

A Report on the Survey on Movie-going Habits in Hong Kong

Executive Summary

Background

1. The Television and Entertainment Licensing Authority (TELA) of the Government of the Hong Kong Special Administration Region has commissioned the Hong Kong Policy Research Institute (HKPRI) to carry out a Survey on Movie-going Habits in Hong Kong in December 2000. The objective of the survey was to collect public opinion (at aged 12 or above) on movie-going habits in Hong Kong for the reference of the concerned authorities and the local film industry.
2. The study consisted of two parts. The first part was a quantitative study (telephone survey). The number of interviews successfully completed was 1,014, and the respondents were the public aged 12 or above. During the process of analysis, the survey data was weighted in accordance with the population age structure of Hong Kong. The second part was a qualitative study (focus groups). The participants were also the public aged 12 or above recruited through various channels. There were altogether nine focus groups structured in accordance with the participants' age and frequency of movie-going. Participants were first divided into three different age groups (12-18 years old, 19-29 years old, and 30 years old or above). Each of the three groups was further broken down into three categories according to the participants' movie-going frequency in 2000 ('infrequent' – those went to cinemas less than 5 times, 'occasional' – 5 to 9 times, and 'frequent' – 10 times or above). A total of 318 participants were invited and 295 turned up at the meetings. The average number of participants of each focus group was 33.
3. This Executive Summary consists of the major findings of the survey, the suggestions given by the focus group participants, and HKPRI's recommendations to the local film industry.

Major findings

4. Respondents watched movies most frequently via 'TVB/ATV' (41.2 times), 'VCDs/video tapes' (32.8 times), and 'Cable TV' (29.2 times) in 2000. Yet the average number of times of 'watching movies in cinemas' was only 5.1 (including 2.5 times during holiday seasons and 2.6 times in normal days).
5. The majority of the respondents (63.8%) were 'infrequent' movie-goers in 2000, with about half (49.2%) of the respondents having gone to cinemas at least once. The most active movie-going age groups were '12-19' and '20-29'. On average, they went to cinemas 7.5 times and 10.4 times in 2000 respectively. The 'occasional' or 'frequent' movie-going proportions within these groups were 58.9% and 66.7% respectively. It was found that the majority of those aged 30 or above were 'infrequent' movie-goers.
6. 'Comedy' was the most favourite type of movies (50.9%) and 'story content' was the most common factor that affected the choice of movie-goers (51.2%).
7. The major merits of Hong Kong movies were 'easy understanding of the language' (73.2%) and 'easy understanding of the story (58.6%)'. The major merits of imported movies were 'rigorous production/live-like or grand scenes' (73.9%), 'good acting skill' (61.5%) and 'good directing skill' (60.3%). In the focus group discussions, participants criticized local movies as limited in themes, unrealistic, unconvincing and vulgar. However, some participants opined that local movies normally reflected the local culture, so they could easily strike the right chord of the local audience. For the young people aged 12-29, the majority of them liked imported movies more (61.6%). Furthermore, among the 'infrequent', 'occasional', and 'frequent' movie-goers, nearly half or more of each category of movie-goers preferred the imported movies (49.4%, 62.5%, and 67.5% respectively).
8. 'Unique environment' (43.3%), and 'better facilities' (36.6%) were the major reasons for watching movies in cinema. It has to be noted that many cinemas have been converted from the single and grand theatre style to multiple and mini-theatre style. This implies that the screen size of

these mini-theatres is further reduced considerably. On the other hand, the domestic video and audio equipment become more and more sophisticated, and the home television sets also become larger and larger in size. The shortening of gap between the means of watching movies at home and in cinemas causes the people to feel like more satisfied with the video discs, and go to cinemas less frequently. Among those respondents who had watched movies via other channels (such as video), 56.1% indicated that 'flexible viewing time' was the reason, and 36.2% liked the 'free environment at home'. Some focus group participants indicated that video movie products were available soon after the movies have been shown in cinema, and this time gap was reducing. This considerably de-motivated some people to watch movies in cinema. Other reasons for not going to cinemas were mainly related to the deteriorating environment of some cinemas. For example, cinema operators did not strictly implement the law of no-smoking inside cinemas, and they did not ask the audience to switch off their mobile phones when watching movies. Of the 'infrequent' movie-goers, 55.2% considered that 'watching video discs and tapes was satisfactory or more convenient', and 51% considered tickets prices 'expensive'.

9. The film industry was confronted with the competition of faked discs in the market. In the focus groups, some participants admitted that the major attractiveness of faked discs was 'low prices'. They said that they did not mind the poor quality of these discs because it was a cheap means to kill time. Even though the Customs and Excise Department had taken severe action against the activities of selling faked discs, they could be bought in many convenient places and were quickly available in the market. Some were even available before the movies were screened in cinema. To this kind of audience, the existence of faked discs was also a reason for not going to cinemas.
10. Expensive ticket prices reduced the audience's desire to watch movies in cinema. The survey results indicated that the two most attractive concessions to encourage movie-going were 'reducing price by 20%' (51.9%) and 'buy 2 get 1 free' (48.4%). It was also found that these two concessions were most appealing to the age groups of '12-19' and '20-29'. About 70% and 60% of these two groups of respondents considered the respective concessions attractive.

11. Majority of the respondents (69.0%) did not go to the cinemas with family members in 2000. The average frequency was 1.1 times. Further analysis by age groups indicated that those who were '30-39 years old' and '40-49 years old' went to cinema with family members more frequently (1.4 and 1.3 times respectively). In the focus group meetings, many participants stated that they seldom went to cinema with their family members because different family members had different taste. Some parents also pointed out that not many movies were suitable for the whole family except the ones produced for family viewers during the holiday seasons. In general, very few local movies were suitable for small children or old people. Also, movie-going for the whole family would be fairly expensive, not to mention the associated activities before or after movie (e.g. dining outside). The total expenses would be considerably high for an ordinary family. Such economic consideration was also reflected in the quantitative survey. The two most attractive concessions for the respondents to go more often to cinemas with their families were 'family discount ticket package' (48.1%) and 'half ticket prices for the elderly and the children' (32.8%).
12. In the pilot test of the telephone survey, no respondent indicated that he/she had watched web movies, therefore in the main survey, the respondents were not asked whether they had watched movies via this means. In the focus groups, only a few participants had the experience of watching web movies. The technical performance of the web movies could not impress the audience even though some of them had broadband facilities. It was believed that web movies would not be able to replace the cinemas in the foreseeable future. It could nevertheless affect the video market when it gradually became popular with the improvement in technology.
13. Only 21.3% of the respondents stated that they favoured movie-going and the majority of those who were 30 years old or above said that movie-going was not their favourite activity. It was also found that only 28.9% and 29.1% respectively of those who did not favour movie-going considered the concessions of 'reducing price by 20%' and 'buy 2 get 1 free' attractive. For those who did not favour movie-going and were aged 30 or above, the most common reasons for in-frequent movie-going were 'watching video discs and tapes was satisfactory or more convenient' (57.6%), and 'expensive' ticket prices (52.3%).

Suggestions by the Focus Group Participants

14. Most of the views focused on the ways in which the quality of the movies should be improved. Some participants felt that film producers should encourage creativity and attempt different types of movies, especially movies with decent themes suitable for different age groups. The film producers were advised to take every aspect of a movie seriously, including screenplays. Instead of just emphasizing on the strong cast, producers should pay more attention to a well-designed and integrated screenplay. Movies with good stories and local or oriental characteristics would also be accepted by the audience. Regarding the film actors, participants considered that it was inappropriate for local actors to participate in the production of more than one film at a time because over-commitment would adversely affect their performance, and would have negative impact on the overall presentation and quality of the movies. It was also pointed out that the remuneration differential of famous actors and other film workers was too big. Wages of the famous actors could constitute a very substantial part of the total expenditure of a movie product. Wages of famous actors should be lowered while that of other film workers should be raised. The local film industry should review the existing remuneration system so that other film workers could be reasonably rewarded and more talents would be attracted to join the industry. It was also felt that many film actors, including the highly paid actors and screenwriters, should receive more proper training so that they could better perform.

15. For the cinema operators, many focus group participants suggested that they should reduce the normal ticket price to about one third or half and re-structure the ticket pricing system so as to attract more audiences during the non-peak periods. Besides price reduction, they could issue monthly or annual tickets or daily passes with some discounts so as to encourage more people watching movies in cinema within the effective period. The cinema operators were advised to upgrade the infrastructure of the cinema. For example, the cinema operators could consider upgrading the design of seating (e.g. adjustable gradient of the seats to make them more comfortable), providing independent cubicles similar to the karaoke lounges for groups of movie-watchers, and enforcing strictly the law of no-smoking inside the cinemas. Cinema staff were advised to be more

polite, especially to students. Furthermore, they should improve the queuing problems by considering the ideas like selling tickets at MTR stations or through the internet with no service charge. Concerning promotion measures, the cinema operators were advised to organize some film clubs through which they could send film catalogues to members in advance to introduce movies which were coming soon. They could also conduct joint promotion with schools by offering discounted tickets to students and encourage them to include movie-going as an extra-curricular activity.

16. A few participants considered that government should be more supportive of film production. For example, the government should relax the existing rules on location shooting. The government should encourage the organization of film festivals for local movies as a kind of the cultural and arts activity. In order to encourage the local movies to be more diversified, government could also consider providing subsidies through various channels to those who attempted to produce non-mainstream movies. Concerning the film classification system, it was felt that the criteria of classifying Category III films should be reviewed to allow teenagers below 18 to have more chances to watch movies that were not indecent but being classified as Category III. From a long-term perspective, the public should be educated (e.g. starting from primary schools) to appreciate movies as part of the local arts and culture. For example, there should be courses in the primary years to introduce movie appreciation to the students, to enable them to know more about movies in their early years.
17. Regarding the training for local film industry, respondents also commented that the number of professional movie production courses in Hong Kong was few and they were usually techniques-oriented. A few participants suggested that independent departments for film production training should be set up in the concerned education institutions that might provide comprehensive and professional training (e.g. screenwriting and film promotion). The current practice of requiring reference for movie production courses should be reviewed so as to permit applications from other qualified and zealous applicants who had difficulties in obtaining references.

HKPRI' s Recommendations to the Local Film Industry

18. The survey results indicated that the major problem of low attendance rate of local movies in cinema was low product quality, and it was inappropriate to impute the problem completely to faked discs. Quite a number of participants indicated that faked discs were just a cheap means for killing time rather than for movie appreciation. Even all the faked discs disappeared, people would not spend money on movie-going in view of the quality of local movies. Therefore, our suggestion was to improve the quality¹ of local movies.
19. As a leverage to quality, price remains an important issue to be addressed by the film industry. Ticket prices could be lowered to enhance attractiveness for movie-going but in the long run, improving movie quality should be the most appropriate means to enhance the competitiveness of the film industry in Hong Kong.
20. Various types of price concession were seen as helpful to attract audiences to watch movies in cinema, especially so for those aged between 12 and 29. Apart from price concession, comprehensive marketing effort would be needed in order to attract more people to go to cinema. The internal environments of the cinemas should be improved. More convenient ticketing outlets (with no extra cost to the customers) should be arranged, e.g. selling tickets through internet and telephone. Young people aged 12-29 is the most active group of movie-goers. They account for 28.5% of the Hong Kong population who are aged 12 or above. Therefore, more targeted and innovative promotion methods should be devised for this target group in order to motivate them to go watching movies more often.
21. For those who do not favour movie-going (mainly 30 years old or above), price concession is unlikely to have any effect in encouraging them to go to cinema. It may be more fruitful to attract the families with small children to go to cinema. If local film producers cannot supply enough movies to cater for the need of family audience, film distributors may try sourcing more quality movies from overseas which are suitable for all age groups.

¹ 'Quality' refers to the movie quality as perceived by the focus group participants, who mainly commented on such aspects as acting skills, directing skills, the reasonableness of the movie story, and the rigor of film production.

22. The situation confronting the declining movie-going habits cannot be redressed overnight. Short-term solutions can only improve the situation temporarily. It is imperative to restore the confidence of the public to the film industry. Although some of the above suggestions could be considered and implemented, the fundamental problem should be thoroughly reviewed and resolved with a long-term developmental perspective. It is also noted that the future development of local film industry should not be the responsibility of any single body. The local film production sector, the cinema operators, the government, and other associated parties should work together closely to communicate, review, and resolve the problems such that the local film industry can achieve excellence in the ever changing social and market environments.

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