

NCM Behind The Screens™ (BTS) Community Study Wave 10

Survey Dates: Sept 7-9, 2021

Sample: 1,202 Respondents

Study Background:

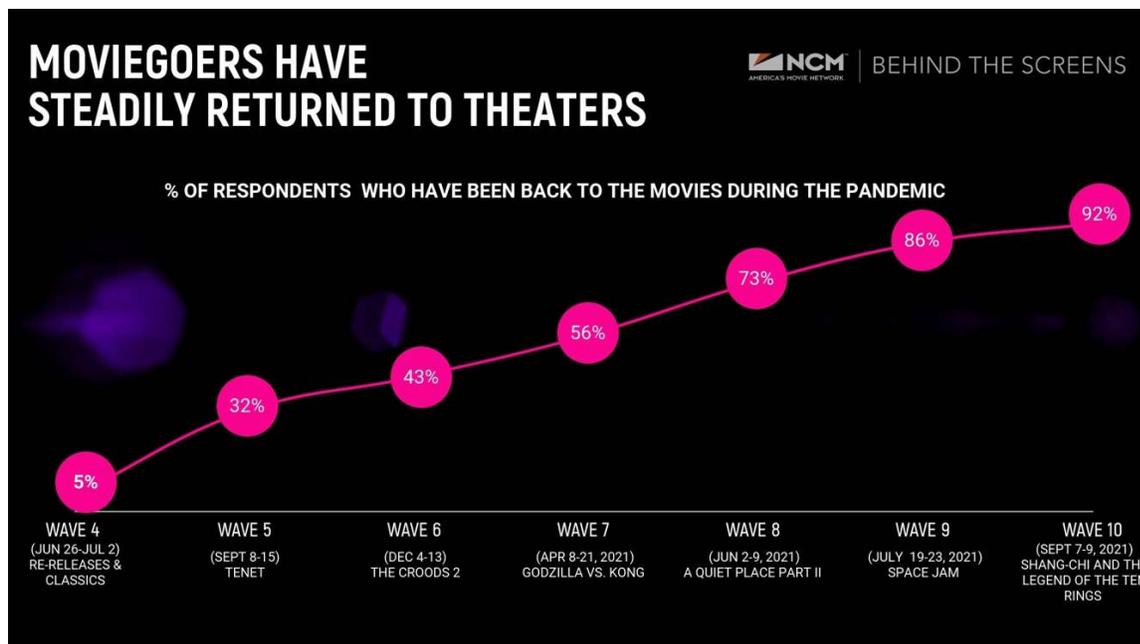
As theaters closed their doors in mid-March 2020 and the country sheltered in place, we set out to create a baseline of measurement by which we could track over time the impact of the COVID-19 virus on our audience by surveying our online community of moviegoers, NCM's Behind The Screens™ Community.

Since Wave 1 (March 2020), we've continued to track the impact at each stage of the pandemic on them, from sheltering at home to returning to leisure activities, especially moviegoing.

The following provides highlights from our most recent survey wave (Wave 10) conducted the week after the opening of *Shang-Chi and the Legend of the Ten Rings*.

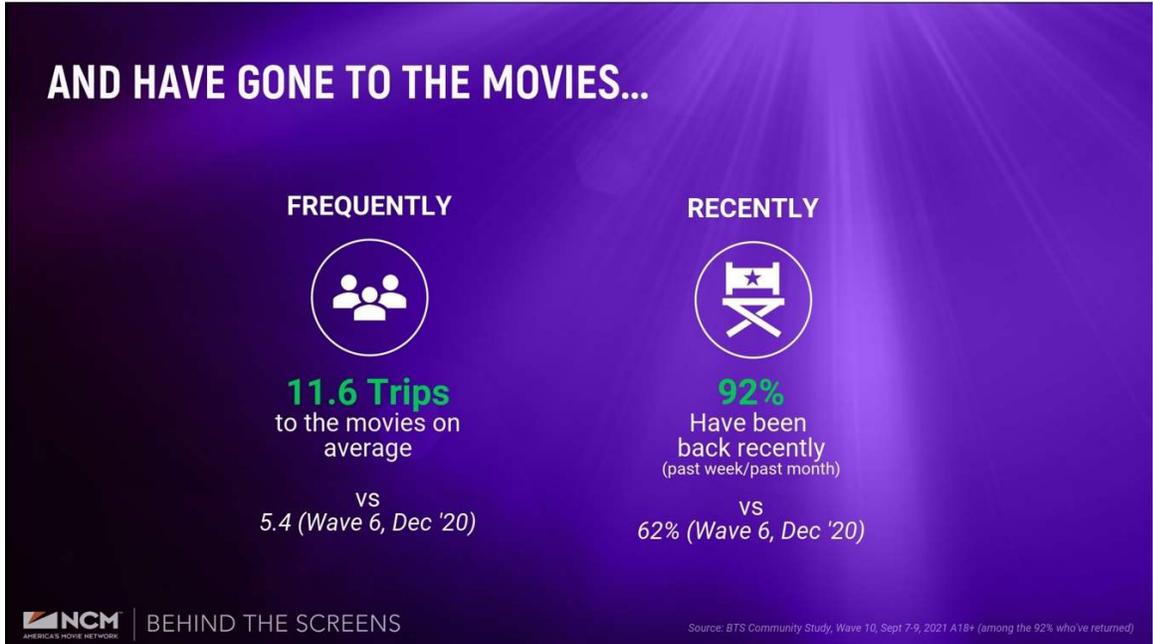
Highlights:

- **Steady return trend to theaters**
 - 92% of the BTS community surveyed said they have been back to the movies during the pandemic
 - +7% lift vs. 86% in Wave 9 (July 2021)
 - Nearly tripling the return rate seen a year ago in Wave 5 (September 2020)



- **Over time, moviegoing behavior has seen an upward trend in terms of frequency & recency**
 - Frequency: Moviegoers have taken 11.6 trips to the movies on average during the pandemic
 - Vs. 5.6 trips when first asked in Wave 6 (December 2020)

- Recency: 92% have been back recently (past week/month)
 - Vs. 62% when first asked in Wave 6 (December 2020)



- **Moviegoining is a shared & highly recommended experience**
 - 70% attend the movies with family & friends
 - 4 out of 5 respondents (80%) said they always have fun when going to the movies with other people
 - Based on their experience, 93% would recommend going to the movies to friends & family (*consistent with prior waves*)



CONSISTENTLY HIGH RECOMMENDATION SCORE

RECOMMEND GOING TO THE MOVIES TO FRIENDS & FAMILY



BEHIND THE SCREENS

Sources: NCM BTS Community Studies [9/8-9/15/2020, 4/8- 4/21/2021, 6/2-6/9/2021, 7/19-7/23/2021, 9/7-9/9/2021], Mfour & NCM Moviegoing Survey [9/5-10/26/2020]

- **Parents (of kids under 12) are comfortable going to the movies with their children**
 - 80% of parents with kids under 12 feel comfortable (very/somewhat) attending the movies w/their kids
 - 84% arrive earlier to the theater when attending with their kids

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%

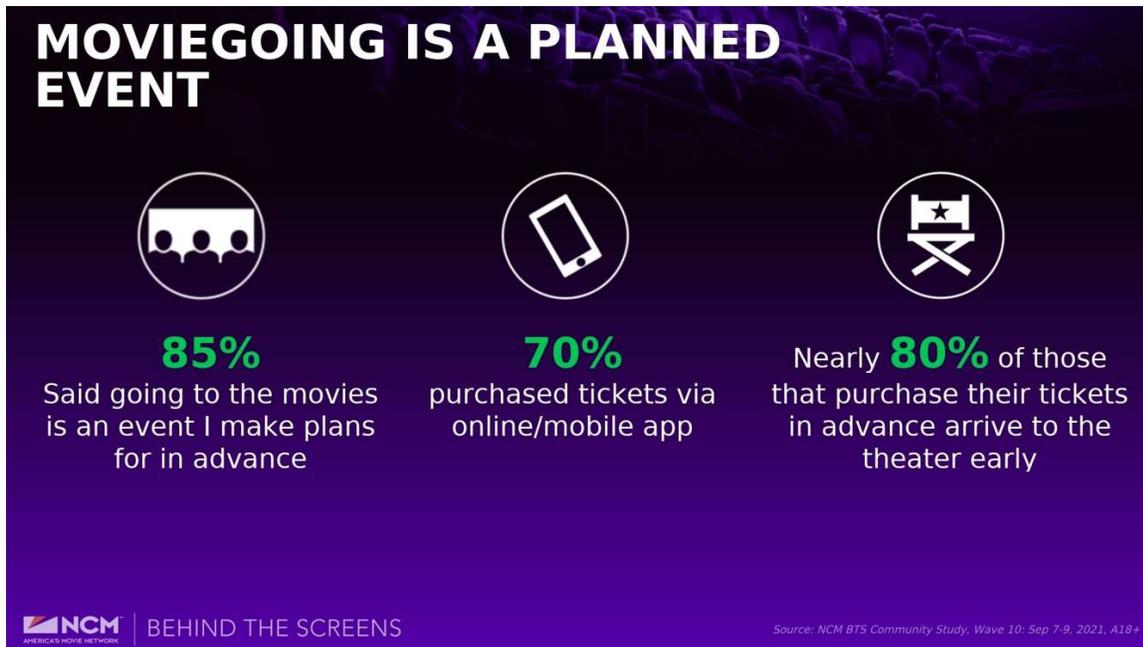


The Boss Baby: Family Business
JUL 16
50% (Under Age 12)

Sources: ComScore, BTS Wave 10, Sep 7-9, 2021
*Responses include somewhat/very comfortable

- **Moviegoing is a planned event**
 - 85% said going to the movies is an event I make plans for in advance

- 70% bought their tickets in advance via online/mobile app
- Even with a high percentage of online ticket purchases, nearly 80% stated that they arrive to the theater early



- **The movies has a lasting importance in consumers lives**
 - The sentiment around going to the movies has remained strong throughout the pandemic
 - 98% enjoy going to see movies in movie theaters
 - *On par with all 9 prior waves*



- **Moviegoers are vaccinated and returning to their “pre-COVID” lives**
 - 85% are fully vaccinated (vs. ~64% US Adult Fully Vaccinated Avg as of 9/9/21)
 - As vaccinations have increased, 86% of moviegoers are more comfortable going to a movie theater
 - More than 90% have resumed all, most, or some of their pre-COVID leisure activities
 - When asked which entertainment venues respondents were most comfortable visiting, movie theaters ranked #1, beating out museums, performing art theaters, bowling alleys/pool halls, sporting arenas, live music/concert venues, and casinos

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

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AMERICA'S HOME NETWORK

Source: NCM BTS Community Study, Wave 10: Sep 7-9, 2021, A18+; NCM BTS Community Focus Group Study, 8/19/21; *CDC as of 9/9/21, A18+.

GETTING BACK TO NORMAL MOVIEGOERS ARE RESUMING ACTIVITIES

91%
Have resumed all, most, or some of their pre-COVID leisure activities

NCM | BEHIND THE SCREENS
AMERICA'S HOME NETWORK

Source: NCM BTS Community Study, Wave 10: Sep 7-9, 2021 A18+

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

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Source: NCM BTS Community Study, Wave 10 Sep 7-9, 2021, A18+
As entertainment venues have reopened since the start of the pandemic, please select the venues you feel most comfortable visiting

- High anticipation for upcoming Q4 films
 - Top 5 anticipated Q4 films:
 - Spider-Man: No Way Home
 - Eternals
 - No Time to Die
 - Ghostbusters: Afterlife
 - Venom: Let There Be Carnage

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

NCM | BEHIND THE SCREENS

Source: NCM BTS Community Study, Wave 10 Sep 7-9, 2021, A18+

NCM's Behind The Screens™ Overview

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



BEHIND THE SCREENS