COMMUNICATION & SOCIETY

Movies and screens: the Spanish audience's choice

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Submitted
June 20, 2014
Approved
August 28, 2014

ISSN 0214-0039
E ISSN 2174-0895
doi: 10.15581/003.27.4.131-145
www.communication-society.com

2014 – Vol. 27(4),
pp. 131-145

How to cite this article:
Pardo, A. & Etayo, C. (2014). Movies and screens: the Spanish audience's choice. *Communication & Society 27*(4), 131-145.

This paper forms part of two subsidized research projects: *New Consumption Habits in Audiovisual Contents: Impact of Digitalization on the European Media Diet*, financed by the Spanish Ministry of Education and Culture for the period 2011-13 (CSO2010-20122); and *The Impact of Digitalization on the Spanish Audiovisual Industry (2011-13)*, financed by the University of Navarra (PIUNA).

Abstract

Consumer habits in relation to audiovisual products are changing due to the greater range and unlimited access to contents available. This article explores the screens viewers favor in watching films, as well as the screens they actually use. The data are taken from a survey of a sample comprising 1,000 Spanish people aged over 14. The results show that there are differences with regard to preferences for screen-type and frequency of use, which correlate with socio-demographic variables (sex, age and educational background).

Keywords

Audiences, Digitalization, Entertainment, Movies, Consumption, Screens.

1. Introduction

The movie industry is undergoing profound transformation at every level due to the disruptive power of digitalization. The main axes around which the matrix of this new digital scenario is built are, on the one hand, the emergence of a new market for the commercialization of movies (the internet, digital reproduction devices, smart phones, smart TVs); and, on the other, the emergence of new types of consumer ('digital natives'). In the case of consumption, the audience demands a customized way of enjoying entertainment, with freedom of choice, unlimited access and a high degree of flexibility and portability.

Film-viewing habits across a number of different screens are explored in this paper. To this end, a brief overview of the development of these screens (cinema, DVD/Blu-ray, television, the internet) over the last ten years is provided. Cinema is defined as film-viewing at a movie theatre; DVD refers to the playing of a film from a physical support, whether it be screened on a TV set or on a computer monitor; television denotes contents viewed as part of the scheduled programming of a given channel or network; and the internet relates to audiovisual products accessed on the internet, which for the purposes of this study is also referred to as PC or similar. The objective is to explore whether the screens usually used by Spanish viewers to watch films are those for which they express a particular preference. The study also traces whether the differences between the screens preferred and used are affected by socio-demographic factors such as sex, age and educational background.

2. Literature Review

The literature on the impact of digitalization on audiences and/or consumption habits is abundant. Some experts have studied the emergence of a new digital culture and its consequences for media and entertainment consumption in a broad sense (Jenkins, 2006; Tapscott, 2009; Pavlik & McIntosh, 2011; Jenkins, Ford, & Green, 2013). Several scholars have also addressed the relationship between television and new media —and the internet in particular— directly (Palmer, 2006; Adams, 2010; Doyle, 2010; Gunter, 2010). For the purpose of this paper, studies on media consumption, particularly films, are of special interest (Basil, 2001; Napoli, 2011; Iordanova & Cunningham, 2012; Taneja et al., 2012).

In the case of Spain, most of the research around this topic —developed over the last few years— has covered issues regarding media convergence and technological migration (Ruano, 2008; Navarro, 2010; Feijóo, 2013), or the specific relationship between television and the internet from different perspectives (García-Galera & Galera-Villaescusa, 2008; Arrojo, 2010; Guerrero, 2011; Guerrero, Diego, & Pardo, 2013). In addition, some scholars have addressed the consumption of television contents (shows and programmes) via new technologies (Lacalle, 2011; Morales, 2011; Castillo-Hinojosa, 2012). Finally, there are a number of studies —mostly based on surveys— that explore the behaviour of young people regarding the use of television through new technologies (Galán & Del Pino, 2010; Cáceres, San Román, & Brändle, 2011; González-Aldea & López-Vidales, 2011). This last set of articles may be regarded as a framework for our study.

In their article, González and López (2007) conclude that from 2007 onwards most of the research based on surveys illustrates the supremacy of the internet over television among young people in Spain. In their own survey, these authors confirm that 43% of young viewers (aged between 18 and 25) prefer to access entertainment contents in their free time via the internet; 21% prefer to go to the cinema; and 12% favour turning on the television set. In contrast, however, Cáceres et al. (2011) found that young people did not express a preference as regards accessing audiovisual contents via television or the internet.

After analysing the most significant contributions made by this group of authors, a number of preliminary research questions arise. To mention just a few: Are the different screens complementary or mutually exclusive? Is there any significant difference in terms of socio-demographic variables? How does digitalization affect the consumption of movies in particular? Are audiences prepared to pay to access contents? Is the current window sequence obsolete or, on the contrary, will migration to the new forms of digital consumption take some time?

3. Evolution of the Spanish Audiovisual Markets

Digitalization has had an impact on movie consumption in Spain. To discern such change, a broader picture of the evolution of the main Spanish audiovisual markets over the last ten years may be enlightening.

Figure 1 shows how the movie theatre market in Spain is experiencing ongoing decline as regards ticket-sale numbers (admissions), going from 135.5 million in 2000, to scarcely 91 million in 2012, which amounts to a 32.7% drop. Likewise, annual frequency has fallen from 3.4 in 2002 to 1.9 in 2012.

Figure 2 presents recent developments in the video market in Spain that has also undergone a severe recession in the last decade due to digitalization (the disappearance of physical copy) and the economic downturn. The grosses for this home entertainment market has accumulated a 79.4% drop in total, higher in the rental (-948%) than in the sell-through (-725%) sectors.

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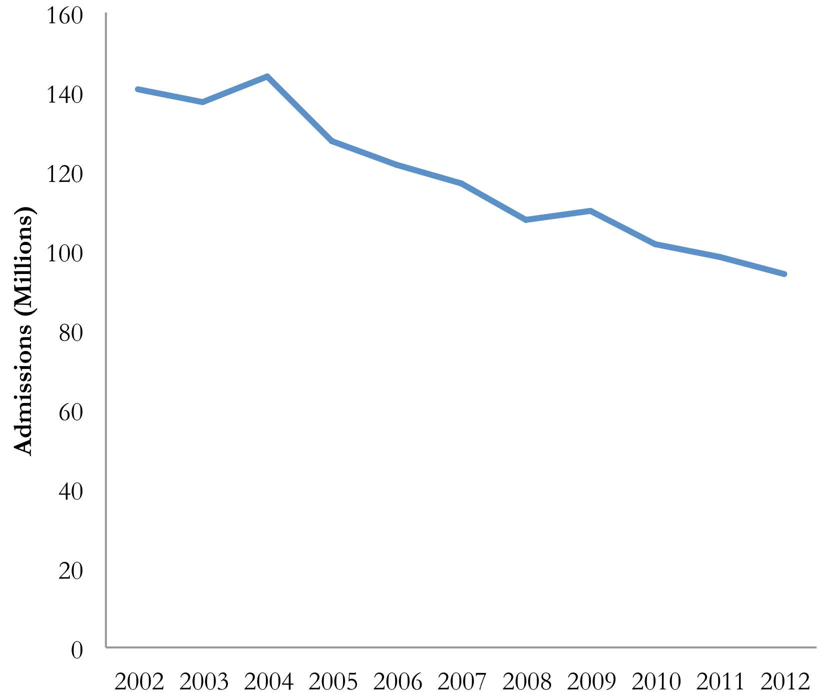
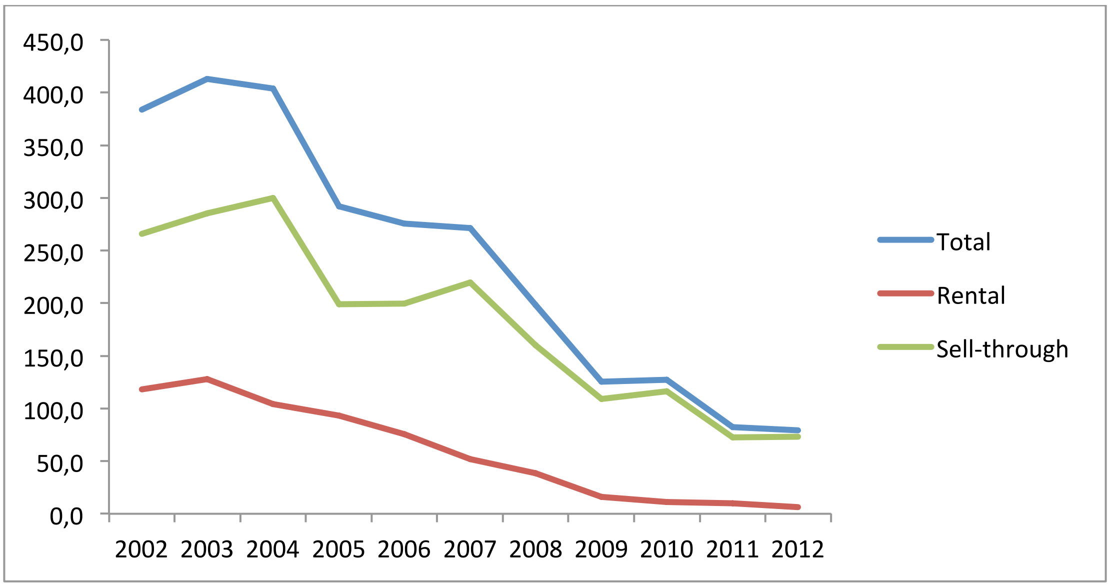
Figure 1. Spanish Theatrical Market - Admissions



Source: ICAA 2012

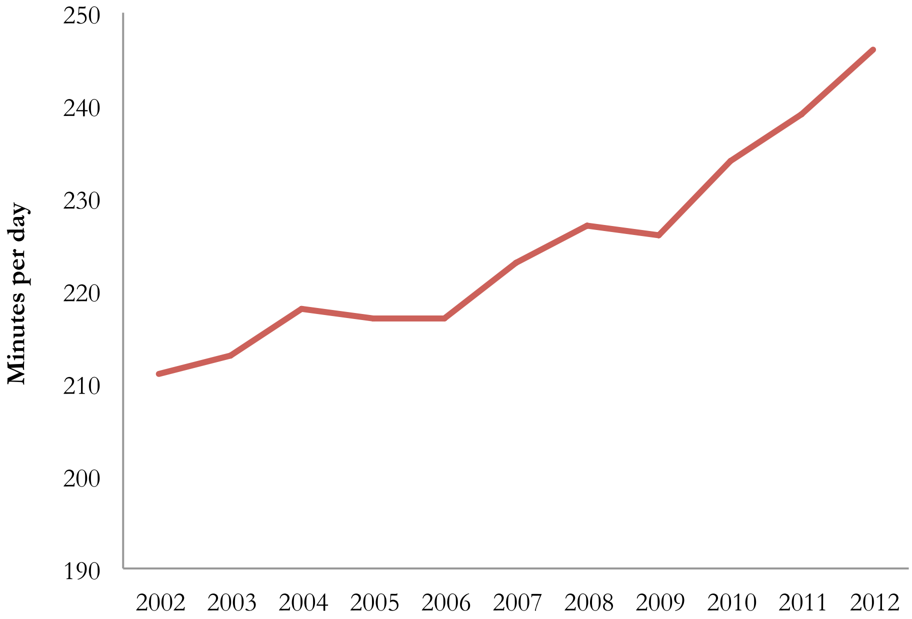
Figure 2. Spanish Video Market: Grosses



Source: SGAE 2013

As regards television, as figure 3 illustrates it is by far the only audiovisual market in Spain undergoing a notable expansion, at least according to the number of minutes of viewing per day. The average Spanish person spends over four hours a day watching TV programmes.

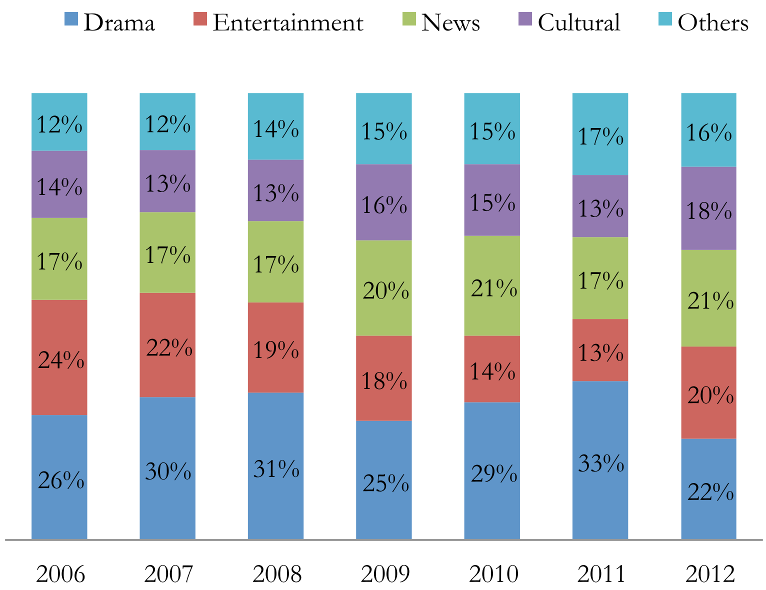
Figure 3. Spanish TV Market: Consumption



Source: Kantar Media 2013

Figure 4 shows the genres of television programmes favoured by viewers. The great appeal of drama (movies and TV shows) as a favourite programming genre is noteworthy. In fact, the percentage of programming devoted to drama has increased in the past five years in response to audience demand, as figure 4 reveals, although in 2012 it underwent significant decline.

Figure 4. Spanish TV Market: Programming by Genre



Source: Kantar Media 2013

In relation to the internet, the percentage of internet users in Spain has scaled up from 40.4% in 2004 to 69.8% in 2012, which represents a 72.8% increase, according to the CIS barometer (Centro de Investigaciones Sociológicas, June 2012).

These data should be completed with the daily time the average Spanish internet user spends on the computer or on any other digital device (tablet, smart phone), as well as with the breakdown of the online screens or platforms. Table 1 shows how 28.9% of internet users in Spain use the internet for most of the day. Table 2 lists the most commonly used screen devices (either laptops or desktops).

Table 1. Daily Time Spent on the Internet by the Average Spanish Internet User (2012)

< 1 h	20.3%
1-2 hs	23.7%
2-4 hs	27.1%
4-8 hs	20.8%
> 8 hs	8.1%
d/k d/a	0.1%

Source: AIMC, 2013

Table 2. The Devices Most Commonly Used by the Average Spanish Internet User (2012)*

Desktop Computer	78.8%
Laptop Computer	80.9%
Tablet	30.7%
Smart TV	11.7%
Smart Phone	79.0%
Desktop Video-console	17.3%
Portable Video-console	6.7%
Other Devices	3.4%
d/k d/a	0.1%

* Multiple Choice
Source: AIMC, 2013

As regards contents, as stated by the CIS barometer, 41.8% of internet users in Spain consume music, movies and videos online, and 14.4% also watch television shows or programmes on the net (CIS, 2012)[1]. Despite this, as figure 5 reflects, total revenues for online movie consumption in Spain are still very low €5.7 million in 2011, although they surpassed the €12 million figure in 2012, according to a Screen Digest forecast (ScreenDigest, 2012). This may prompt the conclusion that most of the movie consumption online is free.

The data presented in Figure 5 are completed by the breakdown of the level of technological penetration in the average Spanish household, offered in Table 3.

A crucial question in regard to movie consumption online is the level of piracy. According to a study released by the Motion Pictures Association of America (MPAA) in 2006, Spain had the highest film piracy rate in Western Europe at that particular time 32% of the overall business, calculated by the level of legal income lost through piracy, including internet and street piracy, in comparison to France (20%) and Italy (25%) (Hopewell, 2006). Another study carried out by IDC Research Iberia found that piracy accounted for 83.7% of all online movie consumption in 2009, whereas, paradoxically, 54.8% of internet users expressed their willingness to pay at the same time (Hopewell, 2010).

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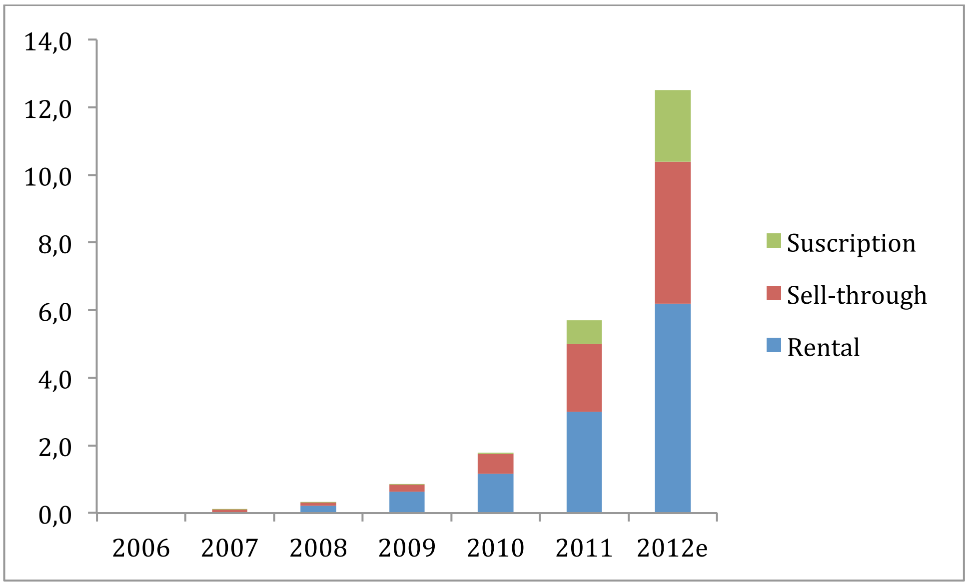
Figure 5. Online Movie Revenues in Spain (Million euros)



Source: Screen Digest

Table 3. Spanish Average Household – Equipment (2012)

TV	99.4%
DVD	74.4%
Blu-ray	7.1%
Mobile Phone	93.7%
PC	64.8%
Internet Access	58.6%
Video-console	30.3%

Source: SGAE, 2013

In the following years the situation became even worse. According to another report from the Spanish industry lobby Coalición de Creadores, a consortium of the majority of rights collectors, digital piracy had increased in Spain by 25% between June 2010 and June 2011, with entertainment industry losses during that period estimated at €10.8 billion, 0.9 million in the case of the film industry. In addition, this report also showed that 77% of total digital entertainment was illegally consumed on the web –73.9% in the case of movies watched online (Sarda, 2011, 2012).

At the beginning of 2012, the Spanish government approved a new piracy law, which helped to fight illegal sites. Nevertheless, the piracy rate is still high. According to the latest report from the Observatorio de Piratería y Hábitos de Consumo de Contenidos Digitales (Piracy and Digital Consumption Habit Observatory), which publishes piracy results every six months, 43% of Spanish internet users watch movies illegally.

As a summary, the evolution of the audiovisual markets in Spain reflects the current moment of transition from the analogue scenario to the digital one, characterised by the coincidence of old and new business models and paradigms. Platforms based on physical copies (theatrical motion pictures and DVD/Blu-ray) are being drastically reduced, whereas rigid programming based on advertising (television) is also going to change. On the contrary, online consumption is emerging as having great potential, although it is still marginal from the revenue point of view.

4. Research Questions and Methodology

The previous market analysis is based on reports and statistics from official institutions and private consultancy firms. Some draw on market and industry data (ICAA, Screen Digest), and others on surveys (CIS, GfK). However, none offers a homogeneous comparative picture about movie consumption in Spain.

Equally, several articles based on surveys mentioned in the literature review contain research limitations. Their authors acknowledge that some of their findings are only partially relevant, either because their sample was limited in terms of target population or because they were taking results from different, not always very homogeneous, databases and statistics.

For these very reasons, we have conducted our own survey in order to discover what the favourite screens for watching movies in Spain are, and to establish the main differences in relation to socio-demographic variables.

The data used in the empirical part of the paper comes from an original survey designed by the authors conducted in June 2012. The target population consisted of all the residents in Spain aged 14 or over (40,606,471 inhabitants). Sampling was polietapic, stratified by autonomous region and size of municipality. The selection of the interviewee in each home was made using gender and age quotas. The final sample size is 1,000. For a confidence level of 95.5% this means a margin of error of 3.1%. Interviews were conducted through CATI (Computed Aided Telephone Interview). The average length of the interviews was 15 minutes. The response rate was 18.4%.

The aims of this survey are the following: in the first place, to identify the most popular platform for watching films (cinema, television, DVD/Blu-ray and the internet) according to frequency (actual use) and preference (ideal option); and secondly, to classify the main differences in relation to socio-demographic variables.

5. Results: Screen Frequency vs Screen Preference

The key findings of our research are outlined in this section. They are broken down into two different parts: screen frequency (actual use) and screen preference (ideal option). In both cases, we will further explain the differences in relation to the main socio-demographic variables (sex, age and educational background).

5.1. *Screen Frequency*

To begin with, the survey outcomes show that there is a wide variety of screen choices for watching films (see Table 4). 'Frequency' means 'actual use' for our purpose. Television is still the most used screen for movie consumption in Spain (50.9% of the population watch movies quite often or very often), followed by PC (20.7% and DVD/Blu-ray (19.1%). Cinema remains the least frequently used screen in comparison to the others, but it is still significant (15.6%). It is likewise noteworthy, according to our data, that PC is so far the least used screen for movie consumption (62.9% of interviewees state they never use this medium to watch films). In our opinion, this first outcome mirrors the picture of the audiovisual markets offered in section 3.

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Table 4. Screen Frequency for Watching Films

	Never	Few times	Sometimes	Often	Very often
Cinema	44.4%	23.5%	16.5%	8.1%	7.5%
Television	5.3%	14.9%	28.9%	22.5%	28.4%
DVD/Blu-ray	47.8%	17.3%	15.8%	8.5%	10.6%
PC or similar	62.9%	8.3%	8.1%	7.4%	13.3%

Source: the authors

There are significant differences across the Spanish population depending on socio-demographic variables. In this regard, for instance, as Table 5 reveals, men are more frequent cinemagoers than women (17.6% of men go to the cinema often or very often vs. 13.8% of women) and use computers more often than women for watching films (23.6% vs. 18.1%). On the contrary, more women prefer to watch films on television, as compared to men (53.7% vs. 47.8%).

Table 5. Screen Frequency for Watching Films by Sex

		Never	Few times	Some times	Often	Very often	Chi-2
Cinema	Men	38.2%	26.5%	17.7%	9.4%	8.1%	14.772***
	Women	50.1%	20.7%	15.4%	6.9%	6.9%	
TV	Men	7.3%	17.5%	27.3%	21.7%	26.1%	14.014***
	Women	3.5%	12.5%	30.3%	23.2%	30.5%	
DVD/ Blu-ray	Men	44.3%	19.8%	16.7%	9.0%	10.2%	6.660
	Women	51.1%	15.0%	15.0%	8.1%	10.9%	
PC or similar	Men	57.4%	10%	9.0%	9.0%	14.6%	12.840**
	Women	67.9%	6.7%	7.3%	6.0%	12.1%	

*** $p < 0.01$, ** $p < 0.05$, * $p < 0.10$

Source: the authors

In terms of age, as the Spanish population get older, assiduous use of cinemas drops as does the use of the computer for watching films. Thus, 25% of viewers aged 14-20 and 22.6% of viewers aged 21-24 go to the cinema often or very often, in comparison with 74.2% of viewers aged 55-64 and 82.4% of viewers aged 65-74 who never or very rarely visit movie theatres (see Table 6). A much greater difference can be seen in regard to the use of computers for movie consumption. 59.7% of the population aged 14-20 and 54.8% of those aged 21-14 state they use the PC often or very often for watching films, whereas 86% of Spaniards aged 55-64 and 96% of those aged 65-74 admit they never watch a movie on a PC.

The results for television and DVD/Blu-ray are more balanced. In the case of the former, there are no significant differences in relation to age. In this regard, television remains the most popular means of entertainment. In relation to home entertainment (video), most of the movie consumers are aged under 44, the most prominent segment being those aged 21-34. On the contrary, Spanish viewers aged between 45 and 75 years old are not frequent consumers of DVDs or Blu-rays.

In our view, this figure reflects the consolidation of some consumption habits related to the generation gap.

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Table 6. Screen Frequency for Watching Films by Age

		Never	Few times	Some times	Often	Very often	Chi-2
Cinema	14-20	12.5%	37.5%	25%	8.3%	16.7%	183.183***
	21-24	14.5%	27.4%	35.5%	11.3%	11.3%	
	25-34	29.6%	23.1%	20.1%	16%	11.2%	
	35-44	43.4%	27.6%	15.3%	7.1%	6.6%	
	45-54	40.6%	28.5%	14.5%	6.7%	9.7%	
	55-64	55.1%	19.1%	14.7%	8.1%	2.9%	
	65-74	68.4%	14.0%	12.3%	1.8%	3.5%	
	≥75	82.6%	10.5%	3.5%	3.5%	0%	
TV	14-20	2.8%	12.5%	30.6%	30.6%	23.6%	35.263
	21-24	8.1%	19.4%	22.6%	24.2%	25.8%	
	25-34	5.3%	15.4%	32.5%	24.3%	22.5%	
	35-44	6.6%	13.3%	27.0%	25%	28.1%	
	45-54	1.8%	22.4%	29.7%	18.2%	27.9%	
	55-64	3.7%	12.5%	27.2%	20.6%	36.0%	
	65-74	7.0%	8.8%	29.8%	21.1%	33.3%	
	≥75	9.3%	14.0%	29.1%	18.6%	29.1%	
DVD/ Blu-ray	14-20	25.0%	26.4%	20.8%	18.1%	9.7%	151.737***
	21-24	32.3%	22.6%	22.6%	4.8%	17.7%	
	25-34	28.4%	20.1%	17.2%	13.0%	21.3%	
	35-44	38.8%	17.3%	19.4%	10.7%	13.8%	
	45-54	50.3%	21.2%	14.5%	6.7%	7.3%	
	55-64	62.5%	14.7%	14.7%	4.4%	3.7%	
	65-74	71.9%	8.8%	9.6%	3.5%	6.1%	
	≥75	76.7%	8.1%	8.1%	5.8%	1.2%	
PC or similar	14-20	11.1%	11.1%	18.1%	19.4%	40.3%	378.871***
	21-24	24.2%	1.6%	19.4%	16.1%	38.7%	
	25-34	34.3%	12.4%	15.4%	12.4%	25.4%	
	35-44	61.2%	12.2%	7.1%	7.1%	12.2%	
	45-54	68.5%	11.5%	6.7%	7.3%	6.1%	
	55-64	86.0%	6.6%	2.9%	2.2%	2.2%	
	65-74	98.2%	0.9%	0.9%	0%	0%	
	≥75	100%	0%	0%	0%	0%	

*** $p < 0.01$, ** $p < 0.05$, * $p < 0.10$

Source: the authors

Educational background is also relevant in determining screen choice for movie consumption: the higher the educational level, the greater the propensity to go to the cinema or watch movies on DVD/Blu-ray or computer, and the less likely viewing on television. Part of this trend is related to average income, since the people with a higher educational background tend to have better-paid jobs and are wealthier. Again, these differences are much more noticeable in the case of cinema, video and computers, and more balanced with regard to television. As Table 7 illustrates, whereas 86.4% of those without studies and 63.5% of those with elementary studies declare that they never go to the cinema, 34.4% of the population with a high-school diploma level and 20.7% of those with a university degree go to the cinema often or very often. A parallel picture is observable in relation to DVD/Blu-ray and computers. In the first case, 78% of those without studies and 60.8% of those with elementary studies never watch a movie on DVD or Blu-ray, probably because they do not even have one, in contrast to 11.7% of those with a diploma level and 21.6% of those with a university degree who declare they do so very often. In relation to computers or similar, up to 93.2% of those without studies and 82.9% of those with elementary studies never watch a movie on a computer, also because they probably cannot afford one, in contrast to 24.9% of those with a diploma level and 19% of those with a university degree who declare they do so often or very often.

Table 7. Screen Frequency for Watching Films by Educational Background

		Never	Few times	Some times	Often	Very often	Chi-2
Cinema	< Elementary	86.4%	6.8%	0%	6.8%	0%	141.910***
	Elementary	63.5%	14%	13.5%	2.3%	6.8%	
	Secondary	39.1%	25.5%	20.7%	7.8%	6.8%	
	Diploma level	33.5%	24.9%	17.3%	12.7%	11.7%	
	Degree level	20.7%	42.2%	16.4%	13.8%	6.9%	
TV	< Elementary	5.1%	11.9%	28.8%	22.0%	32.2%	27.659**
	Elementary	3.2%	12.6%	28.8%	16.2%	39.2%	
	Secondary	5.3%	15.9%	28.0%	25.5%	25.3%	
	Diploma level	7.1%	15.7%	32.5%	19.8%	24.9%	
	Degree level	6.0%	16.4%	24.4%	29.3%	24.1%	
DVD/ Blu-ray	< Elementary	78.0%	5.1%	10.2%	1.7%	5.1%	76.471***
	Elementary	60.8%	14.0%	10.8%	8.6%	5.9%	
	Secondary	44.4%	18.4%	16.2%	10.1%	10.4%	
	Diploma level	38.6%	18.8%	20.3%	10.7%	11.7%	
	Degree level	31.9%	22.4%	20.7%	3.4%	21.6%	
PC or similar	< Elementary	93.2%	0%	5.1%	0%	1.7%	95.185***
	Elementary	82.9%	5.4%	1.3%	2.3%	7.7%	
	Secondary	52.5%	10.1%	9.7%	9.8%	17.9%	
	Diploma level	53.8%	10.2%	11.1%	10.7%	14.2%	
	Degree level	60.3%	8.6%	12.1%	6.9%	12.1%	

*** $p < 0.01$, ** $p < 0.05$, * $p < 0.10$

Source: the authors

5.2. *Screen Preference*

As for the screen preference (ideal option) when watching movies, there are also relevant differences between Spanish viewers (see table 8). A significant majority (89.9%) choose theatres as their favourite place for the cinematic experience (quite a lot or a lot). Television is also a significant option (60.2%), very closely followed by DVD or Blu-ray (59.3%). Nevertheless, computers and other digital devices remain the least preferred screen for movie consumption (46.4%). In our view, this trend reflects, on the one hand, why cinema attendance, despite experiencing a substantial drop, as seen in Tables 1 and 2, still maintains significant numbers; and on the other hand, the fact that screen size matters when watching a film, PCs, tablets and smart phones are the least favoured options.

Table 8. Screen Preference for Watching Films

	Nothing	A little	Some	Quite	Quite a lot
Cinema	0.9%	3.1%	6.1%	17.7%	72.2%
Television	1.8%	8.2%	29.8%	30.5%	29.7%
DVD/Blu-ray	4.4%	9.4%	26.8%	31.0%	28.3%
PC or similar	7.1%	20.9%	25.5%	19.8%	26.6%

Source: the authors

It is interesting to compare these results with the ones presented in Table 4 (screen frequency). As can be observed, there are substantial differences between the actual option (screen frequency) and the favourite one (screen preference), especially with regard to cinema, DVD/Blu-ray and PC or similar.

In addition, it is equally noticeable that there are no significant differences according to socio-demographic variables in the case of screen preference, with the exception of television. Thus, from the gender point of view (table 9), women like to watch movies on TV more than men (35.1% vs. 23.5%), with no significant variations for the other screens.

Table 9. Screen Preference for Watching Films by Sex

		Nothing	A little	Some	Quite	Quite a lot	Chi-2
Cinema	Men	1.0%	3.7%	5.7%	20.9%	68.6%	2.971
	Women	0.8%	2.3%	6.6%	14.0%	76.3%	
TV	Men	2.9%	9.0%	31.2%	33.3%	23.5%	14.912***
	Women	0.8%	7.4%	28.5%	28.1%	35.1%	
DVD/ Blu-ray	Men	4.5%	8.6%	28.6%	32.0%	26.3%	1.955
	Women	4.3%	10.3%	24.9%	30.0%	30.4%	
PC or similar	Men	6.9%	23.6%	25.1%	20.2%	24.1%	2.738
	Women	7.3%	17.6%	26.1%	19.4%	29.7%	

Source: the authors

Similarly, television is the only screen which involves differences in terms of age (Table 10). The percentage of the population choosing this option to view films increases with age.

Table 10. Screen Preference for Watching Films by Age

		Nothing	A little	Some	Quite	Quite a lot	Chi-2
Cinema	14-20	0%	3.2%	3.2%	22.2%	71.4%	33.362
	21-24	1.9%	1.9%	5.7%	20.8%	69.8%	
	25-34	0%	0.8%	5%	18.5%	75.6%	
	35-44	0%	4.5%	7.2%	17.1%	71.2%	
	45-54	1.0%	2.1%	7.2%	11.3%	78.4%	
	55-64	1.7%	3.3%	5%	23.3%	66.7%	
	65-74	5.6%	8.3%	5.6%	16.7%	63.9%	
	≥75	0%	7.1%	21.4%	7.1%	64.3%	
TV	14-20	2.9%	2.9%	34.3%	38.6%	21.4%	57.058***
	21-24	1.8%	8.8%	29.8%	35.1%	24.6%	
	25-34	3.1%	11.3%	31.9%	36.3%	17.5%	
	35-44	1.1%	7.1%	31.9%	29.1%	30.8%	
	45-54	2.5%	12.5%	36.3%	24.4%	24.4%	
	55-64	0%	6.2%	24.6%	30.8%	38.5%	
	65-74	1.9%	5.8%	24%	23.1%	45.2%	
	≥75	1.3%	6.5%	19.5%	33.8%	39.0%	
DVD/ Blu-ray	14-20	1.9%	14.8%	25.9%	37%	20.4%	39.677*
	21-24	2.4%	7.1%	21.4%	38.1%	31.0%	
	25-34	2.5%	4.1%	21.5%	38%	33.9%	
	35-44	5.0%	5.9%	31.9%	31.1%	26.1%	
	45-54	8.6%	12.3%	34.6%	18.5%	25.9%	
	55-64	5.9%	13.7%	29.4%	27.5%	23.5%	
	65-74	6.3%	18.8%	21.9%	21.9%	31.3%	
	≥75	0%	15.8%	10.5%	31.6%	42.1%	

PC or similar	14-20	6.3%	14.1%	25%	28.1%	26.6%	28.439
	21-24	4.3%	10.9%	32.6%	23.9%	28.3%	
	25-34	5.4%	21.6%	19.8%	19.8%	33.3%	
	35-44	9.3%	22.7%	26.7%	26.7%	28.0%	
	45-54	9.8%	33.3%	27.5%	27.5%	17.6%	
	55-64	10.5%	26.3%	31.6%	31.6%	5.3%	
	65-74	0%	0%	50%	50%	0%	

*** p < 0.01, ** p < 0.05, * p < 0.10

Source: the authors

Regarding educational level, the difference between the different segments is even more evident. In this regard, as Table 11 shows, 78.2% of the Spanish population with the lowest educational level prefer to watch movies on television quite a lot or a lot, in contrast to 50.5% for those with a university degree. As mentioned before, this socio-demographic variable is also related to income capacity, which usually determines the economy of media consumption (in Spain, television is, generally, the only free option for watching films). On top of that, educational background may also be related to demand for quality or level of expectation; those with a lower education level may not be so demanding in terms of quality and are more easily satisfied with any sort of content.

Table 11. Screen Preference for Watching Films by Educational Background

		Nothing	A little	Some	Quite	Quite a lot	Chi-2
Cinema	< Elementary	0%	12.5%	0%	0%	87.5%	15.382
	Elementary	2.5%	5.0%	8.8%	18.8%	65.0%	
	Secondary	0.8%	2.9%	7.1%	17.2%	72.0%	
	Diploma level	0%	0.8%	3.8%	18.3%	77.1%	
	Degree level	1.1%	4.3%	5.4%	18.5%	70.7%	
TV	< Elementary	0%	3.6%	18.2%	27.3%	50.9%	52.453***
	Elementary	0.9%	7.1%	22.2%	27.8%	42.0%	
	Secondary	1.6%	7.3%	32.3%	33.3%	25.5%	
	Diploma level	3.3%	9.3%	35.5%	31.7%	20.2%	
	Degree level	2.8%	14.7%	32.1%	25.7%	24.8%	
DVD/ Blu-ray	< Elementary	7.7%	7.7%	30.8%	23.1%	30.8%	18.586
	Elementary	9.3%	11.6%	25.6%	22.1%	31.4%	
	Secondary	2.7%	11%	30.6%	29.7%	26.0%	
	Diploma level	4.1%	5.8%	21.5%	40.5%	28.1%	
	Degree level	3.8%	9.0%	25.6%	32.4%	29.5%	
PC or similar	< Elementary	0%	25.0%	0%	50.0%	25.0%	19.732
	Elementary	10.8%	18.9%	18.9%	13.6%	37.8%	
	Secondary	6.5%	22%	23.1%	21.0%	27.4%	
	Diploma level	7.7%	23.3%	24.2%	17.3%	27.5%	
	Degree level	6.5%	15.2%	43.5%	23.9%	10.9%	

*** p < 0.01, ** p < 0.05, * p < 0.10

Source: Own elaboration

6. Conclusions and discussions

Some partial conclusions have been mentioned above. The main ones are summarized here, along with some further discussion.

Among the main findings regarding the aims explained at the end of section 4, it should be noted that television is still the main screen for watching films according to frequency (actual use), followed by video (DVD/Blu-ray) and cinema. Contrary to what may be expected, the internet is not yet a popular option.

There are important socio-demographic differences within the current panorama. Men prefer going to the cinema or using the internet to watch movies, whereas women usually watch them on television. Young people watch films on DVD/Blu-ray and on the internet, rather than on television or in cinemas. Accordingly, age (generational gap) is revealed as the most significant socio-demographic variable for different movie consumption habits.

Nevertheless, if we consider screen preferences, the options are slightly different. Theatres are still the favourite screen for a cinema experience, followed by television and DVD or Blu-ray. Computers and other digital devices are less preferred for movie consumption, which, in our view, reflects the fact that screen size matters when watching a movie.

There are no significant differences according to socio-demographic variables in the case of screen preference, with the exception of television. As noted, women favour television more than men. In terms of age, the percentage of the population that prefers this screen for watching films increases as viewers get older. Finally, educational background is a key factor in relation to screen preference. The Spanish population with the lowest education level prefers to watch movies on television quite a lot or a lot, in contrast to those with a university degree. This may be explained by the fact that education levels are usually related to income (television is a free option for watching films), as well as to lower demands for quality (as occurs with many television programmes).

In conclusion, the Spanish film market is still in the throes of the migratory movement from analogue to digital screens. Movies are still one of the favourite entertainment products. Regarding the internet, although it is not yet a key market, some of the findings show that it has great potential, especially because it is directly related to younger viewers. It is true that the young viewers of today will be the older viewers of tomorrow, but they will presumably hold onto the movie consumption habits they develop over the course of their lives.

Notes

[1] The CIS barometer regards as an "internet user" anyone who has used the internet at least once in the last month.

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