



3D from a Viewer's Perspective: Results of Quantitative and Qualitative Research

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Gefördert durch das



Our Survey

- Is part of the research group „PRIME“
- Partners are: DVS Digital Video Systems AG, Flying Eye Managementberatung für Medieninvestitionen GmbH, Fraunhofer Institut für Nachrichtentechnik Heinrich-Hertz-Institut (HHI), Fraunhofer Institut für Integrierte Schaltungen (IIS), Kinoton GmbH, KUK Filmproduktion GmbH, Loewe Opta GmbH
- Is concerned with quality-evaluation and acceptance testing

Our Survey

- Was conducted from March to September 2009
- Combines qualitative and quantitative research methods
- First part was an opinion survey conducted standardized and representatively by phone
- 1002 in people based in Germany age from 14 – 64 were questioned
- Second part was a qualitative analysis of 17 web forums / bulletin boards on German-spoken web sites

Focus of Research

Cinema, TV, Computer

- *Experience*
with 3D Media, especially 3D cinema
- *Interest in and Appeal*
of three-dimensional media content
- *Acceptance*
of the need for 3D glasses, higher ticket prices or the fear of
headaches / nausea / dizziness
- *Preference*
for specific media contents and genres in stereoscopic presentation

Survey Results

- Most people know what stereoscopic 3D is and are aware of its possibilities
- 85% have heard of the possibility to produce and screen a film or TV programme in 3D
- To watch a film in 3D appeals to 53 % of the population
- 47% think of this as rather uninteresting

Survey Results

- There are no gender-specific differences and no differences in regard to education
- Interest in 3D depends largely on age
- 79% of the 14 to 19 years old think of 3D contents as very or rather interesting
- Only 44% of the 50 to 59 years old and 40% of people over 60 think so

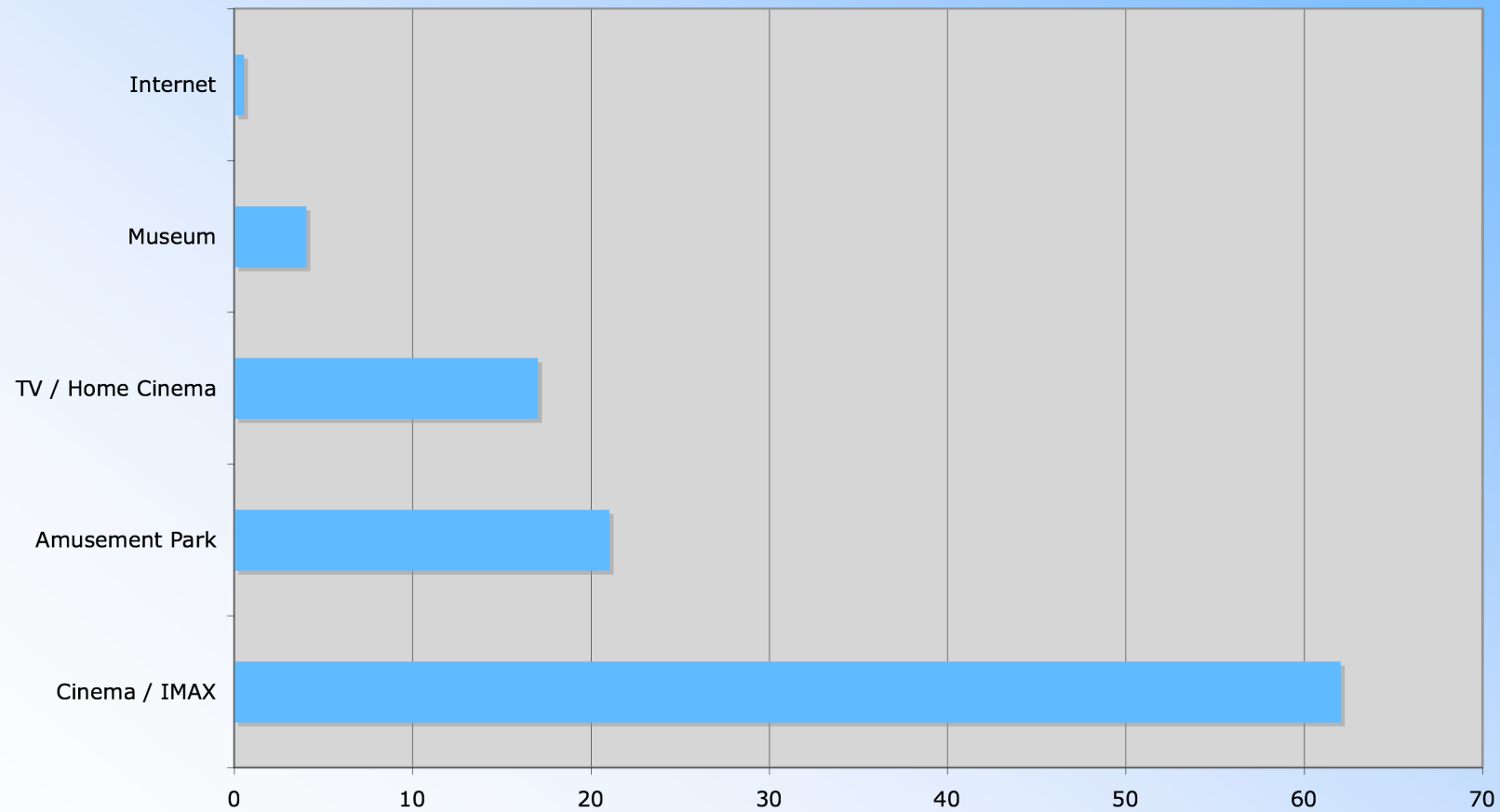
Experiences with 3D

- 44 % of the participants have already seen 3D content
- 56 % of the under 19s have watched 3D media
- Of the over 50s only 36 % have experience with 3D media

	Age					
	<=19	20-29	30-39	40-49	50-59	60+
Have seen 3D Content	56,1%	47,1%	41,4%	51,2%	36,7%	37,6%

Experiences with 3D

Where have you watched 3D media?



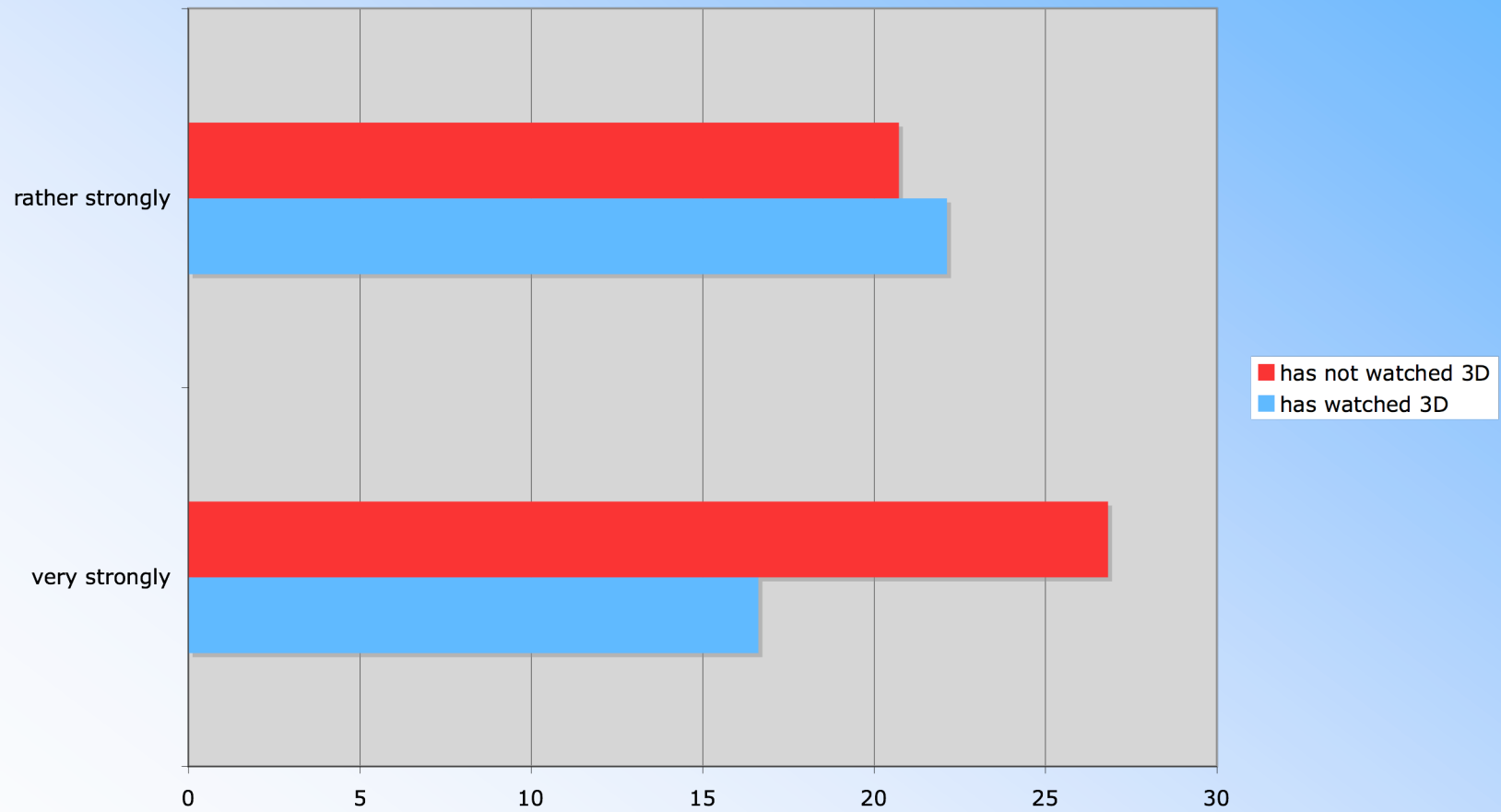
3D Glasses

- More than half of the participants (54,4%) don't think that 3D glasses will affect their viewing experience in the cinema strongly or rather strongly
- The acceptance of the need for glasses is again higher with young people from 14 to 19 years
- Overall, 22% indicate that 3D glasses will affect their viewing experience in a negative way strongly or rather strongly; 44% of people age 50 to 59 think so

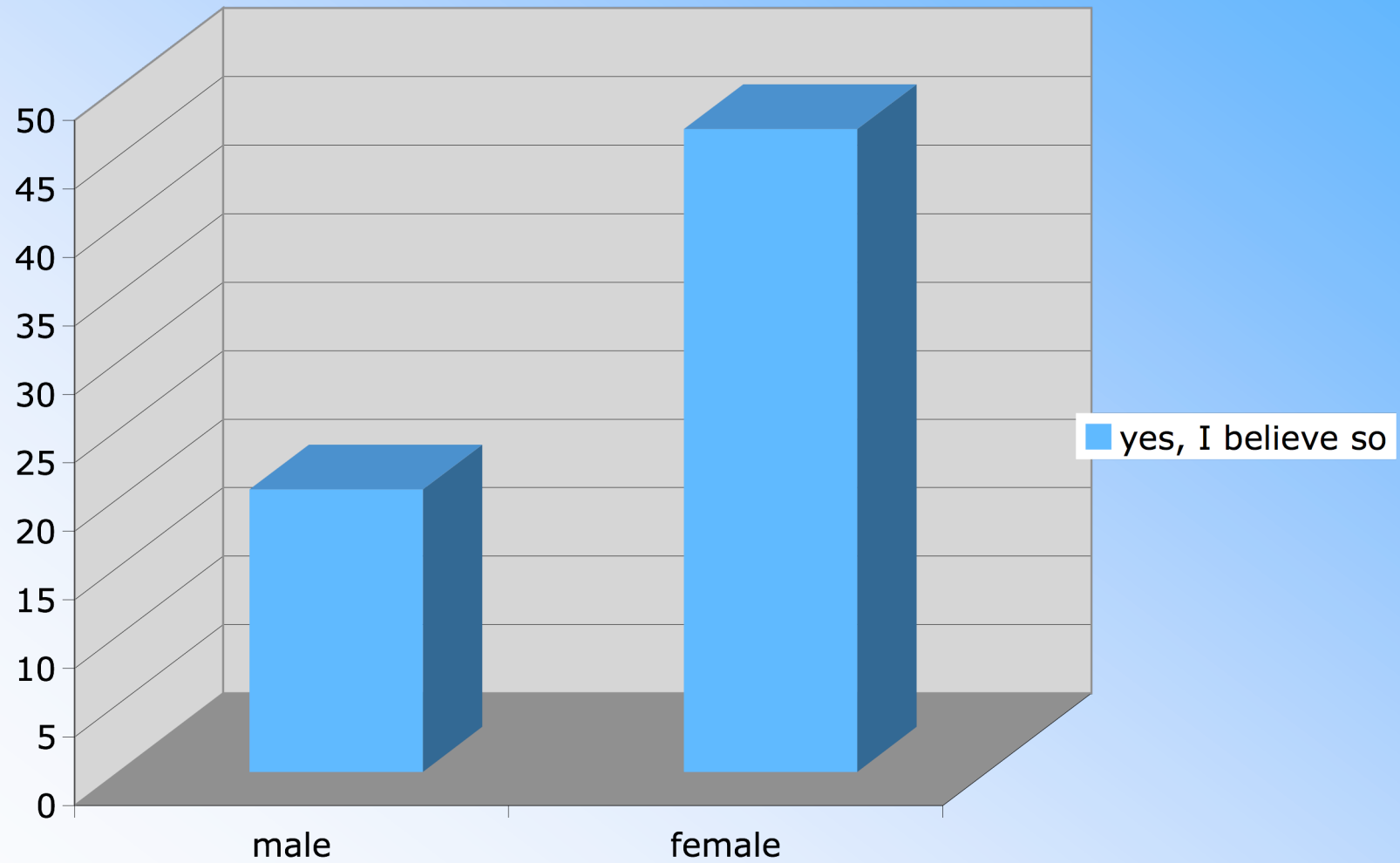
3D glasses seem to be accepted but not loved

3D Glasses

Rejection of 3D glasses depending on 3D viewing experience



Fear of Malaise

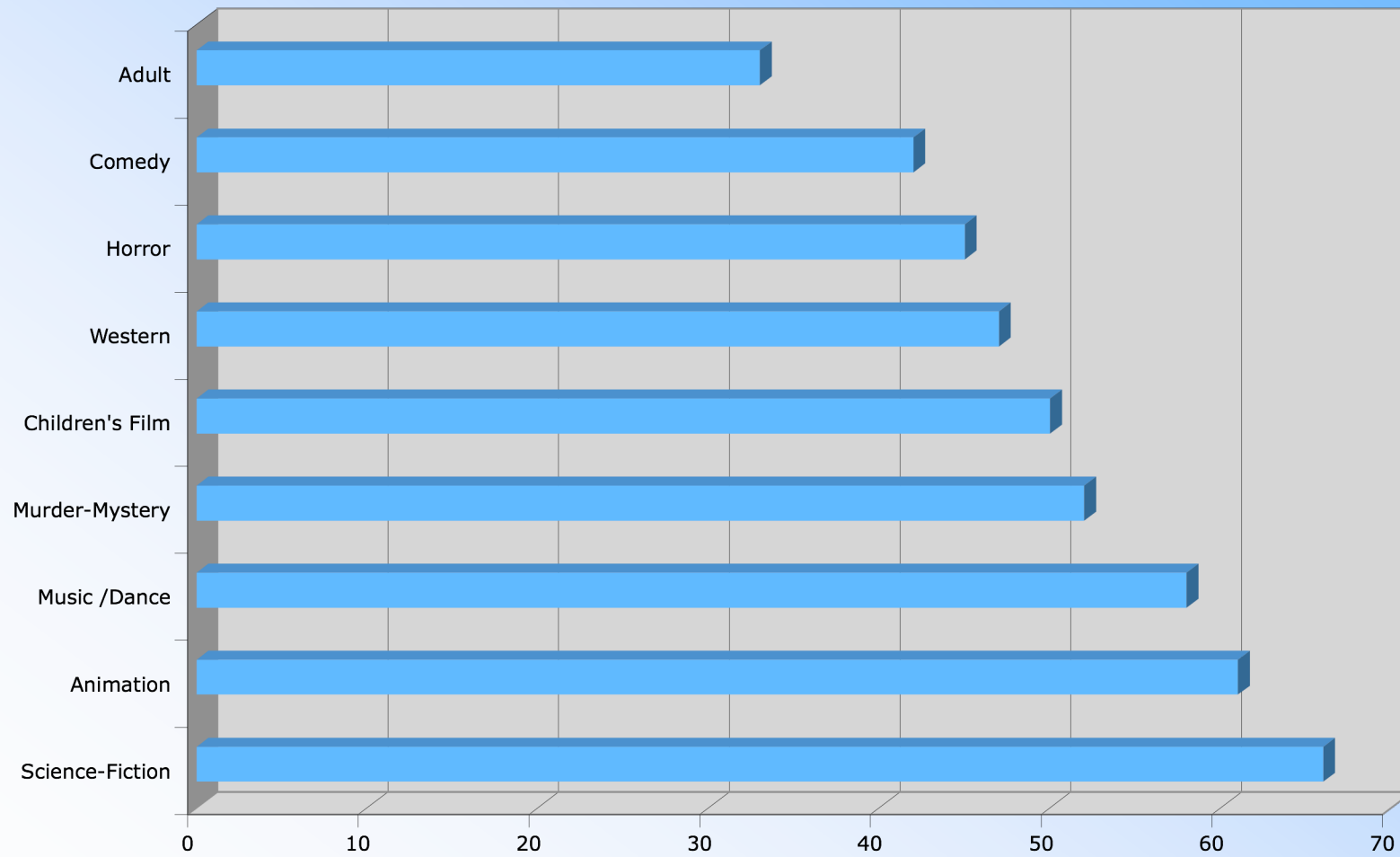


Extra-Cost for 3D

Extra-Costs Cinema

- 46% are willing to pay higher ticket prices
- 70% of the teenagers (14 to 19) would pay higher ticket prices but only 30 % of people over 60
- If people have experience with 3D they are more likely to pay higher ticket prices

Genres in 3D



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Genres in 3D

- 87% of the 14 to 19 years old think of science-fiction as very well or rather well suited
- All genres get higher acceptance ratings from teenagers

Reasons to watch 3D

- 59% think that 3D delivers a more realistic experience and 65% think of it as a more immersive experience
- Most people think that 3D has added value and only 9 % believe that there is no benefit from watching 3D content compared to 2D content
- 27% think that with 3D you will feel more emphatic to characters and narration

Web Forum Analysis

- Qualitative and quantitative analysis of 17 German spoken web forums with 300 contributions
- Responses to 3D digital cinema feature films
- Responses to “Bolt”, “Journey”, “Monsters vs. Aliens”, “My Bloody Valentine 3D”, “Coraline”, “Final Destination 4”, “Up”
- There are four prevailing topics: added value of 3D, picture quality, costs, glasses
- In web forums there is a predominant positive response to 3D experiences; 189 of 300 responses are positive, 60 negative, 32 neutral
- One can find strict rejection as well as a strong support of 3D

Web Forum Analysis

Benefits of 3D for contributor in web forums are

- With 3D you enter another world
- There is more suspense, more surprises
- Immersive experience, realistic display

Problems with 3D

- Not much added value in some films
- Some disappointments when 3D is not really visible
- Darker pictures
- Bad films might damage the reputation of 3D

Summary

- Interest among young people, especially 14 to 29, is very high
- More than half of the participants in the first survey are interested in 3D content
- Almost half of the participants have already watched 3D media; a similar number is willing to pay more for 3D
- Science-fiction and animation seem to be especially well suited for 3D in the eyes of the participants, but known preferences (male, female, age) are not affected by 3D
- Posts in web forums indicate that 3D is viewed as an interesting added value, though some films profit more than others

Conclusion

3D can raise interest in a film and can raise its chances in the market