

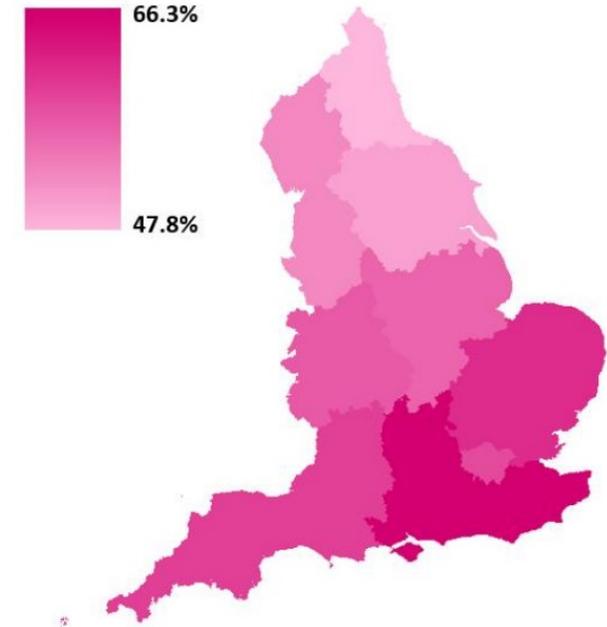
How can cinemas and streaming platforms co-exist?

An audience perspective...

Research background

'Beyond the Multiplex: Audiences for Specialised Film in English Regions' - Arts and Humanities Research Council funded three-year project (2017-2020)

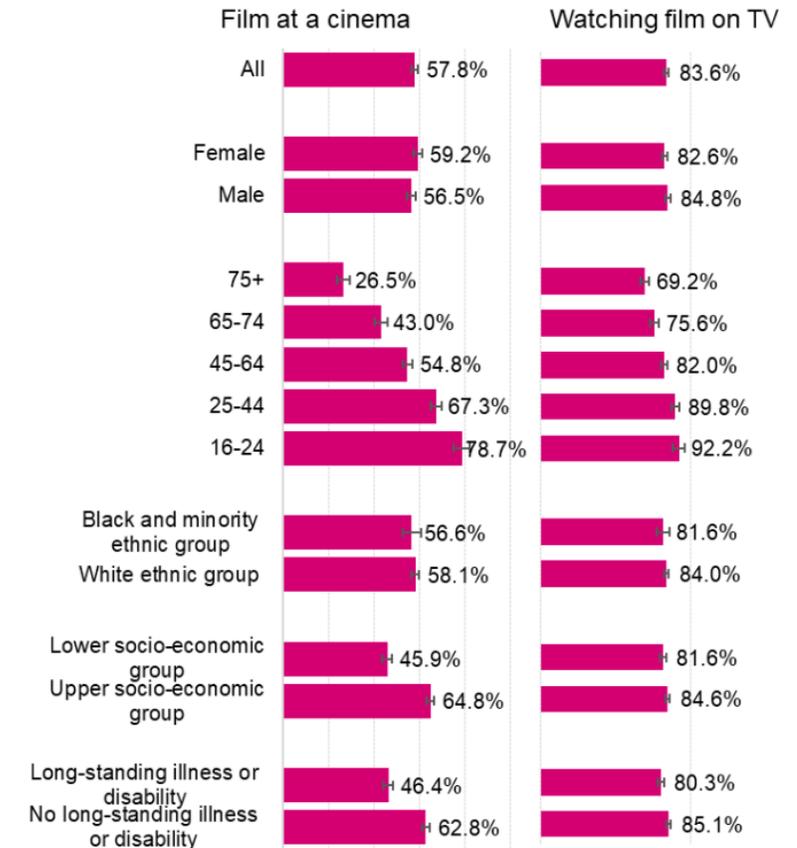
- **Aim:** To understand how to enable a wider range of audiences to participate in a more diverse film culture that embraces the wealth of films beyond the mainstream
- **Context:** Unequal provision of non-mainstream film and access to diverse film culture across the UK
- **Focus:** 4 x English regions - North East | North West | South West | Yorkshire and Humber
- **Methodology:** Policy analysis | 200 audience interviews | Focus groups | Large-scale survey (N=5,000)
- **Outputs:** Website | Open-access data | Data visualisation and Search tools | Articles | Book



Proportion of adults who watched a film at a cinema by region, 2016/17 (Source: DCMS (2017) *Taking Part focus on: Film*)

The picture from the UK: Film watching at home and at the cinema

- VoD viewing is changing very rapidly - 47% of UK homes (13.3 million, Q1 2019) subscribed to at least one of Netflix, Amazon, NOW TV or Disney Life. Netflix is the most popular VoD service, 40% of UK households have a Netflix subscription (11.5 million in Q1 2019), an increase of 26% in the last year.
- On average, subscribers to VoD platforms in the UK spend around a quarter (24%) of their total viewing time watching films. But almost half (49%) of UK adults say that nothing would encourage them to increase the amount of TV programmes or films they watch online.
- Broadcast television remains the largest platform for film consumption in the UK. There were 7,000 unique film titles across all channels in 2017, and the cumulative film audience on television was over 3.7 billion.
- In 2018 UK cinema admissions were 177 million, 3.7% greater than 2017, the highest total since 1970.



The proportion of adults who watched a film at a cinema or other venue and adults who watched TV who watched a film, by demographic group, 2016/17. Source: DCMS (2017) *Taking Part focus on: Film*



How do audiences configure their film watching across venues, screens and media in English regions?

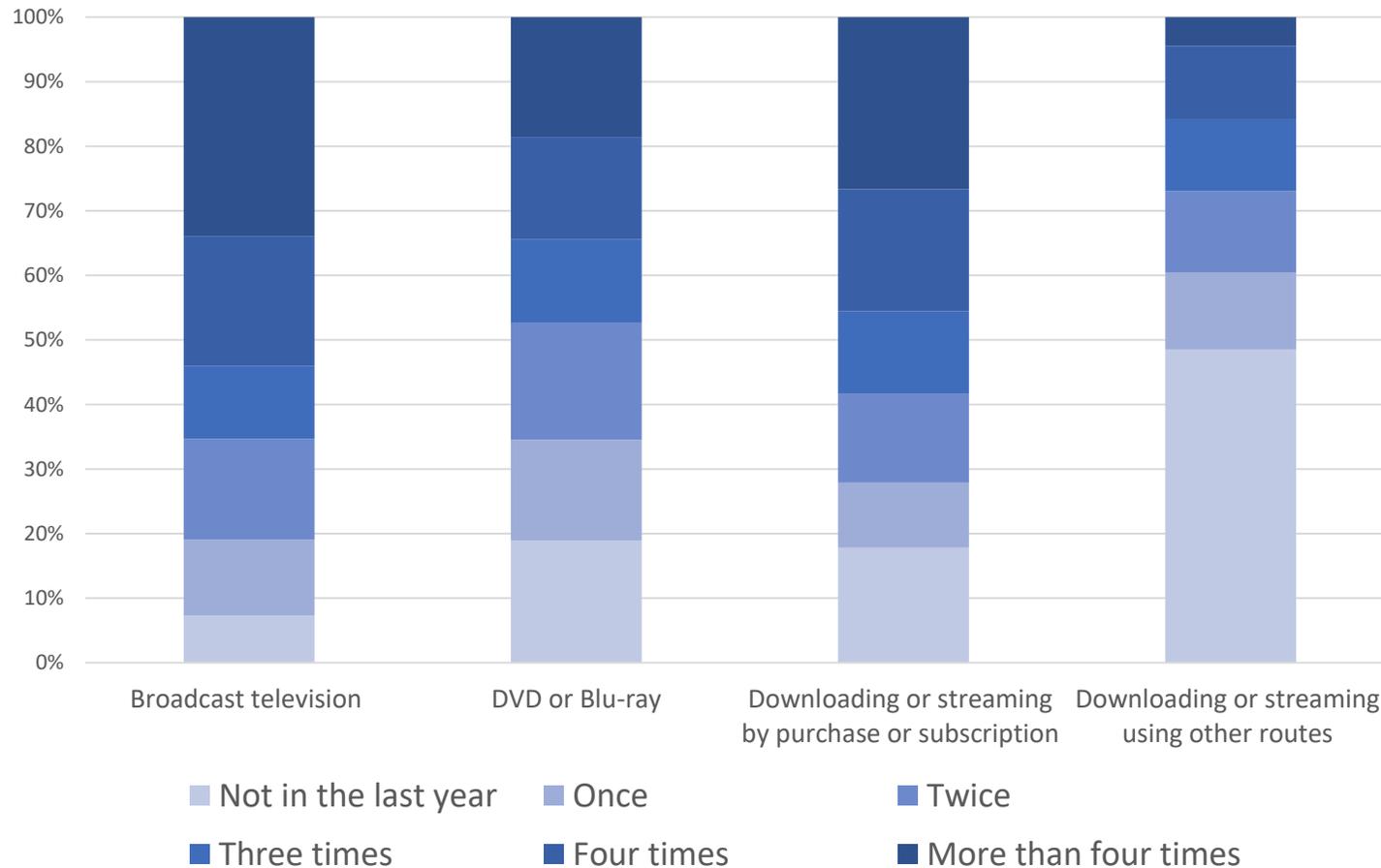
The percentage of people who watched at least one film over the previous 12 months via...

- 89% Broadcast television
- 66% Large commercial multiplex cinema chains (Odeon,Vue, Cineworld etc)
- 63% DVD or Blu-ray discs
- 62% Downloading or streaming by purchase or subscription (Netflix,Amazon Prime etc)
- 22% Downloading or streaming using other routes (torrent,VPN or other websites)
- 24% Small commercial cinema chains (Curzon, Everyman, Empire etc)
- 22% Mobile watching (on a plane or train etc)
- **16% Independent or arthouse cinemas**
- 11% Community events or film clubs

How do independent cinema audiences configure their film watching?



During the last year, how often have you watched films in the following ways?



Question: Can you describe all the different ways that you watch films today?

Yeah... we will go to the cinema if there's something that's current and we can go. We don't go that often, certainly, you know, once a month at most. We go to HOME in Manchester which will, probably, be our preferred choice of cinema... we, probably, prefer to go there even if a film is also on at one of the mainstream multiplexes. So firstly, we go to the cinema. Secondly, I do still buy DVDs, so...I'll look something up and buy it. Thirdly, I will watch films I can download, so I use iTunes... I won't browse on iTunes... if it's available to rent, then I'll rent it and watch it... And then, we also... to a more limited extent, we will occasionally watch a film on Netflix but services like that, it's all really bland stuff.

James | 55-64 | Charity Worker | North West



How do cinemas and streaming platforms co-exist for audiences? VoD provides convenience, choice and affordability but...

Tim | 45-54 | Magazine Editor | South West

The streaming thing is great because you've got lots of choice and options, but I almost feel overwhelmed by it, and I do not get the same sensation ever, by clicking a button and saying "play now." ...I just don't get the same sense of value. I still enjoy the film, but I guess that's the difference for me. It's that I see the film as wider than just what I'm looking at, I'm seeing everything. It's like the cinema, I'm seeing the cinema around, I'm seeing the community, I'm seeing the value of the popcorn thing, you know. It's like all that stuff around.

Rebecca | 55-64 | Landscape Architect | Yorkshire

Watching in my own home is nice 'cause I got the fire, and I don't have to leave my dog, and I don't have to feel guilty (Laughs). But, you know, the big screen is always, always better. And...so going to the cinema is very nice.

Anna | 18-24 | Paralegal | Yorkshire

Question: do you think there are positives to watching at home instead?

Anna: [it's] cheaper... more casual.... So lot of the times, instead of going to the cinema and paying five quid, we'd just watch Netflix...but cinema is more fun to go to.

Jon | 45-54 | Lecturer | Yorkshire

Cinema is for me, it's a different experience. It's not like being at home. At home, you have your own comfort... So, you know, you can go to the bathroom, you can pause it, you can go and get snacks...but I still prefer the cinema because the cinema is a big screen, it's dark, it's comfortable.

Julie | 35-44 | Teacher | Yorkshire

Yeah, it's convenient if you were at home. I don't feel that I necessarily, put as much thought into what I watch at home.



In light of the changing ecology of film watching, in what ways do audiences value the cinema?

- Spaces for enjoyment, entertainment and pleasure
- Spaces for encountering films that can excite, challenge, and inspire
- Spaces for social and community development
- Spaces to connect with other people
- Spaces that enrich everyday cultural lives
- Spaces for resistance, social action and political expression
- Spaces that enhance wellbeing, emotion and mood
- Spaces to educate
- Spaces to get closer to film culture
- Spaces to develop and share personal interests and taste

Question: how do you contrast your cinema viewing with your home viewing?

I much prefer the cinema because I feel like I can focus there...it's a big-deal and I feel that childish excitement again...I feel like when I'm watching the film on Netflix it just doesn't feel like the same... and I also find it difficult to focus because there's always, you know, I try to turn my phone off... Sometimes, I watch films alone, but I don't like it much, I'd rather watch with someone. So things like streaming services and stuff kind of encourage you to do a lot of watching alone. And I do that sometimes but not often...I like the collective experience...sharing something.

Kasia | 35-44 | Translator | North West



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Thank you

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