Portrayal
Vs. Betrayal?

April 2011

An investigation of diverse and mainstream UK film audiences
A research report commissioned by the UK Film Council

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Foreword

Watching films is one of the UK's favourite pastimes. We know that the UK is becoming an increasingly diverse society and it is absolutely vital that the film industry reflects that by serving the broadest possible audiences, reflecting their lives and age, gender, ethnicity, race, sexual orientation and physical ability.

However, despite the rapidly changing demographics of modern Britain, a recent consultation across all sectors of the film industry revealed that there is little knowledge, insight or understanding of the definitive drivers and barriers for diverse film audiences in the UK. The conversations also revealed that the film sector recognised the importance and commercial value of understanding and delivering what diverse audiences want but that there is very little comprehensive and freely accessible research into diverse audiences and how best to reach them.

This new study, **Portrayal Vs. Betrayal?** aims to provide the answers by focusing on a number of groups including older women, working class, lesbian, gay and bisexual audiences; minority ethnic audiences including more recent immigrants, Eastern European.

The findings are intended to be a valuable tool for film makers who want to think more about the audience's perspective and make films that are relevant, connected and authentic to the broadest and most diverse film goers. In the future this could lead to greater economic returns across the entire sector.

Mary FitzPatrick
Head of Diversity, UK Film Council
April 2011

The people behind this report

Mary FitzPatrick is Head of Diversity at the UK Film Council. Previously she worked at the BBC and Channel 4 as Editorial Manager, Cultural Diversity, so she has an extensive background working with organisations with public and commercial sector remits.

Sean Perkins is Acting Head of Research and Statistics at the UK Film Council. His research interests include UK and global theatrical markets, film on video and television, the emerging online market for film and film audiences. Sean is co-author of the UK Film Council's Statistical Yearbook.

Chantal Badjie, Senior Project Manager BBC Vision, led and managed one of the BBC's most significant minority ethnic research projects in 2003/4. Formerly the Editor of Audiences Online - the BBC's audience research site (2004-6) aimed at production, commissioning and channel controllers - she launched the BBC's influential audience research tool, the Pulse in 2006. She is currently the Editorial Advisor for 'Mixed Race' focus which broadcasts on BBC Two later this year.

Meriel Palmer is Diversity Executive at the UK Film Council. She has expertise in project management and previously worked for the charity sector in both an Event management and Corporate Fundraising capacity.

Lorraine Dourado is Diversity Officer and Assistant to the Head of Diversity at the UK Film Council. She has graduated with an English degree from Queen Mary, University of London and is a PartnerVoice spokesperson for John Lewis. She has a varied arts background, being selected to perform at Notting Hill Carnival, The Mayor's Thames Festival and the Royal Albert Hall.

Steve Evans heads up the entertainment research division at Harris Interactive. He has 20 years' experience in research, working across many sectors in entertainment and technology. His experience includes working for some of the biggest companies in film, music, video gaming and technology devices & platforms.

Steve Mellor is a senior qualitative consultant for Harris Interactive. He has held positions in qualitative and quantitative research during the past 13 years, working on studies as varied as food, drink, fashion, music, television and education.

Jonathan Robinson is a senior researcher within the entertainment division at Harris Interactive. He has worked on numerous research studies for some of the biggest names in entertainment, including film and video gaming companies.

Claire Ross is a qualitative specialist at Harris Interactive and has played a key role in a wide range of research projects for a portfolio of major clients across the media, FMCG, retail and financial sectors. Claire holds a degree in marketing from Lancaster University.

Victoria Usher, Director, GingerMay PR is expert in creating and managing dynamic PR campaigns that deliver tangible results and commercial success.
Formerly Global Marketing Director of a global communications agency and ex-MD of a specialist PR agency, Victoria now runs her own PR agency that works with a broad range of clients in the media, marketing, financial services and research sectors.

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Portrayal Vs. Betrayal?

Executive summary

Film consumption

Key insight

The research shows diverse audiences to be a lucrative and passionate segment of the total film market, ahead of national averages for overall film consumption, cinema attendance and overall enthusiasm for film

The evidence

- Diverse audiences tend to be heavier film consumers compared to the national average, especially Eastern Europeans (31% are "heavy" film consumers compared to 12% for the national average)
- Asian, Black, Eastern European and LGB audiences attend the cinema much more frequently than the national average (all over 30% for "very regular" compared to 14% for the national average)
- These audiences also have an above-average affinity for cinema, with over 1 in 2 Black, Eastern European and LGB audiences saying cinema remains the best place to watch film – even higher (3 in 5) for the Asian audience
- DVD/Blu-ray purchase levels are also higher for these audiences – most notably LGB (36% of whom are "heavy" purchasers, compared to 19% for the national average)
- Older female and working class audiences are also key market segments, with a relationship with film more closely aligned with the national average

The conclusion

Attending better to the needs of diverse audiences is not only a good thing in its own right, it can elicit a hard commercial gain

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Ways of watching films
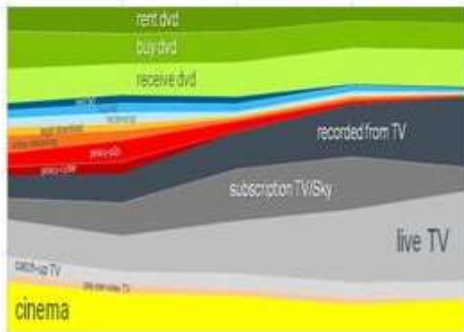
Key insight

The research provides a market-wide examination of film consumption by platform, showing how some of these diverse audiences are ahead of the national average for *digital* *and* *non-traditional* *ways of watching film*

The evidence

❑ **Asian, Black, Eastern European and LGB audiences are much more likely than the national average for watching films on a wider variety of platforms, especially digital**

❑ **Eastern Europeans are the most in tune with digital consumption to find their content, and unfortunately this means they heavily over-index for piracy**

❑ **Working class people are closely aligned with the national average for their viewing patterns**

❑ **While the older female audience lags below the national average in their incidence of viewing across the variety of platforms, it is worth bearing in mind that still 2 in 3 buy DVDs, 1 in 10 buy Blu-rays and 1 in 3 attend the cinema regularly**

❑ **The report provides incidence levels for watching by each platform, plus a detailed volumetric share analysis – all by demographics and by each diverse audience**

The conclusion

Asian, Black, Eastern European and LGB audiences are much less traditional in their viewing patterns than the average audience

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The perceived power of film

Key insight

The great majority recognise the *awesome power* *of film to tell stories, to influence, to educate and to inspire. Our country's diverse audiences are even more aware of this power, especially for film's ability to generate role models and to influence the public mindset.*

The evidence

- ❑ **69% of the general public say that films have the power to educate about real life issues – and our diverse audiences even more readily agree with this (75% for the older female audience, 74% for the Asian audience)**

- ❑ **More than merely inform, 1 in 2 of the general public also go further to say that film has the power to challenge stereotypes – and again our diverse audiences are ahead of the national opinion on film's power to change the mindset (80% of the LGB audience, 75% of the Black audience)**

- ❑ **The detailed report also investigates the power of film to create stories and scenes about diverse communities that make people want to talk to each other about issues and how film can play a role in learning about people unfamiliar to us – all of these findings all point towards an extraordinary power that film has to shape and mould public opinion**

The conclusion

That film has such a power to influence mindsets means filmmakers should spend time to reflect on how all parts of our society are portrayed

The importance of portrayal

Key insight

Of course there is room for fantasy and escapism, but the research shows clearly that *authentic* *portrayal of our nation's diverse audiences is very important, and the view is felt even more keenly by people within these diverse audience segments*

The evidence

- ❑ **7 in 10 of the general public say it is important for some films to portray real life issues facing our communities – our diverse audiences tend to think this even more important (e.g. 88% of the Black audience)**

- ❑ **Diverse audiences are also more likely to think it important that they can see stories, characters and settings to which they can personally relate – for example, 65% of the working class audience say it is important to see their own stories authentically reflected in the films they watch**

- ❑ **Later we will see that more work needs to be done to create a more realistic, genuine and authentic portrayal and this is felt more keenly by our nation's diverse audiences, who, as we saw earlier, are highly connected with film**

The conclusion

Filmmakers should do more to ensure that portrayal of diverse audiences is more authentic and genuine, meeting not only the needs of important market segments, but also reflecting majority national opinion

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We have come a long way but…

Key insight

Nearly 7 in 10 of the general public believe UK film's authenticity of portrayal has improved over the last decade, a view shared by diverse audiences. While we have undoubtedly improved, diverse audiences tell us a great deal more work needs to be done to get more authentic.

The evidence

❑ 67% of the general public say the portrayal of our nation's diverse audiences has become more authentic over the last ten years – and this view is largely shared by diverse audiences

❑ The stark difference comes when we enquire about the amount of work needed to be more authentic: 19% of the general public perceived "a great deal" more work needs to be done, and this compares to 43% for the Asian audience and 58% of the Black audience

❑ Only 5% of the Asian audience, 3% of the Black audience and 5% of the Eastern European audience think no work is required and the general public agree

❑ Nearly everyone has an opinion to share on the portrayal of diverse audiences in film – less than 5% of the general public answered "not sure" to all the attitudinal statements asked in the research

The conclusion

We have improved but diverse audiences, particularly Black and Asian, are telling us we are far from finished to get portrayal right

The need for more authentic portrayal

Key insight

❑ 4 in 10 of the general public say characters from ethnic minorities are too often in films as a **token gesture** – and feelings are even more intense among our nation's diverse audiences…

- o 60% for LGB
- o 69% for Asian
- o 76% for Black African/Caribbean
- o 62% for Eastern European

❑ Over 1 in 3 of the general public say roles for minority groups too often have **no depth** and are poorly written – and feelings are even more intense among our nation's diverse audiences…

- o 54% for LGB
- o 58% for Asian
- o 72% for Black African/Caribbean
- o 51% for Eastern European

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Enhancing portrayal as a commercial consideration

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Key insight

The research shows the importance of diverse audiences as segments of the total film market, so making films that reflect their lives and settings more authentically will pay dividends. There is strong evidence to suggest that film demand will increase if portrayal is more real.

The evidence

❑ **We asked about the demand for watching film. The following are the proportions from diverse audiences who tell us they would watch <u>more</u> films if people from diverse backgrounds were portrayed more authentically:**

- o **32% of the Older female audience**
- o **31% of the C2D working class audience**
- o **51% of the LGB audience**
- o **59% of the Asian audience**
- o **66% of the Black audience**
- o **54% of the Eastern European audience**

The conclusion

Creating more authentic portrayals in UK film is not mere lip-service to political correctness – it can elicit a commercial reward

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Selected examples of how we should enhance portrayal (1 of 2)

Key insight

In the report we look at specific, sometimes controversial, ways in which diverse audiences are portrayed. Below are a selection of attitudes of diverse audience members – from older women, working class (C2DEs) and LGBs…

Did you know…?

- ❑ 69% of the older female audience think that films feature and glamorise the young with older female characters being significantly under-represented

- ❑ 56% of the older female audience think older characters, especially women, are too often marginalised and tend only to feature as background characters

- ❑ 48% of C2s and 55% of DEs say stories focusing on working class people are too often depressing

- ❑ 37% of C2s and 38% of DEs say there should be more middle class tragedy in UK film

- ❑ 80% of the LGB audience think that characters portrayed as gay too often have their sexual orientation as the main character trait

- ❑ 64% of the LGB audience think that characters portrayed as lesbian are too often depicted as male sexual fantasies

… and these views are shared by the general public

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Selected examples of how we should enhance portrayal (2 of 2)

Key insight

In the report we look at specific, sometimes controversial, ways in which diverse audiences are portrayed. Below are a selection of attitudes of diverse audience members – from Asian, Black and Eastern Europeans living in the UK…

Did you know…?

❑ 78% of the Asian audience say Asian characters are too frequently portrayed as having family conflicts

❑ 74% of the Asian audience say Asian religious culture needs to be reflected more authentically

❑ 80% of the Black audience say Black characters are too often portrayed as drug dealers in films

❑ 63% of the Black audience say Black characters are too often portrayed as being overtly sexual

❑ 72% of the Eastern European audience thinks that new immigrants from Eastern Europe are too often portrayed at the bottom of the economic ladder

❑ 75% of the Eastern European audience think films need to paint a more realistic picture of Eastern Europeans living in the UK

… and these views are shared by the general public

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overall conclusions

❑ We highlight in this report just how passionate and commercially important our nation's diverse audiences are to the UK film industry

❑ We show just how important film is to both the general public and diverse audiences, with the latter even more attuned to film's power to inform and influence the public mindset

❑ While most feel that we have moved on considerably in the last decade, many of our diverse audiences are telling us that a great deal more work needs to be done to enhance the authenticity of portrayal and the general public agree

❑ Enhancing portrayal is not only a good thing in its own right, it serves the demand of important market segments and is shown to have considerable commercial benefits in stimulating the demand for film

❑ In the report we look in depth at some instances of the need for better portrayal for each diverse audience – just one example of many is that 61% of the older female audience feel that older characters, especially women, tend not to be portrayed as having sexual needs and desires (there are many other examples of stereotypical or unrepresentative portrayal in the detailed report)

❑ That film has such a power to inform and influence creates a need for filmmakers to stop and consider how best to portray our society's different and diverse audiences

Detailed findings
Cinema attendance
& film consumption
(statistical analysis)

Estimated levels of film consumption among the general national public

To start our market overview, let's first look at the total number of films consumed by the general GB public aged 16+ per quarter.

These are films watched on any platform, including cinema, TV, digital and piracy. A breakdown is provided by platform and a volumetric analysis later in this chapter.

First we see just how **important** film viewing is today despite the plethora of other ways of spending our leisure time nowadays. This is true too for 16-24s.

Over half the nation are watching six or more films a quarter and over one in ten watch more than 25 films a quarter, which is around two films a week.

Film is for **everyone**, for males and females of all ages. Film consumption is slightly lower among the over 55s, but still over two in five are watching six or more films a quarter.

Total number of films watched in last three months
Base: representative sample of total GB 16+ population (2,228)
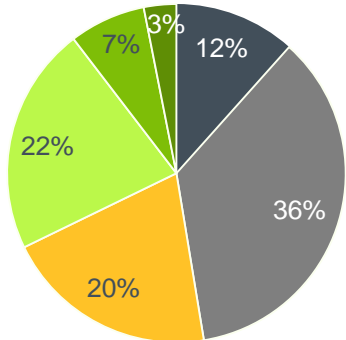
	None
■ None	"None" **12%**
■ 1 to 5	"Light" **36%**
■ 6 to 10	"Medium" **42%**
■ 11 to 25	
■ 26 to 50	"Heavy" **10%**
■ Over 50	

	Male	Female	16-24	25-34	35-44	45-54	55+
Base	1,060	1,168	273	433	426	341	755
None	11%	12%	11%	7%	10%	8%	17%
Light	34%	38%	35%	36%	33%	31%	40%
Medium	43%	41%	40%	45%	43%	50%	37%
Heavy	12%	9%	15%	11%	14%	12%	5%

The overview

Film remains a crucial part of all our lives. Over half of the nation are watching 6 or more films a quarter, with 1 in 10 watching 25 or more. Overleaf we see how film consumption compares for diverse audiences.

Estimated levels of film consumption (quarterly) among diverse audiences

Films are for everyone and diverse audiences are even **more into** film, with levels of medium/heavy viewing much greater than the national average.

The Eastern Europeans and LGB audiences we interviewed are particularly high film viewers.

Older women and working class people are more mainstream, more closely aligned with the national average, the former being lighter viewers of film. While their viewing is less than that of the other diverse audiences surveyed, film still represents a very important aspect of their lives. So again we see that **film is for everyone**.

This analysis really highlights the need for filmmakers to consider carefully the needs of these diverse audiences. They are an **important segment** of the total market and it is clear from the analysis they spend a disproportionate amount of time and money on film. We will go into detail later on how and why it is important to cater for their needs and to ensure authentic portrayal, and the potential commercial benefits for delivering against these needs.

Audience	None	Light	Medium	Heavy
Total GB	12%	36%	42%	10%
Total GB into film *for better comparison with diverse audiences below*		41%	48%	12%
Asian		24%	64%	13%
Black African/Caribbean		26%	60%	13%
C2D/Working class		38%	48%	14%
Eastern European		10%	59%	31%
Lesbian, Gay, Bisexual		18%	64%	18%
Older women		47%	45%	8%
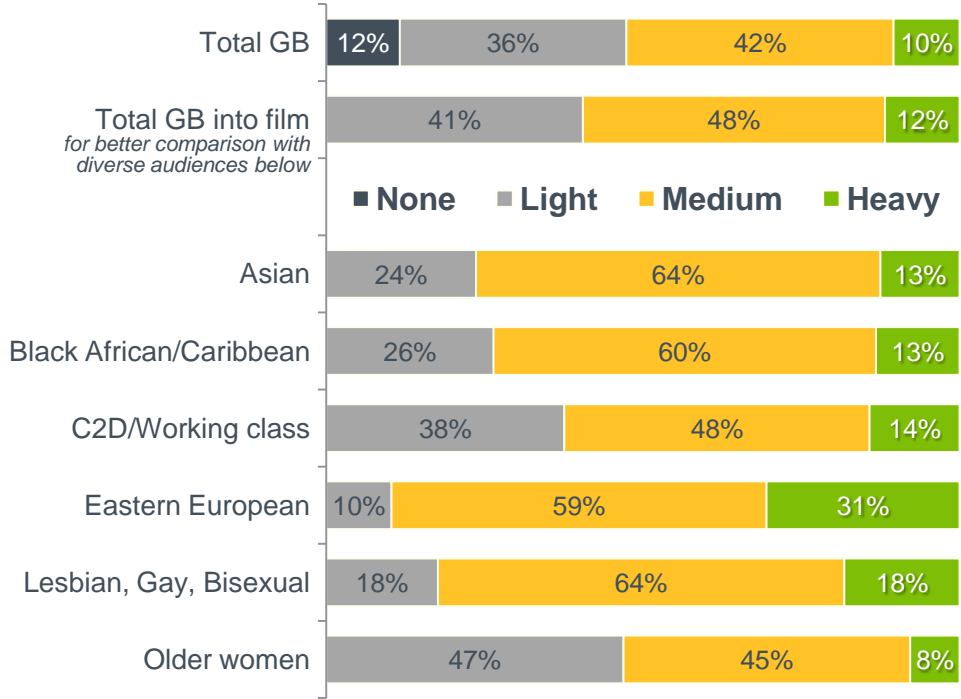
The overview

Our nation's diverse audiences are among the most highly connected with film, representing a highly attractive segment of the market from a commercial perspective

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Cinema attendance frequency among the general public

People, as we will see later, tend to agree that the cinema remains the **best** place to see film.

Among the general public, 1 in 2 say they are **regular** attendees, going to the cinema at least every few months.

Attendance peaks among the under 35s and tends to trail with age. But even among the over 55s attendance is **high** in absolute terms – nearly 3 in 10 of the over 55s surveyed say they go to the cinema at least every few months.

Overleaf we compare cinema attendance of the general public to the diverse audiences.

Cinema attendance frequency
Base: representative sample of GB 16+ population (2,228)

Pie chart values: 6%, 6%, 15%, 23%, 28%, 22%
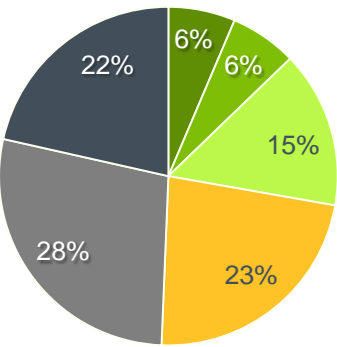
- Weekly or more often — "Very regular" **13%**
- Fortnightly
- Monthly — "Regular" **38%**
- Every few months
- Less often — "Occasional" **28%**
- Never — "Never" **22%**

	Male	Female	16-24	25-34	35-44	45-54	55+
Base	1,060	1,168	273	433	426	341	755
Very regular	18%	8%	25%	33%	10%	5%	3%
Regular	37%	39%	52%	41%	44%	40%	26%
Occasional	25%	31%	14%	20%	32%	31%	33%
Never	20%	23%	8%	6%	14%	24%	38%

The overview The cinema remains the best place to see film and over 1 in 2 of the general public count themselves as regular attendees

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Cinema attendance frequency among diverse audiences

Many of the diverse audiences are even **more into** cinema than the average of the general public. Eastern European and Asian audiences in particular stand out, as do Black and LGB audiences. Working class people are more mainstream, on average.

Older women are less likely than average to visit the cinema, but 7 in 10 attend with some regularity, highlighting that cinema is for **people of all ages**.

As with the general demand and passion for film, this is strong evidence for filmmakers to sit up and **take notice** of these audiences. They over-spike for passion and, as we see here, for attendance. As such, they are a crucial and lucrative segment of the total market.

Cinema attendance frequency
Bases: representative sample of GB 16+ population and diverse audiences

	Very regular	Regular	Occasional	Never
Total GB	13%	38%	28%	22%
Total GB into film *for better comparison with diverse audiences below*	14%	43%	26%	17%
Asian	36%	49%	13%	3%
Black African/Caribbean	32%	47%	17%	5%
C2D/Working class	15%	45%	24%	17%
Eastern European	36%	53%	10%	
Lesbian, Gay, Bisexual	31%	46%	17%	6%
Older women	5%	28%	37%	30%
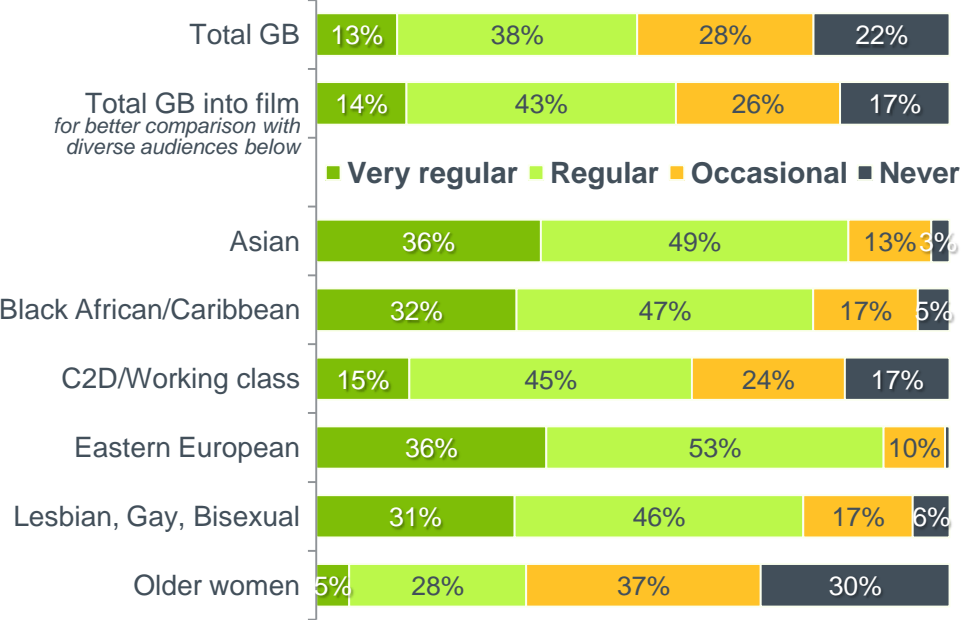
The overview

Diverse audiences are into cinema, some much more strongly than the national average – they are a crucial segment of the total market and filmmakers should be aware of their needs for commercial reward

Belief that the cinema remains the best place to enjoy film

Over 2 in 5 of the general public agree that the cinema remains the **best place** to enjoy watching films. This view is most strongly felt by the under 45s.

Diverse audiences are even more **connected** with film and cinema, ahead of the national average. This is particularly true for the Asian, Eastern European, Black and LGB segments of the audience.

Older women (and older people in general) tend to visit the cinema less frequently in comparison, but even so, 2 in 5 say it remains the best place for film. The view of working class people is close to national public opinion, with over 2 in 5 saying cinema is the best place to watch films.

% that agree the cinema is the best place to watch films
Bases: representative sample of GB 16+ population and diverse audiences

| Total GB | 41% |
| Total GB into film | 44% |

split by demographics

Male	Female	16-24	25-34	35-44	45-54	55+
49%	40%	49%	46%	55%	36%	39%
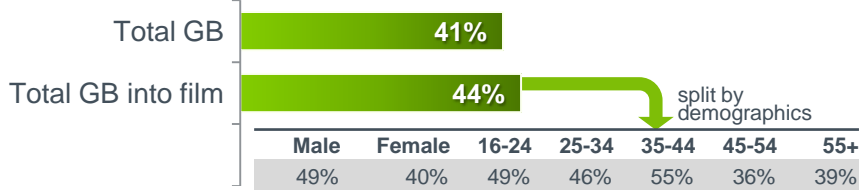
% that agree among diverse audiences

Asian	62%
Black African/Caribbean	54%
C2D/Working class	41%
Eastern European	57%
Lesbian, Gay, Bisexual	54%
Older women	38%
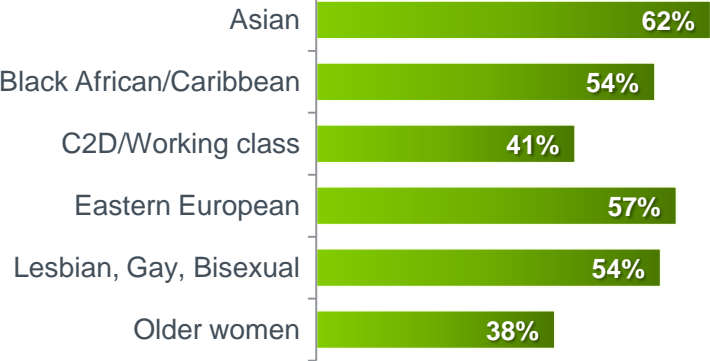
The overview

A substantial proportion of the general public feels cinema remains the best place to watch film – and the view tends to be even more likely felt by diverse audiences

DVD/Blu-ray purchase levels in past year among the general public, including gifts

To investigate peoples' connection with film, we also want to take home entertainment into account.

Here we see the levels of **DVD/Blu-ray purchasing** among the general public.

69% of the general public say they bought a disc in the past year and we split the data further by purchase level.

Younger people, as would be expected, are the heaviest purchasers. There is not a great deal of difference by gender.

While purchasing tends to trail off with age, it is still the case that **half of all 55+ year olds** say they bought a DVD or Blu-ray in the last 12 months.

A key analysis is to compare the incidence and level of disc purchasing of the general public to that of diverse audiences – this is provided overleaf.

DVD/Blu-ray purchase levels in the past year
Base: representative sample of GB 16+ population (2,228)
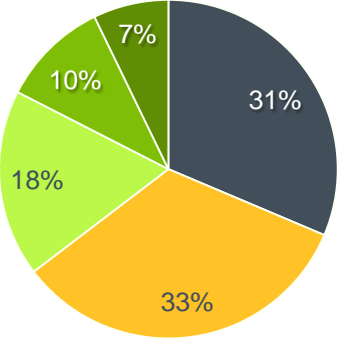
- None — "None" **31%**
- 1 to 5 — "Light" **33%**
- 6 to 10 — "Medium" **18%**
- 11 to 25
- 26 or more — "Heavy" **17%**

	Male	Female	16-24	25-34	35-44	45-54	55+
Base	1,060	1,168	273	433	426	341	755
None	31%	32%	20%	13%	26%	27%	50%
Light	31%	35%	30%	39%	34%	34%	31%
Medium	19%	17%	23%	25%	21%	17%	11%
Heavy	19%	16%	28%	23%	19%	22%	7%

The overview

7 out of 10 people in the country say they bought a DVD or Blu-ray disc in the last year, with 16-24s being the heaviest purchasers

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DVD/Blu-ray purchase levels in past year among diverse audiences, including gifts

The passion for film among many diverse audiences not only manifests itself in elevated cinema attendance, but also in healthy demand for **home entertainment** DVDs and Blu-rays.

The group that spikes the most is **LGB**, over a third of whom count themselves as heavy film purchasers for the home.

Black and working class people are slightly ahead of the national average, while Asians and Eastern Europeans are more aligned to the average.

Older women are less likely to purchase discs, but in absolute terms, nearly 2 in 3 purchase with some regularity, with 12% being heavy purchasers.

This is more evidence to show that diverse audiences provide a **substantial share** of commercial revenues for film. We will see later that there is an opportunity to increase this potential.

DVD/Blu-ray purchase levels in the past year
Base: representative sample of GB 16+ population and diverse audiences

	None	Light	Medium	Heavy
Total GB	31%	33%	18%	17%
Total GB into film *for better comparison with diverse audiences*	25%	36%	20%	19%
Asian	23%	35%	22%	20%
Black African/Caribbean	21%	33%	21%	24%
C2D/Working class	22%	34%	20%	24%
Eastern European	21%	39%	19%	21%
Lesbian, Gay, Bisexual	15%	27%	22%	36%
Older women	37%	41%	11%	12%
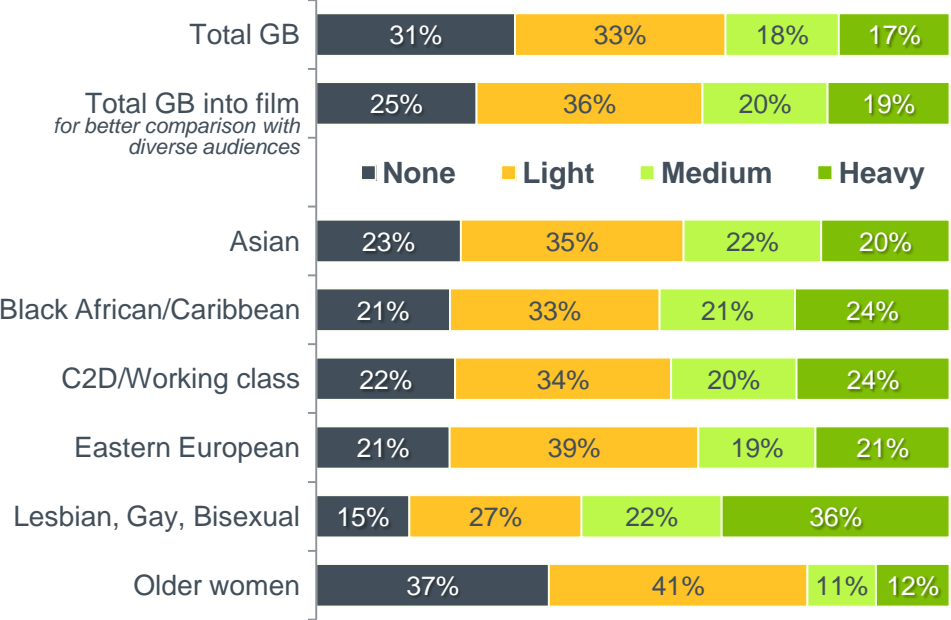
The overview

Diverse audiences, most notably LGB, account for a considerable slice of home entertainment revenues

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An overview of how the general public watch films
(other than cinema and live TV)

The ways people can watch films is ever expanding and here we look at the incidence of ever seeing a film on platforms other than live broadcast TV and cinema.

We see the importance of the DVD market and that **Blu-ray** (BD) still has a long way to go before it can begin to approach the incidence levels of its predecessor.

We also see the ever-growing importance of **DVR** and **catch-up** TV.

And while it remains a minority level, we also see the significance of the **online market**, both legal and illegal.

Nearly 1 in 5 (18%) of the general public say they have watched a **pirated** film downloaded via peer-to-peer (p2p) networks or downloaded via links spread on blogs/discussion boards and hosted on cyberlockers/file-hosting sites.

Overleaf we provide a breakdown of the general public data by demographics.

Watch films in this way…
Base: representative sample of total GB 16+ population (2,228)

■ **Yes**   ■ **No**

	Yes	No
Receive DVD gift	73%	27%
Buy DVD	68%	32%
Recorded from TV	65%	35%
Catch-up TV	52%	48%
Subscription TV/Sky	46%	54%
Rent DVD	36%	64%
Online streaming	23%	77%
Pay-per-view TV	23%	77%
Buy BD	20%	80%
Receive BD gift	19%	81%
Legal download	17%	83%
Piracy-P2P	16%	84%
Rent BD	13%	87%
Piracy-Cyberlockers	11%	89%

18% net piracy
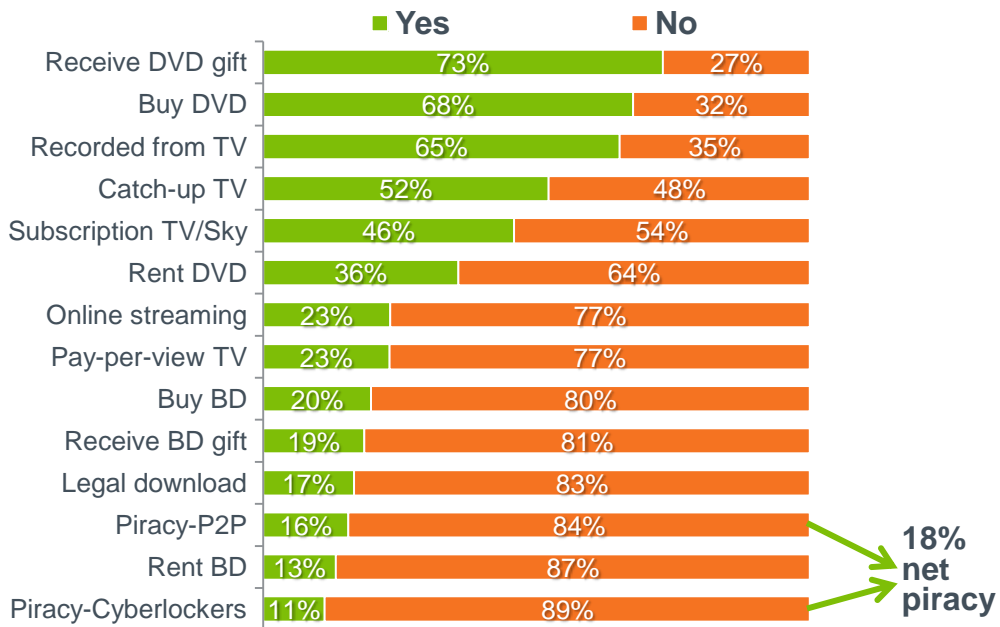
The overview

There are so many ways to watch a film nowadays – traditional formats like DVD still top the list but we can picture the growth of Blu-ray, TV platforms and digital, with piracy prevalent for nearly 1 in 5 of the public

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An overview of how the general public watch films
(other than cinema and live TV)

Of course we expect to see some **large differences** when we split the incidence of viewing by platform by gender and age.

The biggest differences are by **age**, where it is very clear to see that younger people are much more likely to be **digital and Blu-ray** compared to older demographics.

1 in 3 16-24 year olds say they have watched a bought Blu-ray film.

We also see very high levels of **piracy** – over 1 in 3 of 16 to 34 year olds have watched a movie pirated downloaded via peer-to-peer sites and software.

	Total GB	Gender				16-24		25-34		35-44		45-54		Age 55+	
		Male		Female											
Base	2,228	1,060		1,168		273		433		426		341		755	
Receive DVD gift	73%	70%	-3	76%	+3	73%	0	78%	+5	74%	+1	76%	+3	69%	-4
Buy DVD	68%	67%	-1	68%	0	75%	+7	75%	+7	76%	+8	68%	0	57%	-11
Recorded from TV	65%	68%	+3	63%	-2	58%	-7	65%	0	60%	-5	67%	+2	71%	+6
Catch-up TV/iPlayer	52%	53%	+1	52%	0	64%	+12	60%	+8	51%	-1	55%	+3	44%	-8
Subscription TV/Sky	46%	49%	+3	44%	-2	48%	+2	64%	+18	49%	+3	54%	+8	31%	-15
Rent DVD	36%	36%	0	36%	0	49%	+13	50%	+14	41%	+5	31%	-5	22%	-14
Online streaming	23%	30%	+7	17%	-6	52%	+29	38%	+15	20%	-3	15%	-8	10%	-13
Pay-per-view TV	23%	26%	+3	21%	-2	32%	+9	41%	+18	24%	+1	27%	+4	9%	-14
Buy BD	20%	25%	+5	15%	-5	32%	+12	34%	+14	21%	+1	16%	-4	9%	-11
Receive BD gift	19%	23%	+4	15%	-4	34%	+15	34%	+15	19%	0	15%	-4	6%	-13
Legal download	17%	22%	+5	12%	-5	39%	+22	32%	+15	12%	-5	11%	-6	5%	-12
Piracy-P2P	16%	21%	+5	10%	-6	35%	+19	36%	+20	11%	-5	8%	-8	5%	-11
Rent BD	13%	16%	+3	11%	-2	24%	+11	32%	+19	13%	0	6%	-7	3%	-10
Piracy-cyberlockers	11%	16%	+5	7%	-4	33%	+22	28%	+17	6%	-5	4%	-7	1%	-10

Film consumption

Qualitative insight

Asian

- Many films this audience watch are **mainstream UK and Hollywood blockbusters** with big name stars and special effects.

- Asian audiences display **above average consumption patterns to the mainstream** (although in many ways this audience are mainstream), so DVD and Cinema consumption is not unusual.

- Pakistani respondents in general, although particularly females, are watching a fair amount of South Asian film/TV. This is in contrast to our Indian respondents, for whom **Bollywood can appear out of date and not in tune with modern times**.

- There is an overall feeling, however, that **Asian film is highly inaccessible in UK cinema** as it is shown at inconvenient times and this is a suggested area for improvement.

Qualitative insight

Black African / Caribbean

- Whilst the black audience that we met qualitatively were interested in mainstream film genres, their tastes were also influenced by black directors. This issue dominated discussion – with the overriding issue that **there are very few British black directors of note**.

- They were particularly attracted to films with **all black casts**. They like films such as '*Why did I get married?*' (one respondent recently got married so could relate to it!) and '*The Family that Preys*', both of which were directed by Tyler Perry.

- One group attendee was a collector of U.S. 'Blaxploitation' films, primarily because of the music. Many more **buy movies with all black casts from Amazon** (shipped from the US).

- Overall there is a feeling that films with an all black cast are **highly inaccessible in UK cinemas**, for example they may be shown in one cinema in the whole country (Brixton) or are shown for extremely short periods – sometimes just a few days.

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Film consumption

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Qualitative insight

Social Grade C2DE

- Most of our respondents **spontaneously knew** half a dozen UK films and could often name the director and lead actors.

- Word of mouth is influential, but **big budget marketing campaigns are often recalled**, press and poster advertising, trailers, internet advertising and social networks are all used to form a view about which film to watch.

- **Cinema visits are high** for this audience (on average compared to the general public), although cost can be an issue.

- **Piracy is common for this audience**. Often they and their children are downloading films illegally and sharing them, or they are buying pirate DVD's at work or in public houses. Little thought is given to the industry, in fact the common mantra is 'you are a fool if you don't'.

Qualitative insight

Eastern European

- Eastern Europeans watch a **wide range of film genres** including action, sci-fi, romcom, drama, comedy drama, war films and horrors.

- While they watch a wide range of UK/big budget Hollywood films, they also consume a **variety of films from across Europe** (largely picked up from the frequently mentioned Polish Box). These tended to be the same genres as mentioned above.

- This group will generally decide to watch a film having seen a trailer or having received a **word of mouth recommendation from a friend**. Whilst cinemas are visited quite often, films were consumed via DVD/TV (again using Polish Box).

- Younger Polish people, like many of the C2DE social class white audience we spoke to, **were downloading / streaming a lot of films illegally** and sharing pirate DVDs with people at work.

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Film consumption

Qualitative insight

Gay and Lesbian

- Our **lesbian respondents liked less 'traditional' film**, for example Film Noir, Classics, World Cinema and Bio Pics.

- Being interested in film, lesbian women are actively **on the lookout for trailers**. Of all the audiences, they are most likely to **rely on their own instincts** when choosing a film to watch.

- For both gay and lesbian audiences there is a degree of **word of mouth** recommendation that takes places as well. They tend not to focus on reviews as much as other audiences, primarily because the **reviews cater for mass audience tastes.**

- The **gay audience was fairly mainstream** in their film viewing habits and watched films via a mix of visiting the cinema , renting DVDs, subscribing to movie channels and watching films on TV.

- A **genre/storyline** considered to be of specific interest is the key factor leading gay men to watch a film as well as a big name cast and special effects.

Qualitative insight

Older Women 50-75yrs

- This group is more **traditional** in their consumption – they do not visit the cinema as regularly as younger people, but they make outings if they read **good reviews** in the national press. Many are often going to the cinema with grandchildren to enjoy family films.

- The majority are watching films at home, often **renting them on DVD**, with a large number also **recording films** from television. There is a greater reliance on the TV as a source of film.

- They are influenced highly by **trailers and posters** in the main. Personal recommendation is very strong and powerful in influencing film watching, although the repertoire of films is fairly narrow – this audience knows what it likes.

- The **younger members of this older audience** in London that we spoke to were **more in tune with technology**, many have iPhones and one had a Kindle. Two of the youngest and sociable are on social media and were having lively social lives, although this was rarely cited as influencing their film choices in any way.

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An overview of how diverse audiences watch films
(other than cinema and live TV)

	Total GB	Asian		Black African/ Caribbean		C2D/ Working class		Eastern European		Lesbian, gay, bisexual		Older women	
Receive DVD gift	73%	70%	-3%	81%	+8%	78%	+5%	84%	+11%	89%	+16%	77%	+4%
Buy DVD	68%	66%	-2%	77%	+9%	72%	+4%	70%	+2%	88%	+20%	63%	-5%
Recorded from TV	65%	61%	-4%	65%	0%	62%	-3%	34%	-31%	68%	+3%	68%	+3%
Catch-up TV/iPlayer	52%	66%	+14%	81%	+29%	54%	+2%	58%	+6%	70%	+18%	50%	-2%
Subscription TV/Sky	46%	56%	+10%	69%	+23%	49%	+3%	43%	-3%	50%	+4%	36%	-10%
Rent DVD	36%	48%	+12%	49%	+13%	39%	+3%	48%	+12%	51%	+15%	29%	-7%
Online streaming	23%	47%	+24%	56%	+33%	28%	+5%	63%	+40%	41%	+18%	9%	-14%
Pay-per-view TV	23%	30%	+7%	35%	+12%	27%	+4%	19%	-4%	28%	+5%	13%	-10%
Buy BD	20%	29%	+9%	27%	+7%	21%	+1%	23%	+3%	27%	+7%	10%	-10%
Receive BD gift	19%	26%	+7%	26%	+7%	19%	0%	21%	+2%	24%	+5%	8%	-11%
Legal download	17%	38%	+21%	43%	+26%	18%	+1%	43%	+26%	34%	+17%	5%	-12%
Piracy-P2P	16%	31%	+15%	26%	+10%	16%	0%	49%	+33%	25%	+9%	5%	-11%
Rent BD	13%	22%	+9%	23%	+10%	14%	+1%	18%	+5%	24%	+11%	6%	-7%
Piracy-cyberlockers	11%	31%	+20%	22%	+11%	13%	+2%	41%	+30%	20%	+9%	1%	-10%

(Total GB column labelled: benchmark)

There are some very **large differences** to the average general public when compared to diverse audiences.

Eastern Europeans, for example, are heavily into **streaming, downloading and piracy** to acquire their films, presumably in native language. Asian and Black audiences are also disproportionately into a digital life, both legal and illegal. The LGB audience over-indexes for digital, but also for purchased and gifted DVDs. Working class people are more closely aligned to the national average and older women tend to be less likely to consume films from newer digital platforms.

This is further evidence to show that these audiences are **highly connected** with film, that they are ahead of the curve for digital adoption and, arguably, more needs to be done to provide what they need/demand though legitimate channels.

Volumetric analysis – general public
(share of volume by way of watching films)

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Pie chart: share of volume by way of watching films

- Rent DVD, 6%
- Cinema, 11%
- Pay-per-view TV, 2%
- Buy DVD, 9%
- Catch-up TV/iPlayer, 5%
- Receive DVD gift, 11%
- Live TV, 20%
- Rent BD, 1%
- Buy BD, 2%
- Receive BD gift, 2%
- Legal download, 1%
- Online streaming, 2%
- Piracy-P2P, 3%
- Piracy-cyberlockers, 1%
- Recorded from TV, 15%
- Subscription TV/Sky, 11%
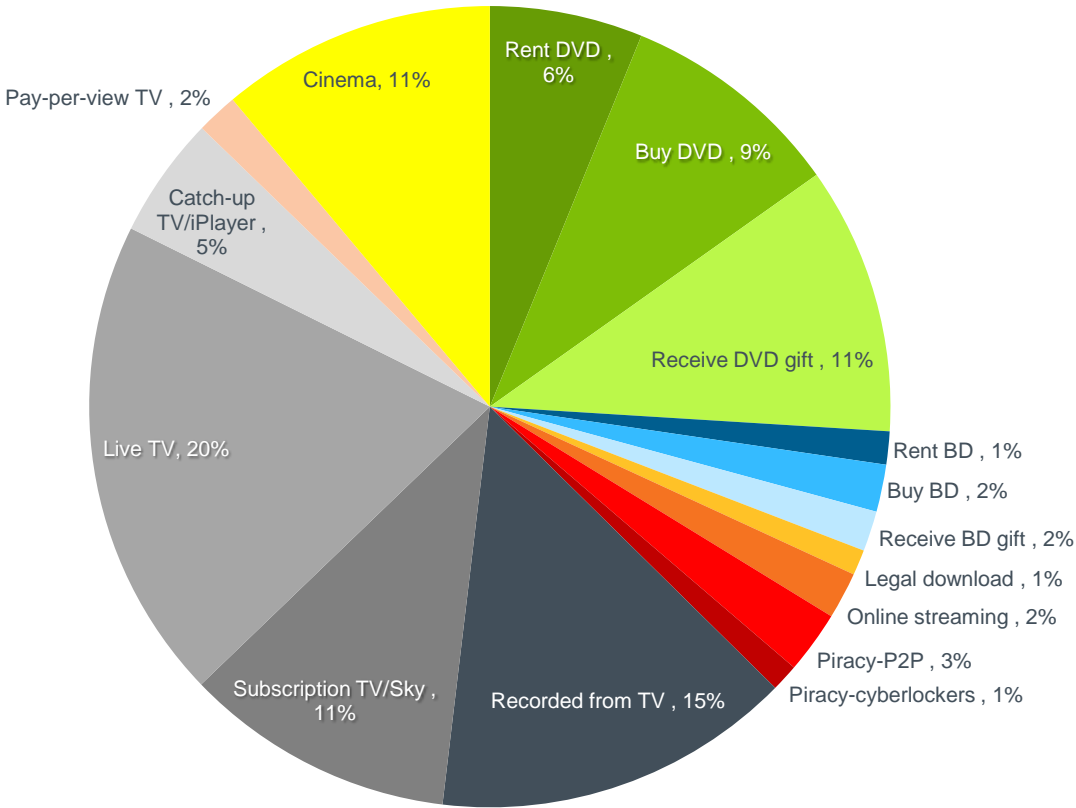
We asked the general public to tell us precisely how they watched the last ten films they saw, whether it was on TV, on DVD, in the cinema, downloaded and so on. By aggregating all the data we are able to assess the **share of volume** by platform/channel, as above.

As you can see, TV, in its various forms, accounts for a large share of volume, as does DVD. Blu-ray is undoubtedly growing but as of now represents a relatively low share. Online/digital accounts for a sizeable chunk of volume, but much of it is piracy.

The volume shares shown above represent the total national market. An even more interesting analysis is to look at the same volume shares by different age groups in the country.

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Volumetric analysis – general public
(share of volume by way of watching films split by age)

16-24s   **25-34s**   **35-44s**   **45-54s**   **55+**

- rent dvd
- buy dvd
- receive dvd
- rent bd
- buy bd
- receive bd
- legal download
- online streaming
- piracy-p2p
- piracy-cyber
- recorded from TV
- subscription TV/Sky
- live TV
- catch-up TV
- pay-per-view TV
- cinema

Y-axis: 0%, 25%, 50%, 75%, 100%
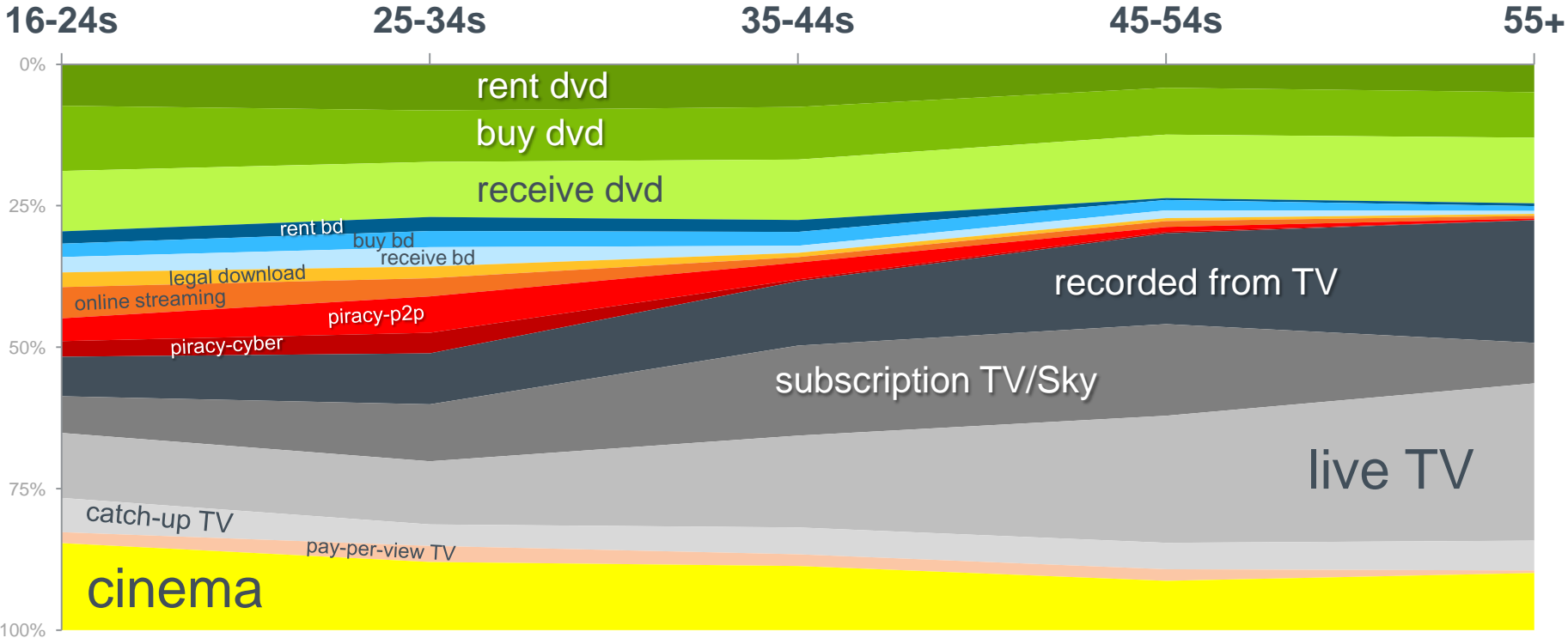
We see some clear patterns emerging when we assess the share of ways of watching film by age. As people get older, they are typically more reliant on more traditional TV-based platforms (as shown in grey). Younger people, especially 16-24s squeeze TV-based viewing considerably and spread their viewing across more platforms more evenly, and they are, as one would expect, the greatest users of digital. This includes piracy, which represents a considerable share of viewing among the under 35s. While DVD-based viewing and cinema viewing is roughly even across age groups (albeit dipping for the over 55s), the newer Blu-ray format is more biased towards the under 35s.

Volumetric analysis – diverse audiences

General public

- Rent DVD
- Buy DVD
- Receive DVD
- Blu-ray
- Legal download
- Stream
- Piracy-p2p
- Piracy-cyber
- Recorded TV
- Sub/Sky
- Live TV
- Catch-up TV
- Pay-per-view
- Cinema

Asian

- Rent DVD
- Buy DVD
- Receive DVD
- Blu-ray
- Legal download
- Stream
- Piracy-p2p
- Piracy-cyber
- Recorded TV
- Sub/Sky
- Live TV
- Catch-up TV
- Pay-per-view
- Cinema

Black African/ Caribbean

- Rent DVD
- Buy DVD
- Receive DVD
- Blu-ray
- Legal download
- Stream
- Piracy-p2p
- Piracy-cyber
- Recorded TV
- Sub/Sky
- Live TV
- Catch-up TV
- Pay-per-view
- Cinema

C2D/ Working class

- Rent DVD
- Buy DVD
- Receive DVD
- Blu-ray
- Legal download
- Stream
- Piracy-p2p
- Piracy-cyber
- Recorded TV
- Sub/Sky
- Live TV
- Catch-up TV
- Pay-per-view
- Cinema

Eastern European

- Rent DVD
- Buy DVD
- Receive DVD
- Blu-ray
- Legal download
- Stream
- Piracy-p2p
- Piracy-cyber
- Recorded TV
- Sub/Sky
- Live TV
- Catch-up TV
- Pay-per-view
- Cinema

LGB

- Rent DVD
- Buy DVD
- Receive DVD
- Blu-ray
- Legal download
- Stream
- Piracy-p2p
- Piracy-cyber
- Recorded TV
- Sub/Sky
- Live TV
- Catch-up TV
- Pay-per-view
- Cinema

Older women

- Rent DVD
- Buy DVD
- Receive DVD
- Blu-ray
- Recorded TV
- Sub/Sky
- Live TV
- Catch-up TV
- Pay-per-view
- Cinema

We can do the same share of volume analysis for each **diverse audience**. Again, some striking differences compared to the national average. The most clear difference is the use of online/digital by Eastern Europeans – they are clearly watching a massively disproportionate volume through streaming and piracy, which in turn squeezes their reliance on TV. Cinema plays a disproportionate role for Asians, Eastern Europeans and, to a lesser extent, for Black and LGB audiences.

Detailed findings

What film means to people

Passion for film and a way to spend leisure time

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Here is an overview of peoples' basic relationship with film. We see that film has the power to make peoples' lives more **pleasurable** and they are an outlet for **escapism** from the daily grind. This is true for all demographics and it never leaves us as we get older.

Film is a **shared** experience for many, especially so for people in their late 30s as family matters become more important.

It is so important that over 2 in 5 of the general public state themselves to be **passionate** about film. Incidence of passion is higher among the under 45s, where a majority of people say they are passionate about film and while it trails off for the over 45s, still a substantial minority say they are passionate about film.

Despite all the competing pressures on peoples' time and spend, film is seen to be a **vital** part of our lives. But what about for the different diverse audiences? We show this overleaf.

% that agree with these statements
Base: representative sample of GB 16+ population into film (1,978)

Statement	%
Watching a film is a **pleasurable** way to fill my time	76%
I watch films to **relax** & unwind	76%
I like to watch films to **escape** the pressures & demands of everyday life	62%
Films are a great way of **sharing** experiences with family & others	59%
Watching films is an **important** part of my leisure life	50%
I am **passionate** about films	40%
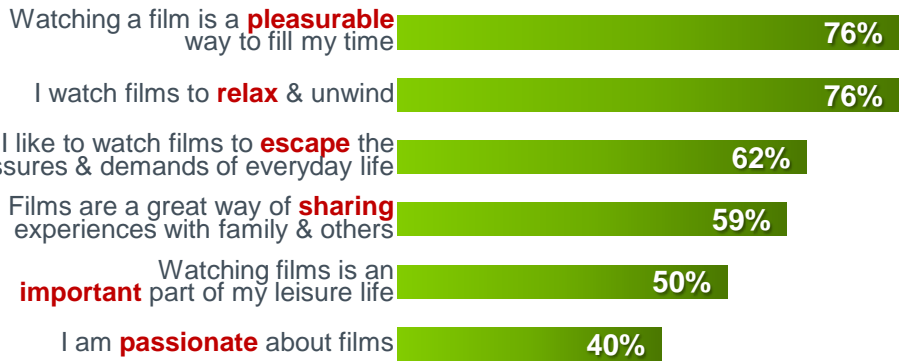
	Male	Female	16-24	25-34	35-44	45-54	55+
Base	941	1,037	250	408	389	312	619
Pleasurable	74%	77%	63%	71%	84%	81%	75%
Relax	73%	79%	63%	73%	81%	83%	76%
Escape	58%	65%	59%	63%	71%	65%	54%
Sharing	53%	65%	57%	62%	69%	61%	51%
Important	47%	53%	51%	60%	59%	51%	39%
Passionate	43%	37%	53%	60%	52%	37%	18%

The overview

Confirming what we already know, film has the power to enrich our lives and escape the daily grind. So much so that a majority of the under 45s say they are passionate about film.

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Passion for film and a way to spend leisure time

% that agree with these statements
Base: diverse audiences benchmarked against total GB into film

	Total GB into film	Asian		Black African/ Caribbean		C2D/ Working class		Eastern European		Lesbian, gay bisexual		Older women	
Pleasurable	76%	82%	+6	87%	+11	75%	-1	84%	+8	90%	+14	78%	+2
Relax	76%	81%	+5	85%	+9	75%	-1	86%	+10	86%	+10	81%	+5
Escape	62%	70%	+8	61%	-1	63%	+1	66%	+4	69%	+7	63%	+1
Sharing	59%	75%	+16	82%	+23	62%	+3	68%	+9	67%	+8	63%	+4
Important	50%	70%	+20	64%	+14	50%	0	66%	+16	69%	+19	46%	-4
Passionate	40%	61%	+21	66%	+26	43%	+3	65%	+25	64%	+24	22%	-18

benchmark

The general public are seen to be into film and to value it greatly, but the results pale in comparison to many of our nation's diverse audiences. Lesbian/Gay/Bisexual, Asian, Black and Eastern European members of our society are **substantially more passionate** about film than the average general public. We have already seen that there are some key drivers for this, such as above-average level of viewing and cinema attendance.

The comparative figures for older women and for working class people is more on a par with the national average. Older women are less likely to say they are passionate about film, but they remain either on average or slightly ahead for valuing film as part of their lives (as are working class people).

What this shows is that our society's diverse audiences are not only highly connected with the medium of film, but they are an audience that must not be ignored when considering how best to fill the cinema and for home entertainment. The relative **commercial attractiveness** of these audiences will be a running theme in this report, as will be the need for their authentic portrayal in film itself.

The overview	People in diverse segments are highly connected with film – delivering against their needs will unlock a substantial commercial potential

The power of film to tell stories, influence and inspire

7 in 10 say film conveys powerful **emotions**

> ### Qualitative insight
>
> *"That was one film [Philadelphia] that did truly affect me. To see someone being treated so badly for such a devastating affliction was heartbreaking. But then again it is more of a tragedy for gay people..."*
>
> **Male** (Gay, focus group)

> ### Qualitative insight
>
> *"American Beauty was an inspiring film. It made me look at things differently...how we all have our own private issues to deal with."*
>
> **Female** (Indian, focus group)

7 in 10 say films are **inspirational**

The power of film to tell stories, influence and inspire

People have such a strong bond with film that their power stretches way beyond a way of passing the time pleasurably. Most people agree that films are a vehicle to convey **powerful emotions**, having the ability to be **inspirational**. A majority also agree they are the most powerful way to tell stories about **real issues** in life.

While fewer people say that films directly influence their taste or have given them direct role models, still more than a quarter of the general public feel they have.

While there is, of course, always space for sheer entertainment and mindless fun, it is this power of film to mould and create a public **mindset** which we will explore in more detail in this report, especially with regard to the portrayal of diverse audiences and peoples' attitudes towards them.

Firstly, how do diverse audiences compare with the general public for their power to convey emotions, to inspire and tell real stories? This is answered overleaf.

% that agree with these statements about film
Base: representative sample of GB 16+ population into film (1,978)

Films have the power to convey powerful **emotions**	73%
Films have the power to be **inspirational**	67%
Films are the most powerful way to tell **stories** about real issues	54%
Some films have **influenced** my own style, fashions & taste	29%
Some characters in films have become **role models** that have inspired me	28%

	Male	Female	16-24	25-34	35-44	45-54	55+
Base	941	1,037	250	408	389	312	619
Emotions	70%	75%	64%	68%	82%	76%	72%
Inspirational	66%	69%	65%	65%	78%	70%	62%
Stories	50%	58%	53%	60%	56%	52%	51%
Influenced	31%	27%	46%	44%	33%	23%	13%
Role models	28%	27%	46%	45%	31%	21%	12%

The overview

Film has so much more power than merely to entertain and pass the time. It is this power of influence that we will explore in more detail in this report.

The power of film to tell stories, influence and inspire

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% who agree with these statements about film
Base: diverse audiences benchmarked against total GB into film

	Total GB into film	Asian		Black African/ Caribbean		C2D/ Working class		Eastern European		Lesbian, gay, bisexual		Older women	
Emotions	73%	77%	+4	86%	+13	72%	-1	77%	+4	87%	+14	76%	+3
Inspirational	67%	74%	+7	86%	+19	65%	-2	75%	+8	83%	+16	69%	+2
Stories	54%	70%	+16	67%	+13	57%	+3	57%	+3	64%	+10	57%	+3
Influenced	29%	44%	+15	44%	+15	30%	+1	53%	+24	36%	+7	17%	-12
Role models	28%	42%	+14	51%	+23	30%	+2	49%	+21	35%	+7	15%	-13

(benchmark)

Film's power to influence and inspire is felt **even more intensely** by our society's diverse audiences.

- For Asians, it is about stories and finding role models that they find have a direct influence on their lives
- Black people spike for all these factors, especially so for finding role models and stories that inspire
- For LGB people it is more about the power of emotions, being inspired and stories about real life issues
- Eastern Europeans too feel highly influenced by in their tastes by film, finding role models that inspire them

It is plain to see just how strongly connected these audiences are with film, making them an important audience to cater for. But, perhaps more importantly, that film has such a disproportionate power to influence and inspire, it makes it even more important to ensure that their **portrayal** in film generally is authentic and genuine. This is what we will explore in this report.

The overview	Films can inspire and influence us all, but even more so for diverse audiences. Being so influential, especially for role models, means that the need for authenticity and genuineness is heightened.

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The power of film to inform, educate and to change a mindset

50% think films have the power to challenge **stereotype**

Qualitative insight

"Any UK film with black people in, they're never lawyers or doctors or anything, they're either hardcore Christians who are crazy or into drugs and violence. I think that films reinforce stereotypes and then people wonder why there's a problem with young people not aspiring to do things with their lives."

Male (Black, focus group)

Qualitative insight

"We don't all work in meat factories. We live the same lives as other people and we have the same problems. Why can't that be shown."

Female (Eastern European, focus group)

7 in 10 feel that film has the power to **educate** about real life issues and events

The power of film to inform, educate and to change a mindset

With its power to convey emotions and tell impactful stories, it is no surprise to see just how powerful a medium film is to **change** peoples' mindsets.

A majority say film has the power to educate about real life and over half go further to say it has the power to **challenge** stereotypes.

Film, having such power, makes it all the more important for filmmakers to spend time to reflect on how all parts of our society are **portrayed**. For diverse audiences, film having the power to influence and change the way people think is a double-edged sword, depending on the **authenticity** of portrayal. Such influence appears to be even stronger when cultures and communities other than one's own are portrayed, making authenticity all the more important.

A film's influence extends beyond the viewer as half the general public say that films encourage them to **talk** about issues portrayed with friends and family, thus increasing the potential influence and the need for authenticity.

% who agree with these statements about film
Base: representative sample of GB 16+ population into film (1,978)

Statement	%
Films have the power to **educate** about real life issues and events	69%
Films have the power to **challenge** stereotypes	53%
Films make me want to **talk** about the issues portrayed with friends & family	49%
I have **learned**[1] a great deal about different cultures & communities from films	46%
Some films have had a major impact on how I **think** about things	42%
I have **learned**[2] a great deal about my own cultures & communities from films	28%
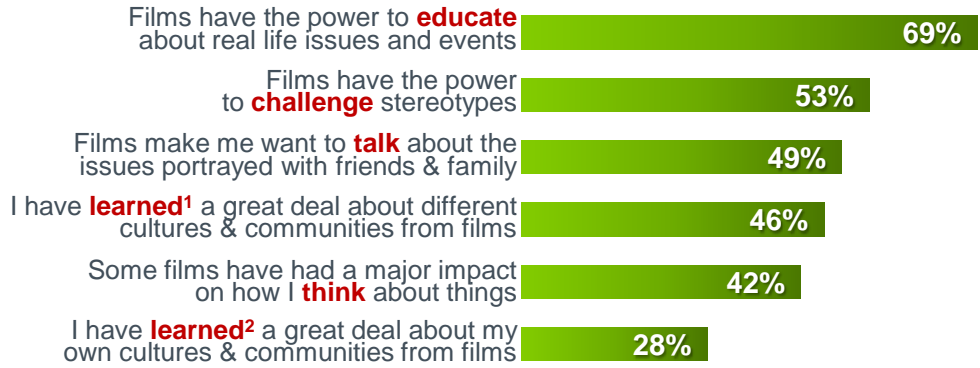
	Male	Female	16-24	25-34	35-44	45-54	55+
Base	941	1,037	250	408	389	312	619
Educate	65%	73%	63%	65%	76%	73%	67%
Challenge	53%	53%	56%	61%	63%	52%	41%
Talk	40%	56%	50%	53%	54%	51%	42%
Learned[1]	45%	46%	48%	52%	45%	42%	44%
Think	40%	44%	53%	52%	49%	41%	29%
Learned[2]	28%	29%	35%	40%	27%	27%	20%

The overview

That film has such a power to educate, challenge and change mindsets, filmmakers should spend time to reflect how all parts of our society are portrayed

The power of film to inform, educate and to change a mindset

% that agree with these statements about film
Base: diverse audiences benchmarked against total GB into film

	Total GB into film	Asian		Black African/ Caribbean		C2D/ Working class		Eastern European		Lesbian, gay, bisexual		Older women	
Educate	69%	74%	+5	87%	+18	68%	-1	70%	+1	82%	+13	75%	+6
Challenge	53%	67%	+14	75%	+22	51%	-2	67%	+14	80%	+27	46%	-7
Talk	49%	63%	+14	67%	+18	51%	+2	63%	+14	62%	+13	57%	+8
Learned[1]	46%	57%	+11	71%	+25	46%	0	66%	+20	58%	+12	46%	0
Think	42%	56%	+14	62%	+20	46%	+4	65%	+23	56%	+14	37%	-5
Learned[2]	28%	40%	+12	47%	+19	30%	+2	42%	+14	36%	+8	26%	-2

(benchmark)

Film's power to inform, educate and change mindsets is felt to be true even more intensely by our society's diverse audiences, especially so for the Black audience. Nearly 9 in 10 of the Black audience interviewed recognise film's power to educate and inform and 3 in 4 say they have the power to challenge stereotypes. Asians, Eastern European and LGB audiences also have a heightened sense of film's ability to change the mindset.

Working class people and older women are more mainstream in their views, but still substantial proportions recognise the power of film to educate and inform – for example, 3 in 4 older women say film has the power to educate and 1 in 2 say it can challenge stereotypes.

The overview	We are all influenced by film in the way that we think – and film's ability to challenge stereotypes and open our minds to new ways of thinking and learning about new cultures is even more keenly felt to be true by our nation's diverse audiences

Detailed findings
The importance of portrayal

Importance that films portray real life issues facing our society in a genuine way

There is room for a massive variety of films to be made and while this report focuses on the **authenticity and genuineness** of portrayal of diverse audiences, there will always be demand for escapism and fantasy. Over 2 in 3 of the general public say it is important for films to cater for this.

Equally important is the public's demand for films to portray real life issues facing our society, and over 4 in 5 agree that films should make us **think** as well as entertain.

Saying that films should be genuine or they should be fantasy is a false dichotomy and, of course, there is room for all types to be made. But, as we saw earlier, filmmakers have an **awesome power** to inform, mould and influence the mindset, so when portraying diverse audiences, whether in real or fantasy scenarios, some care should be taken to ensure false or hackneyed stereotypes are not reinforced. Authenticity and genuineness are important.

How important diverse audiences consider these issues is explored overleaf.

% stating this is important
Base: representative sample of GB 16+ population into film (1,978)

Some films should make you **think** as well as entertain — **82%**

Some films portray **real life** issues facing our communities — **70%**

Some films should be more about escapism and **fantasy** — **68%**

	Male	Female	16-24	25-34	35-44	45-54	55+
Base	941	1,037	250	408	389	312	619
Think	81%	83%	79%	81%	89%	82%	79%
Real life	65%	73%	72%	71%	71%	72%	65%
Fantasy	67%	68%	71%	73%	74%	70%	58%

The overview — The general public has a very strong appetite for films that make us think and there is equal demand for realism and escapist fantasy

Importance that films portray real life issues facing our society in a genuine way

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% stating this is important
Base: diverse audiences benchmarked against total GB into film

	Total GB into film	Asian		Black African/ Caribbean		C2D/ Working class		Eastern European		Lesbian, gay, bisexual		Older Women	
Think	82%	88%	+6	92%	+10	81%	-1	86%	+4	93%	+11	79%	-3
Real life	70%	82%	+12	88%	+18	70%	0	78%	+8	82%	+12	73%	+3
Fantasy	68%	70%	+2	61%	-9	71%	+3	62%	-6	77%	+5	62%	-6

benchmark

Diverse audiences too want a balance of real life and escapist fantasy, but compared to the national average they tend to have a greater appetite for film that portray **real life issues** facing our communities.

Perhaps this is the first evidence to suggest that the specific commercial demand from such audiences are not being met. This appears to be particularly true for Black, Asian and LGB audiences and, to a lesser extent, among Eastern Europeans. Working class people and older women are more mainstream, more closely aligned to the national average.

The notion of **unmet demand** is something we will expand on later.

The overview	Films that make us think and portray real issues facing our communities are particularly important to many of our diverse audiences, more so than fantasy and escapism

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The importance of stories, characters and settings to which we can personally relate

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We saw that there is public demand for real life issues to be portrayed and here is strong evidence to reinforce the need for authenticity and to portray stories, issues, characters and settings that people can **personally identify** with.

A key analysis is to compare these general public sentiments with those of diverse audiences – this is found overleaf.

It is interesting to see that all three are considered important, with the need for stories and people in film that can be personally identified proving most important. The setting of such stories should also be portrayed **authentically** according to 1 in 2 of the general public.

We see overleaf that this feeling is even more strongly felt by a number of diverse audiences.

% stating this is important
Base: representative sample of GB 16+ population into film (1,978)

There are **stories** told and issues portrayed that I can personally identify with — **61%**

There are actors / **characters** in films that I can personally associate with — **56%**

There should be films that portray my own **community** & background authentically — **48%**
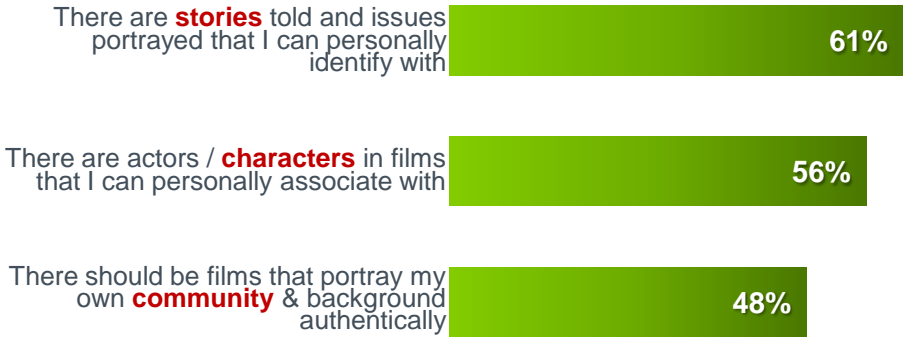
	Male	Female	16-24	25-34	35-44	45-54	55+
Base	941	1,037	250	408	389	312	619
Stories	60%	61%	67%	68%	68%	60%	50%
Characters	53%	58%	73%	63%	66%	54%	39%
Community	49%	47%	57%	61%	53%	42%	37%

The overview

That we can personally associate with stories, issues and people in films we watch is important to most of us, and 1 in 2 say community and background settings should be portrayed authentically

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The importance of stories, characters and settings to which we can personally relate

61% tell us it is important to personally identify with **stories** told and **issues** portrayed

Qualitative insight

"We live on council estates. People fight out there and take drugs so that's the sort of stuff we want to see because it reflects what we live with every day"

Female (Low social grade, focus group)

Qualitative insight

"I didn't identify with Judi's character in 'Notes on a Scandal' – she was vile and disturbed, and loneliness had made her like that."

Female (Older women, focus group)

56% agree it is important that there are **characters** in films that they can personally associate with

The importance of stories, characters and settings to which we can personally relate

% stating this is important
Base: diverse audiences benchmarked against total GB into film

	Total GB into film	Asian		Black African/ Caribbean		C2D/ Working class		Eastern European		Lesbian, gay, bisexual		Older Women	
Stories	benchmark 61%	71%	**+10**	81%	**+20**	65%	**+4**	75%	**+14**	79%	**+18**	54%	**-7**
Characters	56%	66%	**+10**	69%	**+13**	58%	**+2**	66%	**+10**	68%	**+12**	46%	**-10**
Community	48%	65%	**+17**	73%	**+25**	50%	**+2**	64%	**+16**	64%	**+16**	37%	**-11**

Most of our diverse audiences believe it is even more important to see films with stories and characters that establish that personal connection. We saw earlier that these audiences have a deep relationship with film and they see film as a powerful medium to inform, influence and change mindsets. Most of these audiences are also much more likely to say that the portrayal of their own communities and backgrounds should be authentic.

We will see later that these heightened feelings are most likely driven by the fact that film, especially mainstream film, does not come close to matching the **demand** from these audiences to see their own lives, stories and issues portrayed; and neither does it match the **expectation** that many portrayals, when they are expressed, are as authentic as they could be. These are areas we will be explore later. But from this alone we can see that the expectations and demand from these audiences is food for thought in its own right.

We also see that older women are slightly below the national average for thinking it important that their own lives, stories and issues are portrayed. We should **not** automatically take from this that such issues are, therefore, unimportant to them. We will see later that older women (and working class people) feel somewhat under-served by current output, and we ought to still bear in mind that 1 in 2 do think it is important for their stories to be told in an authentic way.

The overview	Our nation's diverse audiences are more likely to consider seeing their own stories, issues and setting portrayed as important because they feel under-served by what's made available to them currently

Perception of the number of films that try to authentically portray 'your own' lifestyle, social background or community among diverse audiences

Half of working class people in the country and 2 in 5 older women say they are too infrequently portrayed authentically in films they see.

The view is felt even more intensely among Asian, Black African/Caribbean and LGB audiences, with around 3 in 5 saying they are too infrequently seen portrayed authentically.

This further strengthens the case for meeting the clear demand from diverse audiences to show and tell their own stories in their own settings in a genuine way.

% saying there are too few films that portray own lifestyle etc.
Base: diverse audiences

Audience	%
Asian	62%
Black African/Caribbean	62%
C2D/Working class	50%
Eastern European	61%
Lesbian, Gay, Bisexual	58%
Older women	40%
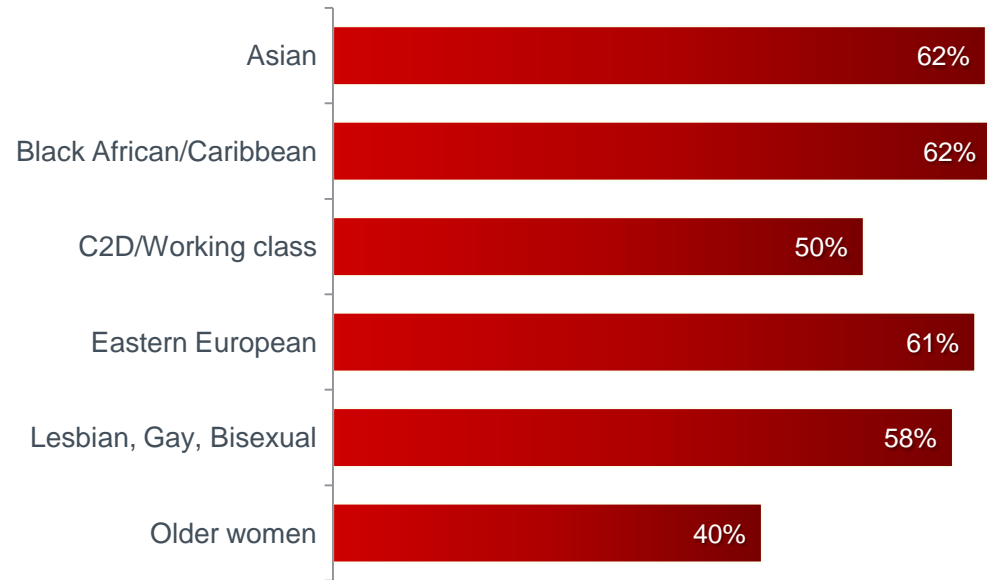
The overview — Around 3 in 5 of some diverse audiences say there are too few films that authentically portray their own lives, strengthening a case for unmet demand

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Enhancing authenticity of portrayal increases overall demand for film

Enhancing authenticity can have a return on investment. While it may be the right thing to do, it also has the potential to increase the return at the box office.

Substantial proportions of the general public are telling us that they would watch **more** films if they were more authentic, especially so for the portrayal of stories, people and scenes from diverse backgrounds.

Over 1 in 3 of the general public say they would watch more films if people from diverse backgrounds were portrayed more authentically – and this is the case, more or less, for all demographics including those aged 55+.

This report focuses a great deal on portrayal of diverse audiences from an attitudinal perspective. Here, however, we see some direct evidence to suggest that filmmakers can benefit **financially** from delivering the public demand for greater authenticity.

A key analysis is how diverse audiences feel and whether they would watch more films if authenticity were delivered. This is shown overleaf.

% that would watch <u>more</u> films if…
Base: representative sample of GB 16+ population into film (1,978)

	If they portrayed real life **issues** that affect us all as a society	41%
	If they revealed real, authentic **stories** about people from backgrounds other than my own	36%
	If people from diverse backgrounds were portrayed more **authentically**	34%
	If I could **believe** that the stories & people being portrayed from diverse backgrounds were authentic	34%
	If they were more broad-minded & authentic about different **cultures**, including my own	34%
	If there were more **characters** I could closely identify with	33%
	If there were more writers & **filmmakers** from my own social background	24%

	Male	Female	16-24	25-34	35-44	45-54	55+
Base	941	1,037	250	408	389	312	619
Issues	41%	42%	43%	45%	38%	42%	40%
Stories	37%	36%	41%	40%	35%	34%	33%
Authentically	33%	35%	37%	40%	34%	31%	32%
Believe	33%	35%	42%	41%	36%	31%	28%
Cultures	36%	31%	43%	41%	35%	27%	28%
Characters	33%	34%	51%	39%	35%	31%	22%
Filmmakers	26%	22%	38%	31%	25%	18%	16%

The overview

The demand for more authenticity, if delivered, has the potential to increase cinema attendance and overall viewing levels

Enhancing authenticity of portrayal increases overall demand for film

59% of LGB audiences would watch more films if they were more **broad-minded** & authentic

Qualitative insight

"We are in the minority – I don't want to watch a heterosexual movie which is narrow-minded. If you are straight, you will love a lot of the fluffy romances, but that kind of thing just doesn't appeal to me...it's wet...I don't despise it, just don't like it

Female (Lesbian, focus group)

Qualitative insight

"We should be shown as having a better command of the English language. The swearing is almost padding for writers to make up for the lack of content."

Male (Black, focus group)

66% of Black African/Caribbean people would watch more films if people were portrayed more authentically

Enhancing authenticity of portrayal increases overall demand for film

% who would watch <u>more</u> films if…
Base: diverse audiences

	Total GB into film	Asian		Black African/ Caribbean		C2D/ Working class		Eastern European		Lesbian, gay, bisexual		Older Women	
Issues	41%	59%	+18	71%	+30	37%	-4	56%	+15	54%	+13	41%	0
Stories	36%	50%	+14	64%	+28	33%	-3	51%	+15	47%	+11	31%	-5
Authentically	34%	59%	+25	66%	+32	31%	-3	54%	+20	51%	+17	32%	-2
Believe	34%	57%	+23	61%	+27	34%	0	53%	+19	47%	+13	32%	-2
Cultures	34%	56%	+22	68%	+34	33%	-1	58%	+24	59%	+25	23%	-11
Characters	33%	47%	+14	57%	+24	33%	0	45%	+12	47%	+14	27%	-6
Filmmakers	24%	39%	+15	54%	+30	24%	0	30%	+6	32%	+8	15%	-9

(benchmark — Total GB into film column)

Here is direct evidence to suggest that providing many of the diverse audiences with a more authentic and genuine portrayal of their communities can **stimulate demand** and, potentially, be **lucrative** for filmmakers. This is also direct evidence to suggest that current output is **under-serving** many of our nation's diverse communities.

Black audiences in particular feel under-served. 7 out of 10 say they would watch more films if they portrayed more real life issues and 2 in 3 say they would watch more films if their portrayal was more authentic. Such elevated intentions to watch more film are true also for Asian, Eastern European and LGB audiences.

While working class people and older women are more mainstream and more aligned to the national average, bear in mind that the national opinion is still substantially in favour of more authentic portrayal.

The overview — This is very strong evidence to suggest that the industry is under-serving many diverse audience segments and, if the demand is met, there is a considerable commercial opportunity to be reaped

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Belief that "mainstream" audiences should be exposed to films featuring issues and circumstances specific to minority groups

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We asked the general public how important, if at all, it is that mainstream audiences be **exposed** to films that feature issues and settings specific to minority groups. 2 in 5 say it is, and a majority of 16-24s say it is.

There is a fair amount of recognition here that being exposed to the unfamiliar is a good thing, perhaps in the same way that travel is said to **broaden** one's horizons.

The feeling is even more pronounced among some of our nation's diverse audiences. Around 2 in 3 of Asian, Black and LGB audiences feel it is important for mainstream audiences to be exposed to films featuring minority groups.

% that believe it is important
Bases: representative sample of GB 16+ population and diverse audiences

- Total GB: **38%**
- Total GB into film: **41%** → split by demographics

Male	Female	16-24	25-34	35-44	45-54	55+
37%	44%	56%	41%	42%	42%	32%
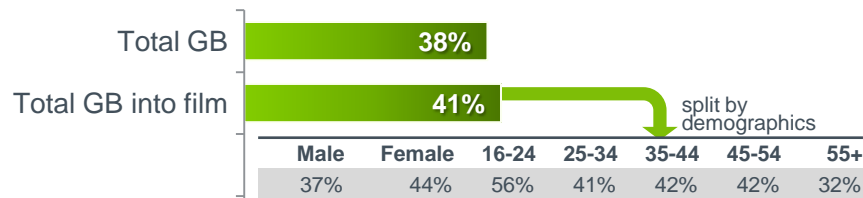
% that believe it is important among diverse audiences

- Asian: **64%**
- Black African/Caribbean: **69%**
- C2D/Working class: **40%**
- Eastern European: **54%**
- Lesbian, Gay, Bisexual: **64%**
- Older women: **37%**
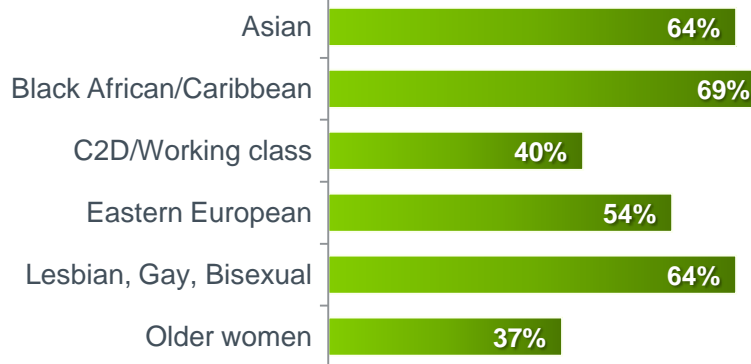
The overview

2 in 5 of the general public feel it is important to be exposed to films that feature minority groups, and our diverse audiences are much more likely to feel this way

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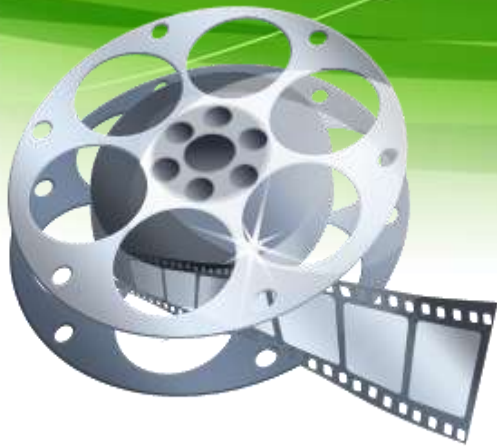
Detailed findings

Have we been getting better at portrayal?

And how much work remains to be done?

The perception of whether UK film's authenticity of portrayal of our nation's diverse groups has changed in the last 10 years

We will see later that more work needs to be done to increase the level of authenticity of portrayal of our nation's diverse audiences in UK film. While more needs to be done, the public certainly seem to believe that we have **moved forward** considerably in the last decade.

Nearly 3 in 4 say the portrayal has become more authentic over the last 10 years. Only a minority say we have moved backwards, an opinion more likely tendered by the over 55s.

While the balance is clearly in favour of improvement, there remains over 1 in 5 who say little has changed in the last decade. Males and those aged 35-54 are more likely to think this way.

So **more work needs to be done**, and we will see this clearly illustrated in the rest of the report, especially when we drill down in turn into specific issues relating to each diverse audience in question.

Please note we asked this question of people aged 25 or older, so that they would have a fair reflection of how things have changed.

Change in authenticity in the last 10 years
Base: representative sample of GB 16+ population into film aged 25+ (1,728)
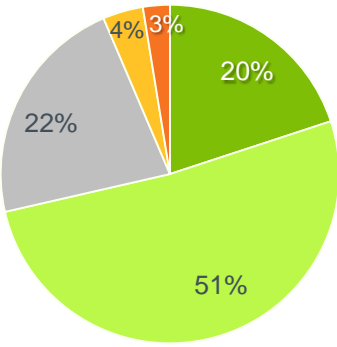
- Got much more authentic
- Got somewhat more authentic
- Not really changed
- Got somewhat less authentic
- Got much less authentic

(data excludes 14% who were "Not sure")

	Male	Female	25-34	35-44	45-54	55+
Base	816	912	408	389	312	619
More authentic	67%	76%	75%	69%	68%	73%
Not changed	25%	19%	22%	25%	27%	18%
Less authentic	8%	5%	3%	6%	5%	9%

The overview

Most of the public think the portrayal of our nation's diverse audiences has become more authentic over the last decade, but we will see later that the job is far from finished

The perception of whether UK film's authenticity of portrayal of our nation's diverse groups has changed in the last 10 years

While, on balance, our diverse audiences also tend to agree that portrayal in UK film of the nation's diverse audiences has got **more authentic** over the last decade, the view is not quite as positive in some segments as it is for the general public.

Black, Asian and Eastern European audiences are somewhat more likely than the national average to think that things have not really changed in the last decade, although, as stated earlier, the balance does clearly favour a net improvement in the authenticity of portrayal. It's also worth bearing in mind that many Eastern Europeans living in Britain are new migrants.

It is really interesting to see that the LGB audience and older women are actually **ahead** of the national average for thinking that the level of authenticity has improved.

So, some mixed messages here. On the whole, we think that authenticity is improving, but the case is less well made for some segments, especially for Asian, Black and Eastern European audiences.

Please note we asked this question of people aged 25 or older, so that they would have a fair reflection of how things have changed.

Change in authenticity in the last 10 years
Bases: representative sample of GB 16+ population and diverse audiences

Segment	More authentic	No change	Less authentic
Total GB into film	71%	22%	6%
Asian	62%	29%	9%
Black African/Caribbean	66%	31%	4%
C2D/Working class	73%	20%	7%
Eastern European	62%	27%	11%
Lesbian, Gay, Bisexual	79%	18%	3%
Older women	80%	14%	6%
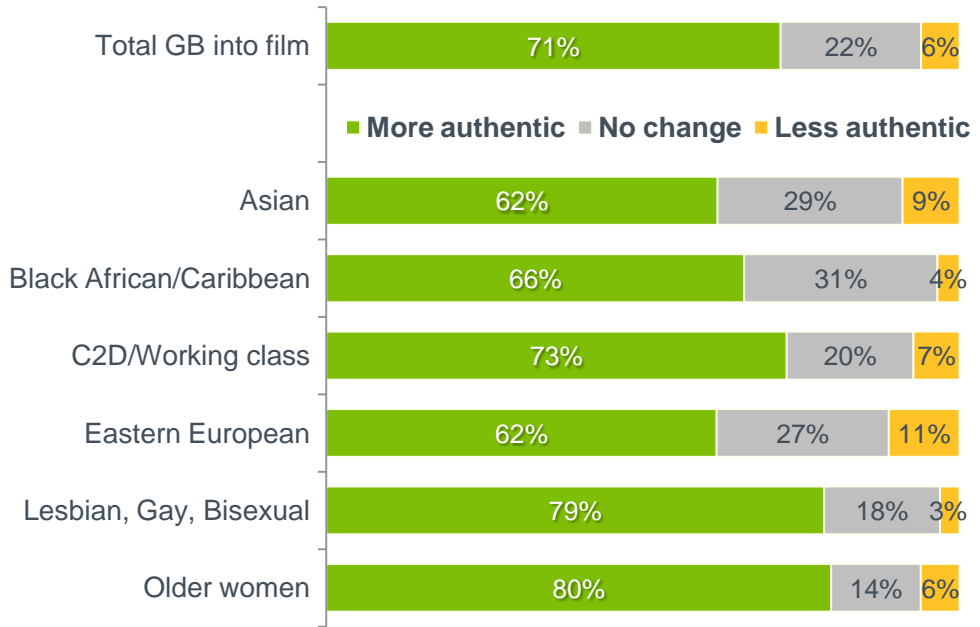
The overview

It is encouraging to see that most consider we are going in the right direction, but not everyone feels the same (over 1 in 3 of the Black audience thinks differently, for example)

The amount of work required by UK filmmakers to create a more authentic portrayal of the nation's diverse communities

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While it is clear, on balance, that most people agree that things have improved over the last decade, we should not rest on our laurels because not only do we see that diverse audiences feel they are under-served, but also we have some direct feedback from people telling us that **more work** needs to be done.

7 in 10 of the general public tell us that more work needs to be done to improve the **authenticity** of portrayal of our nation's diverse communities.

Young people in particular tend to be more prevalent in saying that more work needs to be done.

Of course, how this compares to the views of diverse audiences is key, and this is provided overleaf.

Please note we asked this question of people aged 25 or older, so that they would have a fair reflection of how things have changed.

Amount of work needed
Base: representative sample of GB 16+ population into film aged 25+ (1,728)

- 30% None required
- 51% A little more
- 19% A great deal
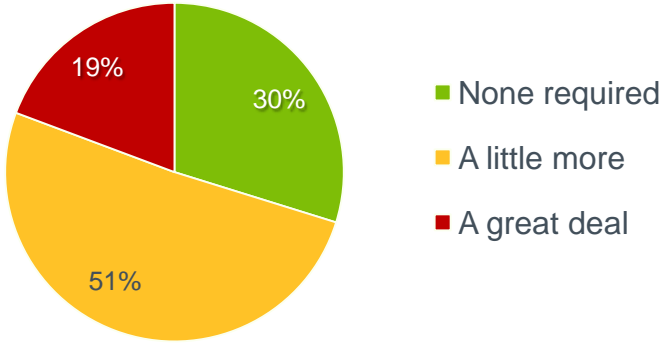
	Male	Female	25-34	35-44	45-54	55+
Base	816	912	408	389	312	619
None	32%	28%	19%	27%	37%	34%
A little more	43%	58%	55%	57%	46%	47%
A great deal	24%	15%	26%	16%	17%	19%

The overview

7 out of 10 people say more work needs to be done to improve authenticity of portrayal, with 1 in 5 saying "a great deal" of work

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Amount of work required to create a more authentic portrayal of diverse communities living in the UK among diverse audiences

While 7 in 10 of the general public say more work needs to be done to improve authenticity, this pales in comparison compared to the size of the task perceived by our society's diverse audiences.

97% of the Black audience think more work needs to be done; 95% for Asian and for Eastern European; and 90% of the LGB audience.

So, nearly **all** of the people in diverse audiences says more work needs to be done and the majority of the general public agree.

More than this, these diverse audiences are also much more likely than the national average to say that "**a great deal**" more work needs to be done (for example, nearly 3 in 5 of the Black audience is telling us this).

Despite improving in recent times, we should not **underestimate** the size of the task to enhance the authenticity of portrayal.

Please note we asked this question of people aged 25 or older, so that they would have a fair reflection of how things have changed.

Level of work required to be more authentic
Base: representative sample of GB 16+ population and diverse audiences

	None required	A little more	A great deal
Total GB into film	30%	51%	19%
Asian	5%	52%	43%
Black African/Caribbean	3%	39%	58%
C2D/Working class	29%	53%	19%
Eastern European	5%	63%	32%
Lesbian, Gay, Bisexual	10%	57%	33%
Older women	35%	51%	14%
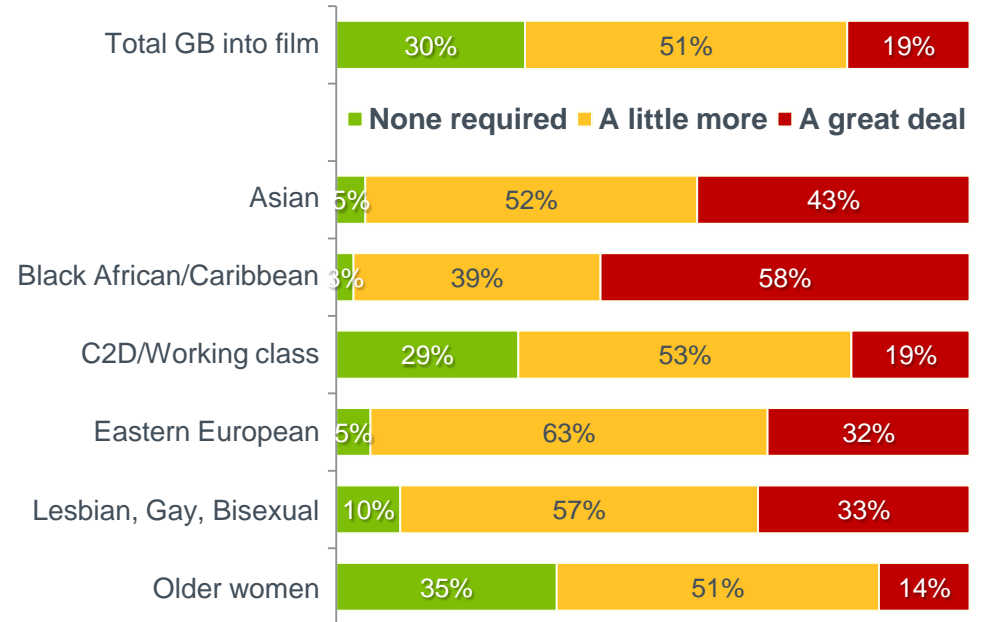
The overview

We see a stark difference of opinion between the general public and some diverse audiences as to the amount of work needed to deliver more authentic portrayals in UK film

Perception of **minority group portrayal** among the general public

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Another case made for more action is that 2 in 5 of the general public agree that characters from ethnic minorities are often cast in films as a **token gesture**. 1 in 2 younger members of the public agree with this.

Furthermore, over 1 in 3 say that roles for minority groups too often have **little depth** and are **poorly written**. Again, 1 in 2 16-24s agree with this view.

It is clear that more work needs to be done to work against such concerns.

% that agree with each statement
Base: representative sample of GB 16+ population into film happy to answer sensitive questions (1,705)

Statement	%
Characters from ethnic minorities are too often in films as a **token gesture**	**41%**
Roles for minority groups too often have **no depth** and are poorly written	**36%**

	Male	Female	16-24	25-34	35-44	45-54	55+
Base	791	914	205	327	342	286	545
Token gesture	40%	42%	50%	47%	37%	44%	36%
No depth	39%	34%	53%	41%	26%	37%	33%

The overview

2 in 5 of the general public tell us that characters from ethnic minorities are cast as tokens, reinforcing the need for more work and action to create more authentic and meaningful portrayals

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Comparing perceptions of minority group portrayal between the general public and all diverse audiences

% that agree with each statement
Base: diverse audiences

	Total GB into film	Asian		Black African/ Caribbean		C2D/ Working class		Eastern European		Lesbian, gay, bisexual		Older women	
Token gesture	41%	69%	+28	76%	+35	40%	-1	62%	+21	60%	+19	39%	-2
No depth	36%	58%	+22	72%	+36	33%	-3	51%	+15	54%	+18	33%	-3

The view that characters from ethnic minorities are token gestures is even more strongly felt by some diverse audiences. Particularly so for the **Black audience** – 3 in 4 of whom agree this is a problem. It is also strongly felt by Asian, Eastern European and LGB audiences, but not quite to the same extent as the Black audience. Working class and Older women audiences also agree, but more in line with the national average.

The overview — 3 in 4 of the Black audience think that ethnic casting is too often a token gesture with little depth

Comparing the portrayal of films made in the UK with Hollywood among diverse audiences

We asked our diverse audiences about portrayal and their perception as to who was better/worse: UK films or Hollywood?

🟩 **UK films tend to do this better**   🟥 **Hollywood films tend to do this better**

Net better/worse Base: diverse audiences	Asian	Black-African -Caribbean	C2D/ Working class	Eastern European	Lesbian, gay, bisexual	Older women
Authentically portray your **own** lifestyle	+25%	+10%	+46%	+28%	+60%	+58%
Authentically portray **diverse** cultures	+22%	+7%	+35%	+22%	+55%	+47%
Create **believable** storylines & characters	+6%	+1%	+36%	+30%	+47%	+51%
Create films that make you **think**	+3%	-12%	+23%	+29%	+48%	+54%
Give lead roles to **older female** actors	+1%	0%	+31%	+19%	+38%	+47%
Give lead roles to **Asian** actors	+13%	+23%	+29%	-6%	+35%	+41%
Give lead roles to actors from your social **background**	+5%	-17%	+36%	+16%	+47%	+42%
Include actors from **all groups** in society	+4%	-17%	+18%	+10%	+41%	+41%
Give lead roles to **GLB** actors	-10%	+1%	+11%	+2%	+37%	+16%
Create films that make you want to **watch**	-34%	-43%	-9%	-13%	+8%	+21%
Give lead roles to **black** actors	-41%	-61%	-30%	-50%	-26%	-37%

As you would imagine, UK films are seen to be better than Hollywood for portraying our own lifestyles, cultures and stories as so many more UK films are set in this country.

However, opinion gets much more divided on ethnicity lines – with people tending to believe that UK film is better than Hollywood for Asian actors, and Hollywood being substantially better than UK film for giving lead roles to Black actors.

There is also a feeling that Hollywood is better at creating films that make you want to watch, whereas UK film is better at making films that make you think.

Detailed findings

What people think of the portrayal of diverse audiences

(1 of 6) Asian portrayal

Perception of **Asian portrayal** among the general public

In these sections of the report we will take each diverse audience in turn and understand attitudes. We start off by understanding the view of the general public and, overleaf, we compare this to the view of the diverse audience in question.

We see over 1 in 2 of the general public saying filmmakers should be **braver** when portraying extreme religious views. This, it goes without saying, is <u>not</u> an issue exclusively for Asian members of our society, but given recent debate it is most interesting to compare this attitude with our Asian audience (overleaf). Younger people and, to a lesser extent, males are more likely to think that filmmakers should be braver about portraying such views.

Related to this, just over 1 in 3 believes that Asian religious culture needs to be reflected more **authentically** – and younger people are much more likely to say this (over 1 in 2 16-24s agree)

Just under half the general public believes that Asian characters are too often portrayed as having **family conflicts** – and again young people are more likely to think this.

Taken as a whole, we saw earlier that more work needs to be done to **enhance portrayal** and this is echoed here for Asian portrayal. But what does our Asian audience think? See overleaf…

% who agree with each statement about Asian portrayal

Base: representative sample of GB 16+ population into film happy to answer sensitive questions (1,705)

Statement	%
Film-makers need to be **braver** when portraying extreme religious views	54%
Asian characters are too frequently portrayed as having family **conflicts**	45%
Asian religious **culture** needs to be reflected more authentically	37%
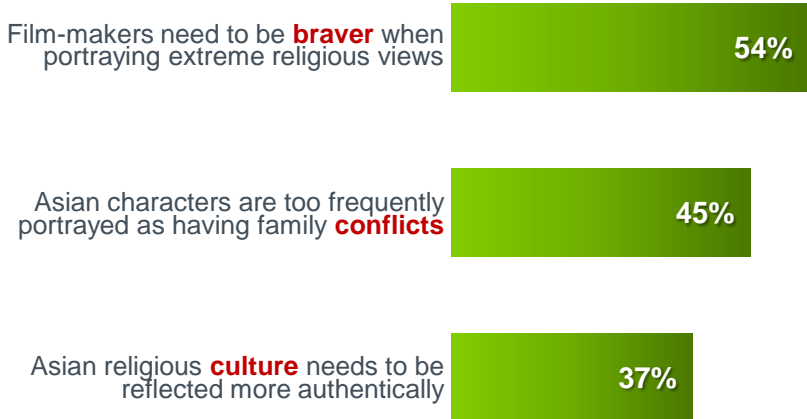
	Male	**Female**	**16-24**	**25-34**	**35-44**	**45-54**	**55+**
Base size	791	914	205	327	342	286	545
Braver	59%	50%	66%	58%	52%	54%	49%
Conflicts	45%	45%	58%	52%	42%	37%	43%
Culture	37%	36%	52%	45%	35%	32%	30%

The overview

Over half of the general public (and even more younger people) think that filmmakers need to be braver when portraying extreme religious views, and a majority of young people say we need to be more authentic

Comparing perceptions of Asian portrayal between the general public and Asian people

While 1 in 2 of the general public say filmmakers should be braver, our Asian audience is saying it **even more strongly**.

2 in 3 of the Asian audience interviewed say filmmakers should be **braver**.

Even bigger differences are seen in the other two statements. Over 3 in 4 Asians say that their portrayal in film is too frequently that of **family conflict**.

3 in 4 also say Asian religious culture needs to be reflected more **authentically** (this is twice the level of agreement compared to the national average).

So, more work needs to be done to improve portrayal of Asian audiences. The feeling among the Asian audience is much more intense compared to that of the general public.

% that agree with each statement
Base: representative sample of GB 16+ population into film happy to answer sensitive questions (1,705) and Asian people (220)

■ **General public**   ■ **Asian people**

Film-makers need to be **braver** when portraying extreme religious views
- 54%
- 66%

Asian characters are too frequently portrayed as having family **conflicts**
- 45%
- 78%

Asian religious **culture** needs to be reflected more authentically
- 37%
- 74%
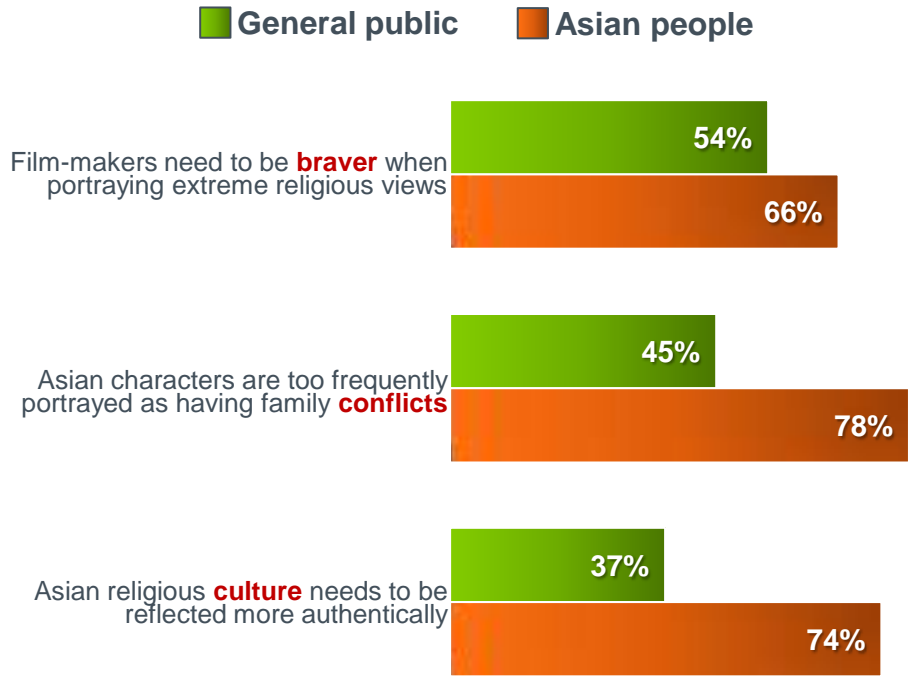
The overview	Most of the Asian audience want filmmakers to be braver, to be more authentic and less prone to portray them in family conflict

Perception of **Asian portrayal** by Indian audiences

Qualitative insight

There are differences in attitudes towards the performance of UK film between Indian and Pakistani audiences...

- The **Indian audience is generally comfortable** with the way UK Film is representing them.

- Overall the Indian audience that we spoke to qualitatively (second and third generation) feel as British as any other white British person. Some tell us they feel **more British than Indian** simply because this is their home.

- This is a strong feeling, to the point that they **do not see themselves as 'diverse'** from a mainstream audience. They also discuss that some of their parents and grandparents also feel this way, although many of them may not speak English.

"If we are talking about real Indian films there are late night films of C4 that are much more credible. They are often set in villages in India with a cast of real people. But UK films do a great job of featuring us"
Indian Woman, 31

"I am just an Indian person brought up in a British society. On Chapatti and Chips. The portrayal needs to reflect that, without being too bland"
Indian Man, 45

Qualitative insight

- All felt that characters in UK film featuring Asians were true to life, capturing the issue of **balancing mainstream UK expectations with more traditional parents values**. Two films singled out for praise were Damien O'Donnell's '*East is East*' and Gurinder Chadha's '*Bend it like Beckham*'.

- **Indian parents really are interfering, but loved for it!** For one or two however this stereotype has been overdone in UK film and they are ready for a fresh look at Indian characters.

- Some discuss how Indians playing the parts of taxi drivers or shop keepers with broken English are **damaging to the overall portrayal of the Indian community.** On the whole though, **portrayal is favourable and true to life**.

Perception of Asian portrayal by Pakistani audiences

Qualitative insight

The Pakistani audience...

- **Pakistanis can feel disenfranchised** from UK film, with very few Pakistani actors and actresses featuring in mainstream film in the UK. Further it was felt that **where Pakistanis are depicted this is often done inaccurate**ly.

- They did concede however that due to their strong religious beliefs and respect for their families, **it would not be acceptable** for a Pakistani actor/actress to be shown on screen **swearing, drinking, or engaging in sexual activity** and as many UK film roles require this, potentially contributing to the fact there are few featured in films.

- The issue of **tokenism** arose for this audience; the British soaps are found to be most guilty of casting Asian families and when they leave replacing them with another.

Qualitative insight

- '*Four Lions*' (Christopher Morris, Simon Blackwell) was, at the spontaneous level, perceived as **predominantly humorous.** It was claimed this was a feeling held by the wider Pakistani community as a whole.

- However, the white protagonist in the film is an extreme terrorist which was felt to **reinforce the stereotype that those who convert to Islam becomes extremist** and it also, more obviously, reinforces that all Muslims are terrorists.

- Damien O'Donnell's '*East is East*' was also spontaneously discuss as a favourite , however, this film does raise some concerns that people will think all **Muslim men will treat their wives badly and rule the family as a tyrant**, not a positive stereotypical view of Pakistani life.

"You can relate to East is East because you really get the feeling the film makers understand us. They got it right with the stuff that went on in the film. Like there are ugly girl cousins whose parents try their hardest to marry off"
Pakistani Man, 34

"I did love Four Lions but it took the piss out of how Pakistanis speak. We don't all say 'bro' all the time. We're not all that type of Pakistani"
Pakistani Man, 28

Comparing perceptions of **Asian portrayal** between the general public and all diverse audiences

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% that agree with each statement
Base: diverse audiences

	Total GB into film	Asian		Black African/ Caribbean		C2D/ Working class		Eastern European		Lesbian, gay, bisexual		Older women	
Braver	54%	66%	+12	71%	+17	55%	+1	66%	+12	61%	+7	46%	-8
Conflicts	45%	78%	+33	65%	+20	43%	-2	48%	+3	58%	+13	44%	-1
Culture	37%	74%	+37	57%	+20	35%	-2	51%	+14	46%	+9	31%	-6

benchmark

Here we compare these attitudes across all the diverse audiences in the study. We see that the heightened feeling that filmmakers should be braver and more authentic is felt also by Black, Eastern European and LGB audiences. The Black audience in particular feels strongly about this. This need is also felt by working class people and by older women, but their view is more aligned with the national average.

The overview

All diverse audiences tend to say that filmmakers should be braver and more authentic, with Black, Eastern European and LGB audiences sharing the same heightened sense felt by Asians

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Detailed findings

What people think of the portrayal of diverse audiences
(2 of 6) Black portrayal

Perception of Black portrayal among the general public

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In these sections of the report we will take each diverse audience in turn and understand attitudes. We start off by understanding the view of the general public and, overleaf, we compare this to the view of the diverse audience in question.

We see some strong opinion from the general public here about Black portrayal. Around half of the general public say that Black characters are too often portrayed as **drug dealers** in films and that there should be a **Superhero** that isn't a white guy. 2 in 5 say that Black characters do not get enough "**good guy**" roles and 1 in 3 say Black characters are too often portrayed as being **overtly sexual**.

These feelings are shared with the public across the board with feeling only slightly dipping in frequency among the over 55s.

Taken as a whole, we see substantial opinion that Black roles are not as richly diverse and authentic as they could be, with a view from many that some **stereotyping** is taking place.

But, of course, the key analysis is to compare what the general public believes with the views of the Black audience itself – this is provided overleaf.

% who agree with each statement about Black portrayal
Base: representative sample of GB 16+ population into film happy to answer sensitive questions (1,705)

Statement	%
Black characters are too often portrayed as **drug dealers** in films	53%
There should be a **Superhero** that isn't a white guy	46%
Black characters do not get enough roles as "**good guys**" in films	39%
Black characters are too often portrayed as being overtly **sexual**	32%

	Male	Female	16-24	25-34	35-44	45-54	55+
Base size	791	914	205	327	342	286	545
Drug dealers	50%	55%	54%	58%	49%	55%	50%
Superhero	44%	49%	54%	56%	48%	48%	37%
Good guys	40%	38%	48%	44%	40%	41%	32%
Sexual	34%	30%	44%	39%	23%	31%	29%

The overview

Much of the public believes that Black characters are too often portrayed stereotypically, and this is a view shared across most demographics

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Comparing perceptions of Black portrayal between the general public and Black African/Caribbean people

UK FILM COUNCIL
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While much of the general public thinks Black portrayal is sometimes stereotypical, the view is even **more intensely** felt by the Black audience itself.

4 out of 5 of the Black audience interviewed feel that Black characters are too often portrayed as drug dealers in films and the same **heightened** feelings are seen for the other three statements we enquired about.

For not getting enough "good guy" roles and for Black characters being portrayed too often as overtly sexual, the level of feeling is almost **double** that in intensity compared to the general public.

We saw earlier how passionate and (commercially) substantial the Black audience is for film in the UK. We also saw the strength of feeling of the size of the task to make portrayal more authentic. Here again is some more specific and weighty evidence to say that filmmakers should be more **sensitive** to such an important segment of the total market.

Sensitivity and authenticity is key because we also saw earlier that film not only has the power to mould a mindset, but also that it has the **power** to challenge stereotypes such as this.

% that agree with each statement
Base: representative sample of GB 16+ population into film happy to answer sensitive questions (1,705) and Black people (231)

■ **General public**　■ **Black people**

Statement	General public	Black people
Black characters are too often portrayed as **drug dealers** in films	53%	80%
There should be a **Superhero** that isn't a white guy	46%	74%
Black characters do not get enough roles as **"good guys"** in films	39%	76%
Black characters are too often portrayed as being overtly **sexual**	32%	63%
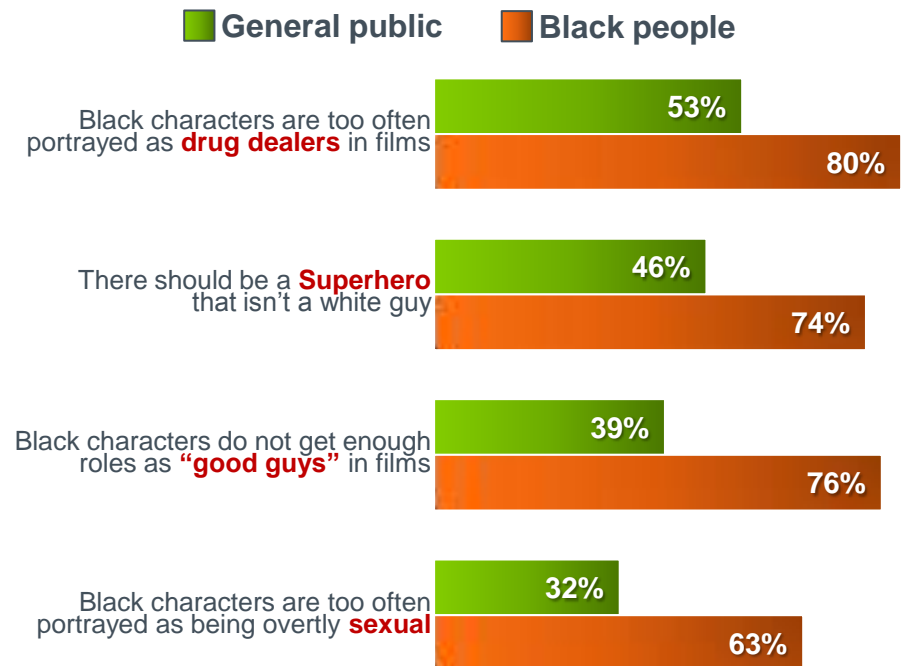
The overview | The Black audience feels substantially more than the general public about stereotyping and filmmakers should do more to cater more sensitively to such an important segment of the total market

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Perceptions of **Black portrayal** by Black audiences

UK FILM COUNCIL LOTTERY FUNDED

Qualitative insight

It was clear from our focus groups that Black audiences are one of the most disenfranchised in the UK

- Qualitatively, our Black groups were not positive about UK film because it is often seen as **depressing, dark and violent** – often referred to as 'grime' films.

- Many felt that they could not watch a UK film with parents, grandparents or children as there is too much **swearing, sex and violence**. Shane Meadows '*This Is England*' attracted particular criticism and was considered to be "*irresponsible film making that suggests racism is okay*".

"*Black people have to go online to find films with more people like them in them*"
Black Caribbean Male, 42

"*UK films are just so depressing, it's like even when the sun is shining it's raining. They're all focused on violence and crime. People are always saying 'keep it real, keep it real' but that isn't everyone's reality*"
Black British Male (Jamaican origin), 38

Qualitative insight

- There is a general consensus that **black people are under-represented in UK cinema** and where they are featured it tends to be in a negative light. The overwhelming view is that black people are generally portrayed as drug dealers, wearing hoodies, actively involved in gangs and living in sink estates. **They rarely have regular, professional jobs.**

- In contrast, Black characters were seen as being portrayed much more **positively in US film making**.

- Inclusion of **token black people in film and TV** received heavy criticism, especially in '*EastEnders*' (BBC) and '*Coronation Street*' (ITV). It is felt that there should be more black people in **pivotal roles** really serving a purpose. '*Shameless*' (Channel 4) also received criticism on this matter for the introduction of a black family who 'have sex all day and smoke weed'.

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Perceptions of Black portrayal by Black audiences

Qualitative insight

- Respondents would like to see more humour or more of a story line, e.g.' *Rita Sue and Bob Too*' (Alan Clarke) where respondents can **relate to the racism, but feel it is done in a way that's palatable**, or Roger Donaldson's '*Bank Job*', which has some history and humour and is also based on a true story.

- Noel Clarke's '*Adulthood*' and '*Kidulthood*' are believed to paint the most stereotypical picture of multi-cultural youth and black people in particular. There is nothing inspiring about these films and they do **nothing to suggest to people that they can get out of the situation they are in**. '*Bullet Boy*' (Saul Dibb) was another film singled out that portrayed black people in a negative light. That said, opinion is clearly divided as the quantitative analysis shows Noel Clarke's films to be among their favourites.

"*We're not all from Jamaica. And when it is recognised we're from Africa, we're all not from Nigeria*"
Black Ghanaian Female, 31

"*Occasionally there will be some effort made, say to put someone in traditional African clothing, but it needs to go further, like maybe include the sayings people use or the food they eat*"
Black African Female (Nigerian origin), 37

"*The way people were portrayed in the films [Adulthood/Kidulthood], it's like they have no chance for change because they're still living round the same people, these people are still after them, there's no escape. It left me depressed*"
Black Caribbean Female, 31

Qualitative insight

- The fact that there is believed to be **no distinction between Caribbean/African countries** received a great deal of criticism. Ultimately it was felt that there is little authenticity regarding the individual's true heritage; characters are simply black.

- In summary, this audience feels that the UK film industry still has some way to go to ensure portrayal of black audiences is **modern, representative and fair**.

Comparing perceptions of **Black portrayal** between the general public and all diverse audiences

% that agree with each statement
Base: diverse audiences

	Total GB into film		Asian		Black African/ Caribbean		C2D/ Working class		Eastern European		Lesbian, gay, bisexual		Older women	
Drug dealers	53%	benchmark	69%	+16	80%	+27	51%	-2	54%	+1	60%	+7	56%	+3
Superhero	46%		61%	+15	74%	+28	46%	0	48%	+2	59%	+13	41%	-5
Good guys	39%		60%	+21	76%	+37	38%	-1	43%	+4	45%	+6	39%	0
Sexual	32%		54%	+22	63%	+31	30%	-2	41%	+9	41%	+9	29%	-3

Here we compare these attitudes across all the diverse audiences in the study. We see that it is not just the Black audience who shares the same heightened feeling about Black portrayal – Asians and, to a lesser extent, the LGB audience also tend to agree strongly that Black portrayal is too often stereotypical.

The overview | That Black portrayal should be more authentic and less stereotypical is shared by everyone, most notably among the Asian and LGB audience

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Detailed findings

What people think of the portrayal of diverse audiences
(3 of 6) Class & British culture portrayal

Perception of Class & British Culture portrayal among the general public

In these sections of the report we will take each diverse audience in turn and understand attitudes. We start off by understanding the view of the general public and, overleaf, we compare this to the view of the diverse audience in question.

3 in 5 of the general public are telling us that British culture could feature more **prominently** in UK film – and this view is held more often among the over 55s.

Over half the general public say that stories focusing on working class portrayal are too often **depressing**. 16-24s are the most likely to feel this way.

Over 1 in 3 say there should be more **middle class tragedy** in UK film – and over 1 in 2 16-24s agree with this.

Reading between the lines, this starts to put forward a case that working class portrayal is potentially too often miserable and, arguably, middle class portrayal too often sweet.

The interesting analysis in this case is to split these results by social economic grade demographics – see overleaf.

% that agree with each statement
Base: representative sample of GB 16+ population into film happy to answer sensitive questions (1,705)

Statement	%
British **culture** could feature more prominently in UK film	61%
Stories focusing on working class people are too often **depressing**	54%
There should be more **middle class** tragedy in UK film	37%

	Male	Female	16-24	25-34	35-44	45-54	55+
Base	791	914	205	327	342	286	545
Culture	60%	62%	65%	57%	52%	58%	69%
Depressing	50%	57%	61%	54%	46%	58%	53%
Middle Class	35%	39%	52%	43%	29%	35%	34%

The overview
British people want to see their lives portrayed more prominently in UK film – but should filmmakers be more balanced with the misery they dish out when portraying communities of differing social class?

Comparing perceptions of Class & Culture portrayal
between the general public split by social grade

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When we split out general public opinion by social class we see that, on the whole, we all tend to think the same **regardless** of what class we occupy.

It is not the case that only working class people think their portrayal is too often depressing. We **all** tend to think this way. Likewise with middle class portrayal.

And we all tend to think the same way when wanting British culture to feature more prominently in UK film.

% that agree with each statement
Base: representative sample of GB 16+ population into film happy to answer sensitive questions (1,705)

British **culture** could feature more prominently in UK film
- 61%
- 59%
- 63%
- 62%
- 61%

Stories focusing on working class people are too often **depressing**
- 54%
- 54%
- 56%
- 48%
- 55%

There should be more **middle class** tragedy in UK film
- 37%
- 35%
- 38%
- 37%
- 38%

- UK total
- AB
- C1
- C2
- DE
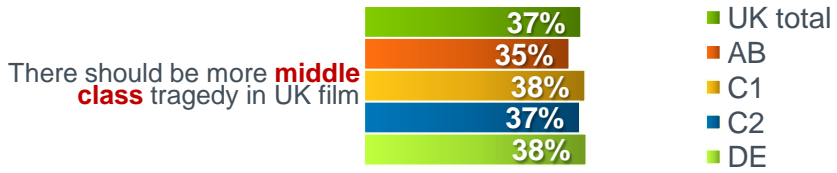
The overview	We all tend to think the same way regardless of our social class

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Perceptions of **Class portrayal** from C2DE social grade

Qualitative insight

Working class audiences are happy about their portrayal

- This group is perhaps **the most content of all audiences** we spoke to with the performance of the UK film industry and the way they are portrayed in film, but there are still areas for improvement and freshening up. In fact, UK film may well be focussing on this group too often, perhaps to the detriment of other diverse audiences in this study.

- **Many are proud to be working class**. The fact that they have come from a modest background and are surviving in difficult circumstances is something to be very proud of. In this way **UK film romanticises their lives, glamorises it, and provides a sense that they are not invisible**.

"I don't care if people watch these films and get a bad impression of normal English people. We are what we are. We know how to take care of ourselves and I'm proud of that"
Male, 32

"Look at The Full Monty. They're out of work steel workers on the dole, pinching steel and stuff. All UK comedies are like that and it's funny because it's so real and you can relate to it"
Female, 29

Qualitative insight

- **The British identity is felt to be hard wearing, tough and resilient**. It comes through strongly via 'gritty' film for this audience – films like Barry Skolnick's '*Mean Machine*' , Julian Gilbey's '*Rise of the Footsoldier*', Guy Ritchie's '*Lock Stock and Two Smoking Barrels*', Lexi Alexander's '*Green Street Hooligans*', Nick Love's '*The Firm*' – the list goes on.

- Some say they have friends who match the profiles of actors and actresses that they see in UK film. In this sense **they feel authentically represented**, with characters that are in tune with their values and attitudes.

- They feel that they often see their lives played back in film. **Actors have the right background** – many are felt to be authentically working class - and therefore have a 'right to play' the character. Danny Dyer is a hero of this audience. So is Jason Stratham.

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Perceptions of Class portrayal from C2DE social grade

Qualitative insight

- Generally the characters are **not complex, intelligent or in mainstream jobs** – spontaneously this is not an issue though. This audience is proud to be English and UK film is portraying them in the right manner.

- Key characters can sometimes be **poor or struggling**, poorly educated, an accent (Yardney in the case of Kidulthood) but **often have their wits about them**, something this audience can relate to.

- Some characters may have a **comedic or quirky edge, alongside violent and aggressive traits** (Lock Stock and Two Smoking Barrels), which, whilst being unnerving for mainstream audiences, can be appealing to the male low social grade audience.

> "*I like films with a comedic theme with violence as well, like Lock Stock or Mean Machine. They've got British humour and you can relate to the gangsters*"
> Male, 39

> "*I wouldn't watch a film like Love Actually. I can't relate to it*"
> Male, 34

Qualitative insight

- This audience feel that whilst they are represented well in UK film, the **storylines have increasingly become negative and depressing**. The classic stories of struggle and heroic endeavour are enjoyed however some feel that there could be **more positive outcomes featuring the lower classes**.

- In moving forward there is some interest in **middle class representation** – with the belief that they face some of the same issues; drugs, infidelity, work pressures. The middle classes are featured much more on television than film, and the few films featuring middle classes that were recollected were often felt to be unappealing , for example Roger Michell's '*Notting Hill*'.

Comparing perceptions of Class portrayal between the general public and all diverse audiences

% that agree with each statement
Base: diverse audiences

	Total GB into film	Asian		Black African/ Caribbean		C2D/ Working class		Eastern European		Lesbian, gay, bisexual		Older women	
Culture	benchmark 61%	68%	+7	66%	+5	59%	-2	66%	+5	66%	+5	67%	+6
Depressing	54%	60%	+6	67%	+13	51%	-3	60%	+6	58%	+4	63%	+9
Middle Class	37%	52%	+15	51%	+14	36%	-1	50%	+13	43%	+6	42%	+5

When we compare these views to the specific diverse audiences in this study, we see that diverse audiences tend to have a somewhat **heightened** level of agreement. Britain's diverse audiences, like everyone else, want to see more British culture reflected in UK film.

The view that British working class are too often portrayed as depressing is shared by everyone, and is felt particularly intensely by the Black audience and by older women.

That there could be more middle class tragedy is also shared by all these audiences, but most notably among Asian, Black and Eastern European audiences.

The overview

Diverse audiences share the same feeling that class and culture portrayal needs care and sensitivity
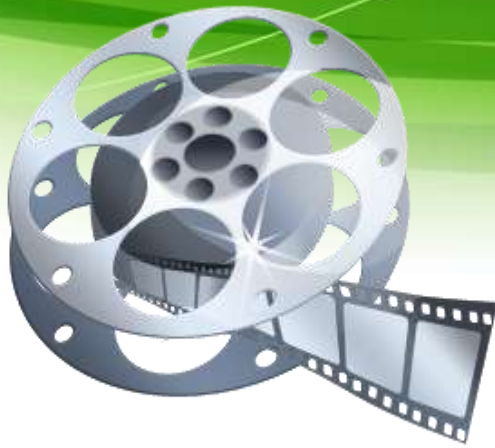
Detailed findings

What people think of the portrayal of diverse audiences

(4 of 6) Eastern European portrayal

Perception of Eastern European portrayal among the general public

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In these sections of the report we will take each diverse audience in turn and understand attitudes. We start off by understanding the view of the general public and, overleaf, we compare this to the view of the diverse audience in question.

Some strong evidence here to suggest that filmmakers need more sensitivity when portraying new Eastern European migrants to the UK. Over half the general public (and nearly 2 in 3 16-24s) believe that such people are too often portrayed at the **bottom** of the economic ladder – a new potential stereotype. Over 2 in 5 (and over half of young people) say their portrayal should be more **realistic**; and over 1 in 3 (over half of 16-24s) say their portrayal should be **warmer**.

Taken as a whole, there is strong evidence here, felt particularly strongly by younger people, that Eastern European migrants are sometimes portrayed stereotypically.

A key analysis is to compare these general public views with those of Eastern Europeans living in the UK.

% who agree with each statement about Eastern European portrayal
Base: representative sample of GB 16+ population into film happy to answer sensitive questions (1,705)

New immigrants from Eastern Europe are too often portrayed at the bottom of the **economic** ladder (e.g. as cleaners, poor) — **52%**

Films need to paint a more **realistic** picture of Eastern Europeans in the UK — **44%**

Eastern Europeans should be portrayed as **more warm**, kind characters in film — **35%**

	Male	Female	16-24	25-34	35-44	45-54	55+
Base	791	914	205	327	342	286	545
Economic	53%	51%	64%	51%	45%	49%	53%
Realistic	42%	45%	56%	48%	40%	44%	39%
More warm	34%	36%	52%	43%	27%	32%	31%

The overview

There is a danger of new stereotypes developing for new immigrants to our country and filmmakers should be sensitive not to incubate them in their stories and characters

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Comparing perceptions of Eastern European portrayal
between the general public and Eastern European people

As with some of the other areas we've focused on, we see a heightened sensibility from Eastern Europeans living in our country regarding these issues.

Roughly 3 in 4 Eastern Europeans living here say that they are too often portrayed at the **bottom** of the ladder and that a more **realistic** portrayal is needed. 7 out of 10 Eastern Europeans seek a **warmer** image in film when they are portrayed – roughly twice the level of the national average.

It is yet another case of filmmakers being sensitive to ensuring a genuine and authentic portrayal, in this case for a potentially new form of **stereotyping**.

We saw earlier just how passionate and connected this audience is with film, and how their viewing and cinema attendance was among the highest of all audiences. They are, then, an important segment of the total market and having their portrayal conveyed with more balance and authenticity is, therefore, all the more important.

% that agree with each statement
Base: representative sample of GB 16+ population into film happy to answer sensitive questions (1,705) and Eastern European people (202)

General public　　**Eastern European people**

New immigrants from Eastern Europe are too often portrayed at the bottom of the **economic** ladder
- 52%
- 72%

Films need to paint a more **realistic** picture of Eastern Europeans in the UK
- 44%
- 75%

Eastern Europeans should be portrayed as **more warm**, kind characters in film
- 35%
- 69%
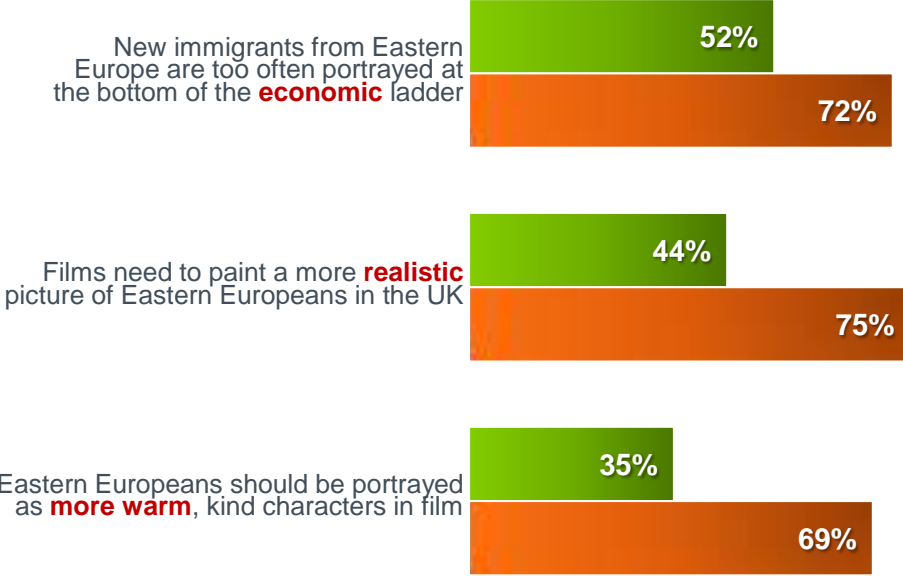
The overview — Most Eastern Europeans are sensitive to how they are portrayed and they too see a danger of a new form of stereotyping emerging

Perceptions of **Eastern European portrayal** from Eastern Europeans

Qualitative insight

East Europeans feel under-represented by UK film, and misrepresented by UK media

- **This audience have a degree of 'angst' about the way they are viewed** in the UK; they feel they are perceived to be ill educated, working in extremely low paid jobs, often not bothering to learn the English language etc. They are very proud of their home country's culture and heritage and the UK is felt to be lacking in this respect.

- Eastern Europeans **watch a wide range of mainstream film genres** including action, sci-fi, romcom, drama, comedy, war films, horrors. They sometimes watch TV channels via satellite from their own countries, but the films viewed are generally Hollywood blockbusters that have been dubbed.

"Why can't we be shown as having better jobs than working in a factory, showing us with some personality"
Female, Polish, 29

"There are lots of Indians, Pakistanis and Africans in film because they came to the UK in the forties and fifties. We have only been here five, six years so we wouldn't expect to be shown"
Male, Polish, 34

Qualitative insight

- Films such as Nick Love's '*Football Factory*' and Lexi Alexander's '*Green Street*' were enjoyed by younger male respondents. This group did admit that films of this genre reinforce stereotypes; this film makes them think **British men/football fans are 'underclass thugs',** reinforcing the power of film.

- Eastern Europeans feel that they are **featured minimally in UK film**, as well as TV. They feel, however, that this is to be expected as they have not been living in the UK for as long as other ethnic minority groups.

- There is an overall belief that where Eastern Europeans are represented in film (as well as TV) they are portrayed as working in 'the lowest of the low jobs' and will do whatever it takes to stay in the country, including **prostitution and crime**.

Perceptions of **Eastern European portrayal** from Eastern Europeans

Qualitative insight

- There is also the perception that Eastern Europeans do not bother to learn English. It was mentioned that some were like this, however our respondents had learnt English and did not want to be **tarred with the same brush.**

- Just two films were recalled that featured Eastern Europeans: Pierre Morel's '*Taken*', which featured Albanian terrorists, and Brad Anderson's '*Transiberian*', which was **the one and only example of Eastern Europeans being featured in a positive light** (Ben Kingsleys Russian detective character).

> "*It's like all the crimes in this country are committed by Albanians. It used to be about eating swans – it was ridiculous. Now the Romanians are the baddies! The Russians? The Russians have always been baddies*"
> Female, Albanian, 45

> "*Stories about my experience would be good to see...working hard, coming here with £400, learning English, getting a job, all the sacrifices I made, my children's experiences at school*"
> Female, Albanian, 45

Qualitative insight

- When prompted on the film '*Eastern Promises*' the respondents were unaware of the film. When it was explained that this is a film portraying **Russians as mafia/underground/illegal types** the respondents felt this not at all surprising.

- After showing respondents '*The Last Resort*', the general consensus was that it was felt to be old and irrelevant now as **Poland is now part of the EU and they no longer have to seek asylum**.

- The overall underlying feeling is that Eastern Europeans people are viewed negatively in the UK and that the **film could help to show a positive side** or that they are just 'normal people' who experience the same good and bad times as everyone else.

Comparing perceptions of Eastern European portrayal between the general public and all diverse audiences

% that agree with each statement
Base: diverse audiences

	Total GB into film	Asian		Black African/ Caribbean		C2D/ Working class		Eastern European		Lesbian, gay, bisexual		Older women	
Economic	benchmark 52%	66%	+14	65%	+13	48%	-4	72%	+20	62%	+10	53%	+1
Realistic	44%	64%	+20	62%	+18	40%	-4	75%	+31	60%	+16	44%	0
More warm	35%	52%	+17	52%	+17	34%	-1	69%	+34	48%	+13	34%	-1

As with other specific areas we have focused on, it is not solely Eastern European audiences that feel this way. The heightened sensitivity to the authenticity of portrayal is shared also by Asians, Black and LGB audiences in our society. Older women and working class people are more aligned to the national average, roughly half of whom say there should be more realism.

The overview — Other diverse audiences in the UK share the same feeling that there is a danger of stereotyping Eastern European portrayal in film

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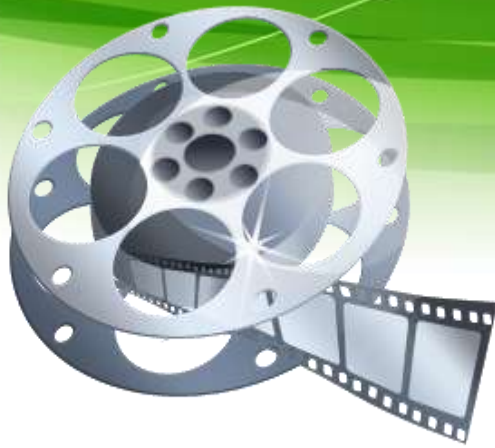
Detailed findings

What people think of the portrayal of diverse audiences
(5 of 6) Gay and Lesbian portrayal

Perception of Gay portrayal among the general public

In these sections of the report we will take each diverse audience in turn and understand attitudes. We start off by understanding the view of the general public and, overleaf, we compare this to the view of the diverse audience in question.
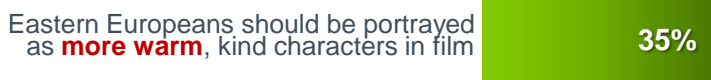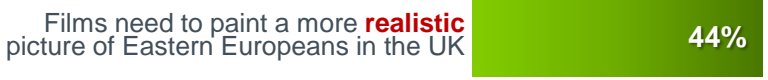
Among the general public, the majority agree that gay characters are too often portrayed as having their sexual **orientation** portrayed as their main trait and are too often depicted as "**camp**". Substantial proportions also agree that gay characters are too often portrayed as having **problems** and are often placed in film as a **token** gesture.

Young people, especially 16-24s, are most likely to believe that gay characters are often portrayed stereotypically or without balance and sensitivity.

Overleaf we show how these feelings compare with the LGB audience.

% who agree with each statement about Gay portrayal
Base: representative sample of GB 16+ population into film happy to answer sensitive questions (1,705)

Statement	%
Characters portrayed as gay too often have sexual **orientation** as the main trait	63%
Characters portrayed as gay are too often depicted as "**camp**"	57%
Characters portrayed as gay are too often shown as having **problems**	44%
Characters portrayed as gay are too often placed in film as a **token** gesture	44%
Films portraying gay characters too often have a **tragic** ending	32%

	Male	Female	16-24	25-34	35-44	45-54	55+
Base	791	914	205	327	342	286	545
Orientation	61%	64%	71%	62%	64%	62%	59%
Camp	55%	59%	62%	62%	55%	58%	54%
Problems	43%	45%	52%	52%	41%	45%	39%
Token	44%	43%	57%	51%	43%	45%	35%
Tragic	31%	33%	40%	39%	27%	27%	31%

The overview

Over half the public say that gay portrayal lacks balance and is too often camp – and over 2 in 5 say it is overly negative and too often a token gesture

Comparing perceptions of Gay portrayal between the general public and Lesbian, gay, bisexual people

As with many other areas of specific focus, the gay audience has, compared to the general public, a **heightened** sense of feeling towards these issues. 4 in 5 of the LGB audience believe gay characters are too often portrayed with their sexual orientation as their main trait and are too often depicted as camp.

The LGB audience is telling us they want more balance, sensitivity and authenticity in film portrayal. 7 out of 10 say gay characters are too often shown as having problems and 2 in 3 say they too often have a tragic ending. This suggests the LGB believe there is a considerable **lack of balance** and perspective.

As this audience, as with many others, are shown to be such an important segment for UK film viewing, creating this balance and sensitivity is all the more important. They are passionate about film and believe strongly in its power to challenge stereotype and change the mindset. This then is something that UK filmmakers would do well to **take on board**.

% that agree with each statement
Base: representative sample of GB 16+ population into film happy to answer sensitive questions (1,705) and Lesbian, gay, bisexual people (224)

■ **General public**   ■ **Lesbian, gay, bisexual people**

Characters portrayed as gay too often have sexual **orientation** as the main trait
- General public: 63%
- Lesbian, gay, bisexual people: 80%

Characters portrayed as gay are too often depicted as **"camp"**
- General public: 57%
- Lesbian, gay, bisexual people: 79%

Characters portrayed as gay are too often shown as having **problems**
- General public: 44%
- Lesbian, gay, bisexual people: 71%

Characters portrayed as gay are too often placed in film as a **token** gesture
- General public: 44%
- Lesbian, gay, bisexual people: 70%

Films portraying gay characters too often have a **tragic** ending
- General public: 32%
- Lesbian, gay, bisexual people: 65%

The overview	The LGB audience feels there is a lack of balance and authenticity in their portrayal in film

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Perceptions of Gay portrayal by gay men

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"The more I watched it [Bruno] I thought he took it to extremes. It offended me in the way it depicted gay men, it was giving out the total wrong impression. It says all gay guys mess about, are sexually aggressive, use sex toys…"
Gay Man, 29

Qualitative insight

Gay men feel there is plenty of room for UK film to improve.

- This audience **varies greatly in the extent to which their sexuality is overt** and this impacts to some extent on their choice of film. For example, the more overtly gay men in the group were drawn to what could be described as more typically feminine films such as Baz Luhrmann's '*Moulin Rouge*' and Richard LaGravenese's '*PS I Love You*' whereas those who were less overtly gay were more open to watching thriller, horror and gritty films.

- There were indications of **societal disconnect with this audience**. While UK society claims not to be homophobic on the whole, in reality **gay men feel society is not comfortable with seeing open homosexual relations on screen**.

"They always say 'I'm fine with at as long as they don't shove it down my throat' – so basically they don't want to see it"
Gay Man, 38

Qualitative insight

- Many felt that it would be progressive if **more gay kisses/love scenes** (as are frequently shown amongst heterosexuals) were featured in film, although not gratuitously.

- This audience feel it is **acceptable for a gay character to be fairly camp** providing that the 'campness' fits with the overall tone of the film, for example Stanford Blatch in Michael Patrick King's '*Sex and the City* ' was felt to be well placed as a highly effeminate character as the whole tone of the films is 'camp as Christmas'.

- The fact that the plot in films with gay characters tends to focus on the tragedy of gay people was criticised; many believing that **there is never a happy ending**.

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Perceptions of Gay portrayal by gay men

Qualitative insight

- Further, it is felt that **the fact a character is gay does not need be his defining feature**, rather it should be incidental. Ang Lee's '*Brokeback Mountain*' was a film that addressed this issue very well.

- This belief was also shared with lesbian women and is a key issue. **The sexual orientation of characters is all too often over dramatised** and gay men feel the UK film industry are lacking in sophistication in this area.

- In terms of the most influential films for this audience, there are few films that compare to 'Philadelphia' (Jonathan Demme), **highlighting the prejudice a gay man can face in life**, and in this case, especially when affected by HIV.

Qualitative insight

- The area of **bisexuality** is felt to be fraught with difficulty when portraying characters in film.

- In essence, the role requires the character to **overtly communicate sexual orientation**, which is felt to be damaging because it potentially **reinforces the fact that bisexual people are primarily sexually oriented**.

- Our bisexual respondents were unaware of any film that has successfully attempted this since the 1992 film by Neil Jordan '*The Crying Game*'. **There is room to feature bisexual audiences carefully, and more often.**

"*It [Brokeback Mountain] was very good for the fact that it was two blokes who happened to be in love. It was a straightforward love story without any of the schmaltz. They didn't have to be gay; it was just incidental to the story*"
Gay Man, 32

"*It would be difficult to make the fact a person is bisexual incidental because you'd have to show them clearly with a man and a woman in the space of 90 minutes, which makes this person look promiscuous and therefore obsessed with sex. Not good*"
Gay Man, 30

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Comparing perceptions of Gay portrayal between the general public and all diverse audiences

% that agree with each statement
Base: diverse audiences

	Total GB into film	Asian		Black African/ Caribbean		C2D/ Working class		Eastern European		Lesbian, gay, bisexual		Older women	
Orientation	63%	65%	+2	71%	+8	60%	-3	60%	-3	80%	+17	61%	-2
Camp	57%	57%	0	63%	+6	56%	-1	52%	-5	79%	+22	58%	+1
Problems	44%	59%	+15	54%	+10	43%	-1	51%	+7	71%	+27	46%	+2
Token	44%	48%	+4	52%	+8	46%	+2	52%	+8	70%	+26	42%	-2
Tragic	32%	41%	+9	42%	+10	30%	-2	43%	+11	65%	+33	36%	+4

(benchmark: Total GB into film)

We see here that the LGB audience does feel most strongly about these issues, but much of the heightened sense is felt by many of our nation's other diverse audiences, particularly the Black audience, when compared to the view of the general public.

That gay characters are too often portrayed as having problems delivers a heightened level of agreement among all the diverse audiences except for older women and working class people, as is the tendency to show gay characters having tragic endings.

But that gay characters are too often depicted as camp and having their sexual orientation as a main trait is less shared by the other diverse audiences, who are more closely aligned to the national average (which, remember, remains a majority view).

The overview — Diverse audiences other than LGBs say that gay characters are too often portrayed negatively – reinforcing a need for better balance

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Perception of Lesbian portrayal among the general public

UK FILM COUNCIL
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In these sections of the report we will take each diverse audience in turn and understand attitudes. We start off by understanding the view of the general public and, overleaf, we compare this to the view of the diverse audience in question.
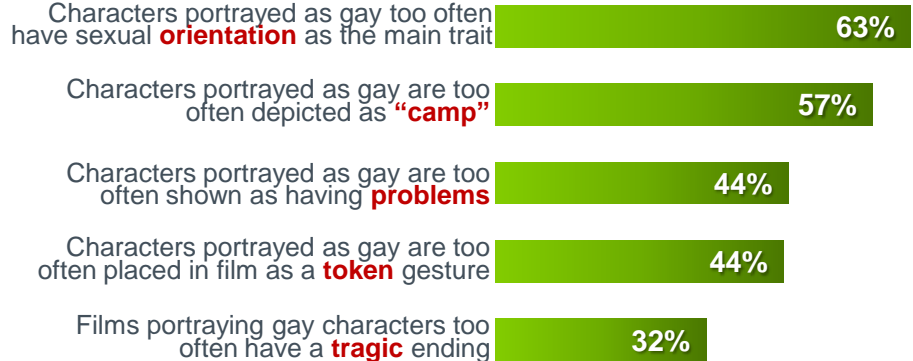
2 in 5 of the general public say that lesbian characters in film are too often portrayed as **fantasies** and nearly as many say they are too often depicted **negatively**. Such views are much more strongly felt by **younger** members of the general public.

The strength of agreement with these views are somewhat less strong than of the gay portrayal explored earlier, but still we see a substantial minority (and a **majority** in the case of 16-24s) telling us that lesbian portrayal could be more balanced, more sensitive and authentic.

We compare the general public's attitudes with that the of the LGB audience overleaf.

% that agree with each statement
Base: representative sample of GB 16+ population into film happy to answer sensitive questions (1,705)

Statement	%
Characters portrayed as lesbian are too often depicted as male sexual **fantasies**	40%
Characters portrayed as lesbian are too often depicted as sexually **aggressive**	37%
Characters portrayed as lesbian too often have psychological **problems**	36%
There should be more films featuring **feminine** lesbian portrayal	29%

	Male	Female	16-24	25-34	35-44	45-54	55+
Base size	791	914	205	327	342	286	545
Fantasies	41%	40%	62%	51%	43%	36%	27%
Aggressive	37%	36%	54%	43%	29%	36%	32%
Problems	36%	36%	52%	43%	30%	32%	32%
Feminine	35%	24%	55%	44%	29%	22%	16%

The overview

A substantial minority (and a majority of 16-24s) believe lesbian portrayal could be more balanced, sensitive and authentic

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Comparing perceptions of Lesbian portrayal between the general public and Lesbian, gay, bisexual people

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A clear majority, just under 2 in 3, of the LGB audience say that lesbian portrayal needs to be more **balanced**, sensitive and realistic.

That there should be more films featuring feminine lesbian portrayal particularly **struck a chord** with the LGB audience in comparison with the general public view. More than double the proportion agree there should be more.

% that agree with each statement
Base: representative sample of GB 16+ population into film happy to answer sensitive questions (1,705) and Lesbian, gay, bisexual people (224)

General public   **Lesbian, gay, bisexual people**

Characters portrayed as lesbian are too often depicted as male sexual **fantasies**
- 40%
- 64%

Characters portrayed as lesbian are too often depicted as sexually **aggressive**
- 37%
- 63%

Characters portrayed as lesbian too often have psychological **problems**
- 36%
- 63%

There should be more films featuring **feminine** lesbian portrayal
- 29%
- 61%
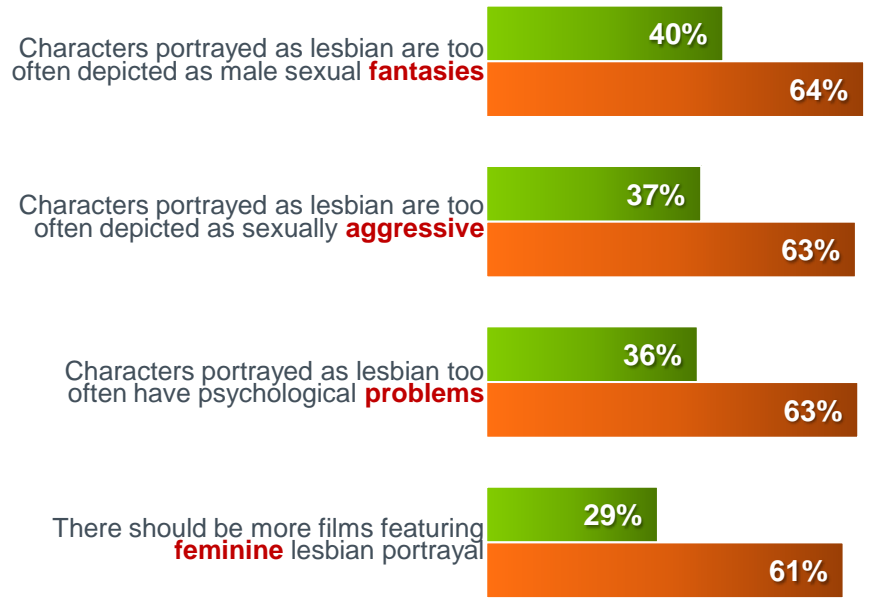
The overview

The majority of the LGB audience is telling us there is a need for a more sensitive, balanced and authentic portrayal of lesbian characters and stories in film

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Perceptions of **Lesbian portrayal** by lesbians

Qualitative insight

Lesbian women are one of the most unhappy of all audiences with the way they are portrayed in film

- Of all the audiences we spoke to, the Lesbian audience feel that **they are under-represented**; not just by UK film, but by European and US film makers as well. They struggled to recollect lesbian characters from films they know, only being able to recount two or three characters.

- The film industry doesn't really cater for them on a number of levels ...

  ~ The depiction of **heterosexual romance is irrelevant to them**

  ~ **Portrayal is not authentic**

  ~ The storylines that lesbian characters are given tend to be **extreme**

  ~ There are **no prominent lesbian actresses**

Qualitative insight

- Many of the films that this audience enjoy are full of deep, meaningful issues that are challenging and not run of the mill – for example Mike Leigh's '*Secrets and Lies*'. Hollywood blockbusters are watched, but **this audience is selective and fastidious in their choices**.

- They perceive films featuring lesbian characters are lacking in authenticity. To a lesbian women, **the subtleties of lesbian character traits are usually missed in film**. As one woman put it 'films are often aimed at what a man may be thinking, from a mans angle'.

"A love affair between women can be a beautiful thing, but often a man can get in the way. Films are often aimed at what a man may be thinking, from a mans angle"
Lesbian Woman, 28

"It's important to portray a positive image to the young; that we are not fucked up because of our sexual preferences"
Lesbian Woman, 29

Perceptions of **Lesbian portrayal** by lesbians

Qualitative insight

- Lesbian women are aware that they are sexually appealing to men, but contrary to what one would expect, they don't mind one way or the other. **Ultimately being attractive to men is inconsequential to them**, in fact, they feel it is ridiculous as in reality the feeling would not be reciprocated.

- This audience does feel that the **portrayal is too narrow**. Spontaneously they discuss characters that are too **masculine**. When discussing the most prominent character traits of lesbian women the opposite is in fact true.

- In their view, lesbian relationships are usually more **gentle and beautiful** than heterosexual relationships, and so the misconception that lesbians are in fact more masculine cuts deep. This is compounded by the fact that **some lesbian characters are psychotic,** for example the protagonist in Patty Jenkin's '*Monster',* although the overuse of this type of character was not as salient as the issue of masculinity.

"It's like, that men think women can't have a serious sexual relationship with one another. But men are genuinely turned on by lesbians, which is ridiculous from my point of view"
Lesbian Woman, 38

"I'd like to see women being lesbians without having to have a man around. I'd like to see more intimacy, more beauty between women"
Lesbian Woman, 32

Qualitative insight

- For the stronger characters that film requires, rather than masculine traits currently evident, there is an opportunity to build in newer and more authentic traits. One lesbian woman enthusiastically offered the following **suggestions that could challenge the current stereotype**:

    ~ **entrepreneurial, creative, smart, intelligent, beautiful, feminine**

- Positively, this audience feel that UK film is best placed to lead the way on changing attitudes around the world about lesbian portrayal in film. However, they feel **there is a long way to go to address the current situation**.

Comparing perceptions of Lesbian portrayal
between the general public and all diverse audiences

% that agree with each statement
Base: diverse audiences

	Total GB into film	Asian		Black African/ Caribbean		C2D/ Working class		Eastern European		Lesbian, gay, bisexual		Older women	
Fantasies	40%	51%	+11	55%	+15	43%	+3	47%	+7	64%	+24	31%	-9
Aggressive	37%	50%	+13	49%	+12	38%	+1	38%	+1	63%	+26	32%	-5
Problems	36%	44%	+8	45%	+9	35%	-1	41%	+5	63%	+27	35%	-1
Feminine	29%	35%	+6	36%	+7	31%	+2	38%	+9	61%	+32	13%	-16

(benchmark: Total GB into film)

Other diverse audiences also are ahead of the national average opinion on some of these views of lesbian portrayal in film. In particular Asian and Black audiences tend to be above average (amounting to around 1 in 2 of them) that lesbian characters are too often male sexual fantasies and too often sexually aggressive.

Working class people are closer to the national average opinion and older females tend to be somewhat behind national opinion, clearly more conservative in their views, especially for agreeing there should be more films with more feminine lesbian portrayal.

The overview Asian and Black audiences are also ahead of the average opinion for seeking a more balanced portrayal of lesbians in film

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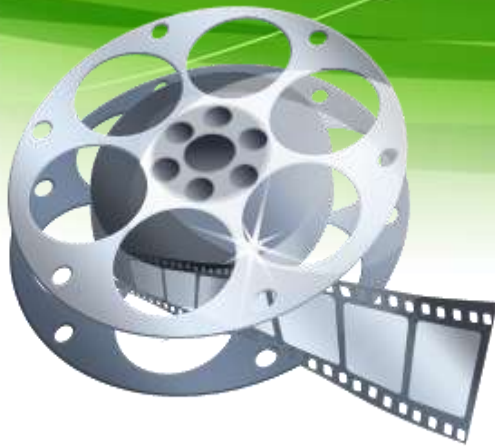
Detailed findings

What people think of the portrayal of diverse audiences
(6 of 6) Older women portrayal

Perception of Older women portrayal among the general public

In these sections of the report we will take each diverse audience in turn and understand attitudes. We start off by understanding the view of the general public and, overleaf, we compare this to the view of the diverse audience in question.

A majority of the general public feel that older characters, especially women, are significantly **under-represented** in film, and, when shown, are too often in marginal roles.

While a majority agree that older female characters tend not to be portrayed as **sexual** beings, half the country perceive that older women are **comfortable** as being attractive to younger men.

A key analysis is to compare the general public's attitudes and perceptions to those of older women themselves (see overleaf).

% who agree with each statement about Older women portrayal
Base: representative sample of GB 16+ population into film happy to answer sensitive questions (1,705)

Statement	%
Films feature and glamorise the young; older characters, especially women, are significantly **under-represented**	62%
Older characters, especially women, tend not to be portrayed as having **sexual** needs and desires	56%
Older characters, especially women, are too often **marginalised** and tend only to feature as background characters	52%
Older women are comfortable seeing themselves as being **attractive** to younger men	50%
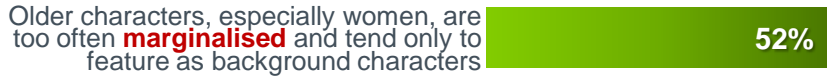
	Male	Female	16-24	25-34	35-44	45-54	55+
Base size	791	914	205	327	342	286	545
Under-rep	59%	64%	62%	56%	59%	59%	68%
Sexual	55%	57%	61%	53%	49%	58%	59%
Marginalised	47%	56%	55%	49%	48%	51%	55%
Attractive	50%	50%	56%	54%	52%	48%	45%

The overview

A majority think that older women are significantly under-represented in film and too often appear in marginal roles

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Comparing perceptions of Older women portrayal
between the general public and Older women

When comparing the general public view with that of older women we see only a little uplift in opinion, meaning everyone tends to feel the **same** way.

With other diverse audiences, we saw very substantial uplifts in the level of agreement compared to the general public. The small increases here may be telling us something about the **lowered expectations** of older females compared to other diverse audiences.

That they feel not that much more strongly about these specific and relevant issues does not mean there is no **spur to action** because it remains the case that the majority of people and older women alike are telling us that older females are under-represented and too often marginalised in roles.

While older females do consume fewer films and attend the cinema less frequently compared to younger demographics, they are still a **significant** part of the total market, so taking their views into account is something filmmakers should take on board.

% that agree with each statement
Base: representative sample of GB 16+ population into film happy to answer sensitive questions (1,705) and Older women (358)

■ **General public**   ■ **Older women**

Films feature and glamorise the young; older characters, especially women, are significantly **under represented**
- General public: 62%
- Older women: 69%

Older characters, especially women, tend not to be portrayed as having **sexual** needs and desires
- General public: 56%
- Older women: 61%

Older characters, especially women, are too often **marginalised** and tend only to feature as background characters
- General public: 52%
- Older women: 56%

Older women are comfortable seeing themselves as being **attractive** to younger men
- General public: 50%
- Older women: 50%

The overview	Older women, like the general public at large, feel they are under-represented in film and are too often marginalised in the roles played

Comparing perceptions of Older women portrayal between Older women aged 50-60 and 61-75

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When we split out older women by age we see that, typically, those aged 61-75 tend to feel even **more strongly** about these issues than those in their fifties.

Almost 4 in 5 of 61-75 year olds interviewed say that they are significantly **under represented** in film and there considerably heightened feelings over those in their fifties towards both being marginalised and not being portrayed as having sexual needs and desires.

It is another example of where filmmakers are **stereotyping** in their character portrayal and more needs to be done to create a realistic and genuine picture across society.

% that agree with each statement
Base: Older women (358)

■ Aged 50-60   ■ Aged 61-75

Films feature and glamorise the young; older characters, especially women, are significantly **under represented**
- Aged 50-60: 57%
- Aged 61-75: 78%

Older characters, especially women, tend not to be portrayed as having **sexual** needs and desires
- Aged 50-60: 56%
- Aged 61-75: 65%

Older characters, especially women, are too often **marginalised** and tend only to feature as background characters
- Aged 50-60: 47%
- Aged 61-75: 63%

Older women are comfortable seeing themselves as being **attractive** to younger men
- Aged 50-60: 52%
- Aged 61-75: 48%

The overview

Older women aged 61-75 have more intense feelings about their misrepresentation in film highlighting the older women are, the less likely they will be represented authentically

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Perceptions of Older women portrayal by older women

Qualitative insight

This audience differ markedly by age and generation. Here we discuss 50-60yr Baby Boomers.

- Overall this audience has **little issue with the way they are portrayed** in film (when compared to other audiences). If anything **more modern, lively and positive characters** would reflect the 50-60 year old audience more authentically.

- This age group see themselves as younger than their years. They are *celebrating life*, embracing new found wisdom and are generally feeling very positive about things. Phyllida Lloyd's '*Mamma Mia!'* captures this spirit and is a key reason the film is appreciated.

- This audience feel that they should be featured more often in film, although this is not a big issue. **One or two remark on feeling invisible** or portrayed poorly in film. For example Judi Dench's character in Richard Eyre's '*Notes on a Scandal*' was felt to be too negative compared to how they see themselves.

"*Meryl was still young in Mamma Mia!, she had a sense of fun, she'd been through the 60s and was the same*"
Older Woman, 52

"*60s are the new 40s. We are in our 50s, having sex and having fun. We are comfortable in our own skin that's for sure*"
Older Woman, 56

"*We are attractive, I have men half my age coming up to me. I've been shocked at the youngness of who has come forward. We are called cougars aren't we?*"
Older Woman, 54

Qualitative insight

- They enjoy films with **characters that are complex, rounded and intelligent**, with a 'back story' i.e. a character with a childhood that moulds them.

- **Characters that portray women as wise, modern, confident and in some cases almost 'reborn' would be appealing**. They are aware that society is beginning to look at them more respectfully – as being modern and intelligent, but also appreciating the maturity as being an attractive quality – sometimes in a physical sense. Many are ready for new romance.

- Contrary to what one would expect, older women are increasingly comfortable with **the 'cougar' image**; they feel it signifies **renewed interest and admiration** for this age group.

Perceptions of Older women portrayal by older women

Qualitative insight

- **For the 61-75yr audience contentment, grandchildren and family preoccupy them**; there is less interest in film overall and they have more sedentary lifestyles vs. their younger counterparts.

- Overall, some in this age group feel they **are represented well in film**; Films like Robert Altman's '*Gosford Park*', Charles Dance's '*Ladies in Lavender*' and Nigel Cole's '*Calendar Girls*' were positively discussed as being favourites but the quantitative analysis suggestions under representation.

- **Nostalgia is strong with this audience** – they are watching films they watched in their youth, for example wartime, romance, westerns, and musicals. Whilst nostalgia is also present for the 50-60yrs cohort, the sense of nostalgia is much stronger and relevant for the older age group.

"I just like films to have a lovely story. Like Ladies in Lavender – that one was lovely and you could really see it happening. It was realistic "
Older Woman, 68

"You feel as if you know those actresses. You've lived with them, through all the films they've been in. You get absorbed into their films"
Older Woman, 72

"I enjoy Costume Drama because everything was softer and more gentle. The way they speak as well...and although there were lots of rules and regulations, one didn't step over the line"
Older Woman, 61

Qualitative insight

- **Period Dramas are specifically enjoyed by older women** because life appeared more gentle and proper, and 'although there were lots of rules and regulations, one didn't step over the line'. This audience enjoy the dialogue and the fact that the **plots feature similar problems to the problems we face as individuals today**.

- They **enjoy films featuring older female actresses** and enjoy watching them appear in different roles – Judi Dench, Maggie Smith, Julie Walters, Helen Mirren, Brenda Blethyn and Angela Lansbury are all strong favourites.

- In contrast with the 50-60yr cohort, **this audience are interested in less challenging storylines**; there is a requirement for more traditional, gentle plots that sit well with this contented stage of life.

Comparing perceptions of **Older women portrayal** between the general public and all diverse audiences

% that agree with each statement
Base: diverse audiences

	Total GB into film	Asian		Black African/ Caribbean		C2D/ Working class		Eastern European		Lesbian, gay, bisexual		Older women	
Under rep	62%	59%	-3	68%	+6	56%	-6	58%	-4	77%	+15	69%	+7
Sexual	56%	52%	-4	65%	+9	56%	0	51%	-5	68%	+12	61%	+5
Marginalised	52%	52%	0	54%	+2	50%	-2	50%	-2	63%	+11	56%	+4
Attractive	50%	51%	+1	62%	+12	49%	-1	57%	+7	57%	+7	50%	0

(benchmark)

We saw that older women are really not that more likely to agree with these issues than the general public, and the same case is true for the other diverse audiences in the study. The one exception is the LGB audience, who tend to much more empathetic with the needs for balance of the portrayal of older women in film. And it is still the case that a majority of all these diverse audiences believe that older women are under-represented in film nowadays.

The overview

A majority of all these diverse audiences say that older women are under-represented in film, with the LGB audience most empathetic

Detailed findings

Genre preferences

(statistical analysis)

Types of film that the general public typically enjoy watching

In our survey, we asked what type of films the general public enjoys watching.

Later we will show what type of films they wish to see more of.

Overleaf are two detailed profiling pages – one splitting this data by demographics; the other splitting it by key market segments, such as cinema attendees and DVD/BD purchasers.

This is followed by genre preferences for our diverse audiences.

% enjoy watching
Base: representative sample of GB 16+ population into film (1,978)

Genre	%
Comedy	64%
Adventure	60%
Drama	55%
Thriller/Suspense	53%
Action (including martial arts)	50%
Science Fiction/Futuristic	44%
Romantic Comedy	37%
Family	37%
Fantasy	37%
Horror	32%
Documentary	31%
Animation for kids	29%
War	29%
Period Drama	29%
Animation for adults	28%
Disaster	28%
Musical	26%
Romance	26%
Biographical dramas	22%
Western	19%
Sport	15%
Teenage Comedy	15%
Kids (non animation)	12%
Film noir	10%
World cinema (non English-language)	8%
Bollywood	4%
Nollywood	1%

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Types of film that the general public typically enjoy watching

Full breakdown by demographics and market segments (1 of 2)

	Total GB into film	Male <35	Male 35+	Female <35	Female 35+	Parents Yes	No	AB	C1	C2	DE
Base	1,978	312	629	346	691	664	1314	605	473	281	619
Comedy	64%	53%	63%	78%	62%	66%	63%	67%	65%	65%	60%
Adventure	60%	56%	73%	60%	50%	61%	59%	60%	60%	63%	59%
Drama	55%	19%	54%	56%	70%	43%	61%	61%	52%	51%	54%
Thriller/Suspense	53%	36%	57%	45%	60%	42%	59%	52%	54%	56%	53%
Action (including martial arts)	50%	57%	62%	52%	35%	52%	49%	42%	52%	54%	51%
Science Fiction/Futuristic	44%	35%	58%	35%	39%	42%	45%	41%	47%	46%	44%
Romantic Comedy	37%	16%	24%	61%	47%	41%	35%	41%	39%	36%	34%
Family	37%	22%	25%	53%	47%	48%	32%	32%	39%	43%	37%
Fantasy	37%	32%	41%	43%	31%	37%	36%	32%	41%	46%	34%
Horror	32%	36%	33%	44%	22%	32%	31%	24%	32%	43%	32%
Documentary	31%	20%	41%	21%	30%	20%	37%	38%	30%	30%	28%
Animation for kids	29%	26%	20%	48%	29%	40%	23%	29%	32%	36%	25%
War	29%	24%	53%	9%	16%	21%	32%	26%	29%	26%	31%
Period Drama	29%	6%	22%	22%	48%	16%	35%	33%	27%	22%	29%
Animation for adults	28%	47%	27%	33%	19%	29%	27%	29%	36%	31%	23%
Disaster	28%	25%	30%	28%	26%	28%	28%	21%	29%	40%	27%
Musical	26%	10%	21%	32%	36%	23%	28%	27%	26%	20%	28%
Romance	26%	13%	12%	43%	35%	26%	25%	27%	27%	25%	24%
Biographical dramas	22%	13%	22%	14%	30%	13%	27%	29%	21%	18%	21%
Western	19%	12%	36%	4%	12%	12%	22%	17%	18%	20%	20%
Sport	15%	22%	22%	8%	8%	15%	15%	16%	17%	16%	12%
Teenage Comedy	15%	22%	9%	38%	5%	21%	11%	9%	14%	23%	15%
Kids (non animation)	12%	8%	7%	26%	13%	23%	7%	11%	13%	15%	12%
Film noir	10%	9%	13%	7%	9%	6%	12%	15%	10%	5%	8%
World cinema (non English-language)	8%	5%	8%	9%	7%	3%	10%	11%	9%	4%	6%
Bollywood	4%	7%	2%	9%	3%	6%	3%	4%	8%	2%	3%
Nollywood	1%	2%	<1%	3%	2%	1%	1%	<1%	1%	<1%	2%

Types of film that the general public typically enjoy watching

Full breakdown by demographics and market segments (2 of 2)

	Total GB into film	Level of cinema attendance			Level of DVD/BD purchasing		
		None	Lighter	Heavier	None	Lighter	Heavier
Base	1,978	310	1,047	621	515	1,090	373
Comedy	64%	56%	69%	58%	59%	64%	69%
Adventure	60%	54%	60%	63%	53%	61%	66%
Drama	55%	55%	59%	48%	59%	52%	57%
Thriller/Suspense	53%	51%	56%	50%	52%	51%	62%
Action (including martial arts)	50%	43%	50%	54%	36%	48%	72%
Science Fiction/Futuristic	44%	41%	47%	41%	35%	43%	60%
Romantic Comedy	37%	32%	39%	38%	34%	37%	42%
Family	37%	26%	41%	38%	28%	38%	47%
Fantasy	37%	33%	37%	38%	28%	35%	53%
Horror	32%	29%	32%	32%	22%	30%	48%
Documentary	31%	39%	32%	24%	38%	28%	31%
Animation for kids	29%	14%	31%	33%	16%	30%	42%
War	29%	33%	30%	24%	29%	25%	39%
Period Drama	29%	33%	30%	24%	35%	27%	27%
Animation for adults	28%	18%	26%	37%	17%	29%	40%
Disaster	28%	28%	27%	29%	25%	25%	40%
Musical	26%	29%	27%	23%	27%	25%	29%
Romance	26%	24%	25%	28%	23%	26%	29%
Biographical dramas	22%	19%	23%	23%	23%	21%	25%
Western	19%	23%	18%	17%	24%	14%	26%
Sport	15%	10%	15%	17%	14%	14%	17%
Teenage Comedy	15%	5%	15%	18%	8%	14%	23%
Kids (non animation)	12%	5%	13%	15%	6%	13%	20%
Film noir	10%	5%	11%	10%	6%	10%	14%
World cinema (non English-language)	8%	3%	9%	7%	6%	6%	13%
Bollywood	4%	3%	3%	7%	2%	5%	5%
Nollywood	1%	<1%	1%	2%	1%	1%	3%

Types of film that diverse audiences typically enjoy watching

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We know from earlier that most of our diverse audiences in the study are disproportionately connected with film. We see this illustrated again here by the degree to which they are higher than the general public for genre viewing.

As it is difficult to see the rank order of preference per diverse audience in the table on the right, on the next page we show the same data in a different way to understand order preference more clearly.

	Total GB into film	Asian		Black African/ Caribbean		C2D/ Working class		Eastern European		Lesbian, gay, bisexual		Older women	
Comedy	64%	81%	+17	84%	+20	64%	0	87%	+23	75%	+11	53%	-11
Adventure	60%	74%	+14	72%	+12	63%	+3	82%	+22	70%	+10	46%	-14
Drama	55%	54%	-1	66%	+11	50%	-5	70%	+15	76%	+21	72%	+17
Thriller/Suspense	53%	61%	+8	63%	+10	50%	-3	59%	+6	67%	+14	62%	+9
Action	50%	73%	+23	74%	+24	55%	+5	74%	+24	58%	+8	25%	-25
Sci-fi/Futuristic	44%	49%	+5	50%	+6	45%	+1	56%	+12	61%	+17	36%	-8
Romcom	37%	62%	+25	59%	+22	38%	+1	66%	+29	49%	+12	44%	+7
Family	37%	61%	+24	60%	+23	42%	+5	55%	+18	41%	+4	40%	+3
Fantasy	37%	44%	+7	46%	+9	41%	+4	58%	+21	61%	+24	25%	-12
Horror	32%	43%	+11	41%	+9	37%	+5	47%	+15	51%	+19	16%	-16
Documentary	31%	40%	+9	54%	+23	25%	-6	73%	+42	58%	+27	33%	+2
Animation for kids	29%	44%	+15	54%	+25	34%	+5	47%	+18	45%	+16	22%	-7
War	29%	26%	-3	33%	+4	26%	-3	40%	+11	29%	0	20%	-9
Period drama	29%	24%	-5	31%	+2	20%	-9	31%	+2	52%	+23	54%	+25
Animation for adults	28%	41%	+13	54%	+26	30%	+2	56%	+28	53%	+25	14%	-14
Disaster	28%	30%	+2	34%	+6	32%	+4	44%	+16	43%	+15	24%	-4
Musical	26%	28%	+2	43%	+17	23%	-3	36%	+10	50%	+24	40%	+14
Romance	26%	49%	+23	47%	+21	24%	-2	49%	+23	42%	+16	35%	+9
Biographical drama	22%	25%	+3	39%	+17	17%	-5	45%	+23	52%	+30	34%	+12
Western	19%	24%	+5	33%	+14	18%	-1	25%	+6	20%	+1	15%	-4
Sport	15%	24%	+9	37%	+22	13%	-2	28%	+13	17%	+2	8%	-7
Teenage comedy	15%	34%	+19	39%	+24	22%	+7	33%	+18	24%	+9	3%	-12
Kids (non animation)	12%	30%	+18	29%	+17	17%	+5	27%	+15	21%	+9	6%	-6
Film noir	10%	18%	+8	23%	+13	6%	-4	26%	+16	36%	+26	9%	-1
World cinema	8%	30%	+22	31%	+23	4%	-4	56%	+48	42%	+34	7%	-1
Bollywood	4%	56%	+52	24%	+20	3%	-1	19%	+15	11%	+7	3%	-1
Nollywood	1%	9%	+8	35%	+34	2%	+1	14%	+13	8%	+7	3%	+2

benchmark

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Comparing film genres the general public typically enjoy watching with the Asian audience

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most preferred genres

least preferred genres

Total GB into film

Asian

Total GB into film	Asian
Comedy	Comedy
Adventure	Adventure
Drama	Action
Thriller/Suspense	Romantic Comedy
Action	Family
Sci-fi/Futuristic	Thriller/Suspense
Romantic Comedy	Bollywood
Family	Drama
Fantasy	Sci-fi/Futuristic
Horror	Romance
Documentary	Fantasy
Animation for kids	Animation for kids
War	Horror
Period Drama	Animation for adults
Animation for adults	Documentary
Disaster	Teenage Comedy
Musical	World cinema
Romance	Kids (non animation)
Biographical dramas	Disaster
Western	Musical
Sport	War
Teenage Comedy	Biographical dramas
Kids (non animation)	Period Drama
Film noir	Western
World cinema	Sport
Bollywood	Film noir
Nollywood	Nollywood

— a big jump in preference for this audience (>3 places in rank order)

— a big dip in preference for this audience (<3 places in rank order)

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Comparing film genres the general public typically enjoy watching with the Black audience

most preferred genres

least preferred genres

Total GB into film

Total GB into film
Comedy
Adventure
Drama
Thriller/Suspense
Action
Sci-fi/Futuristic
Romantic Comedy
Family
Fantasy
Horror
Documentary
Animation for kids
War
Period Drama
Animation for adults
Disaster
Musical
Romance
Biographical dramas
Western
Sport
Teenage Comedy
Kids (non animation)
Film noir
World cinema
Bollywood
Nollywood

Black African/Caribbean

Black African/Caribbean
Comedy
Action
Adventure
Drama
Thriller/Suspense
Family
Romantic Comedy
Documentary
Animation for adults
Animation for kids
Sci-fi/Futuristic
Romance
Fantasy
Musical
Horror
Teenage Comedy
Biographical dramas
Sport
Nollywood
Disaster
War
Western
Period Drama
World cinema
Kids (non animation)
Bollywood
Film noir

— a big jump in preference for this audience (>3 places in rank order)

— a big dip in preference for this audience (<3 places in rank order)

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Comparing film genres the general public typically enjoy watching with the C2D grade (working class) audience

UK FILM COUNCIL LOTTERY FUNDED

most preferred genres

least preferred genres

Total GB into film

Total GB into film	C2D/Working class
Comedy	Comedy
Adventure	Adventure
Drama	Action
Thriller/Suspense	Thriller/Suspense
Action	Drama
Sci-fi/Futuristic	Sci-fi/Futuristic
Romantic Comedy	Family
Family	Fantasy
Fantasy	Romantic Comedy
Horror	Horror
Documentary	Animation for kids
Animation for kids	Disaster
War	Animation for adults
Period Drama	War
Animation for adults	Documentary
Disaster	Romance
Musical	Musical
Romance	Teenage Comedy
Biographical dramas	Period Drama
Western	Western
Sport	Kids (non animation)
Teenage Comedy	Biographical dramas
Kids (non animation)	Sport
Film noir	Film noir
World cinema	World cinema
Bollywood	Bollywood
Nollywood	Nollywood

— a big jump in preference for this audience (>3 places in rank order)

— a big dip in preference for this audience (<3 places in rank order)

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Comparing film genres the general public typically enjoy watching with the Eastern European audience

UK FILM COUNCIL
LOTTERY FUNDED

most preferred genres

least preferred genres

Total GB into film

Total GB into film	Eastern European
Comedy	Comedy
Adventure	Adventure
Drama	Action
Thriller/Suspense	Documentary
Action	Drama
Sci-fi/Futuristic	Romantic Comedy
Romantic Comedy	Thriller/Suspense
Family	Fantasy
Fantasy	Animation for adults
Horror	World cinema
Documentary	Sci-fi/Futuristic
Animation for kids	Family
War	Romance
Period Drama	Animation for kids
Animation for adults	Horror
Disaster	Biographical dramas
Musical	Disaster
Romance	War
Biographical dramas	Musical
Western	Teenage Comedy
Sport	Period Drama
Teenage Comedy	Sport
Kids (non animation)	Kids (non animation)
Film noir	Film noir
World cinema	Western
Bollywood	Bollywood
Nollywood	Nollywood

—— a big jump in preference for this audience (>3 places in rank order)

—— a big dip in preference for this audience (<3 places in rank order)

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Comparing film genres the general public typically enjoy watching with the LGB audience

UK FILM COUNCIL
LOTTERY FUNDED

most preferred genres

least preferred genres

Total GB into film

Total GB into film	Lesbian, gay, bisexual
Comedy	Drama
Adventure	Comedy
Drama	Adventure
Thriller/Suspense	Thriller/Suspense
Action	Sci-fi/Futuristic
Sci-fi/Futuristic	Fantasy
Romantic Comedy	Documentary
Family	Action
Fantasy	Animation for adults
Horror	Period Drama
Documentary	Biographical dramas
Animation for kids	Horror
War	Musical
Period Drama	Romantic Comedy
Animation for adults	Animation for kids
Disaster	Disaster
Musical	World cinema
Romance	Romance
Biographical dramas	Family
Western	Film noir
Sport	War
Teenage Comedy	Teenage Comedy
Kids (non animation)	Kids (non animation)
Film noir	Western
World cinema	Sport
Bollywood	Bollywood
Nollywood	Nollywood

— a big jump in preference for this audience (>3 places in rank order)

— a big dip in preference for this audience (<3 places in rank order)

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Comparing film genres the general public typically enjoy watching with the older female audience

UK FILM COUNCIL LOTTERY FUNDED

most preferred genres

least preferred genres

Total GB into film

Total GB into film	Older women
Comedy	Drama
Adventure	Thriller/Suspense
Drama	Period Drama
Thriller/Suspense	Comedy
Action	Adventure
Sci-fi/Futuristic	Romantic Comedy
Romantic Comedy	Musical
Family	Family
Fantasy	Sci-fi/Futuristic
Horror	Romance
Documentary	Biographical dramas
Animation for kids	Documentary
War	Action
Period Drama	Fantasy
Animation for adults	Disaster
Disaster	Animation for kids
Musical	War
Romance	Horror
Biographical dramas	Western
Western	Animation for adults
Sport	Film noir
Teenage Comedy	Sport
Kids (non animation)	World cinema
Film noir	Kids (non animation)
World cinema	Bollywood
Bollywood	Teenage Comedy
Nollywood	Nollywood

— a big jump in preference for this audience (>3 places in rank order)

— a big dip in preference for this audience (<3 places in rank order)

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Detailed findings

Genre preferences
- favourite films, actors

Types of film that the general public consider their favourites

When considering genre preferences, we also wanted to find out about favourites, asking respondents to choose up to three out of the list offered.
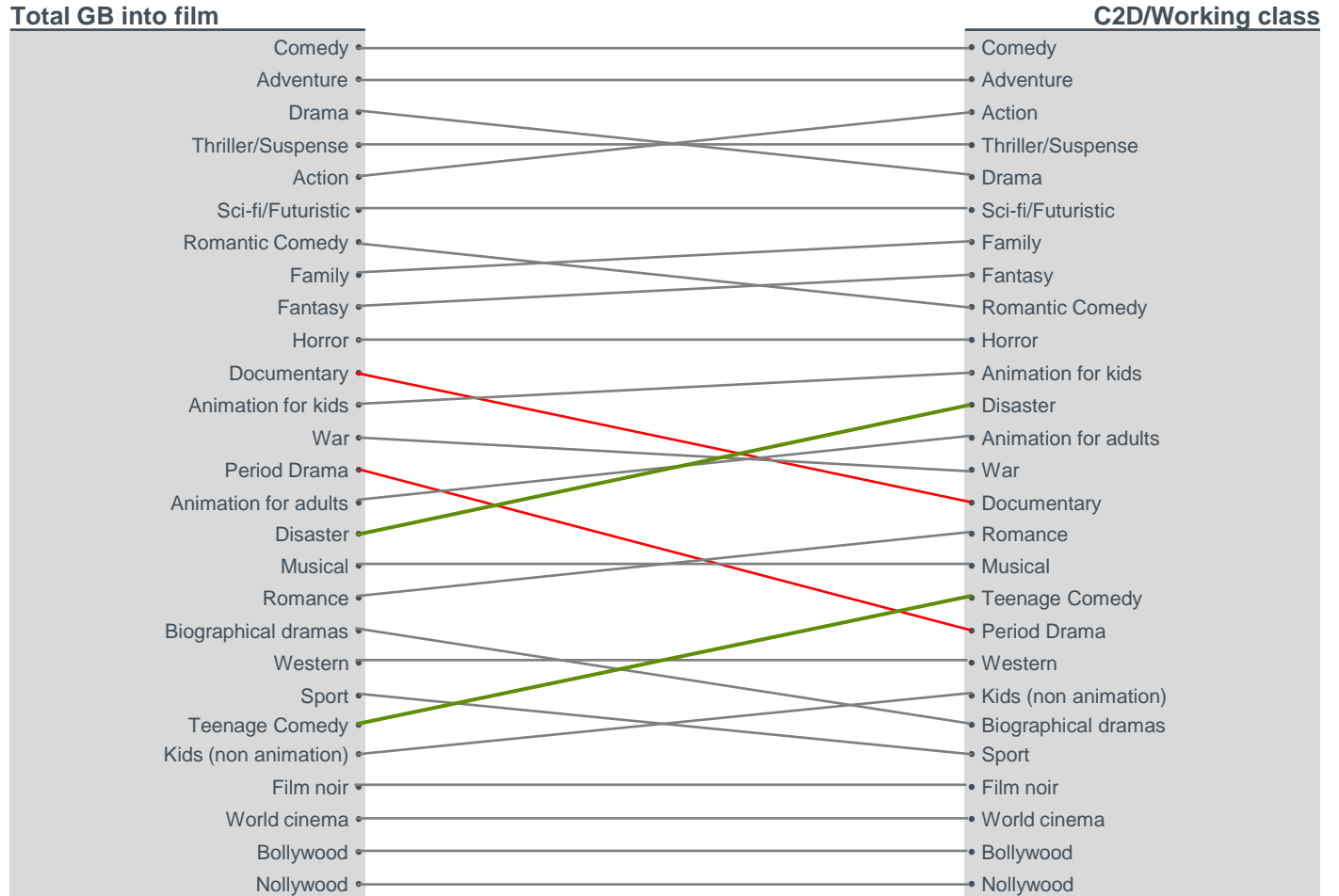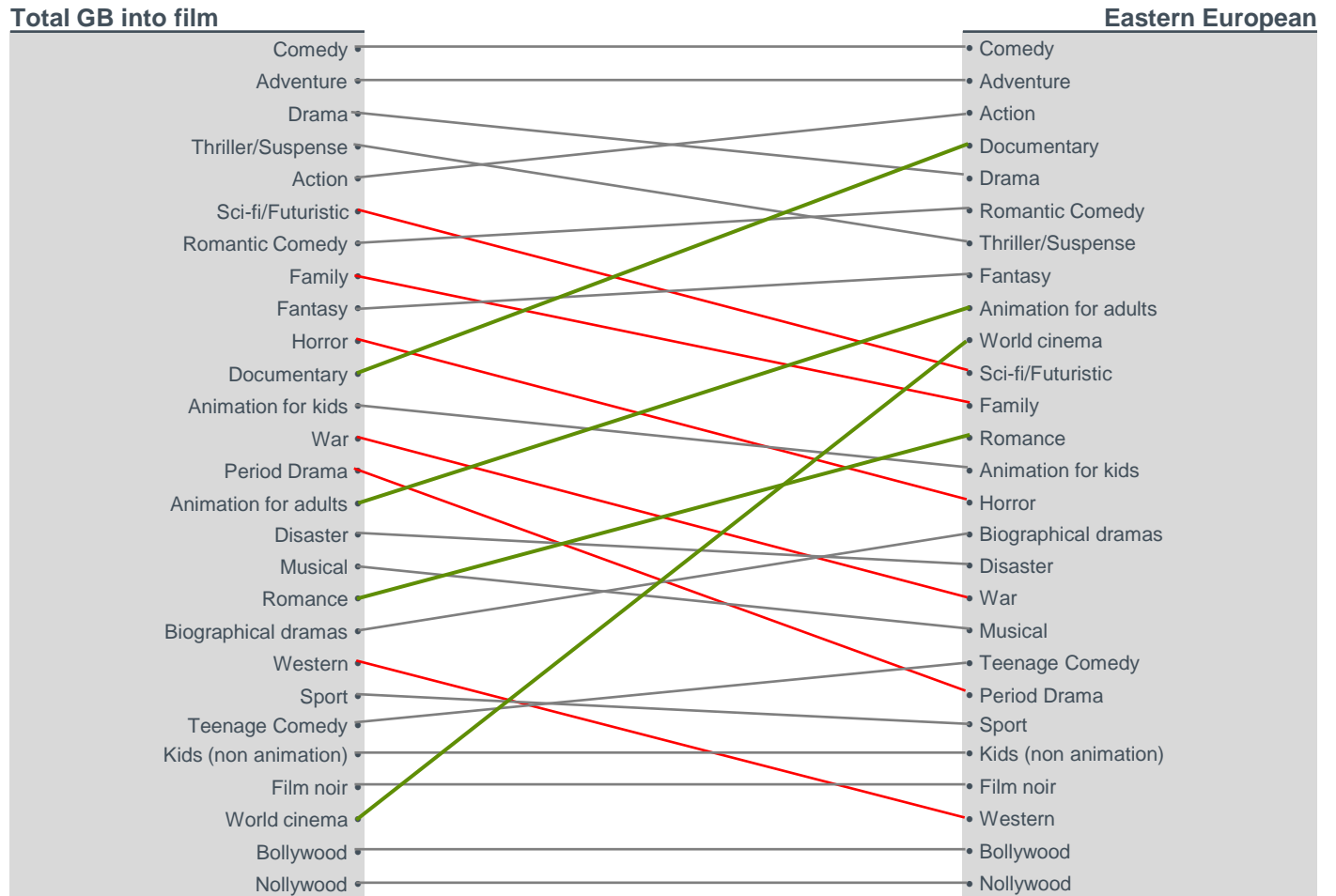
Among the general public as a whole, comedies, thrillers and sci-fi top the list.

Over the next two pages we provide a breakdown of preference by demographics and by key market segments

% who rate each genre as a favourite (up to 3 per respondent)
Base: representative sample of GB 16+ population into film (1,978)
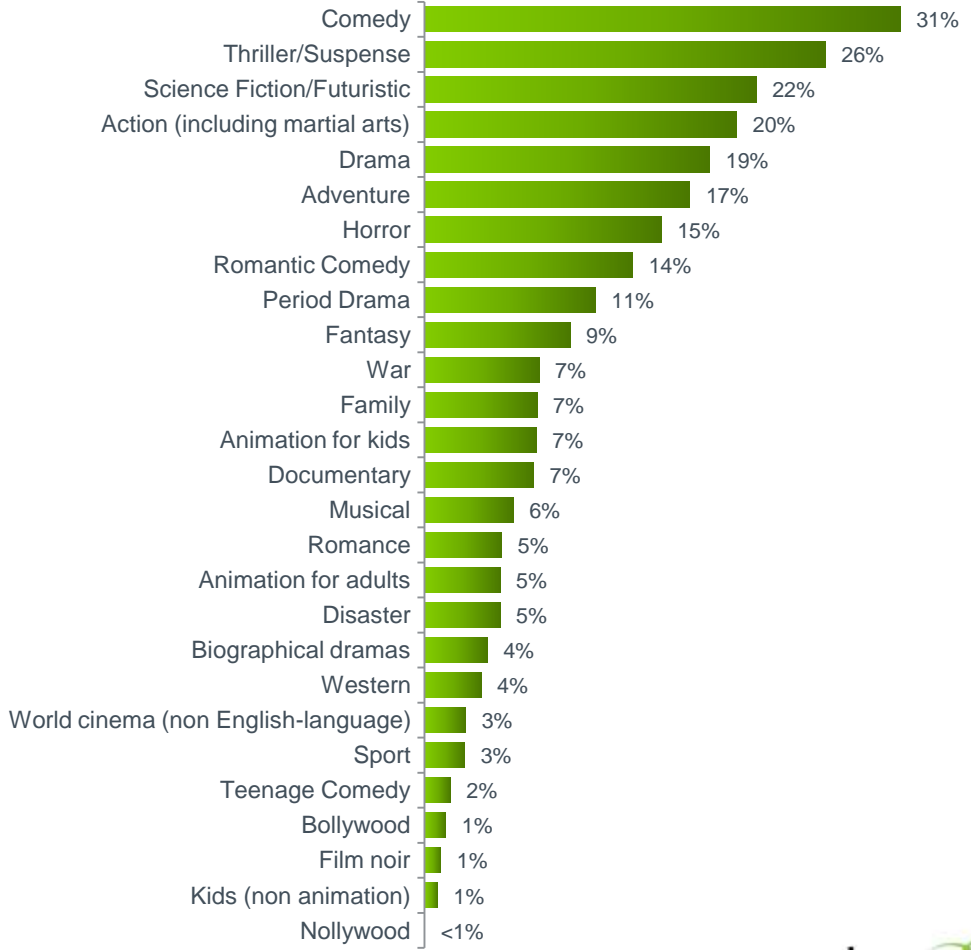
Genre	%
Comedy	31%
Thriller/Suspense	26%
Science Fiction/Futuristic	22%
Action (including martial arts)	20%
Drama	19%
Adventure	17%
Horror	15%
Romantic Comedy	14%
Period Drama	11%
Fantasy	9%
War	7%
Family	7%
Animation for kids	7%
Documentary	7%
Musical	6%
Romance	5%
Animation for adults	5%
Disaster	5%
Biographical dramas	4%
Western	4%
World cinema (non English-language)	3%
Sport	3%
Teenage Comedy	2%
Bollywood	1%
Film noir	1%
Kids (non animation)	1%
Nollywood	<1%

Types of film that the general public consider their favourites

Full breakdown by demographics and market segments (1 of 2)

	Total GB into film	Gender by age				Parents		Social class			
		Male <35	Male 35+	Female <35	Female 35+	Yes	No	AB	C1	C2	DE
Base	1,978	312	629	346	691	664	1314	605	473	281	619
Comedy	31%	32%	29%	48%	24%	32%	30%	32%	33%	35%	28%
Thriller/Suspense	26%	20%	28%	13%	33%	18%	30%	26%	26%	27%	26%
Science Fiction/Futuristic	22%	16%	37%	11%	15%	17%	24%	22%	28%	24%	18%
Action (including martial arts)	20%	37%	25%	20%	10%	26%	17%	13%	21%	23%	23%
Drama	19%	4%	15%	14%	30%	11%	23%	27%	15%	13%	18%
Adventure	17%	24%	23%	14%	11%	19%	16%	20%	15%	17%	17%
Horror	15%	17%	13%	28%	11%	16%	15%	9%	14%	23%	17%
Romantic Comedy	14%	5%	6%	28%	18%	16%	12%	17%	15%	13%	11%
Period Drama	11%	<1%	5%	7%	24%	7%	13%	13%	11%	5%	12%
Fantasy	9%	7%	9%	7%	12%	7%	11%	7%	12%	9%	10%
War	7%	2%	19%	<1%	3%	4%	9%	7%	8%	7%	8%
Family	7%	4%	4%	11%	10%	14%	4%	8%	8%	5%	8%
Animation for kids	7%	6%	4%	12%	9%	12%	5%	6%	5%	11%	8%
Documentary	7%	4%	10%	1%	8%	4%	9%	8%	6%	4%	8%
Musical	6%	2%	3%	6%	10%	3%	7%	6%	3%	3%	8%
Romance	5%	4%	1%	11%	6%	6%	5%	7%	4%	4%	5%
Animation for adults	5%	19%	1%	3%	3%	7%	4%	4%	10%	4%	3%
Disaster	5%	4%	4%	6%	6%	4%	5%	3%	4%	11%	4%
Biographical dramas	4%	1%	3%	1%	7%	2%	5%	5%	3%	1%	5%
Western	4%	<1%	9%	-	2%	1%	5%	2%	2%	3%	6%
World cinema (non English-language)	3%	2%	2%	3%	3%	1%	4%	4%	4%	2%	1%
Sport	3%	3%	5%	1%	1%	2%	3%	3%	3%	3%	2%
Teenage Comedy	2%	2%	<1%	8%	<1%	4%	<1%	1%	<1%	1%	3%
Bollywood	1%	3%	<1%	4%	<1%	3%	1%	2%	3%	<1%	1%
Film noir	1%	1%	2%	1%	1%	<1%	1%	2%	1%	<1%	1%
Kids (non animation)	1%	<1%	<1%	3%	<1%	2%	<1%	1%	<1%	<1%	1%
Nollywood	<1%	-	-	<1%	-	<1%	-	-	<1%	-	-

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Types of film that the general public consider their favourites

Full breakdown by demographics and market segments (2 of 2)

	Total GB into film	Level of cinema attendance			Level of DVD/BD purchasing		
		None	Lighter	Heavier	None	Lighter	Heavier
Base	1,978	310	1,047	621	515	1,090	373
Comedy	31%	31%	33%	28%	27%	32%	33%
Thriller/Suspense	26%	25%	29%	21%	27%	26%	24%
Science Fiction/Futuristic	22%	26%	21%	21%	20%	20%	27%
Action (including martial arts)	20%	15%	18%	27%	13%	20%	30%
Drama	19%	18%	21%	14%	27%	17%	11%
Adventure	17%	10%	17%	22%	15%	19%	15%
Horror	15%	15%	15%	16%	9%	15%	26%
Romantic Comedy	14%	10%	15%	13%	13%	14%	12%
Period Drama	11%	17%	10%	9%	14%	11%	6%
Fantasy	9%	12%	9%	9%	8%	10%	10%
War	7%	12%	8%	4%	11%	6%	6%
Family	7%	5%	9%	6%	7%	7%	9%
Animation for kids	7%	5%	7%	8%	3%	8%	11%
Documentary	7%	14%	7%	3%	11%	6%	5%
Musical	6%	11%	7%	2%	9%	5%	4%
Romance	5%	4%	5%	6%	6%	4%	6%
Animation for adults	5%	1%	3%	10%	1%	6%	7%
Disaster	5%	7%	5%	4%	6%	4%	5%
Biographical dramas	4%	3%	4%	4%	5%	4%	3%
Western	4%	5%	4%	2%	7%	3%	3%
World cinema (non English-language)	3%	1%	3%	3%	2%	2%	6%
Sport	3%	4%	2%	3%	5%	2%	2%
Teenage Comedy	2%	<1%	1%	3%	2%	1%	3%
Bollywood	1%	<1%	1%	3%	1%	1%	3%
Film noir	1%	1%	1%	1%	1%	1%	1%
Kids (non animation)	1%	<1%	1%	1%	-	1%	1%
Nollywood	<1%	-	<1%	-	-	<1%	-

Types of film that diverse audiences consider their favourites

Here is a comparison of peoples' top three favourites benchmarked against each diverse audience.

	Total GB into film	Asian		Black African/ Caribbean		C2D/ Working class		Eastern European		Lesbian, gay, bisexual		Older women	
Comedy	31%	40%	+9	37%	+6	34%	+3	40%	+9	25%	-6	20%	-11
Thriller/Suspense	26%	17%	-9	24%	-2	23%	-3	23%	-3	24%	-2	40%	+14
Sci-fi/Futuristic	22%	18%	-4	14%	-8	20%	-2	15%	-7	27%	+5	10%	-12
Action	20%	27%	+7	34%	+14	26%	+6	15%	-5	12%	-8	5%	-15
Drama	19%	7%	-12	12%	-7	12%	-7	18%	-1	23%	+4	33%	+14
Adventure	17%	18%	+1	16%	-1	16%	-1	19%	+2	11%	-6	10%	-7
Horror	15%	14%	-1	12%	-3	20%	+5	8%	-7	22%	+7	7%	-8
Romantic Comedy	14%	20%	+6	17%	+3	13%	-1	18%	+4	16%	+2	15%	+1
Period Drama	11%	4%	-7	2%	-9	6%	-5	4%	-7	11%	0	27%	+16
Fantasy	9%	10%	+1	3%	-6	11%	+2	17%	+8	15%	+6	11%	+2
War	7%	2%	-5	2%	-5	5%	-2	4%	-3	2%	-5	3%	-4
Family	7%	11%	+4	10%	+3	9%	+2	6%	-1	3%	-4	6%	-1
Animation for kids	7%	6%	-1	8%	+1	11%	+4	3%	-4	5%	-2	8%	+1
Documentary	7%	7%	0	9%	+2	4%	-3	16%	+9	7%	0	11%	+4
Musical	6%	1%	-5	4%	-2	4%	+2	3%	-3	9%	+3	14%	+8
Romance	5%	10%	+5	7%	+2	5%	0	6%	+1	6%	+1	8%	+3
Animation for adults	5%	7%	+2	7%	+2	5%	0	9%	+4	8%	+3	3%	-2
Disaster	5%	4%	-1	2%	-3	7%	+2	4%	-1	5%	0	8%	+3
Biographical dramas	4%	1%	-3	2%	-2	2%	-2	4%	0	5%	+1	10%	+6
Western	4%	1%	-3	4%	0	4%	0	1%	-3	<1%	-4	3%	-1
World cinema	3%	3%	0	5%	+2	1%	-2	13%	+10	12%	+9	2%	-1
Sport	3%	2%	-1	10%	+7	2%	-1	1%	-2	-	-3	2%	-1
Teenage Comedy	2%	1%	-1	3%	+1	3%	+1	<1%	-2	2%	0	-	-2
Bollywood	1%	28%	+27	1%	0	1%	0	<1%	-1	1%	0	<1%	-1
Film noir	1%	2%	+1	3%	+2	<1%	-1	3%	+2	5%	+4	1%	0
Kids (non animation)	1%	1%	0	2%	+1	1%	0	-	-1	<1%	-1	-	-1
Nollywood	<1%	-	0	7%	+7	-	0	-	0	<1%	0	-	-1

benchmark

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Specific films that diverse audiences feel they can personally associate with

(an unprompted, open ended question)

Avatar, East Is East, Slumdog Millionaire and The King's Speech are films that all diverse audiences can personally associate with.

Asian	Black African/Caribbean	C2D/Working class
Slumdog Millionaire	**Slumdog Millionaire**	**Slumdog Millionaire**
The King's Speech	Kidulthood	**The King's Speech**
East Is East	Adulthood	This Is England
Bend it Like Beckham	Blood Diamond	Billy Elliot
My Name is Khan	**The King's Speech**	My Name Is Khan
Black Swan	The Pursuit of Happyness	Bridget Jones's Diary
Inception	Harry Brown	Four Lions
To Kill a Mockingbird	Precious	Milk
Four Lions	**Avatar**	As Good As It Gets
Titanic	The Shawshank Redemption	Torch Song Trilogy
My Sister's Keeper	Mandela	**Avatar**
Crash	Pretty Woman	Donnie Darko
3 Idiots	Bridget Jones's Diary	**East Is East**
Avatar	Roots	The Matrix
The Kite Runner	The Color Purple	The Fighter
Gandhi	Love and Other Drugs	My Left Foot
PS I love You	Mississippi Burning	Kidulthood
Bride & Prejudice	**East Is East**	Eat, Pray, Love
Kidulthood	Philadelphia	Into the Wild
The Kids are Alright	Last King of Scotland	Harry Brown

Eastern European	Lesbian, gay, bisexual	Older women
Slumdog Millionaire	Brokeback Mountain	**The King's Speech**
Black Swan	**The King's Speech**	**Slumdog Millionaire**
Harry Brown	**Slumdog Millionaire**	Black Swan
The King's Speech	Black Swan	Harry Brown
Inception	The Kids are Alright	Calendar Girls
Avatar	Vera Drake	**Avatar**
Fish Tank	A Single Man	Vera Drake
American History X	Milk	The Full Monty
Happy Go Lucky	Boys Don't Cry	Shirley Valentine
Bridget Jones's Diary	If These Walls Could Talk	Trainspotting
Trainspotting	**East Is East**	Mamma Mia!
The Matrix	Bridget Jones's Diary	This Is England
Notes on a Scandal	Philadelphia	Gandhi
Harry Potter	**Avatar**	Another Year
The Pursuit of Happyness	The Hours	**East Is East**
Schindler's List	Girl Interrupted	Brassed Off!
The Reader	Never Let Me Go	Secrets and Lies
East Is East	Harry Brown	The Boy in the Striped Pyjamas
An Education	Trainspotting	Educating Rita
The Pianist	Rabbit Proof Fence	Beaches

Specific actors that diverse audiences feel they can personally associate with

(an unprompted, open ended question)

Colin Firth and Johnny Depp stand out as two actors that all diverse audiences can personally associate with.

Asian	Black African/Caribbean	C2D/Working class
Denzel Washington	Denzel Washington	Jennifer Aniston
Colin Firth	Will Smith	**Johnny Depp**
Will Smith	Samuel L Jackson	Cameron Diaz
Leonardo DiCaprio	Morgan Freeman	Helen Mirren
Aamir Khan	**Colin Firth**	**Colin Firth**
Dev Patel	Angelina Jolie	Leonardo DiCaprio
Ben Kingsley	Brad Pitt	Michael Caine
Bruce Willis	Michael Caine	Sandra Bullock
Jennifer Aniston	Julia Roberts	Jack Nicholson
Sylvester Stallone	Eddie Murphy	Simon Pegg
Johnny Depp	Halle Berry	Tom Hanks
Tom Hanks	Jason Statham	Matt Damon
Jason Statham	Sidney Poitier	Sigourney Weaver
Jackie Chan	Thandie Newton	Ian McKellan
Matt Damon	Matt Damon	Kevin Spacey
Hilary Swank	Tyler Perry	Denzel Washington
Shahrukh Khan	Idris Elba	Meryl Streep
Julia Roberts	Leonardo DiCaprio	Julie Walters
Sandra Bullock	**Johnny Depp**	Al Pacino
Parminder Nagra	Whoopi Goldberg	Dev Patel

Eastern European	Lesbian, gay, bisexual	Older women
Johnny Depp	**Colin Firth**	Helen Mirren
Natalie Portman	Helen Mirren	Judi Dench
Colin Firth	Jake Gyllenhaal	Meryl Streep
Leonardo DiCaprio	Helena Bonham-Carter	**Colin Firth**
Nicole Kidman	Jodie Foster	Julie Walters
Colin Farrell	Angelina Jolie	Maggie Smith
Angelina Jolie	Julianne Moore	Michael Caine
Keanu Reeves	Leonardo DiCaprio	Emma Thompson
Edward Norton	Julie Walters	Alison Steadman
Samuel L Jackson	Ellen DeGeneres	Julia Roberts
Bruce Willis	Drew Barrymore	Helena Bonham-Carter
Brad Pitt	Sandra Bullock	Renee Zellweger
Robert De Niro	**Johnny Depp**	Kathy Burke
Sally Hawkins	Michael Caine	Jim Broadbent
Tom Hanks	Sean Penn	**Johnny Depp**
Denzel Washington	Natalie Portman	Brad Pitt
Julia Roberts	Kathy Burke	Jennifer Aniston
Al Pacino	Hilary Swank	Morgan Freeman
George Clooney	Tom Hanks	Patrick Stewart
Sally Hawkins	Heath Ledger	Dustin Hoffman
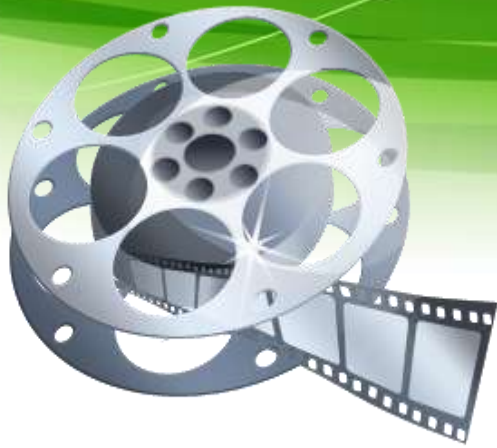
Detailed findings
Stimulating demand
- what people want more of

Types of **UK film** that the general public would like to see **more of** in the future

We wanted to find out the demand for types of UK films both of the general public and among diverse audiences.

Shown right is the demand for types of film from the general public, with blockbuster material topping the list.

Analysing the data at a total market level is important, but also somewhat misleading as these genres differ sharply by demographic.

To provide a more granular and useful analysis, we provide a full breakdown of this list by demographics and key market segments (e.g. heavy cinema attendees and DVD/BD purchasers) overleaf.

We also compare general public demand with that of diverse audiences two pages overleaf.

% interested in seeing more of these
Base: representative sample of GB 16+ population into film (1,978)

Genre	%
Action adventure e.g. Sherlock Holmes	55%
Edge of Seat thrillers e.g. The Bourne Ultimatum	52%
Fantasy adventures e.g. Harry Potter	48%
Biographical dramas e.g. The King's Speech	43%
Action comedy e.g. Hot Fuzz	40%
Crime dramas e.g. Harry Brown	39%
Contemporary Science Fiction e.g. Inception	38%
Comedy animations e.g. Wallace & Gromit	37%
Heart warming romantic comedies e.g. Bridget Jones	37%
Light hearted comedies e.g. St Trinians	36%
Musical song and dance e.g. Mamma Mia!	32%
Dark horrors e.g. 28 Weeks Later	28%
Costume period dramas e.g. Sense and Sensibility	27%
Films set in cultures from around world e.g. Slumdog Millionaire	26%
Family films e.g. Nativity	22%
Social realism e.g. Vera Drake	20%
Docudramas e.g. Touching the Void	19%
Soft romance stories e.g. Last Chance Harvey	17%
Gritty urban gangster e.g. Bullet Boy	15%

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Types of UK film that the general public would like to see more of in the future

Full breakdown by demographics and market segments (1 of 2)

	Total GB into film	Male <35	Male 35+	Female <35	Female 35+	Yes	No	AB	C1	C2	DE
		Gender by age				**Parents**		**Social class**			
Base	1,978	312	629	346	691	664	1314	605	473	281	619
Action adventure	55%	48%	67%	52%	49%	54%	56%	57%	64%	58%	49%
Edge of seat thrillers	52%	33%	66%	39%	53%	42%	57%	56%	54%	54%	48%
Fantasy adventures	48%	45%	48%	55%	45%	51%	46%	49%	55%	49%	43%
Biographical dramas	43%	19%	41%	31%	61%	30%	50%	50%	46%	34%	41%
Action comedy	40%	59%	42%	55%	24%	52%	34%	38%	52%	45%	34%
Crime dramas	39%	21%	49%	29%	41%	33%	42%	38%	39%	40%	38%
Contemporary sci-fi	38%	29%	46%	43%	32%	37%	39%	40%	43%	45%	32%
Comedy animation	37%	31%	38%	54%	31%	40%	35%	41%	37%	39%	34%
Heart warming romantic comedies	37%	8%	27%	52%	51%	34%	38%	40%	36%	34%	36%
Light hearted comedies	36%	22%	41%	43%	35%	36%	36%	34%	35%	37%	38%
Musical song and dance	32%	8%	23%	36%	49%	28%	34%	35%	29%	26%	33%
Dark horrors	28%	30%	31%	39%	20%	30%	28%	21%	30%	38%	29%
Costume period dramas	27%	9%	17%	17%	49%	15%	33%	34%	24%	18%	27%
Films set in cultures around world	26%	13%	26%	25%	32%	21%	29%	33%	28%	24%	22%
Family films	22%	16%	16%	31%	27%	29%	19%	20%	23%	28%	22%
Social realism	20%	13%	18%	11%	30%	16%	23%	26%	18%	19%	19%
Docudramas	19%	9%	25%	13%	21%	13%	22%	19%	20%	18%	20%
Soft romance stories	17%	5%	7%	25%	27%	16%	17%	14%	19%	16%	17%
Gritty urban gangster	15%	15%	22%	12%	8%	15%	15%	13%	17%	19%	14%

Types of UK film that the general public would like to see more of in the future
Full breakdown by demographics and market segments (2 of 2)

	Total GB into film	Level of cinema attendance			Level of DVD/BD purchasing		
		None	Lighter	Heavier	None	Lighter	Heavier
Base	1,978	310	1,047	621	515	1,090	373
Action adventure	55%	51%	55%	59%	46%	56%	66%
Edge of seat thrillers	52%	48%	57%	46%	47%	52%	59%
Fantasy adventures	48%	31%	50%	53%	36%	51%	55%
Biographical dramas	43%	39%	47%	39%	48%	43%	38%
Action comedy	40%	21%	41%	49%	24%	43%	53%
Crime dramas	39%	41%	40%	35%	37%	37%	45%
Contemporary sci-fi	38%	28%	41%	39%	26%	39%	51%
Comedy animation	37%	26%	38%	42%	30%	39%	41%
Heart warming romantic comedies	37%	30%	41%	33%	34%	39%	35%
Light hearted comedies	36%	39%	39%	30%	32%	36%	43%
Musical song and dance	32%	30%	35%	27%	32%	31%	35%
Dark horrors	28%	26%	28%	30%	19%	27%	45%
Costume period dramas	27%	32%	27%	24%	32%	25%	26%
Films set in cultures around world	26%	21%	28%	26%	26%	27%	26%
Family films	22%	17%	23%	24%	16%	23%	31%
Social realism	20%	24%	20%	18%	22%	18%	24%
Docudramas	19%	17%	22%	16%	19%	19%	20%
Soft romance stories	17%	19%	18%	13%	13%	17%	19%
Gritty urban gangster	15%	13%	14%	16%	10%	15%	20%

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Types of UK film that diverse audiences would like to see more of in the future

And this is the future demand of diverse audiences benchmarked against the general public's preferences.

benchmark

	Total GB into film	Asian		Black African/ Caribbean		C2D/ Working class		Eastern European		Lesbian, gay, bisexual		Older women	
Action adventure	55%	61%	+6	54%	-1	51%	-4	68%	+13	53%	-2	47%	-8
Thrillers	52%	45%	-7	58%	+6	48%	-4	45%	-7	56%	+4	54%	+2
Fantasy	48%	47%	-1	37%	-11	48%	0	47%	-1	51%	+3	38%	-10
Biographical	43%	35%	-8	46%	+3	32%	-11	53%	+10	57%	+14	66%	+23
Action comedy	40%	56%	+16	51%	+11	43%	+3	50%	+10	45%	+5	14%	-26
Crime dramas	39%	37%	-2	39%	0	36%	-3	28%	-11	41%	+2	41%	+2
Sci-fi	38%	40%	+2	48%	+10	38%	0	52%	+14	50%	+12	27%	-11
Animation	37%	39%	+2	39%	+2	40%	+3	34%	-3	46%	+9	28%	-9
Romantic comedy	37%	48%	+11	42%	+5	34%	-3	49%	+12	40%	+3	53%	+16
Comedies	36%	34%	-2	28%	-8	39%	+3	26%	-10	42%	+6	33%	-3
Musical	32%	25%	-7	35%	+3	26%	-6	34%	+2	41%	+9	54%	+22
Dark horrors	28%	32%	+4	32%	+4	34%	+6	37%	+9	40%	+12	14%	-14
Period dramas	27%	19%	-8	23%	-4	18%	-9	29%	+2	35%	+8	54%	+27
Cultures	26%	55%	+29	63%	+37	19%	-7	50%	+24	47%	+21	31%	+5
Family films	22%	34%	+12	35%	+13	26%	+4	25%	+3	26%	+4	23%	+1
Social realism	20%	21%	+1	20%	0	17%	-3	27%	+7	51%	+31	28%	+8
Docudramas	19%	24%	+5	28%	+9	17%	-2	32%	+13	33%	+14	22%	+3
Soft romance	17%	28%	+11	28%	+11	16%	-1	20%	+3	22%	+5	29%	+12
Urban gangster	15%	17%	+2	31%	+16	16%	+1	11%	-4	18%	+3	6%	-9

Sources used by diverse audiences to find out about films

UK FILM | COUNCIL

For each diverse audience, here is how they find out about films

	Asian	Black African/ Caribbean	C2D/ Working class	Eastern European	Lesbian, gay, bisexual	Older women
TV ads/reviews	63%	73%	66%	56%	58%	62%
Talking with friends	54%	66%	55%	65%	53%	57%
Cinema trailers	61%	65%	51%	67%	52%	39%
Print ads/reviews	46%	45%	45%	44%	42%	53%
Talking with family	42%	55%	43%	48%	34%	51%
Street/bus/poster ads	46%	55%	38%	51%	35%	24%
Cinema websites	43%	40%	28%	44%	29%	20%
Talking with colleagues	32%	34%	24%	42%	28%	21%
Film review websites	31%	28%	26%	46%	32%	12%
Film websites	36%	31%	21%	36%	26%	11%
Videos on YouTube	28%	34%	20%	48%	18%	5%
DVD/BD trailers	26%	26%	22%	23%	28%	13%
Social networking sites	27%	30%	21%	31%	25%	7%
Radio ads/reviews	17%	27%	23%	22%	16%	19%
Interviews with cast	18%	19%	15%	13%	16%	15%
Other sites/search	12%	11%	10%	23%	19%	9%
Film disk packaging	13%	13%	14%	13%	16%	10%
Newsletters	11%	10%	8%	15%	7%	6%
Leaflets in DVD/BD disks	6%	11%	9%	6%	10%	4%
Library	10%	10%	3%	7%	6%	5%
Staff in cinema/shops	7%	9%	4%	10%	8%	3%
Celebrity recommendations	5%	6%	4%	5%	4%	3%

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Appendix
Methodology

Methodology

The research has been developed by Harris Interactive on behalf of the UK Film Council to uncover the views and opinions about the portrayal of diverse groups in film

Three elements of the research:

Exploration Phase

1 Literature review

- Establish the existing learnings that can be built on and findings connected to
- Ascertain and revise the hypotheses to be tested through the primary research
- Provide context for the results and highlight areas where knowledge is being extended

2 Audience qualitative research

- Identify the most relevant aspects of portrayal to investigate further in the study
- Understand the depth of feelings among selected diverse audiences
- Establish tone and content for the quantitative research survey

Evaluation Phase

3 Quantitative research

- Understand in detail the overall behaviours and attitudes of audiences towards film
- Show the extent to which different views are held by different parts of the population
- Uncover strength of opinion towards areas of portrayal for prioritising action areas

see overleaf for further details on each element of the research

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Methodology

① Literature review

Determine existing knowledge and ascertain the research hypotheses to be tested

- Desk research was conducted during December 2010
- Findings were collated with the key themes and topics drawn out to steer the direction of primary research
- Sources of information included:

  (1) Existing UK Film Council documents and sources

  (2) UK Government and public sector research

  (3) Publications by independent organisations

  (4) Discussion articles by third parties

Methodology

② Audience qualitative research

Understanding what is most important to the different audiences for their portrayal in film

- 12 face-to-face focus groups of 1.5 hours were conducted among diverse audiences between 11-19 January 2011
- Each group comprised of 5-6 respondents from a key audience profile who had an active interest in films
- An in-depth film critic pre-task was used to warm up respondents to reviewing films of personal interest and relevance
- Respondents were able to discuss and debate issues with film clip stimulus material used to stimulate conversation topics

Group	Key Audience	Gender	Age	Social Grade	Location
1	Older women	Female	50-60	BC1C2	London
2	Older women	Female	61-75	BC1C2	Birmingham
3	Skilled manual	Mixed	30-40	C2	London
4	Semi skilled	Mixed	30-40	DE	Leeds
5	Gay / Bisexual	Male	30-40	BC1	Manchester
6	Lesbian / Bisexual	Female	30-40	BC1	London
7	Black African / Mixed race	Mixed	25-35	BC1	Leeds
8	Black Caribbean / Mixed race	Mixed	40-50	BC1	London
9	Indian / Mixed race	Mixed	25-35	BC1	London
10	Pakistani / Mixed race	Mixed	25-35	BC1	Manchester
11	Polish / Eastern European	Mixed	25-35	BC1	Birmingham
12	Polish / Eastern European	Mixed	30-50	BC1	London

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Methodology

③ Quantitative research

Measuring the depth of feeling towards film portrayal and behaviours to prioritise action areas

- 4,315 interviews were conducted using a robust quantitative methodology during February 2011
- Online interviewing was done using two different approaches to reach the entire UK adult market
- Results were filtered by those 'into film' where appropriate (defined as having seen a film in the past 3 months)

(1) Nationally representative survey amongst the General population using Harris Omnibus

- 2,228 interviews among adults (aged 16+) during online fieldwork between 9-14 February 2011
- Sample is weighted to be nationally representative; propensity weighting used to account for respondents being online

(2) Targeted survey amongst Diverse audiences using an online panel

- 2,087 interviews among adults (aged 18+) during online fieldwork between 9-22 February 2011
- Quotas used to achieve a minimum of 200 interviews for each audience
- Sample is weighted to be nationally representative by sex and age
- Qualification criteria for each group:

Asian:	ethnicity as Asian British, Indian, Pakistani, Bangladeshi or Other (non-Chinese)
Black African/Caribbean:	ethnicity as Black-African, Black Caribbean, Mixed (White & Black African or Black Caribbean)
C2D/Working class:	skilled manual workers (C2) and manual/service or semi-skilled manual/service workers (D)
Eastern European:	ethnicity as White – Eastern European (e.g. Polish, Russian, Slovakian)
Lesbian, gay, bisexual:	lesbian, gay or bisexual sexual orientation
Older women:	females aged 50-75

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Methodology

❸ Quantitative research – sample profiles

(1) General population

Amongst all qualified respondents	Interviews
TOTAL	**2,228**
Gender	
Male	1,060
Female	1,168
Age	
16-24	273
25-34	433
35-44	426
45-54	341
55+	755
Social grade	
AB	663
C1	524
C2	314
DE	727

(2) Diverse audiences

Amongst all qualified respondents	Interviews
TOTAL	**2,087**
Asian	222
Black African-Caribbean	235
C2D/Working class	717
Eastern European	202
Lesbian, gay, bisexual	231
Older women	480