

Italians at the cinema

Watching movies inside and outside the cinemas

Overview of findings



Direzione Generale
CINEMA e
AUDIOVISIVO



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Overview of findings...

1. A large part of Italian population suffers from a shortage of free time . The **consumption of audiovisual products** (in a broad sense) is a preferred activity.
2. More than two thirds of Italians **regularly watch films**. Series are reaching an audience of similar size, but with different demographic characteristics.
3. The **preferred film genres** are comedy in the first place, followed by humour, action adventure and detective/noir. These are largely genres of films that Italians tend to prefer to watch at home via streaming.
4. The verdict on **Italian and Hollywood productions** favours the latter, in particular because they are considered more spectacular, exciting, innovative and a must-see at the cinema. Teens verdict is even more drastic. Italian cinema is experienced more as a cultural asset.
5. Less than 4 in 10 Italians went to the cinema **in 2022**, compared to well over 6 in 10 in 2019. More than 30% of Italians have reduced or discontinued their cinema-going.
6. The **reasons given for the reduction in cinema-going** are primarily linked to the fear of contagion, followed, conversely, by intolerance of health prophylaxis. But there are also those who have lost the habit, have become lazy, cannot afford it or claim that no interesting films have come out.

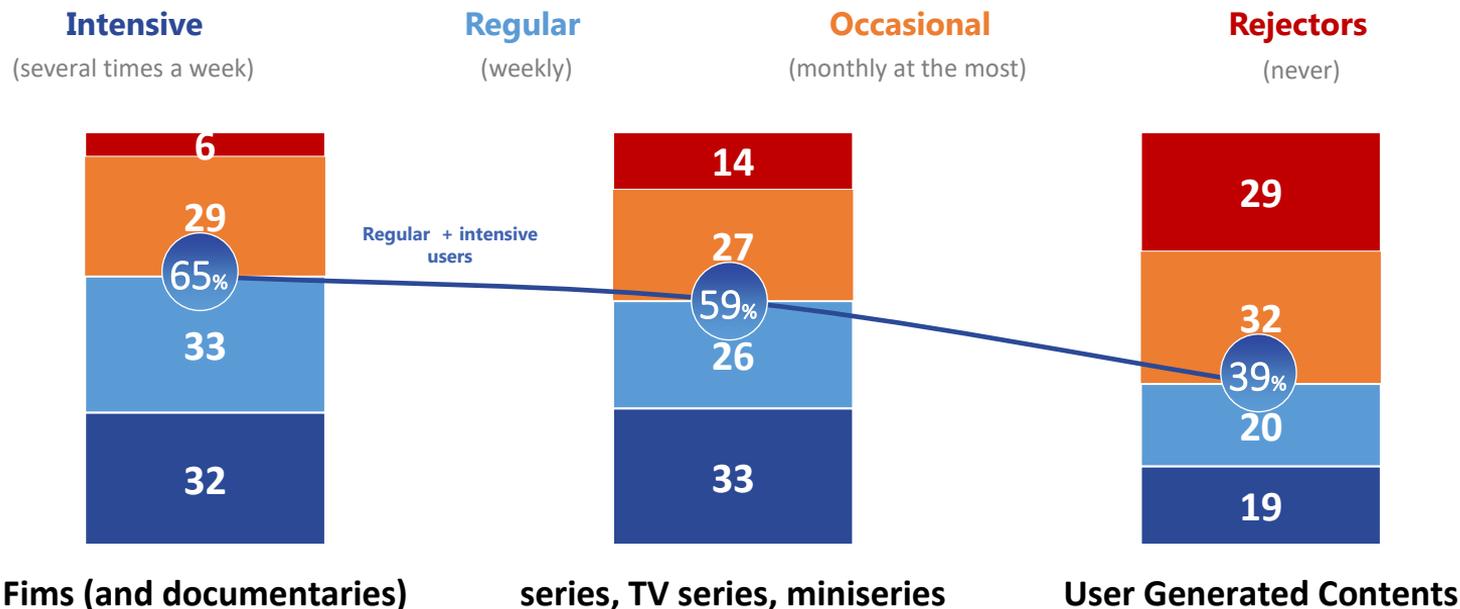
Overview of findings ...

7. However, **considering the mood of cinema-going** for the autumn, in a context of normality, cinema audiences could potentially return to pre-Covid levels.
8. The main **conditions** that could favour a massive return to the movie theatres are: a pandemically 'normal' autumn and a ticket price around EUR 8 for first-run movies.
9. There is no clear preference between **large commercial multiplex cinemas and independent cinemas**, but the two types appeal to significantly different targets.
10. The main **demands of customers** to return to cinemas relate in particular to a more attractive film offer, health safety, as well as more comfort and technological innovation.
11. A range of film-related gadgets, ticket competitions, events and festivals warm up the youth audience to a greater extent, mundane activities (aperitifs, socialising, etc.) attract more specific niches, while the elderly prefer a theatre where films are simply shown, **without any additional activities or services**.
12. A 3-4 month **window of exclusivity** for cinemas before the online release would potentially impact 13% of citizens, while 47% would always wait for the streaming release for home viewing.

Films and TV series are the most viewed audiovisual products

One in 3 respondents declare themselves an intensive consumer of this type of content

Let's talk about audiovisual content. Thinking about 2022, how often have you watched...



Italian vs. Hollywood productions: the elements for evaluation

● ITALY

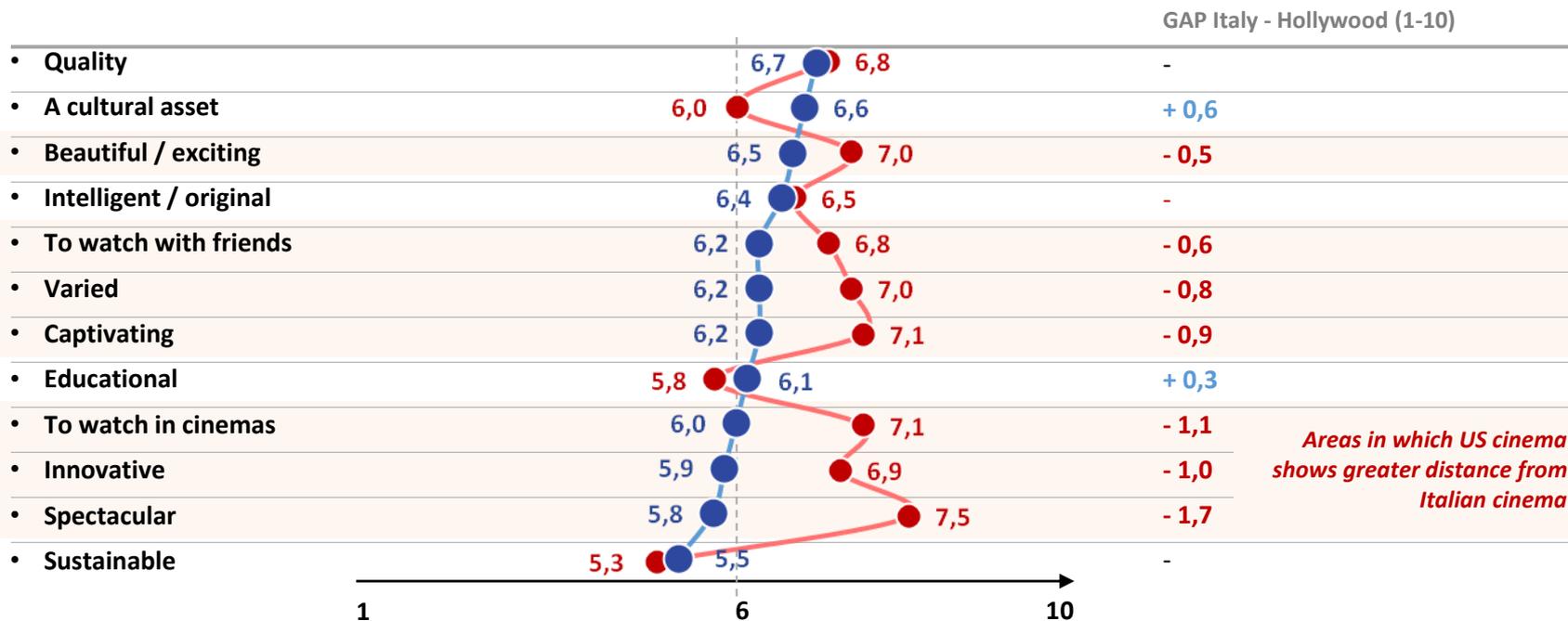
● USA

American films dominate the ratings: spectacular, suitable for theatrical viewing and innovative.

Italian films experienced most as cultural assets with educational value

In your opinion, how much Italian/Hollywood cinema is...

Please now rate each characteristic from 1 to 10 (where 1 = not at all and 10 = very much).



Preferred genres and associated propensity for in-theatre watching

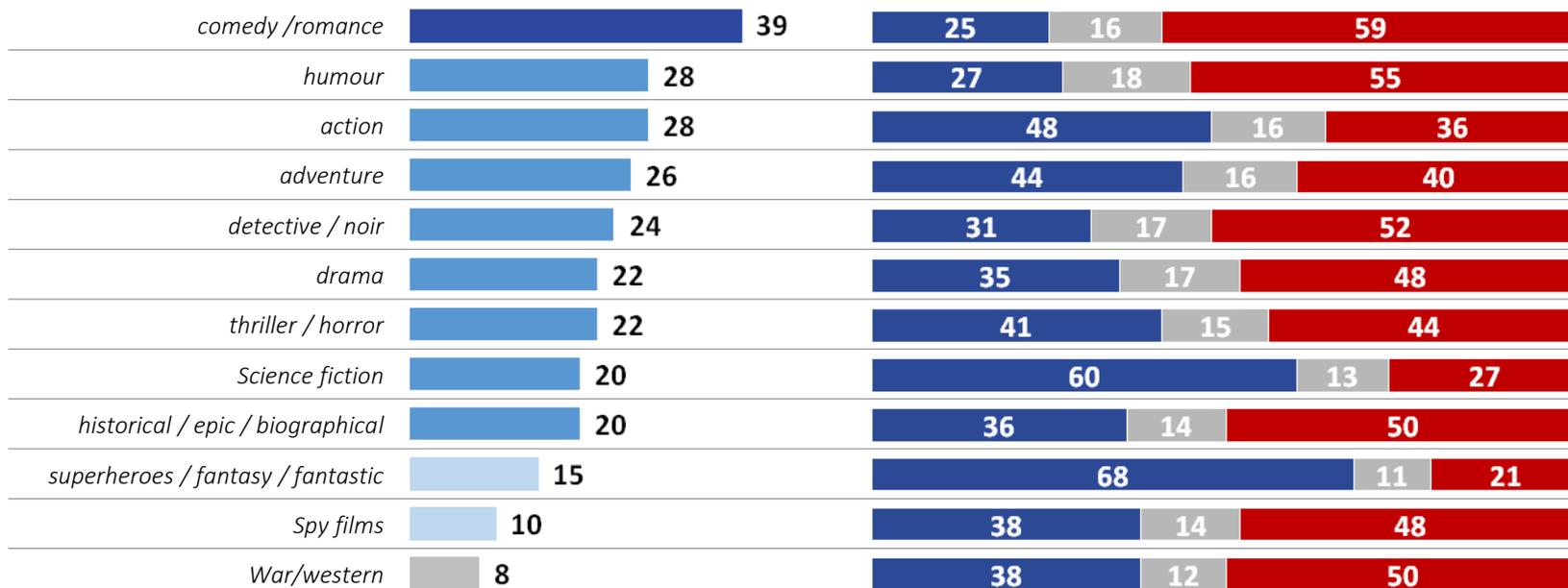
The most preferred genres are considered more suitable for home viewing, with the exception of action and adventure

Which are your preferred film genres?

(3 possible answers, respondents who watch films n = 11,351)

A film of your favourite genre is about to be released. Where would you prefer to watch it for the first time?

In a cinema **I do not know** **At home**



Citizens' self-declarations on cinema going in 2022 vs. 2019

With the pandemic, more than a third of viewers lost: regular viewers almost halved and occasional viewers reduced by a third

CINEMA GOING IN 2022

Regular

weekly or more often	1
several times a month	2

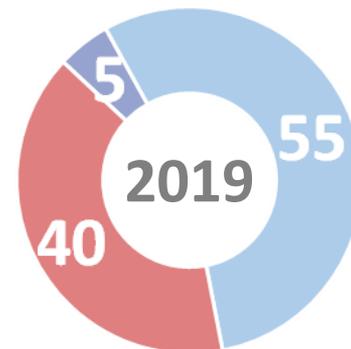
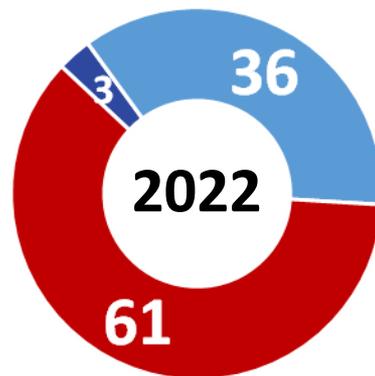
Occasional

approximately once a month	7
sometimes	29

Absent

never	61
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In 2022 **-35%** cinema-goers than in 2019
(from 29 million to less than 19 million people aged 14 and over)



- ✓ Regular users almost halved
- ✓ More than a third of **occasional** users
- ✓ Share of **absent** users in total population rises by 53%

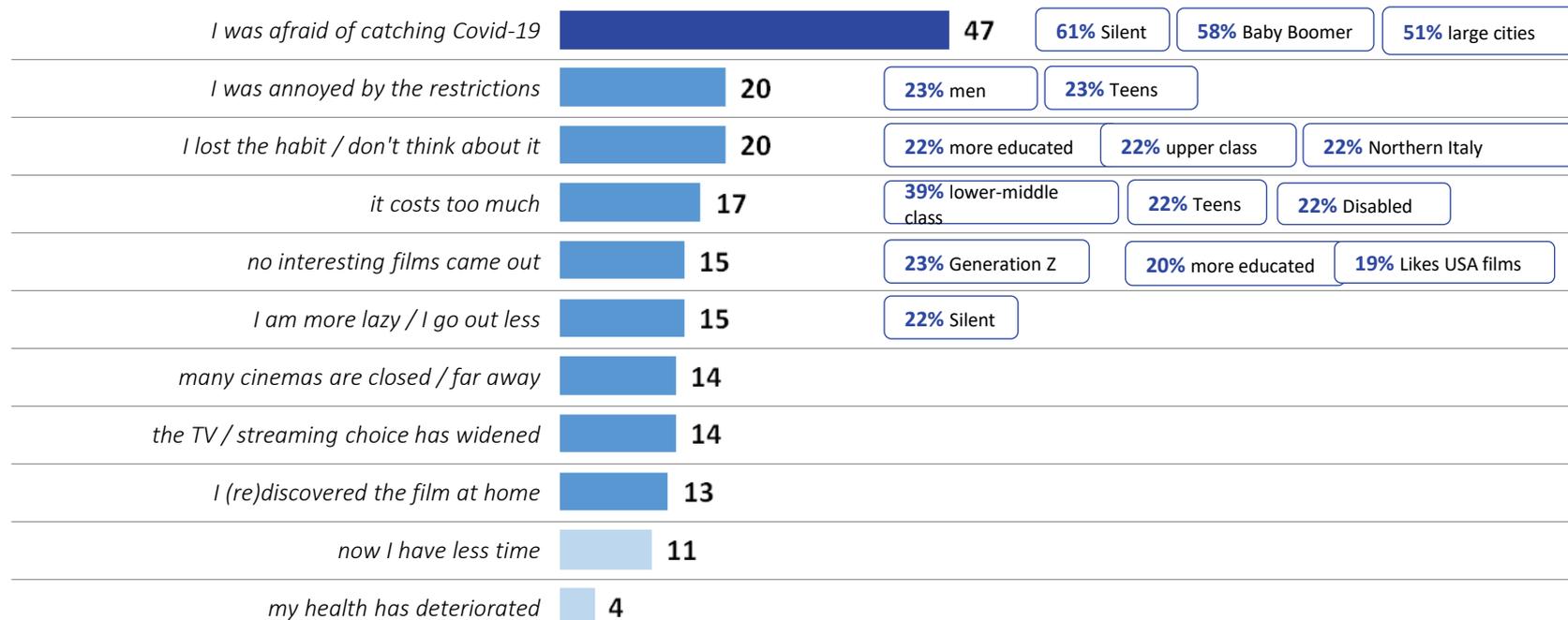
Who has decreased or stopped going: reasons for avoiding cinemas

The first cause is the fear of contagion, primarily among the elderly. This is followed by annoyance about restrictions, more typical of young people, and the feeling of having lost the habit of going to the cinema.

Only after ticket price but with greater impact on the most fragile categories

Why did you go to the cinema more rarely this year than before the pandemic?

/ did you stop going to the cinema? (3 possible answers, respondents who decreased or stopped going to the cinema between 2020 and 2022. n = 3.722)



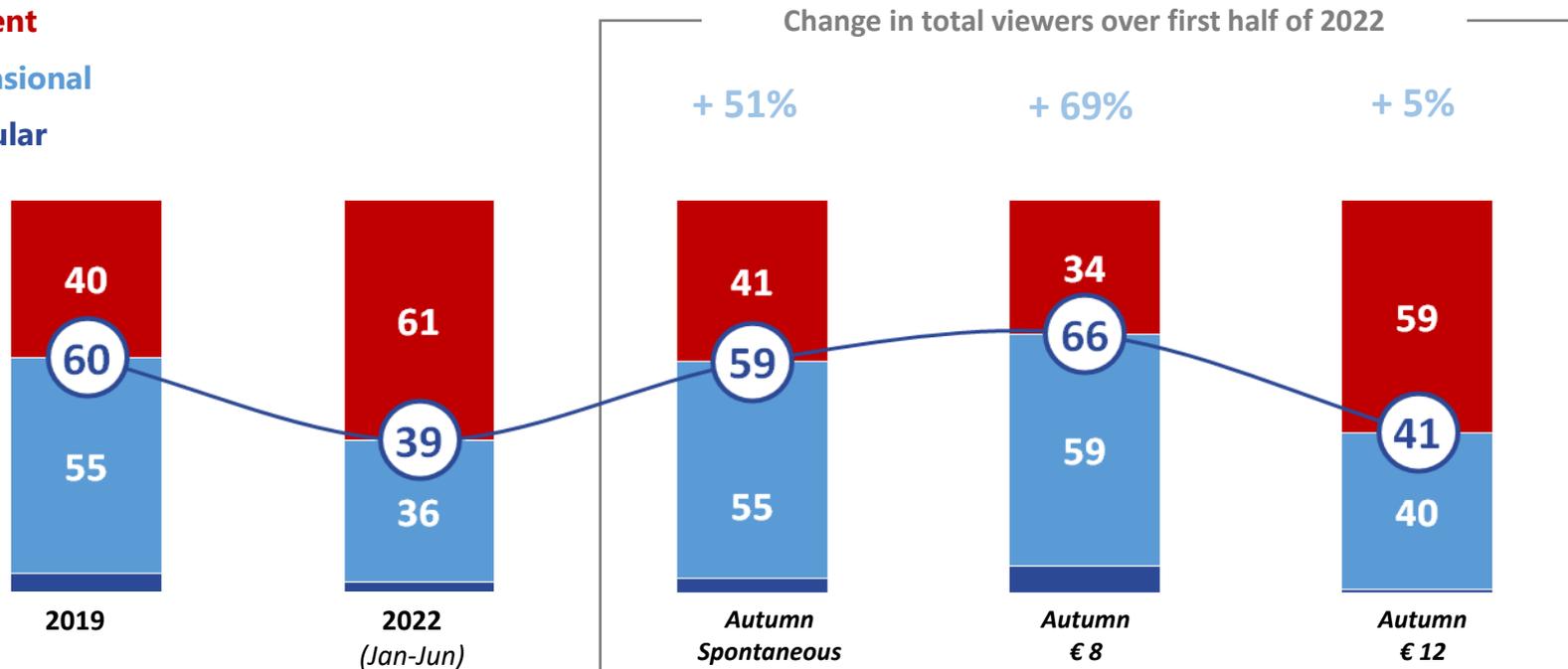
Outlook of viewers for autumn 2022 and the price effect

Potential recovery of +51% over the first semester, up to +69% by keeping the ticket price within €8.
Potentially endangered recovery if ticket price raised to €12

Absent

Occasional

Regular

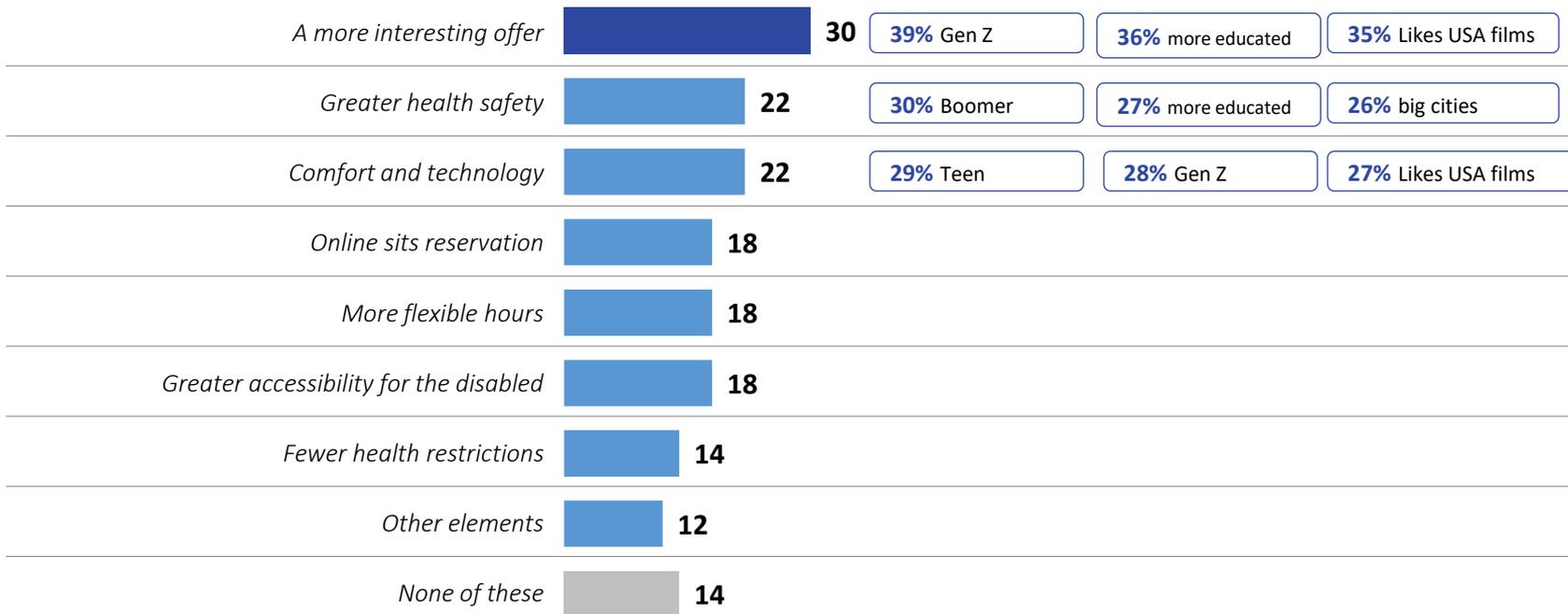


What public wants to come back? Above all, better movies

Greater health safety (among the elderly) , comfort and technology (among young people)

And, beyond the price, what could make you go to the cinema more often / go back to cinema in the future?

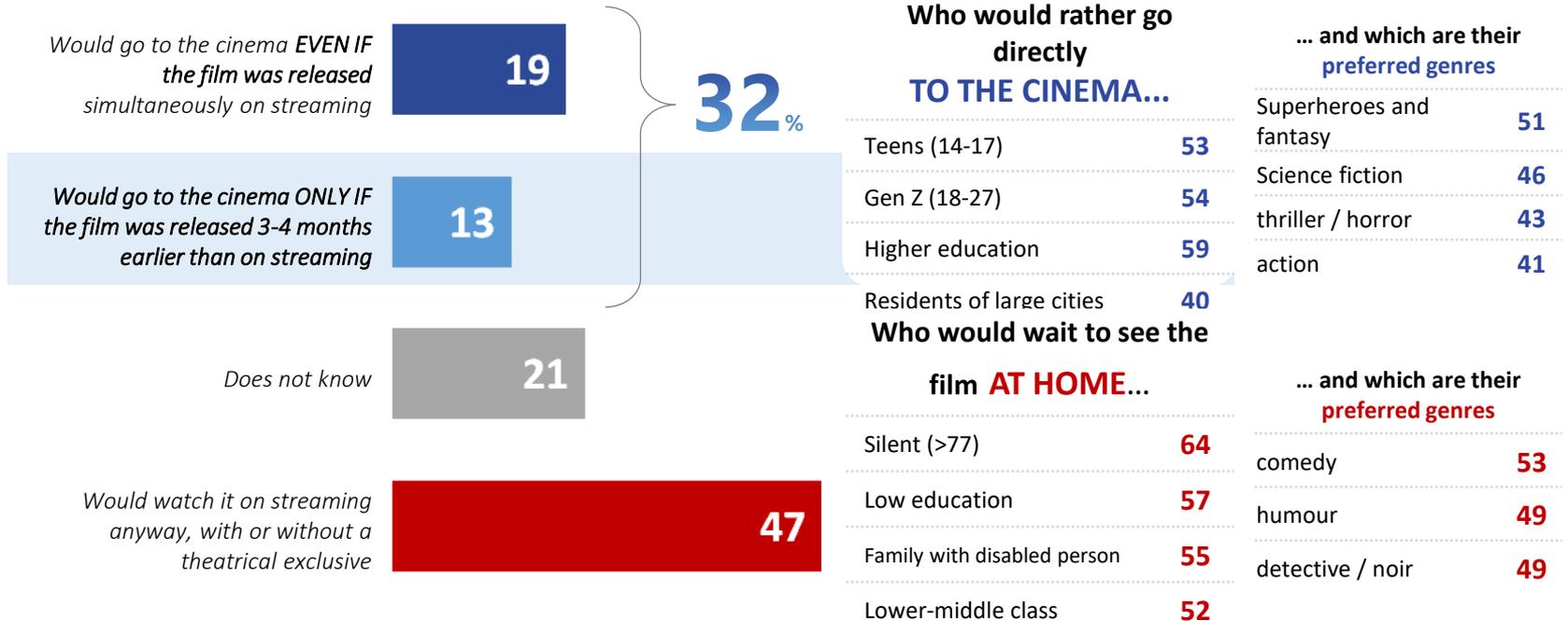
(3 possible answers, respondents who decreased or stopped going to the cinema between 2020 and 2022. n = 3.722)



The window of exclusivity for cinemas: 13% would only go to cinemas if it was implemented

47% willing to wait for home viewing, while 19% would go to the cinema even if the film was released simultaneously on streaming

If a new film you are very interested in was released in cinemas and only 3-4 months later was made available through streaming platforms, what would you do? / And if the same film was released at the same time in both cinemas and streaming, what would you do?



Research Methodology

The survey was carried out by SWG between 1 and 25 July 2022 by means of a structured questionnaire administered with a Cawi - Cati mixed survey technique on a sample of 12,008 individuals representative of the Italian population aged 14 and over.

- **SAMPLING METHOD:** stratified by gender, age, macro-area, population size of municipality of residence and educational qualification
- **REFERENCE UNIVERSE:** 52.079.341 individuals
- **SAMPLE :** 12.008 individuals (of which 30% were interviewed over the phone)
- **ABSOLUTE STATISTICAL ERROR:** max. 0,89% on mean data at 95% confidence interval

Giulio Vidotto Fonda
Research Director
giulio.vifo@swg.it

Camilla Giudice
Researcher
camilla.giudice@swg.it

Values, behaviours, preferences, consumption and political choices. Reading and anticipate them is our mission



- **RELIABILITY**, 40 years of experience in market and managerial competencies
- **PEOPLE**, professional ethics and methodological rigour
- **INNOVATION**, of tools, processes and contents
- **CRAFTMANSHIP**, customised offer and focus on interpretation
- **DATA**, information collected from multiple sources
- **ALGORITHMS**, reliable and scalable solutions

TRIESTE

Via San Giorgio 1 - 34123
Tel. +39 040 362525
Fax +39 040 635050

MILANO

Via G. Bugatti 5 - 20144
Tel. +39 02 43911320
Fax +39 040 635050

ROMA

Piazza di Pietra 44 – 00186
Tel. +39 06 42112
Fax +39 06 86206754