

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

EY’s Quantitative Economics and Statistics (QUEST) group was commissioned by the National Association of Theatre Owners (NATO) to collect data on US moviegoers and to analyze key determinants of movie theatre attendance. EY QUEST conducted a detailed survey of US moviegoers with an emphasis on Millennials – a key focus of the survey and the resulting analysis was to examine the extent to which consumption of streaming services impacted movie theatre attendance.

Survey of US moviegoers

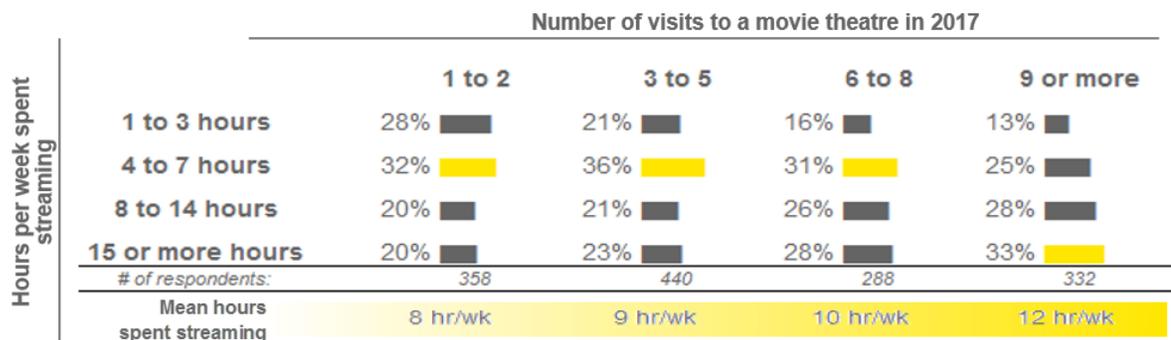
EY QUEST conducted a survey of 2,002 respondents, roughly 80% of whom saw at least one movie in theatres in 2017. The primary data collected in the survey was: (1) movie theatre attendance in 2017, (2) streaming consumption in 2017, and (3) demographic characteristics of the respondents.

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

Survey results presented here include respondents who saw at least one movie in theatres and streamed at least one hour of online content per week in 2017 (i.e., “dual-consumers”).¹

- ▶ **Those who attended movies in theatres 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 theatre 9 times or more than respondents who visited a movie theatre only once or twice. Moreover, respondents who visited a movie theatre in 2017 only once or twice reported an average of 8 hours of streaming per week versus 12 hours of streaming per week for those who visited a movie theatre 9 or more times.

Figure E-1. Movie theatre attendance and streaming consumption, 2017



Note: The EY survey included 2,002 respondents, roughly 80% of whom saw at least one movie in theatres in 2017. The survey results presented in this chart only include respondents who saw at least one movie in theatres and streamed at least one hour of online content per week in 2017. All means are reported as 95% trimmed means.
Source: EY analysis.

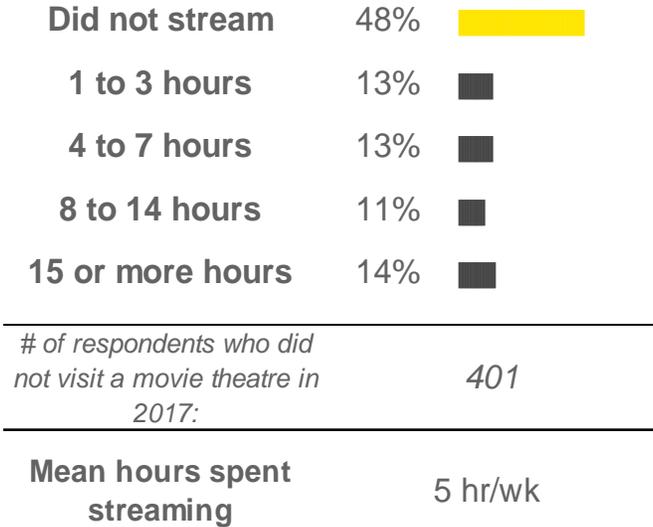
¹ All EY survey means are reported as 95% “trimmed means”. A trimmed mean is a method of averaging that removes a small designated percentage of the largest and smallest values before calculating the mean.

Streaming consumption for “non-moviegoers”

Survey results presented here include respondents who did not see any movies in theatres in 2017.

- ▶ **Those who did not attend a movie in a theatre in 2017 were more likely to report less streaming activity than those who did attend at least one movie in 2017.** Of those who didn’t visit a movie theatre in 2017, nearly half (48%) didn’t stream any online content. Of those who did not visit a movie theatre at all in 2017, only a quarter (25%) streamed online content for 8 or more hours per week.

Figure E-2. Streaming consumption of non-moviegoers, 2017



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