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## AUDIENCE SURVEY PERCEPTION OF THE ECLAIRCOLOR FORMAT

Surveys conducted on 2 and 8 September 2017 in France  
at the Pathé Wepler Cinema (Paris) and Megarama Bordeaux Cinema on behalf of:

### YMAGIS GROUP

SEPTEMBER 2017

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## Methodology and reminder of the objectives

Ymagis Group commissioned the Observatoire de la Satisfaction to conduct a **study concerning how the EclairColor format is perceived by the general public.**

The prime objective was to find out if moviegoers in fact perceive any difference between a film projected in EclairColor and a film projected in a standard format and how they describe these differences.

The survey further sought to measure how well-known EclairColor is among audiences, their satisfaction and whether they recommend it.

The method adopted to conduct this study was to issue the surveys to moviegoers leaving cinemas where they had paid to see a film in EclairColor.

This made it possible to constitute a sample of moviegoers who are used to seeing (either knowingly or without being aware of it) films in EclairColor. This avoids the bias of a sample which could have been significantly out of

tune with the EclairColor audience in the context of recruitment for a test screening.

Moreover, a test screening without showing an entire film in EclairColor would have required respondents to be paid, which would also have created a bias. Finally, the lead times did not favour the test screening scenario.

Moviegoers were not informed in advance of the content of the survey. Thus, **there was no mention of the EclairColor brand and the theme of the survey, which could have influenced moviegoers.** The results delivered provide a totally objective vision of moviegoers' perception of EclairColor.

During the surveys conducted on 2 September, moviegoers were informed of the survey by the projection of an on-screen slide in the cinema and by the interviewers present at the entrance to the auditorium.

The moviegoers were again informed of the survey by the interviewers as they left the auditorium and directed to a reception area in the cinema lobby. Leaflets were placed in this reception area explaining how to answer the questionnaire on the moviegoers' own smartphones. The interviewers assisted moviegoers who did not have smartphones by answering on a tablet or laptop computer.

### Reminder of the main objectives of the study

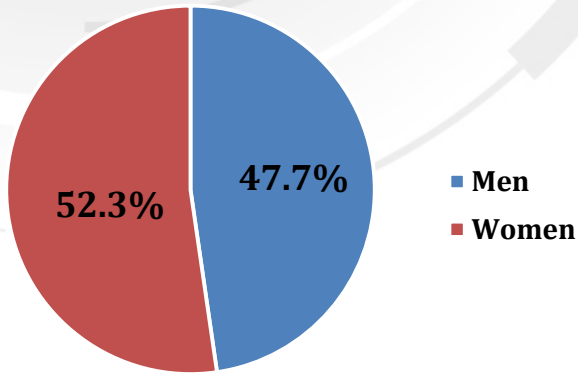
- Measure the difference in perception between a film shown in EclairColor format and a film in standard format
  - Measure awareness of EclairColor among the moviegoers coming to see a film shown in EclairColor
    - Measure satisfaction with the EclairColor experience
    - Measure intention to repeat the EclairColor experience
  - Measure moviegoers' likelihood of recommending EclairColor



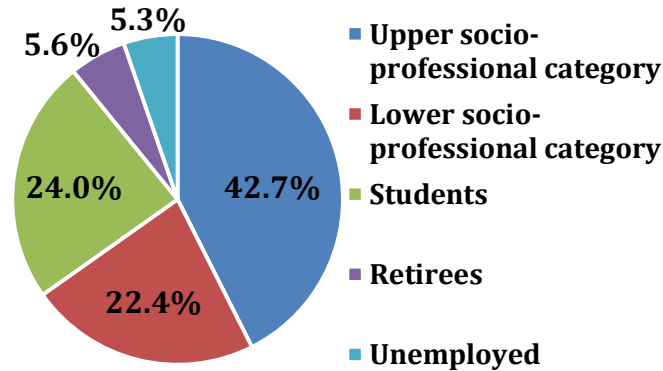
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### Characteristics of the sample (351 audience members surveyed)

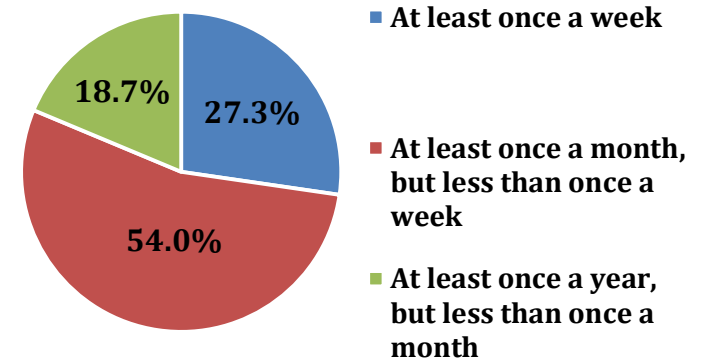
#### Audience Structure/ Gender



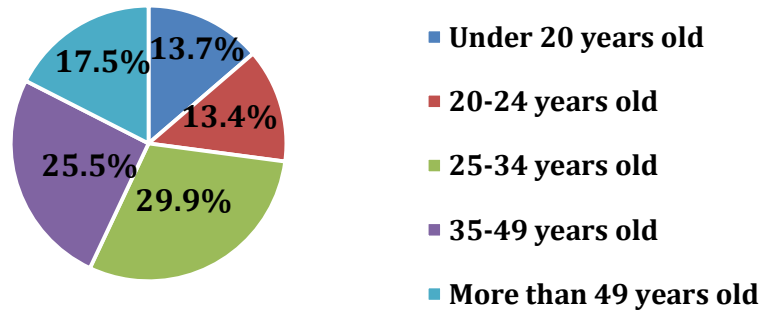
#### Audience Structure/ Socio-professional category



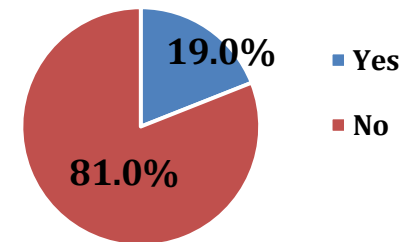
#### Audience Structure/ Cinema attendance frequency



#### Audience Structure/ Age



#### Audience Structure/ Unlimited Movie Passholder



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## Representative nature of the sample

	Men	Women	15-19 years old	20-24 years old	25-34 years old	35-49 years old	Over 49 years old
<b>Structure of the sample</b>	47.7%	52.3%	13.7%	13.4%	29.9%	25.5%	17.5%
<b>Structure of the cinema audience in France in 2016*</b>	48.4%	51.6%	9.7%	8.2%	16.2%	26.3%	39.6%
<b>Difference</b>	-0.7%	+0.7%	+4.0%	+5.2%	+13.7%	-0.8%	-22.1%

\*Source: CNC

- The structure of the sample according to the gender of the respondents was extremely close to that of the cinema audience in France in 2016.
- The structure of the sample according to the age of the respondents proved to be close to that of cinema audiences in France in 2016 for the 15-19, 20-24 and 35-49 age groups. However, there is an under-representation of the over-49 age group and an over-representation of the 25-34 age group. This is due to the film “Seven Sisters” (“What happened to Monday”), following which the survey was conducted, which attracts the 25-34 age group more

than the over-49 age group, whereas the trend is the reverse at the national level.

- We adjusted the results to align the structure of our sample with that of the national average.

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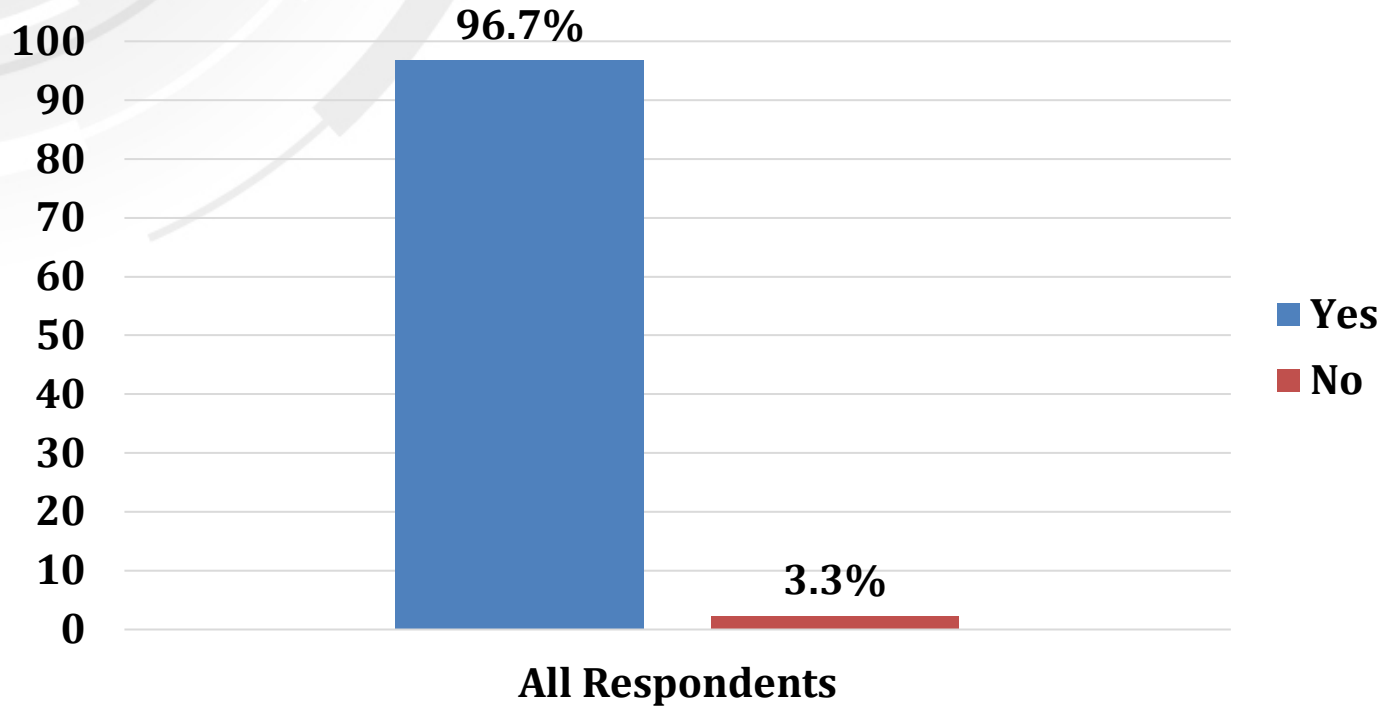




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## Satisfaction with the EclairColor Experience

Are you satisfied with the EclairColor experience?



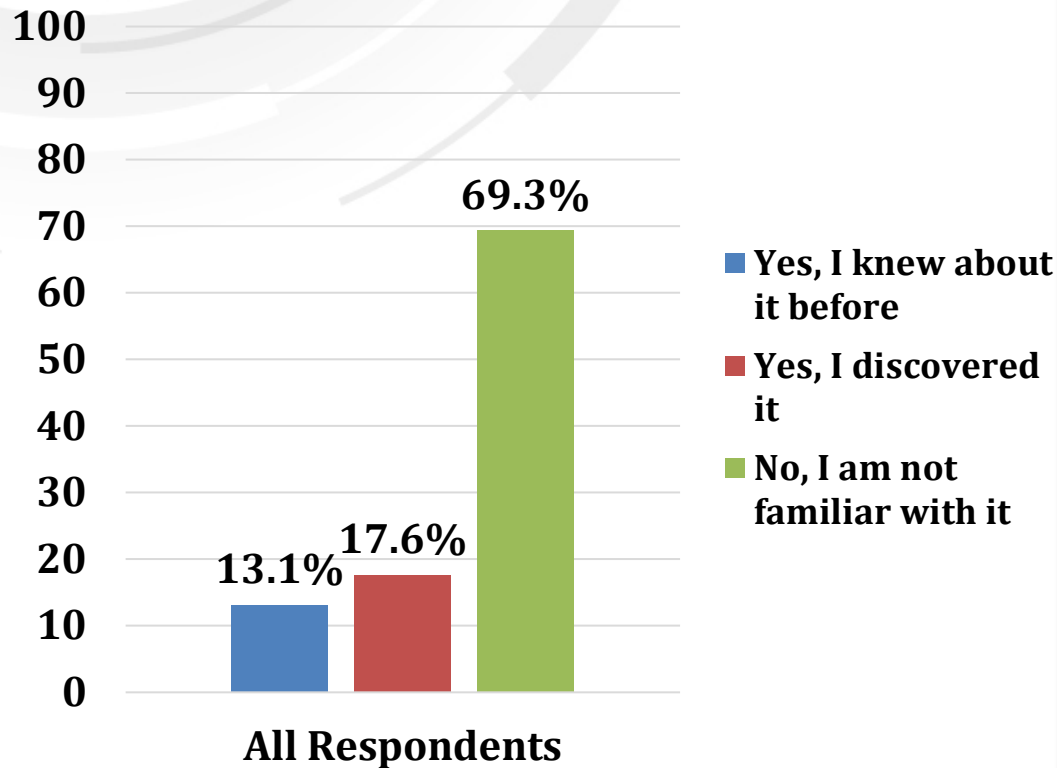
- Moviegoers indicated a very high level of satisfaction (96.7%) with their EclairColor experience. It could be described as an overwhelming majority.



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## Awareness of EclairColor

### Are you familiar with the EclairColor experience?



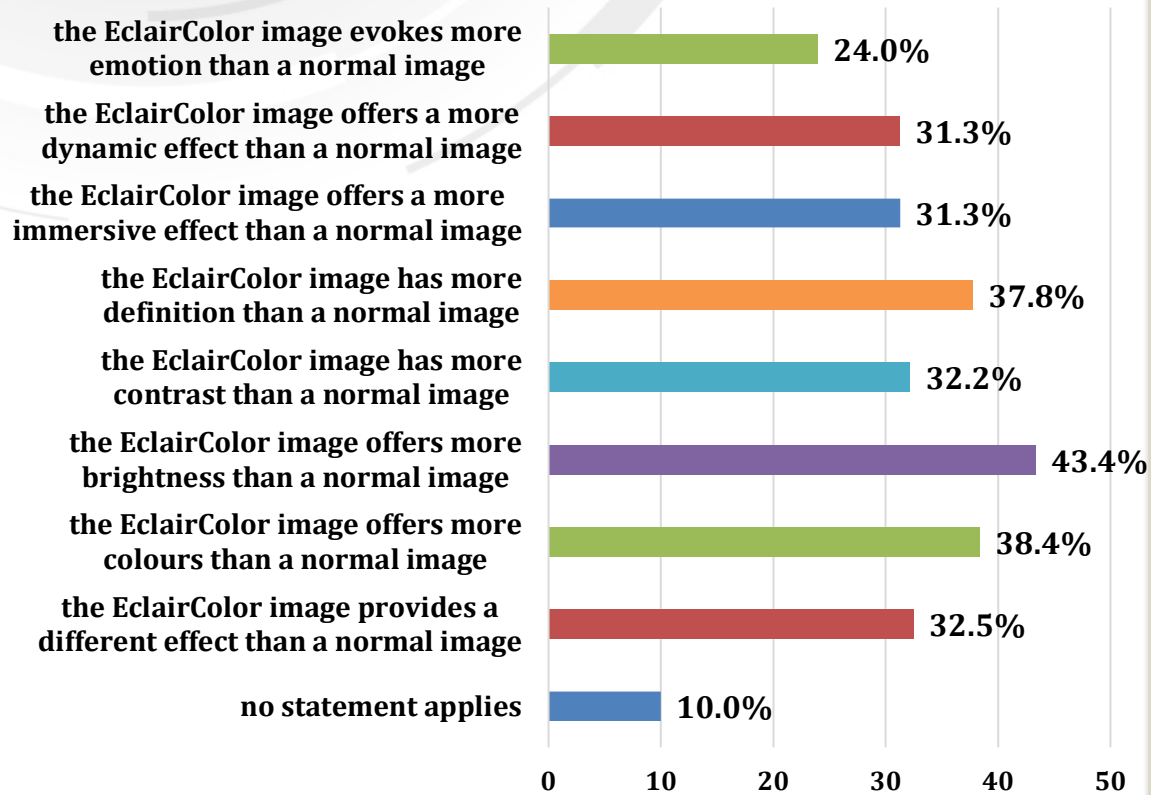
- Overall, almost 70% of the respondents were not familiar with EclairColor. Nearly 18% discovered EclairColor at the start of the screening and over 13% already knew about EclairColor. The screening therefore increased awareness from 13.1% to over 30.7%. Awareness more than doubled.
- The strata with the highest levels of initial awareness of EclairColor are:
  - Men (19.0%)
  - The under-20's (21.3%)
  - Regular cinema-goers (15.8%)



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## Assisted definition of the EclairColor format

### Which of the following statements do you agree with...



- After spontaneous statements, moviegoers were offered 8 statements to define the EclairColor effect. The 3 most commonly cited were also the leading spontaneous statements: **more brightness** (43.4%), **more colour** (38.4%), **more definition** (37.8%). The statement “more definition” can be compared to the spontaneous statements “sharper” and “more precise”.
- Like the spontaneous statements, 10% of respondents do not see any difference with other cinema images (no statement applies).

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## Spontaneous definition of the EclairColor process

### How would you spontaneously define the visual experience in EclairColor?

*After grouping the various themes together, the following main results are obtained:*

Statements/Themes	Frequency (%)
Beautiful, magnificent, grandiose, spectacular, superb	22.7%
More colours, more colourful	20.8%
Brighter	18.2%
Good effect, nice	18.2%
Superior quality, better	16.9%
Sharper	16.6%
More precise, you can see details better	16.6%
Clearer	14.3%
Standard, normal, no different	10.0%
Warm	9.7%
More dynamic, lively	8.1%
Pleasant effect	6.8%
More realistic	5.8%
More contrast	5.8%
Bright, vivid, intense	5.2%
Fluid	4.5%
Deeper, more immersive	3.6%
Captivating, absorbing	2.9%
Clean	1.9%
Comfortable, less tiring	1.9%
Surprising, interesting	1.9%
Innovative	1.6%
OK	1.3%

- The first way moviegoers spontaneously define the visual experience of EclairColor is by citing the beauty of the images (also magnificent, grandiose, spectacular, superb). 22.7% of moviegoers said this spontaneously. If the 18.2% who stated that the effect was good or nice and the 16.9% who stated that it was of superior quality are added, the result is 57.8% fairly general positive opinions concerning the effect.
- Moving on to a more technical description of the image effects, the fact that there is more colour (20.8%) comes out ahead of more brightness (18.2%), followed by sharper image (16.6%), more precise (16.6%) and clearer (14.3%).
- Only 10% of respondents did not see any difference between EclairColor images and other cinema images.

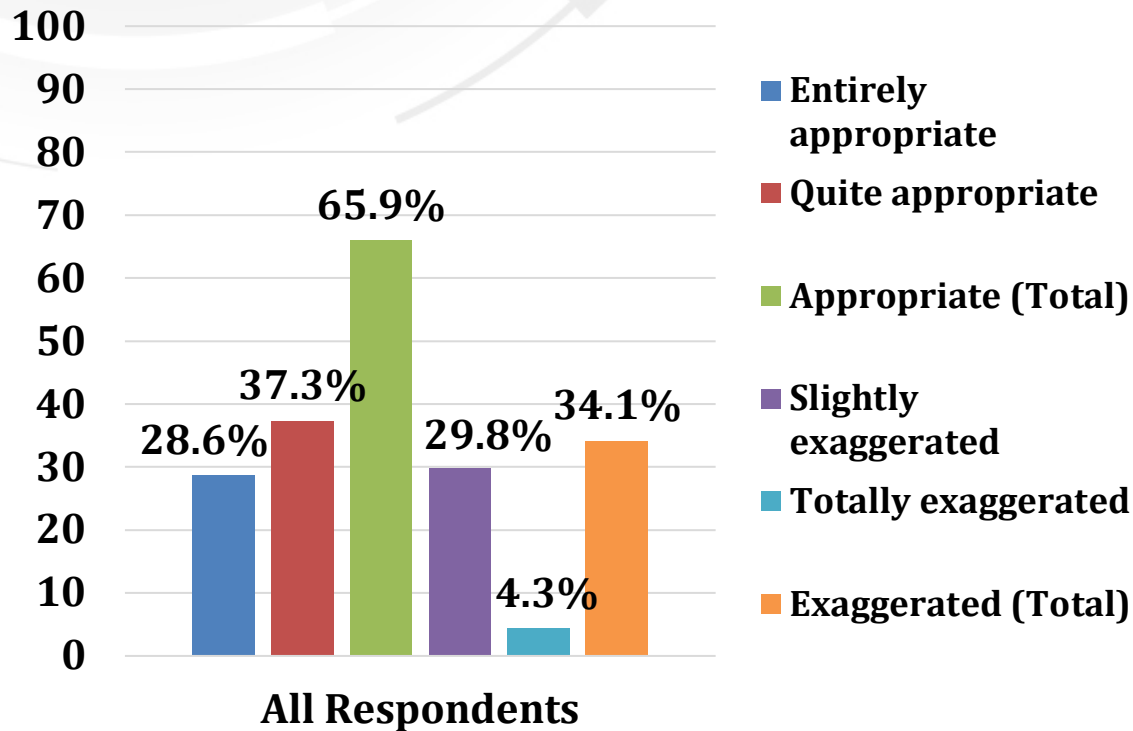




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## EclairColor: “New Cinema Standard”?

Do you think the term "New Cinema Standard" can be used to define the EclairColor image?



- Almost two thirds of moviegoers judged that the term “New Cinema Standard” was appropriate to describe the EclairColor image. A large majority of moviegoers therefore truly perceive the EclairColor image as something new and different.

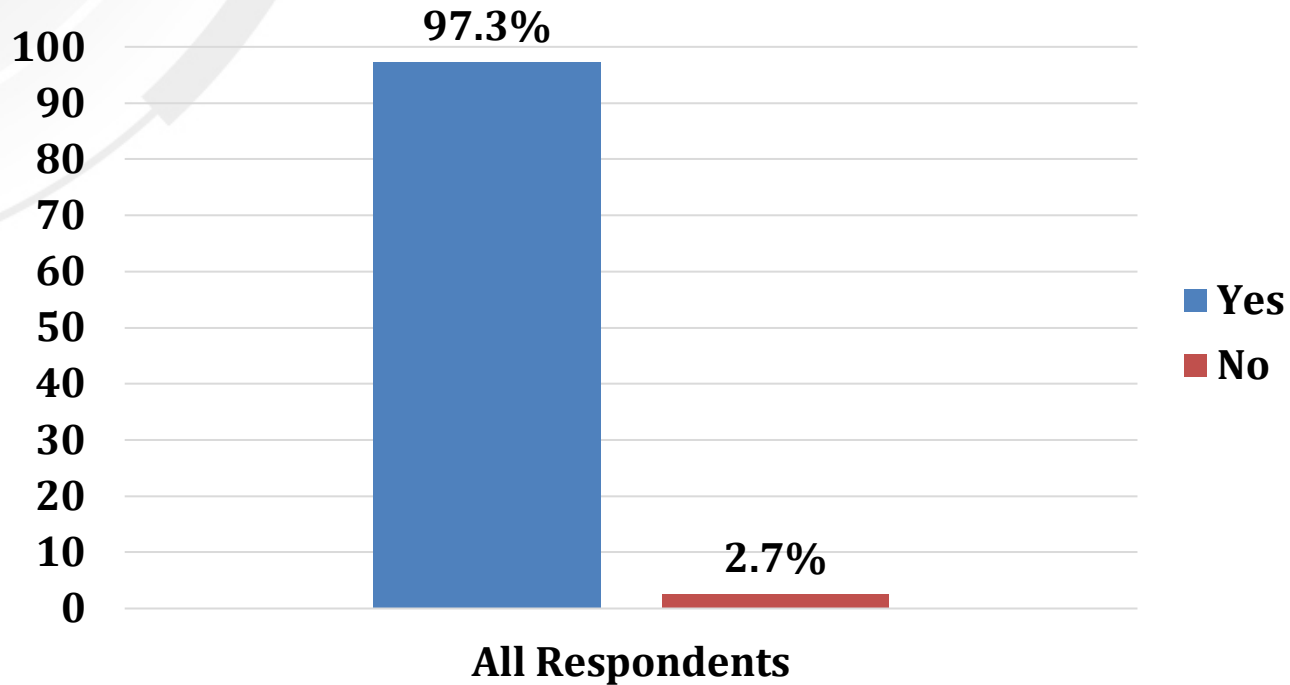
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## Intention to repeat the EclairColor experience

Do you intend to repeat the EclairColor experience?



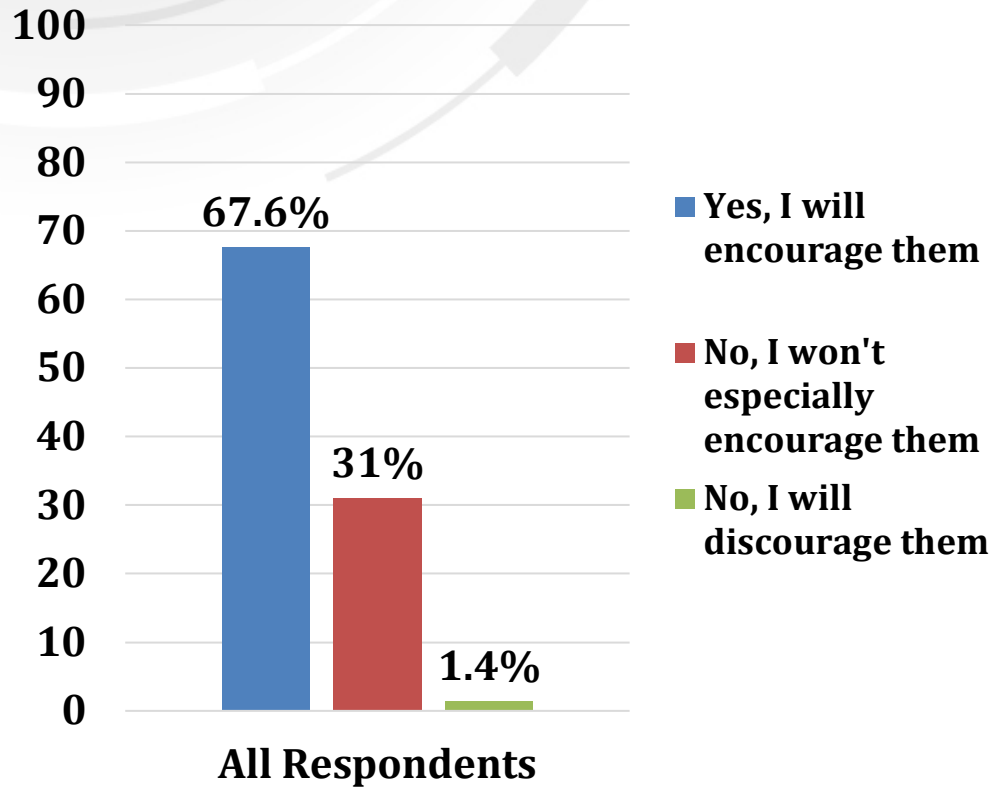
- The level of intention to repeat the EclairColor experience is very high (97.3%). It can once again be described as an overwhelming majority.



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## Recommendation of the EclairColor experience

**Will you recommend going to see a film in EclairColor to your family and friends?**



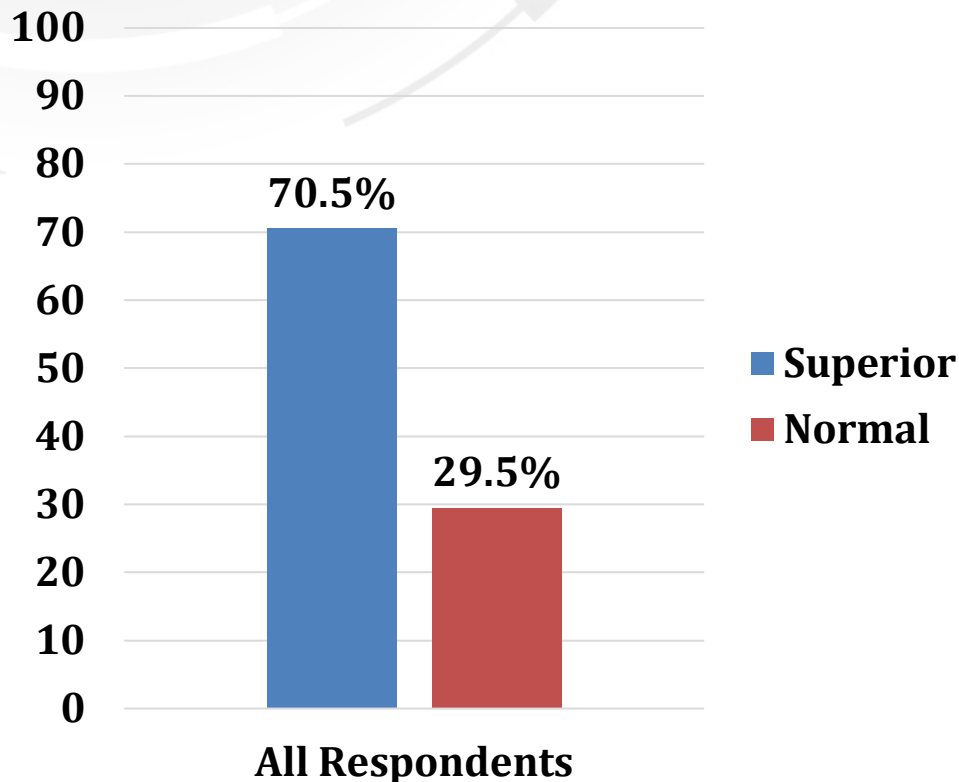
- Over two thirds of moviegoers will recommend going to see a film in EclairColor format rather than the standard format to their family and friends. This is a very high level of recommendation, given that only 13.1% of the moviegoers knew about EclairColor before arriving at the cinema. Only 1.4% of moviegoers stated that they would discourage their family and friends from going to see a film in EclairColor.



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## EclairColor: perception of a higher quality or normal quality image?

Do you feel that "Seven Sisters" was projected with an image quality which was...



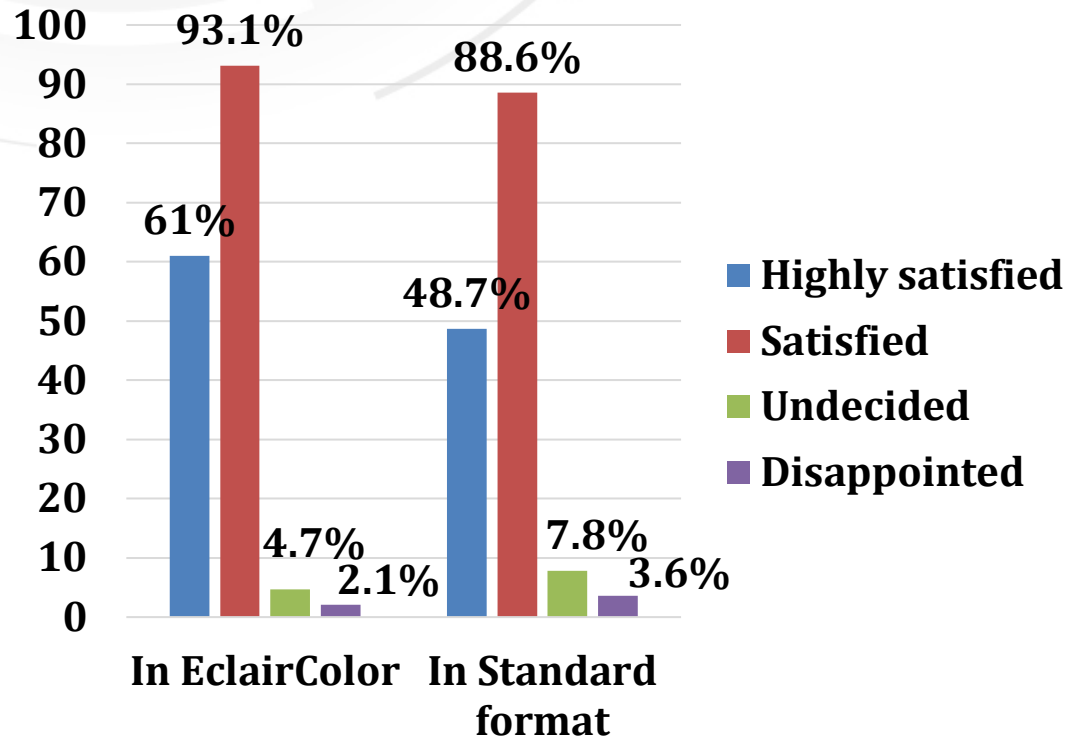
- Overall, over 70% of respondents felt they were watching "Seven Sisters" with a higher image quality. This is a very convincing outcome with regard to perception for EclairColor, given that:
  1. moviegoers were not informed of the theme of the survey prior to the screening (their attention was therefore not focused on the image)
  2. moviegoers were not in a position to compare EclairColor quality directly with standard quality (no split screen). Their comparison was based on their visual memory of a standard projection.



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## Comparison of satisfaction with the film “Seven Sisters” projected in EclairColor format and in standard format

Level of satisfaction with the film "Seven Sisters"  
EclairColor vs. Standard DCI



- We also compared moviegoers’ satisfaction with the film “Seven Sisters” as measured in two different contexts: in the context of surveys for the weekly barometer “Echo du Public” by the Observatoire de la Satisfaction where none of the screenings were in EclairColor format and in the context of our survey with all screenings in EclairColor.
- The difference in outcome was significantly in favour of the EclairColor screenings: 4.5% more moviegoers expressed satisfaction and, in particular, 12.3% more expressed high satisfaction. Moviegoers were clearly more enthusiastic (notion measured specifically through high satisfaction) with regard to the film shown in EclairColor format.

Source for satisfaction measured in standard DCI format:

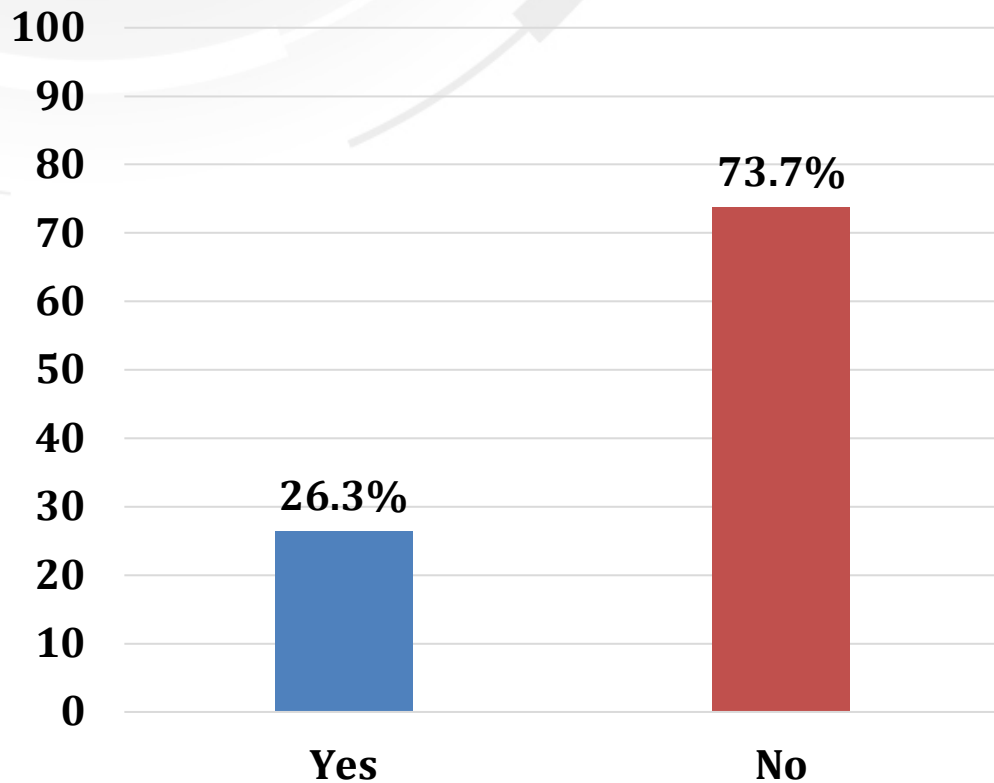




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## Specific intention to see the film in EclairColor

Did you attend this screening specifically to see "Seven Sisters" in EclairColor?



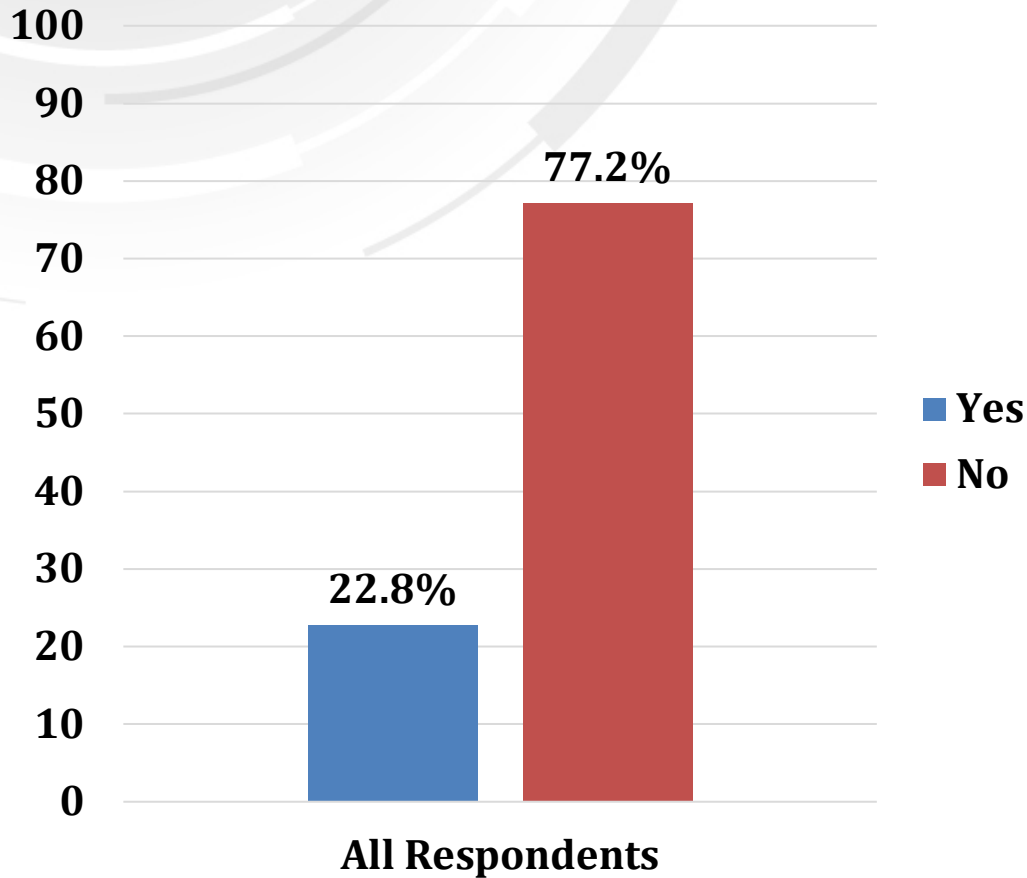
- Only moviegoers (13.1% of the total) familiar with EclairColor before coming to the screening of "Seven Sisters" were asked to respond to this question. Among them, slightly more than a quarter attended the screening specifically to see "Seven Sisters" in EclairColor.
- Obviously, the choice of film is paramount when a moviegoer decides to go to the cinema. The fact that the film is projected in EclairColor is mostly seen by informed moviegoers as a plus for the moment.



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## Awareness of HDR (High Dynamic Range) technology

### Are you aware of HDR technology?



- Overall, over 75% of the respondents are not familiar with HDR technology. Nevertheless, initial awareness of HDR technology (22.8%) is higher than initial awareness of EclairColor (13.1%).
- There is no parallel between awareness of EclairColor and that of HDR technology: moviegoers who were initially aware of EclairColor displayed a lower level of awareness than all the respondents for HDR technology.
- The strata which obtained the highest levels of awareness of HDR technology are:
  - Men (26.0%)
  - The 20-24-year-old age group (41.0%)
  - Regular cinema-goers (23.5%)



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## Key figures and conclusions of the study

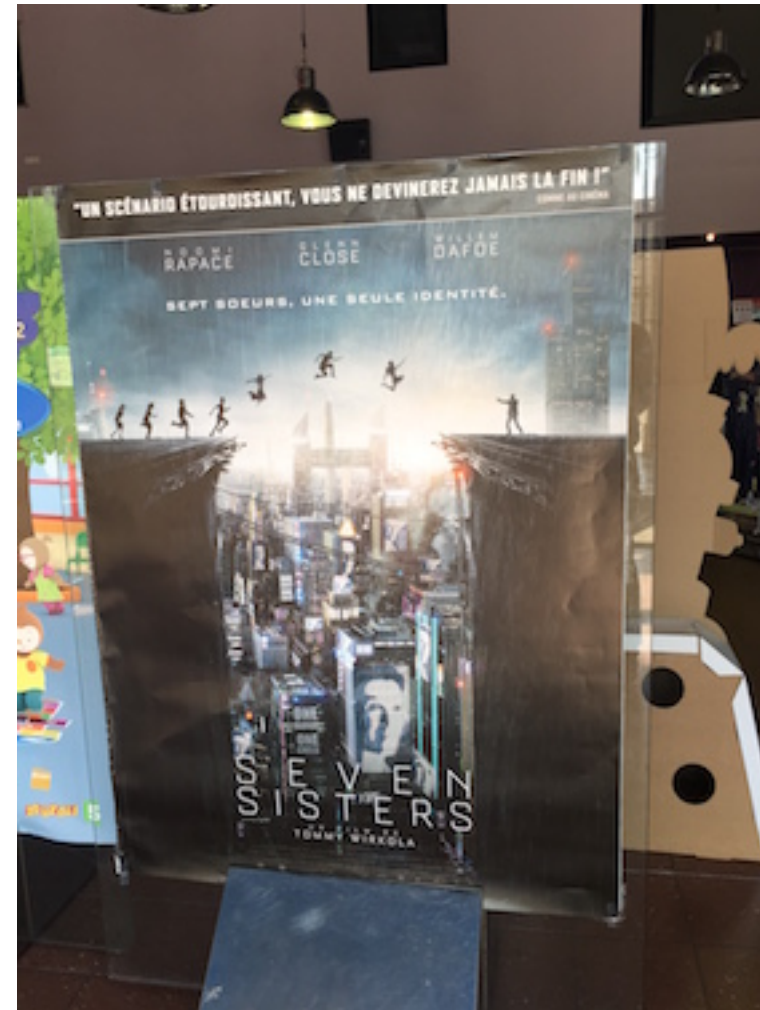
- **Without being forewarned and without the ability to make direct comparisons, over 70% of moviegoers state that the EclairColor image is of higher quality than a normal cinema image**
- 13.1% of moviegoers were initially aware of EclairColor
- 22.8% of moviegoers knew about HDR technology. There is no parallel between awareness of EclairColor and HDR
- Apart from the positive general qualifiers used, moviegoers especially stressed that there were more colours, more brightness, sharpness, precision and clarity in the EclairColor image when spontaneously describing the effect
- For the assisted definition, moviegoers especially stressed that there was more brightness, more colours and more definition (sharpness & precision) in the EclairColor image when defining its effect
- The level of satisfaction with the EclairColor experience is close to 100%
- The level of intention to repeat the EclairColor experience is close to 100%
- The level of recommendation of the experience stands at over two thirds of moviegoers, which is very high given the low level of initial awareness
- Almost two thirds of moviegoers judge that the term “New Cinema Standard” is appropriate to describe the EclairColor image
- **The screening of the film “Seven Sisters” in EclairColor generated a high level of satisfaction among moviegoers with regard to the film, which was significantly more than for standard screenings of the same film. The impact of EclairColor on the level of high satisfaction is clear.**





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## Appendix (Images):



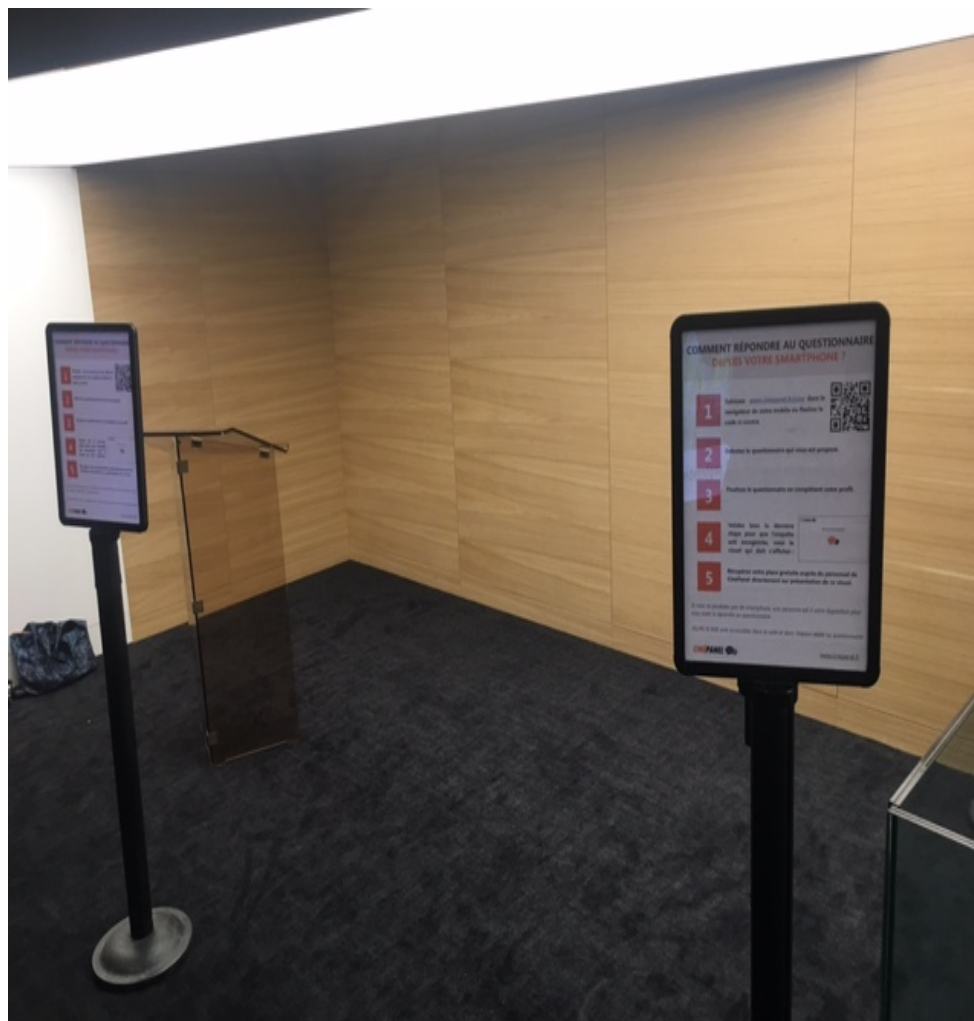
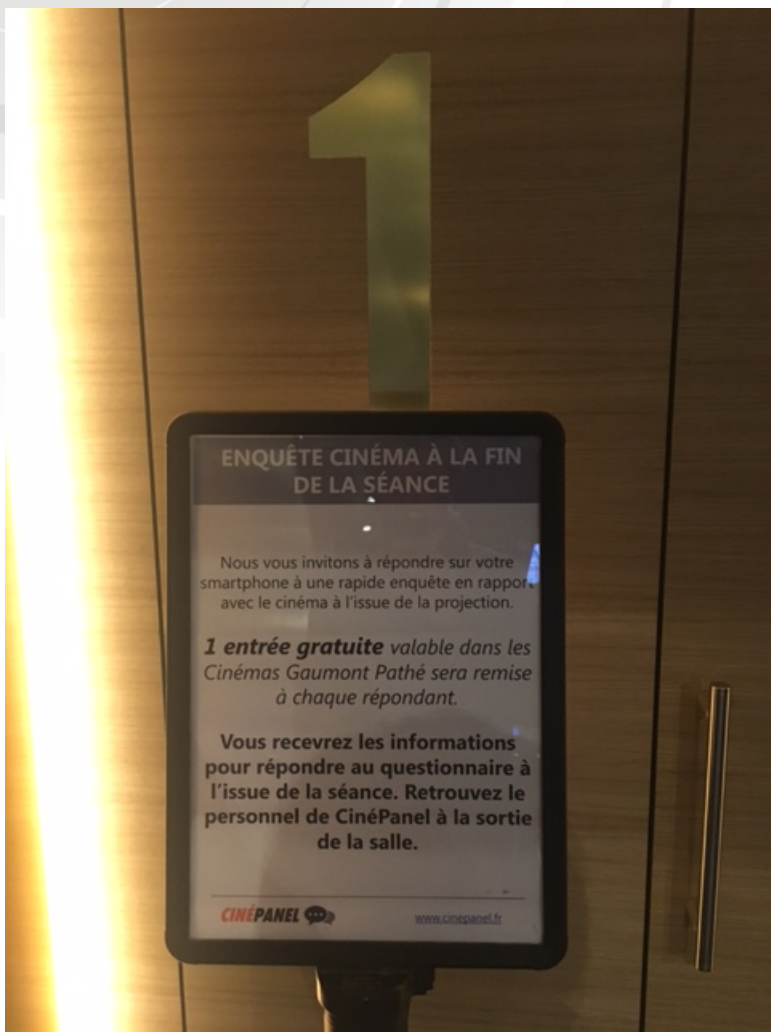
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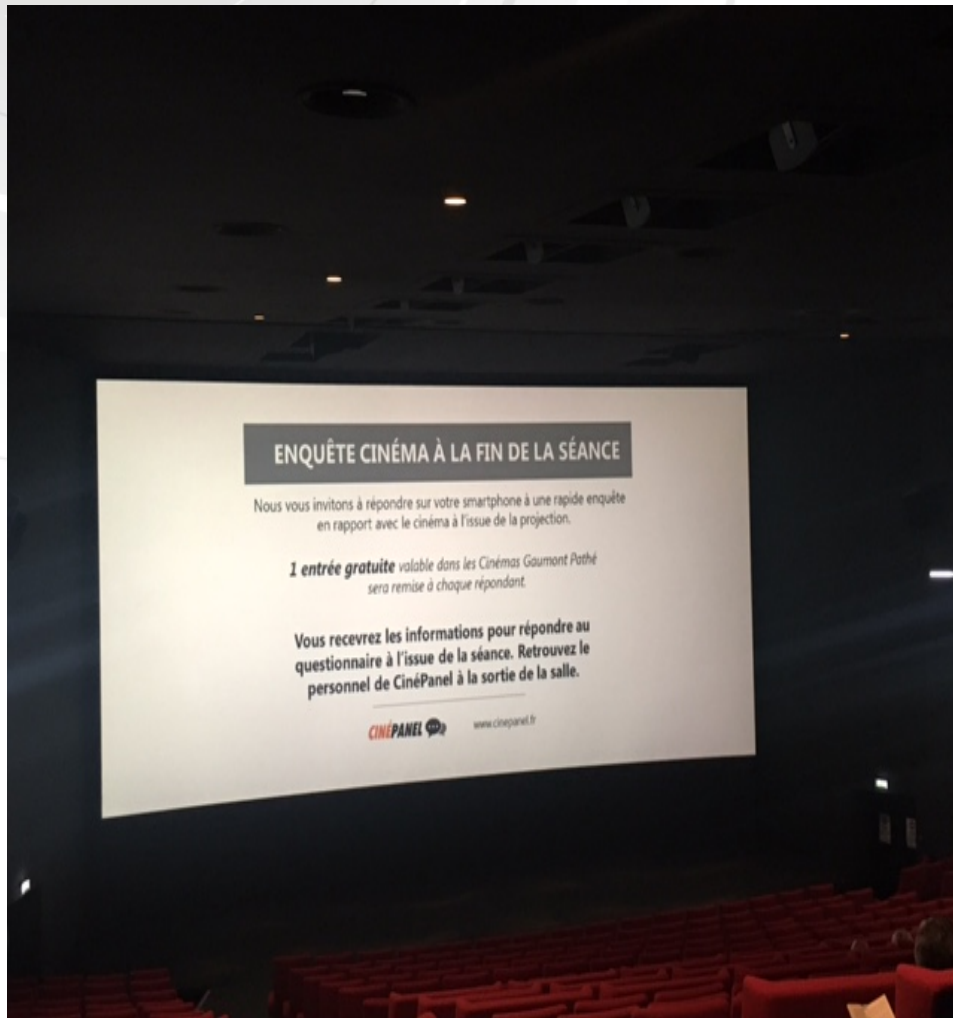
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