

WAVE 10: COVID-19 IMPACT STUDY



BEHIND THE SCREENS

COVID-19 IMPACT STUDY BACKGROUND

As theaters closed their doors in mid March 2020 and the country sheltered in place, we set out to create a baseline of measurement by which we could track over time the potential changes in behavior and attitude as a result.

We tapped into NCM's proprietary online community of moviegoers and launched our first survey (Wave 1) at the end of March.

WAVE 10 OVERVIEW

NCM'S EXCLUSIVE MOVIEGOER INSIGHTS COMMUNITY

This study has been designed to monitor the impact of COVID-19 on NCM Moviegoers' lives and activities. This report provides you with the results of Wave 10 in our series of Coronavirus tracker surveys.

RESPONDENTS: NCM's Behind the Screens (BTS) Community

DATES: September 7-9, 2021 | **SAMPLE:** 1,202 | **DEMO:** A18+

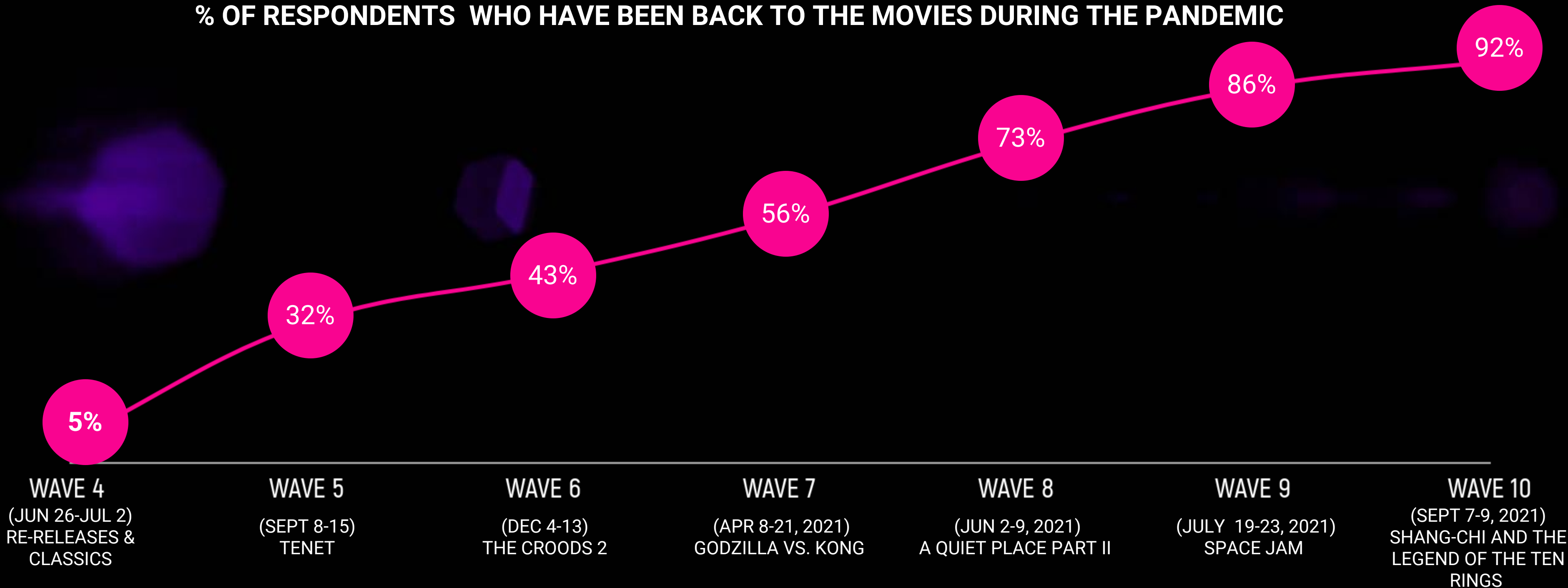
MOVIEGOING DURING THE PANDEMIC



BEHIND THE SCREENS

MOVIEGOERS HAVE STEADILY RETURNED TO THEATERS

% OF RESPONDENTS WHO HAVE BEEN BACK TO THE MOVIES DURING THE PANDEMIC



AND HAVE GONE TO THE MOVIES...

FREQUENTLY



11.6 Trips
to the movies on
average

VS
5.4 (Wave 6, Dec '20)

RECENTLY



92%
Have been
back recently
(past week/past month)

VS
62% (Wave 6, Dec '20)

ENJOYED TOGETHER

70%

Attended the movies
with friends and family

80%

Always have fun when they
go to the movies with
other people

DESPITE VARIANT, FAMILIES ARE GOING TO THE MOVIES



80%

**COMFORTABLE
ATTENDING A MOVIE***
(Parents w/Kids under 12)

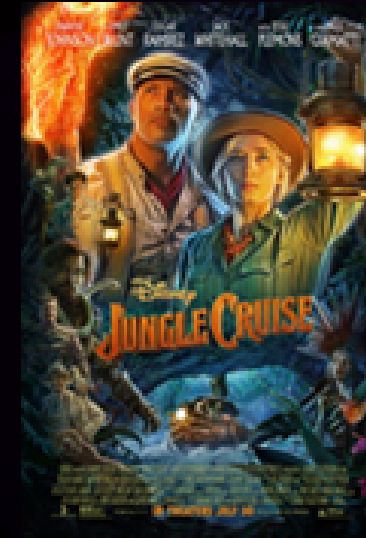
84%

**ARRIVE EARLIER WHEN
WITH THEIR KIDS**
(Parents w/Kids under 12)

% of Audience Under Age 18
(Opening Weekend)



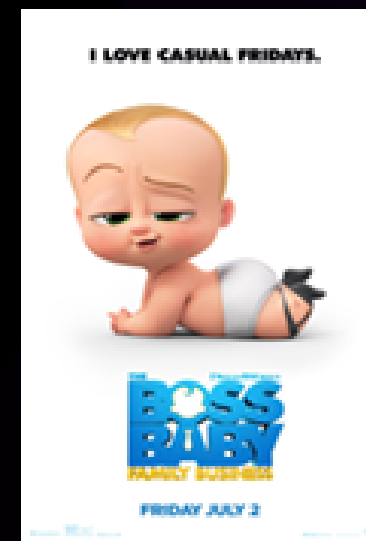
Paw Patrol
AUG 20
47%



Jungle Cruise
JUL 30
34%



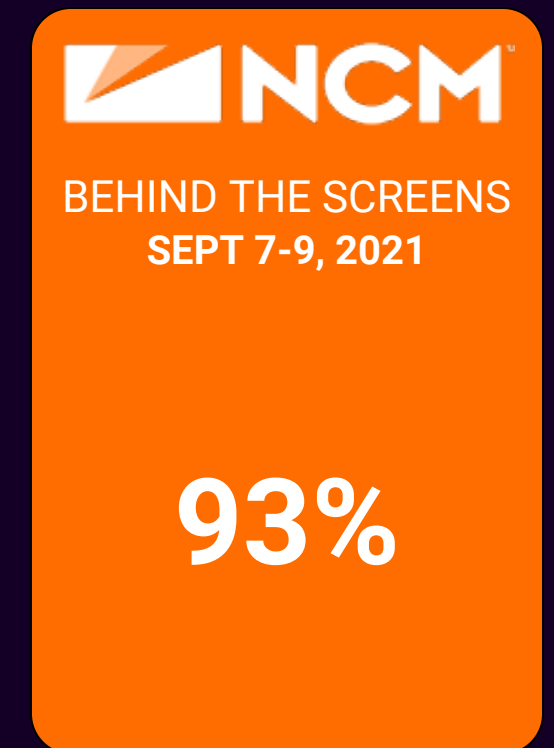
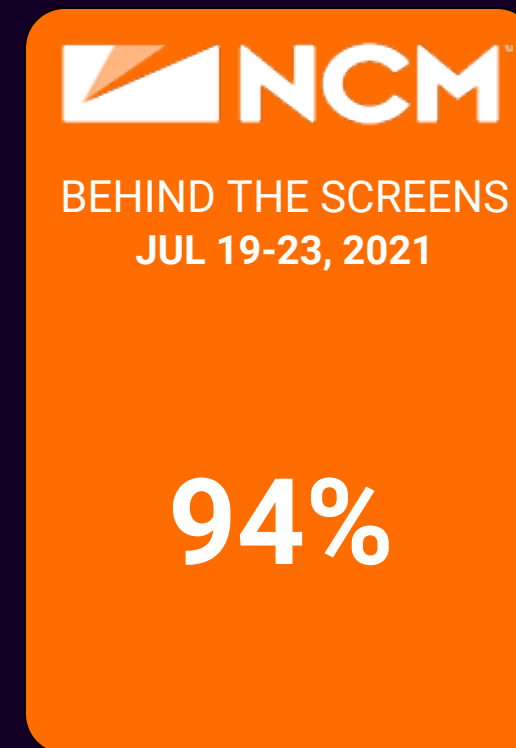
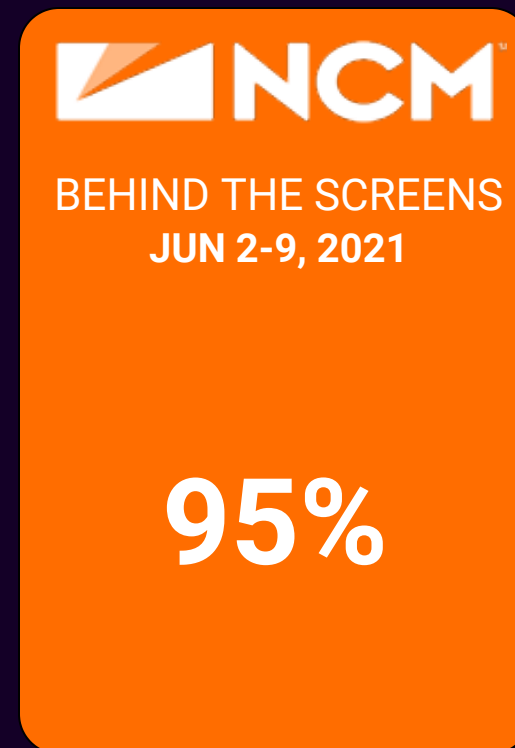
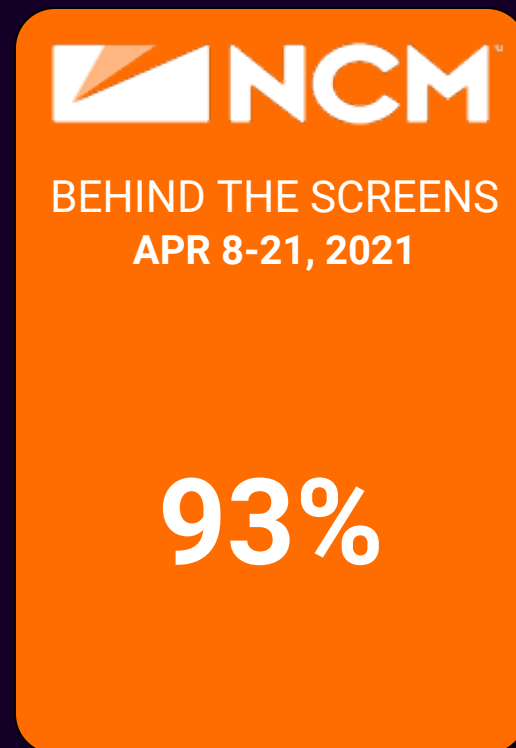
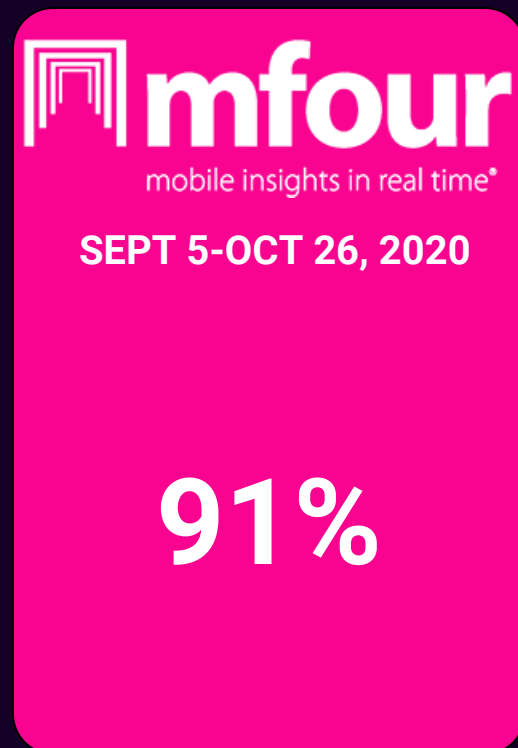
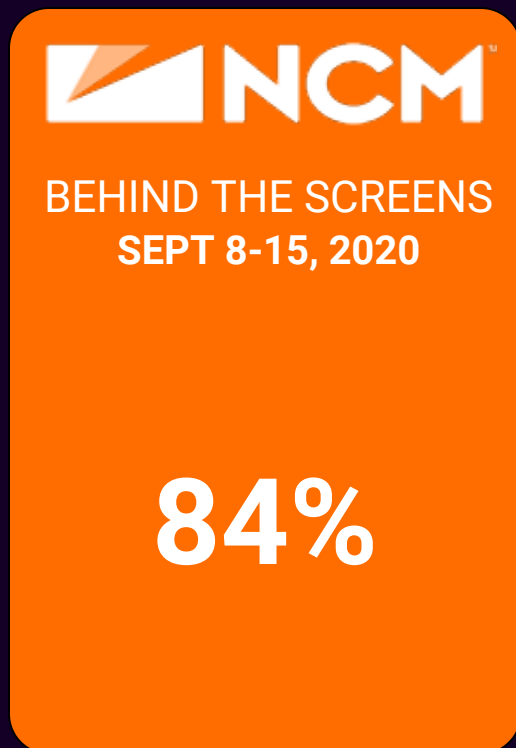
Space Jam: A
New Legacy
JUL 16
32%



The Boss Baby:
Family Business
JUL 16
50%
(Under Age 12)

CONSISTENTLY HIGH RECOMMENDATION SCORE

RECOMMEND GOING TO THE MOVIES TO
FRIENDS & FAMILY



MOVIEGOING IS A PLANNED EVENT



85%

Said going to the movies is an event I make plans for in advance



70%

purchased tickets via online/mobile app



Nearly **80%** of those that purchase their tickets in advance arrive to the theater early

MOVIES HAVE A LASTING IMPORTANCE IN CONSUMERS LIVES



98% Enjoy going to see movies in movie theaters



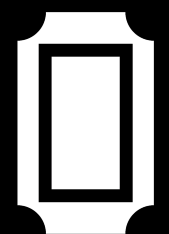
92% Going to the movies is a stress-relieving/relaxing activity



91% Watching movies is an important form of entertainment (at this time especially)



91% Movies provide an escape from life (at this time especially)



89% The experience of watching a movie in the theater cannot be replicated at home

MOVIEGOING OUTLOOK



BEHIND THE SCREENS

POSITIVE VACCINE IMPACT ON MOVIEGOING COMFORT

85%

are fully vaccinated
(vs. ~64% US Adult Fully
Vaccinated Rate*)

86%

are more comfortable going to
a movie theater, as
vaccinations have increased

“

*"Knowing that other people
are going to be vaccinated
or wear a mask definitely
makes me more excited to
go back to the movies."*

Female from Brooklyn

GETTING BACK TO NORMAL MOVIEGOERS ARE RESUMING ACTIVITIES

91%

Have resumed all,
most, or some of their
pre-COVID leisure
activities



MOST COMFORTABLE VISITING MOVIE THEATERS

Entertainment Venues Most Comfortable Visiting:

#1 Movie Theaters

#2 Museums

#3 Performing Art Theaters

#4 Bowling Alleys/Pool Halls/Arcades

#5 Sporting Arenas/Stadiums

#6 Live Music/Concert Venues

#7 Casinos

MOVIEGOERS ARE MOST EXCITED TO SEE...

1.



**Spider-Man:
No Way Home**
12/17

2.



Eternals
11/5

3.



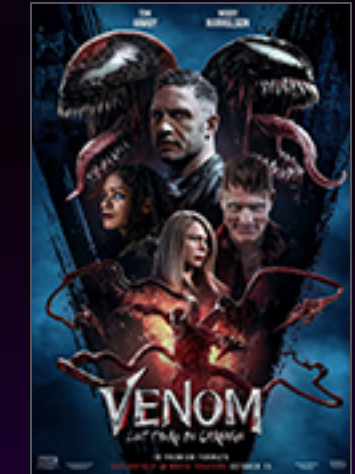
No Time to Die
10/8

4.



**Ghostbusters:
Afterlife**
11/19

5.



**Venom: Let There
Be Carnage**
10/1

6.



Dune
10/22

7.



The King's Man
12/22

8.



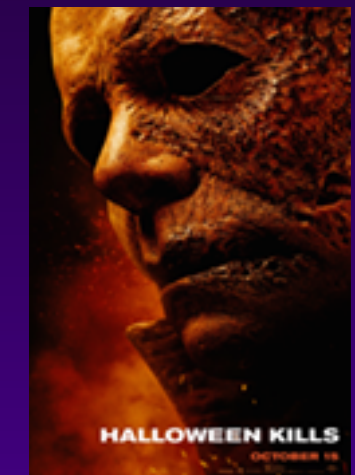
**The Matrix
Resurrections**
12/22

9.



West Side Story
12/10

10.



Halloween Kills
10/15

APPENDIX



BEHIND THE SCREENS

BEHIND THE SCREENS OVERVIEW

NCM'S EXCLUSIVE MOVIEGOER INSIGHTS

6,500+ registered members that are uber-movie fans (as of September 2021)

Established in June 2015, panelist surveyed regularly

The online community is primarily comprised of frequent moviegoers (defined as attending 1+ times a month)

Allows NCM to develop an expertise on the moviegoing audience

Panelists feel empowered in knowing that their responses influence the evolution of the moviegoing experience

THANK YOU



BEHIND THE SCREENS