

Summary of EY report, “The Relationship Between Movie Theater Attendance and Streaming Behavior”

EY’s Quantitative Economics and Statistics (QUEST) group was commissioned by the National Association of Theater Owners (NATO) to collect data on US moviegoers and to analyze key determinants of movie theater attendance. EY QUEST conducted a detailed survey of US moviegoers and examined the extent to which consumption of streaming services impacted movie theater attendance. EY QUEST also studied this relationship with consideration to various demographics, such as age, race, and gender.

Survey of US moviegoers

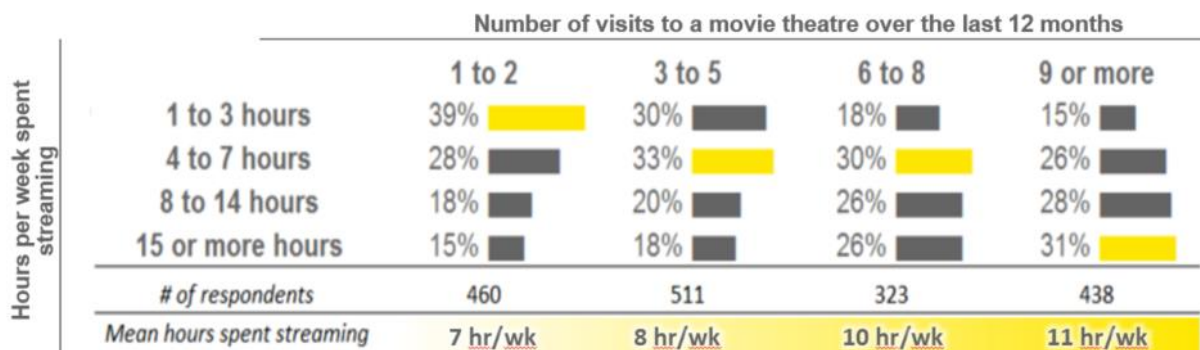
EY QUEST conducted a survey of 2,500 respondents, 80% of whom saw at least one movie in theaters in the last 12 months. The primary data collected in the survey was: (1) movie theater attendance in the last 12 months, (2) streaming consumption in the last 12 months, and (3) demographic characteristics of the respondents.

Movie theater attendance and streaming consumption for “dual-consumers”

Survey results presented here include respondents who saw at least one movie in theaters and streamed at least one hour of online content per week in the last 12 months (i.e., “dual-consumers”).¹

- ▶ **Those who attended movies in theaters more frequently also tended to consume streaming content more frequently.** For every race and age demographic, average streaming hours per week was higher for respondents who visited a movie theater 9 times or more than respondents who visited a movie theater only once or twice. Moreover, respondents who visited a movie theater only once or twice in the last 12 months reported an average of 7 hours of streaming per week versus 11 hours of streaming per week for those who visited a movie theater 9 or more times.

Figure E-1. Movie theater attendance and streaming consumption in the last 12 months



Note: The EY survey included 2,500 respondents, 80% of whom saw at least one movie in theaters in the last 12 months. The survey results presented in this chart only include respondents who saw at least one movie in theaters and streamed at least one hour of online content per week in the last 12 months. All means are reported as 95% trimmed means.

Source: EY analysis.

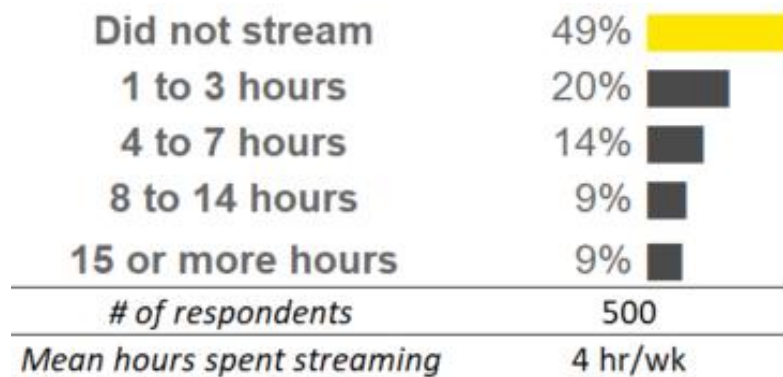
¹ All EY survey means are reported as 95% “trimmed means”. A trimmed mean is a method of averaging that removes a small designated percentage of the largest and smallest values before calculating the mean.

Streaming consumption for “non-moviegoers”

Survey results presented here include respondents who did not see any movies in theaters in the last 12 months.

- ▶ **Those who did not attend a movie in a theater in the last 12 months were more likely to report less streaming activity than those who did attend at least one movie in the same period.** Of those who didn’t visit a movie theater in the last 12 months, nearly half (49%) didn’t stream any online content. Of those who did not visit a movie theater at all in the last 12 months, only 18% streamed online content for 8 or more hours per week.

Figure E-2. Streaming consumption of non-moviegoers in the last 12 months



Note: All means are reported as 95% trimmed means.
Source: EY analysis.