variety of food and drink options appeals, particularly to Mexican moviegoers.

THE OVERALL THEATER EXPERIENCE HAS IMPROVED OVER THE LAST 5 YEARS

Overall, most moviegoers say that the theater experience has improved.

It's particularly true in less mature markets like Mexico and Brazil. In developed markets such as the U.S., U.K., or Japan, sentiment has also slightly improved.

Women are more likely to say their moviegoing experience has gotten significantly better over the last five years.

For any question about this survey or detailed results per country, please contact Qriously at: research@qriously.com. ■