

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 and examined the extent to which consumption of streaming services impacted movie theatre 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 2,015 respondents, who saw at least one movie in theatres over the last twelve months and an additional 505 respondents who did not see any movies in theatres. The primary data collected in the survey was: (1) movie theatre attendance in the last 12 months, (2) streaming consumption in the last 12 months, and (3) demographic characteristics of the respondents.

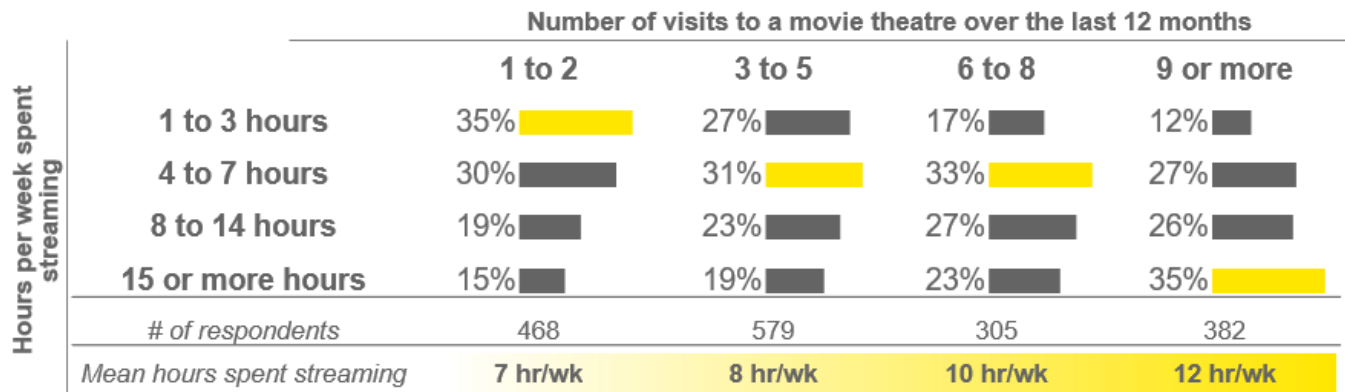
Movie theatre attendance and streaming consumption for “dual-consumers”

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 the last 12 months (i.e., “dual-consumers”).¹ There were 1,734 such respondents in total.

- ▶ **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 were 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 only once or twice in the last 12 months reported an average of 7 hours of streaming per week versus 12 hours of streaming per week for those who visited a movie theatre 9 or more times.

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.

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



Note: 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 the last 12 months (1,734 respondents). Figures may not sum due to rounding. All means are reported as 95% trimmed means.

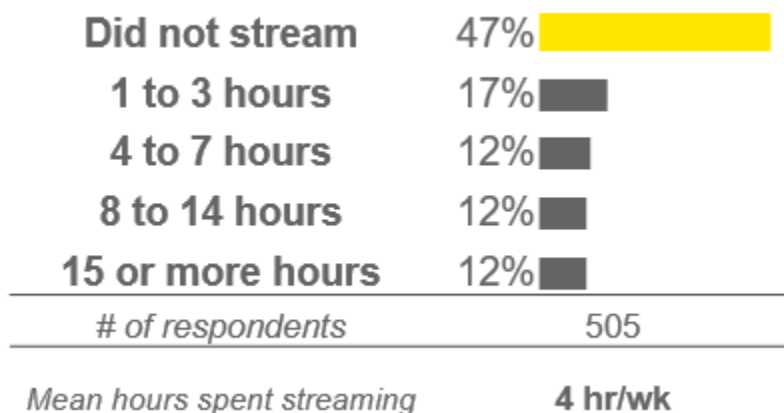
Source: EY analysis.

Streaming consumption for “non-moviegoers”

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

- ▶ **Those who did not attend a movie in a theatre 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 theatre in the last 12 months, nearly half (47%) didn’t stream any online content. Of that same group, only 24% 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. Figure may not sum due to rounding.

Source: EY analysis.

Impact of in-theatre movie release on streaming behavior

Survey results presented here include 2,191 respondents who indicated that they were, in some capacity (rarely, sometimes, usually, always), aware of whether the movie they streamed was released in a movie theatre.

- ▶ **Respondents that were aware of movies' in-theatre releases were more likely to stream a movie when they knew it was released in theatres.** Of those who were always or usually aware of movies' in-theatre releases, 62% reported they were more likely to stream a movie if they knew it was released in a movie theatre. On the other hand, only 3% of these respondents reported they were less likely to stream a movie if they knew it was released in a movie theatre.

How often are you aware of whether the movie was released in a movie theater? →

	Always or Usually	Sometimes or Rarely	Total
I am <u>more likely</u> to stream a movie if I know it has been released in a movie theatre	62%	40%	53%
My decision to stream a movie is not impacted by knowing whether it has been released in a movie theatre	35%	51%	42%
I am <u>less likely</u> to stream a movie if I know it has been released in a movie theatre	3%	9%	6%
Total	100%	100%	100%
<i>Sample size</i>	1,286	905	2,191

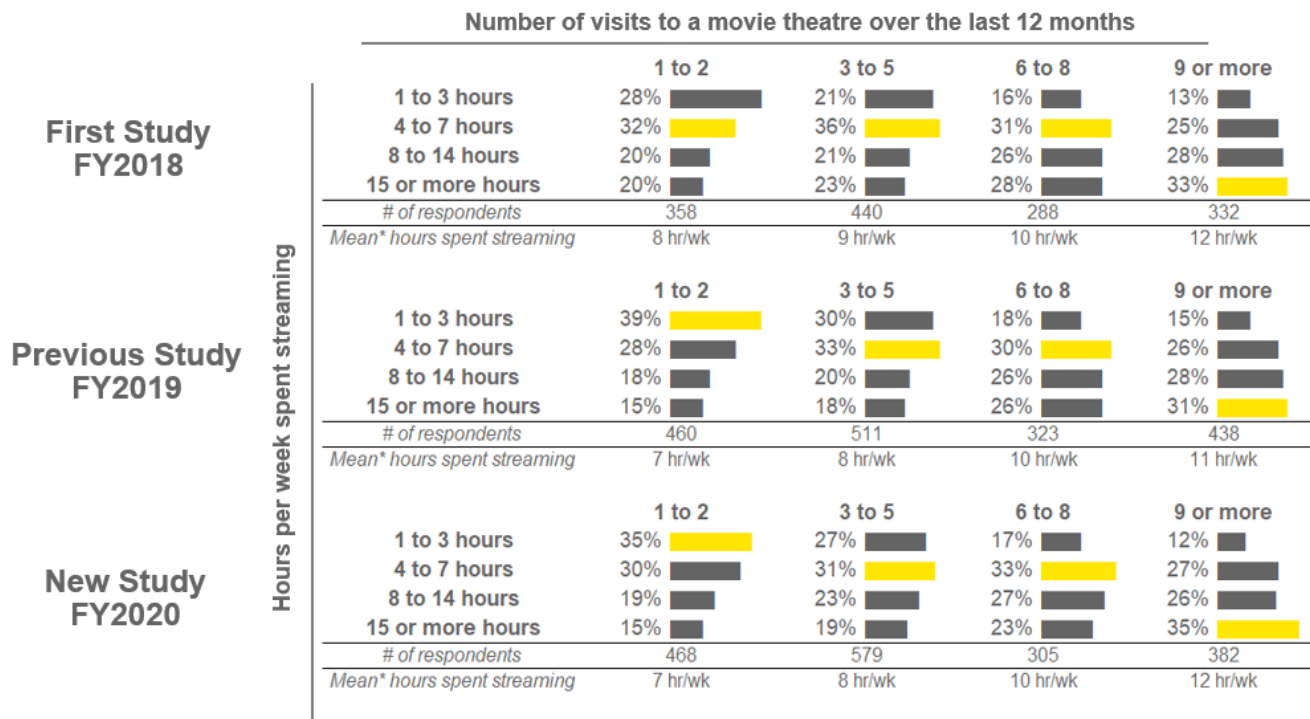
Note: Results presented include 2,191 respondents who indicated that they were, in some capacity (rarely, sometimes, usually, always), aware of whether the movie they streamed was released in a movie theatre. Respondents who reported that they were slightly, somewhat, or much more likely were grouped together as respondents who were more likely to stream a movie if they knew it was release in a movie theatre. Similarly, respondents who reported that they were slightly, somewhat, or much less likely were grouped together as respondents who were less likely to stream a movie if they knew it was released in theatres. Table may not sum due to rounding.

Source: EY analysis.

Comparison of results through all three iterations of the study (FY 2018-2020)

EY conducted the study in 2018 and 2019 as well. The results presented in this report have remained consistent through all three iterations of the study.

Figure E-3. Dual consumers movie theatre attendance and streaming consumption comparison



Note: Figures may not appear to sum due to rounding.
*Means are reported as 95% trimmed means.