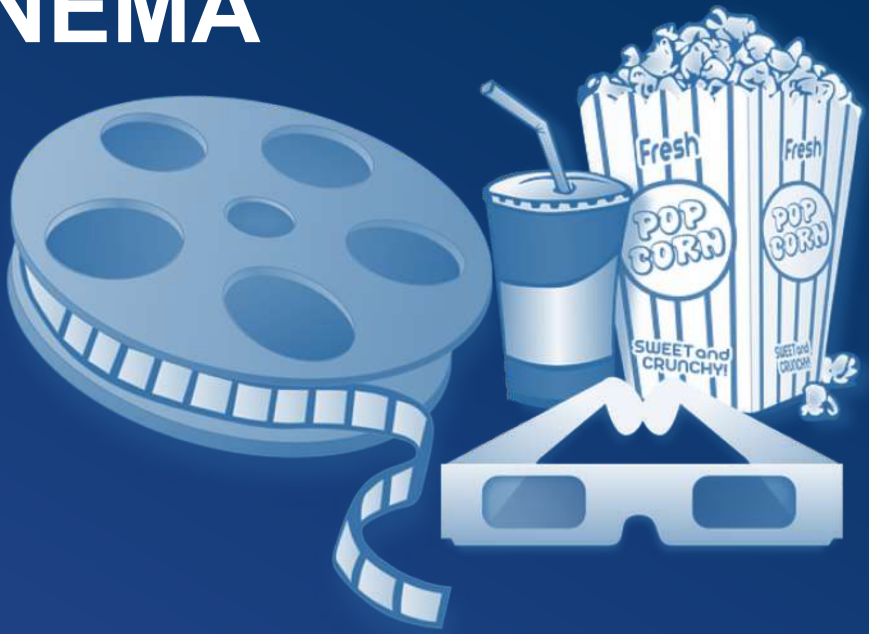
MiC Direzione Generale CINEMA e AUDIOVISIVO

SWG

ITALIANS AT THE CINEMA

Overview of findings



1st september 2023

Summary of the evidence…

1. *Second only to outdoor activities, watching **audiovisual content** (in a broad sense) is confirmed as the **preferred activity**, especially among the under-30s. Audiovisual consumption is cross-cutting and regular and intensive for most of the sample.*

2. *More than two thirds of Italians **regularly watch films**, which remain the **preferred content**. This is followed by TV series, which maintain their second place among the most viewed contents.*

3. *In the first months of 2023, one out of two Italians said they **went to the cinema at least once**, a figure that is **on the rise** compared to the first half of 2022. The percentage of Italians who have **reduced** or **stopped** going to the cinema compared to the pre-pandemic period **has** also **decreased** and now accounts for around 30% of respondents.*

4. ***Cinema-goers** mainly include the **very young**, **parents** of children under 10 and **regular gamers**. Among the **rejectors** are, on the other hand, the **elderly** as well as the **less affluent** and **educated** classes. .*

5. ***Fear of contagion** has less and **less influence** among the reasons why people do not go to the cinema. Instead, the barriers remain mainly related to the general **loss of habit**, the **poor quality of the offer** and the **ticket prices**, which are considered too high.*

6. *The **desire to return** to the cinema next **autumn** is very **marked**, certainly higher than the forecasts for the summer.*

Tutti i diritti riservati

Summary of the evidence …

7. *Cinema-goers are mainly divided into four macro-categories: the **cinephiles**, the **sensationalists**, the **selective** and the **socialists** - each one with a **different approach** to cinema-going.*

8. *The **trailer** remains the main **calling card** of films, a key element when choosing the film to see. To a lesser extent, the **film programme** is also consulted, as well as **recommendations** from **relatives** and **friends**.*

9. *Initiatives that could intrigue and stimulate the viewing of films include **open air screenings**, **cult favourites** as well as **thematic weeks**.*

10. *The practical characteristics have the deepest influence in the choice of the cinema where to go, such as the **distance from home**, the **comfort of the seats** and the **level of cleanliness**. The majority of respondents, seem to have a **specific favourite cinema**.*

11. *The majority of the sample does **not know** the terms of the **exclusive distribution period for cinemas**, but – in any case – it is considered a **useful** and **necessary measure**. In any case, the exclusive distribution period would potentially impact the 10% of Italians, while the 39% would still wait for a home viewing.*

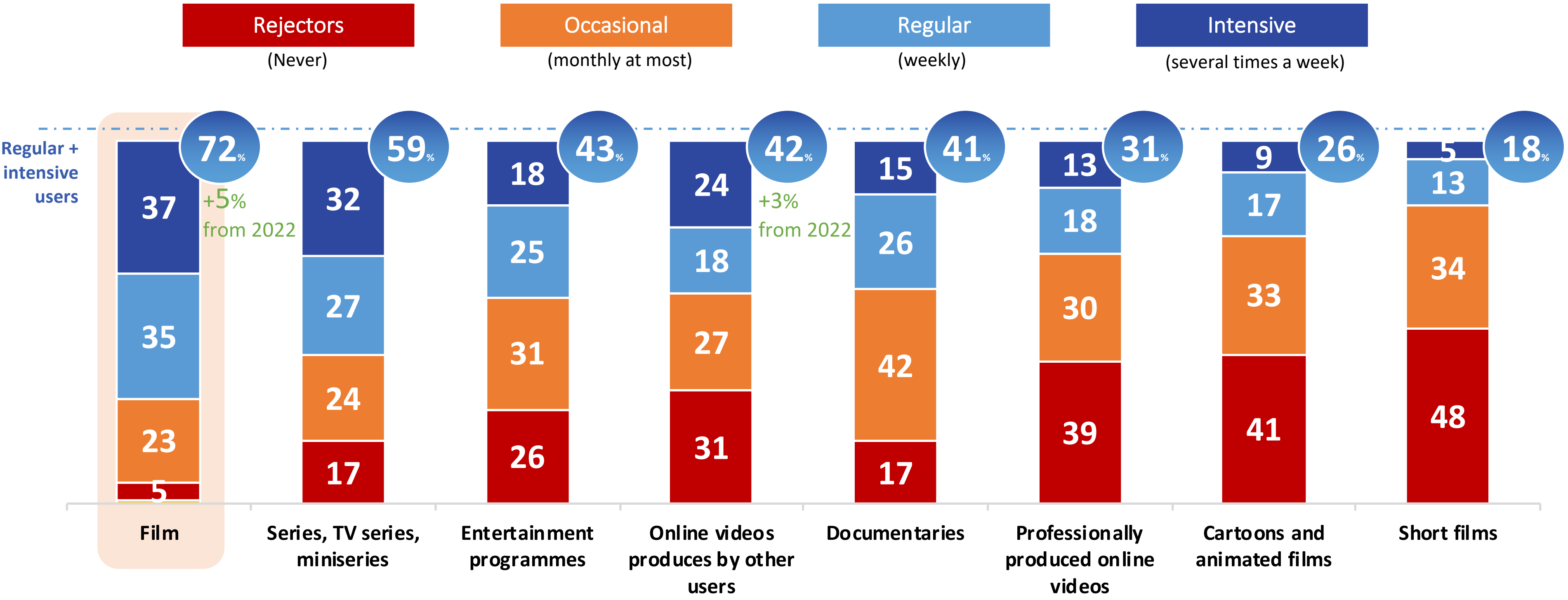
12. *Italians show no particular interest in **ancillary services**, for which they do not seem willing to pay more. Instead, the possibility of **half-price tickets** seems to have a **significant impact**.*

Tutti i diritti riservati

The favourite audiovisuals contents: films and series in the lead

The view of films has increased respect to last year, as well as the User Generated Contents

D8. Thinking about the first months of 2023, how often have you watched....



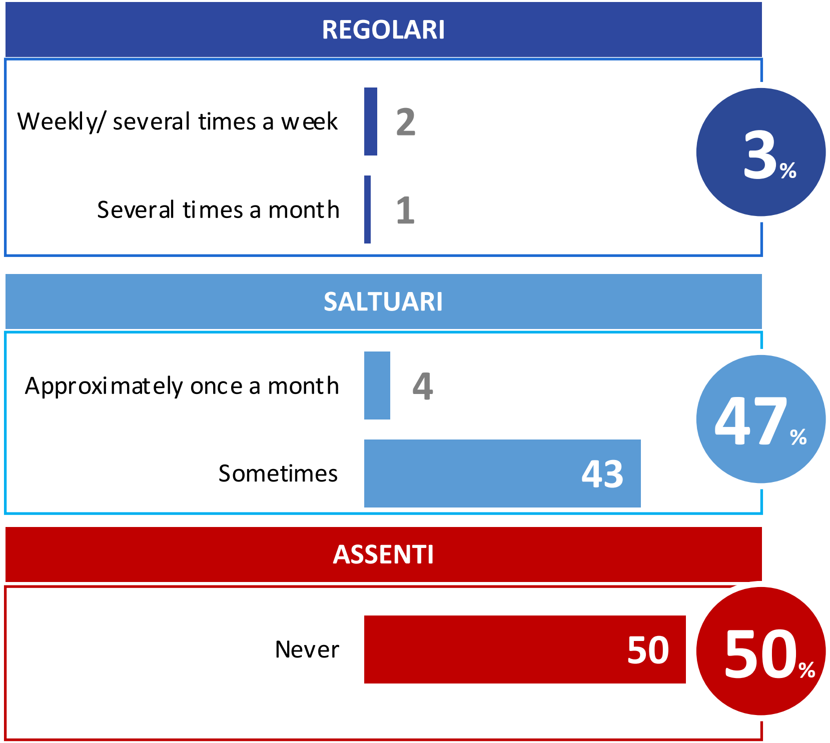
Values given in %. Base: total sample = 12.175

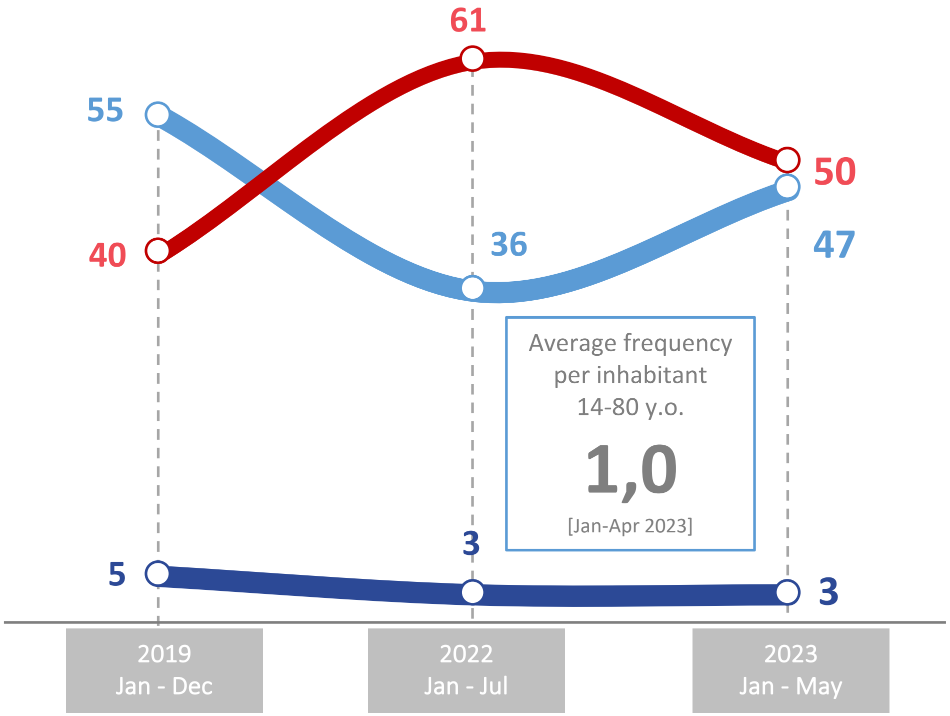
Tutti i diritti riservati

Self-declaration about the cinema attendance in early 2023

Half of Italians declared that they went to the cinema in the first months of2023.
Significant increase in cinema-goers compared to the first half of 2022, but still far from the pre-pandemic levels

CINEMA ATTENDANCE JANUARY - APRIL 2023





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Values given in %. Base: 12.175

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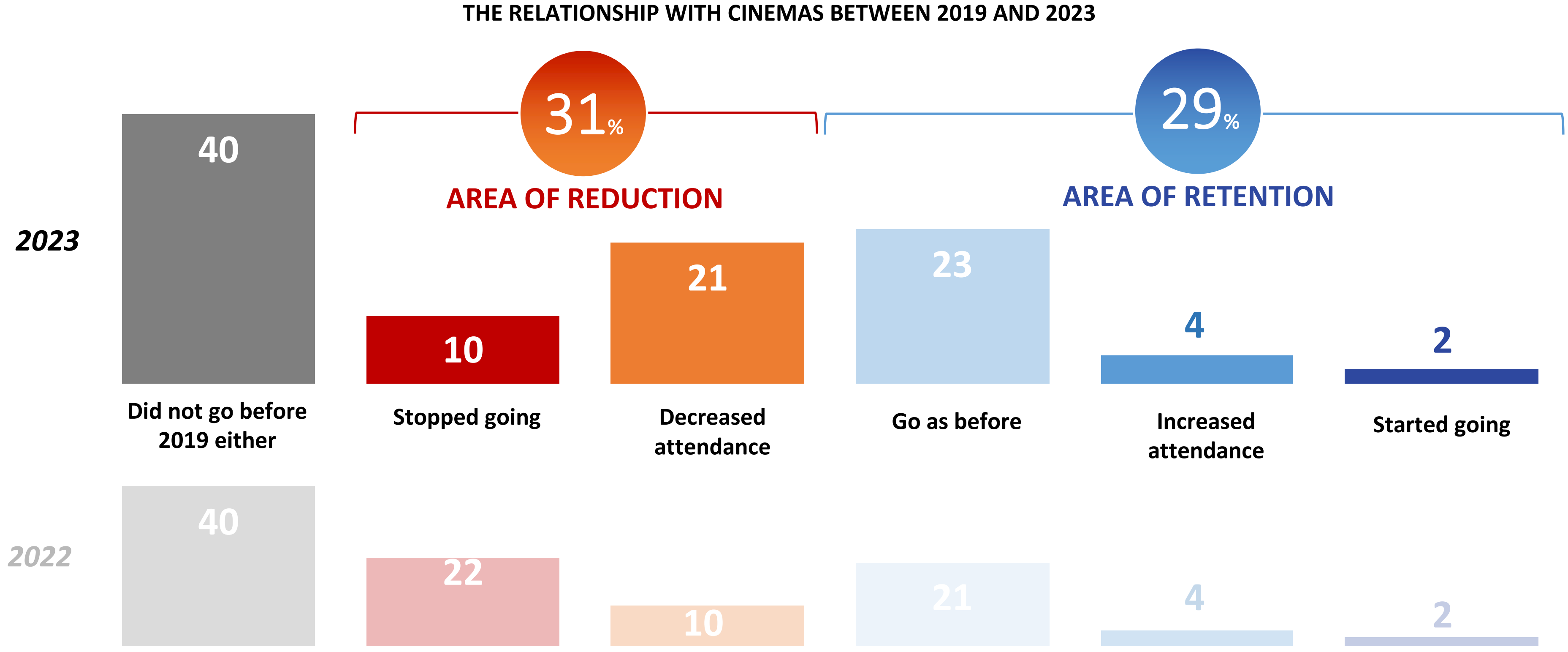
Tutti i diritti riservati

2019-2023: pre and post pandemic cinema-going trends

The 40% still avoids cinema, but the share of subjects who stopped going in the pandemic is reduced to 10% (vs 22% in 2022). However, one fifth of the sample goes to the cinema less than before



Values given in %. Base: total sample 12.175

Tutti i diritti riservati

The reasons for avoiding cinemas

The fear of contagion falls. Still strong the feeling of having lost the habit of going to the cinema.

D13. 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)

	%	Δ from 2022	Attendance reduced	Attendance stopped
I lost the habit / don't think about it	28	+ 8	26	**30**
I was afraid of contracting Covid-19	22	- 25	20	23
No interesting film came out	20	+ 5	**23**	18
I have less spending power	20	+ 3	**22**	18
The TV/ streaming choice has widened	19	+ 5	21	18
I (re)discovered the film at home	17	+ 4	18	16
I have less time now	17	+ 6	17	17
I am lazier/ I go out less	15	=	16	15
I was annoyed by restrictions	12	- 8	13	11
Many cinemas are closed/ distant	9	+ 5	11	8
My health has deteriorated	5	=	5	6

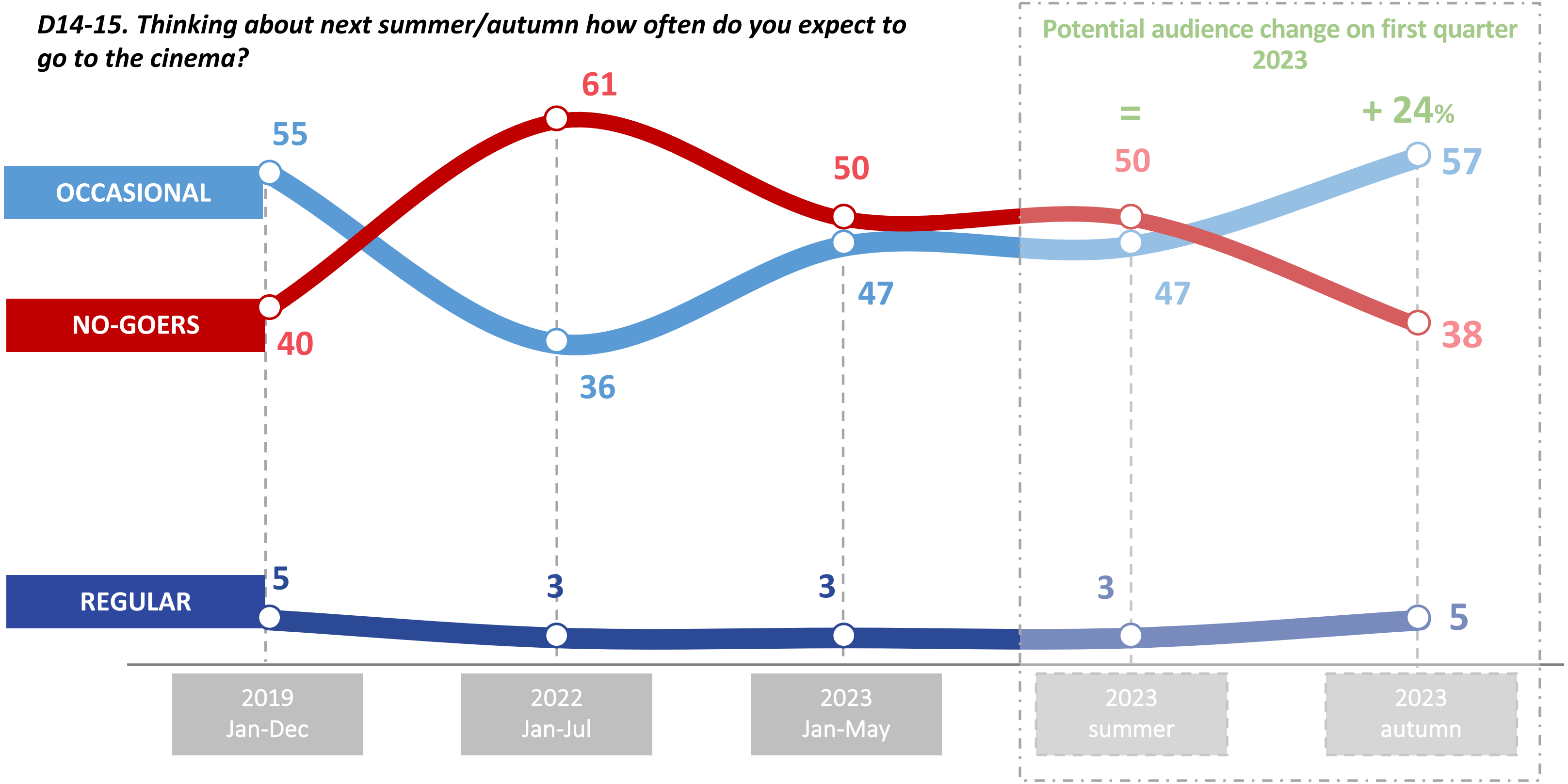
Values given in %. Base = 3.774

Tutti i diritti riservati

A forecast of the spectators in summer and autumn 2023

The desire for summer cinema involves half of the sample,
while autumn potentially hints at a return to the pre-pandemic situation

D14-15. Thinking about next summer/autumn how often do you expect to go to the cinema?



Values given in %. Base: total sample 12.175

Tutti i diritti riservati

The choice of the film: the trailer remains the central element

4 out of 10 viewers watch the trailer online, the 28% sees it on TV.
The word of mouth is crucial for the very young, but also among the elderly

D18. Through which channels do you seek information about the film you want to see in the cinema? (3 possible answers)

	Total	Gen Z (teen)	Gen Z (18+)	Millennials	Gen X	Baby Boomer	Silent	Occasional	Regular
On-line trailer	41	45	**52**	**45**	40	29	15	42	35
Watching the trailer on TV	28	29	23	25	30	30	**33**	28	28
Cinema programming	25	18	25	25	25	**27**	19	24	**28**
Opinions of relatives and friends	24	**28**	**27**	20	20	**28**	25	24	19
Expert reviews	19	12	14	17	21	**26**	20	18	**26**
Audience reviews	17	16	15	12	18	**21**	15	17	17
Portals listing films shown in the area	16	15	13	17	17	14	12	15	**21**
Reviews by influencers	8	**11**	**13**	9	6	4	6	7	**12**

Values given in %. Base: who went to the cinema in 2023 = 6.087

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Tutti i diritti riservati

The most attractive initiatives linked to cinemas

Wide interest in open-air screenings, thematic weeks and original language screnings for young people.
Cult and monographic festivals mainly preferred by seniors

D22. Which of these possible initiatives could encourage you most to go to the cinema?
(Several answers allowed)

	Total	Gen Z (teen)	Gen Z (18+)	Millennials	Gen X	Baby Boomer	Silent
Outdoor screenings	29	27	**34**	31	30	25	19
Screening of cult films over time	24	14	23	25	24	25	**30**
Weeks with themed/genre screenings	21	17	**25**	21	18	23	18
Screenings of films in the original language	16	17	**28**	17	13	10	6
Live screenings of sports, concerts, theatre plays	15	17	16	16	15	12	16
Monographic reviews (linked to specific authors)	13	11	11	13	12	**15**	13
Live screenings of video game gameplays	6 (13% Gamer)	**16**	9	8	5	2	4
None of the above	24	26	20	19	25	**31**	24

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Values given in %. Base: who went to the cinema in 2023 = 6.087

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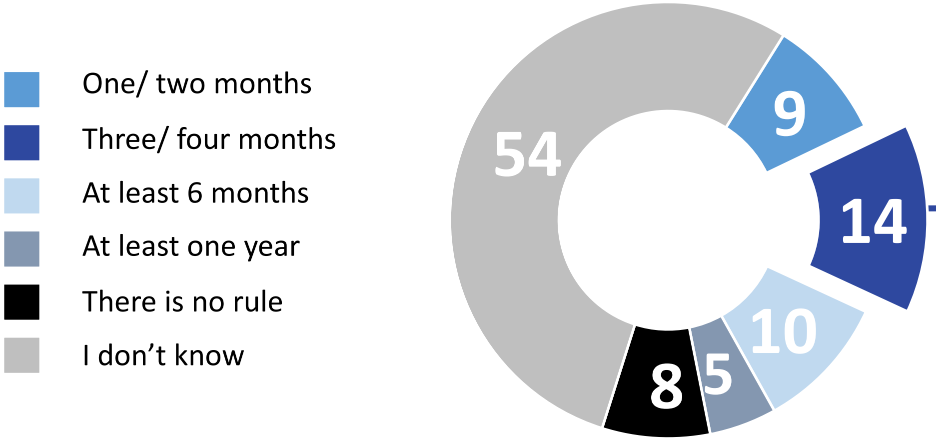
Tutti i diritti riservati

Period of exclusive distribution for cinemas: a limited knowledge

Only the 14% of the sample knows the law about it.
Increased knowledge especially among cinema regulars and the sensational films lovers

D23. Do you know how much time has to elapse by law between the official release of a film in cinemas and its availability for home viewing?



19% of those who went to the cinema in 2023

MOST INFORMED SEGMENTS

19% Gen Z
18% Millennials
15% Have children <11 years old
24% regular cinema-goers
25% sensational films lovers

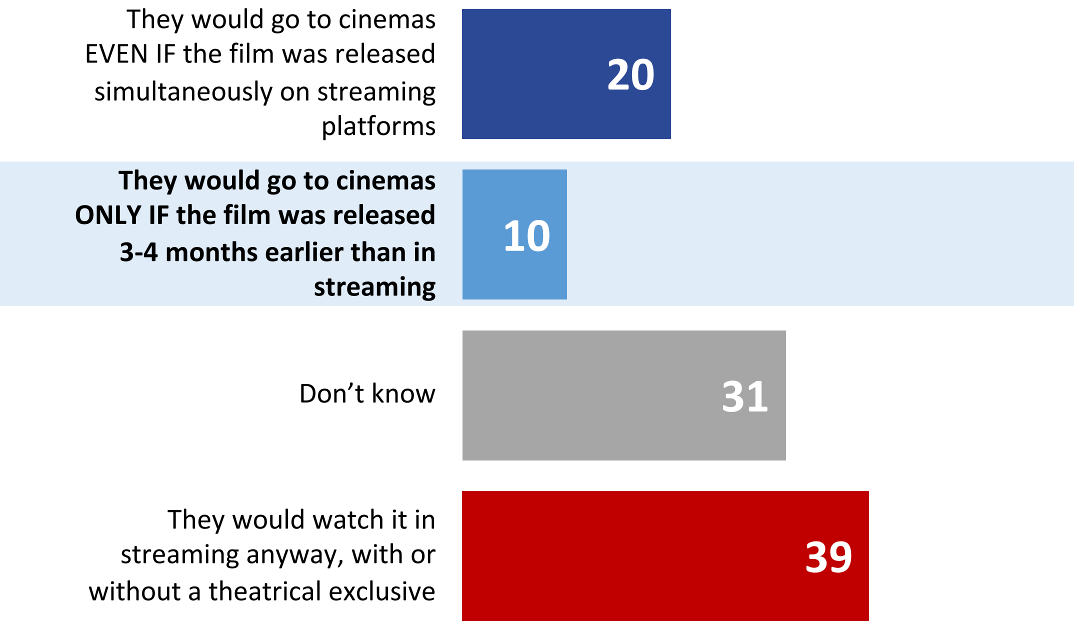
Values given in %. Base: total sample 12.175

Tutti i diritti riservati

Period of exclusive distribution for cinemas: only the 10% would go to the cinema without waiting for the home availability

But there is a large proportion of people who could not answer

D24. If a new film you want to see was released in the cinema and 3-4 months later was made available through streaming platforms, what would you do? D25. If, on the other hand, the same film was available simultaneously in both cinemas and streaming platforms, what would you do?



Most receptive segments to the exclusive distribution period effect	
Gen Z	**14**
Millennials	**13**
Have children <11 years old	**14**
Regular cinema-goers	**16**
Have reduced cinam attendance	**17**
Sensational film lovers	**17**
Have favourite cinemas	**15**
Take part in promotions	**16**

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Values given in %. Base: total sample 12.175

Direzione Generale CINEMA e AUDIOVISIVO
Tutti i diritti riservati

Research Methodology

The survey was carried out by SWG between 15 and 31 May 2023 with a structured questionnaire administered with a Cawi - Cati (Computer Aided Web / Telephone Interview) mixed survey technique on a representative sample of the Italian population aged between 14 and 80.

- **SAMPLE METHOD:** stratified by shares of gender, age, macro-area, demographic size of the municipality of residence and educational qualification
- **REFERENCE UNIVERSE:** 52.079.341 individuals
- **SAMPLE :** 12.175 individuals (30% of whom were interviewed by telephone)
- **ABSOLUTE STATISTICAL ERROR:** max 0,89% on mean data at 95% confidence interval

The telephone survey was carried out entirely by SWG's internal contact centre in Trieste.
The interviewers, all of whom were experienced and native Italian speakers, were trained in the topics of the survey and were constantly supervised by the research team.

The 2022 comparison data comes from the survey carried out on a homogenous sample by SWG for its Management between 1 and 25 July 2022.

Tutti i diritti riservati

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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

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