

**PCH CONSUMER INSIGHTS**

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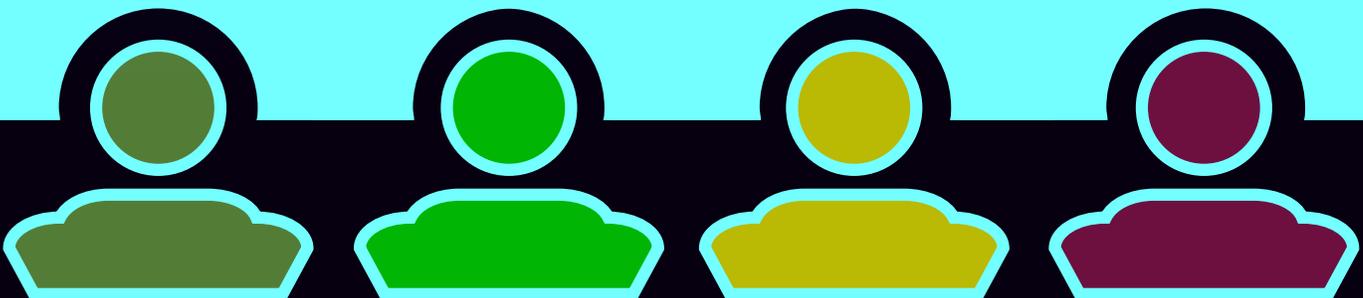
# AMERICANS AT THE MOVIES

**A STUDY OF AMERICAN MOVIE AUDIENCES  
AND THEIR MOVIE WATCHING HABITS**

BY

**PUBLISHERS CLEARING HOUSE & EVAN SHAPIRO**

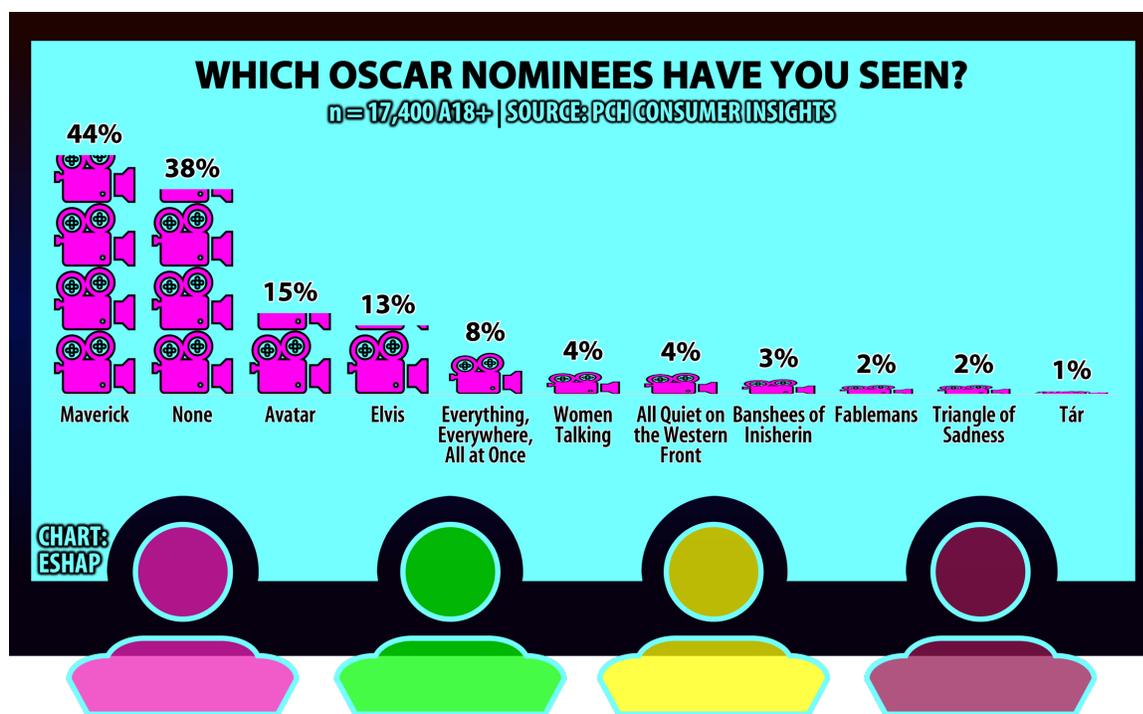
BASED ON DATA FROM 17,400 US ADULTS 18+



Just in time for the 2023 Oscars this is *AMERICANS AT THE MOVIES*, the latest collaborative consumer Media study from PCH Consumer Insights and Media expert Evan Shapiro. In February, we surveyed 17,400 Americans about many of their Movie watching habits.

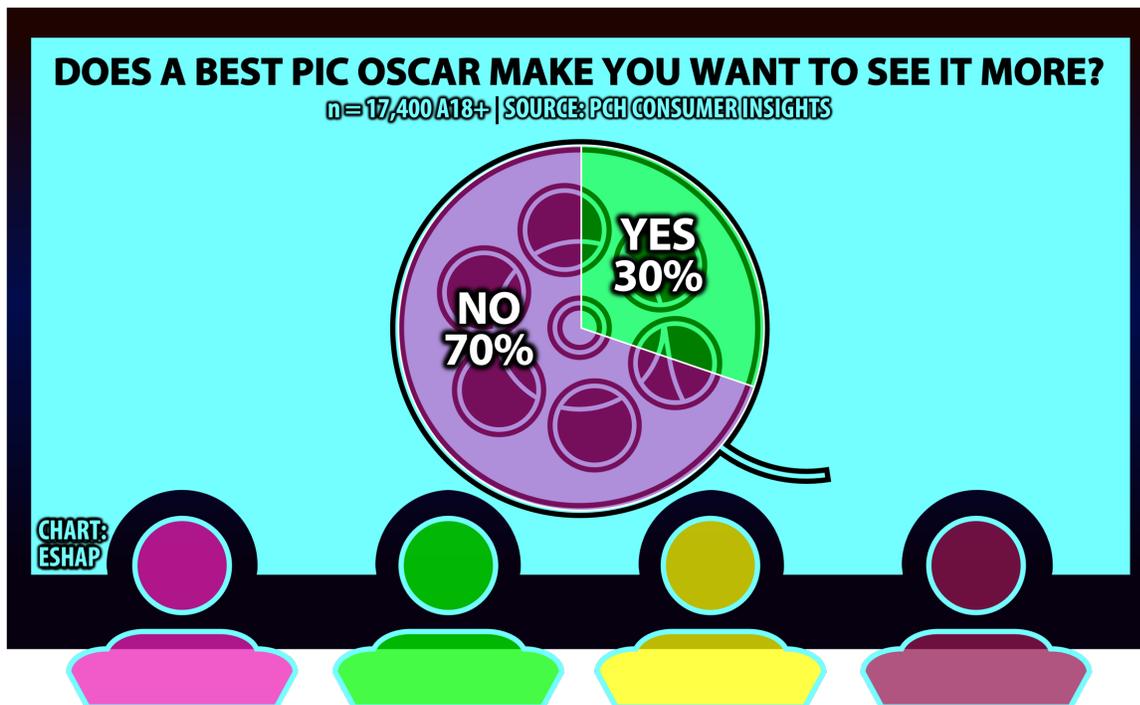
[NOTE: This is a 17,400-person sample of first party data. We have thousands of behavioral attributes by which to slice it. This is the fourth collaborative study from Evan Shapiro and PCH Consumer Insights. With this white paper, we're launching a Media Data Monthly Membership: Members get additional cuts of our monthly survey data, tailored to specific requested demos or attributes. If you'd like to know more, click here.]

The results of our massive Movie study offer very mixed reviews for Oscar's Best Pic nominees...

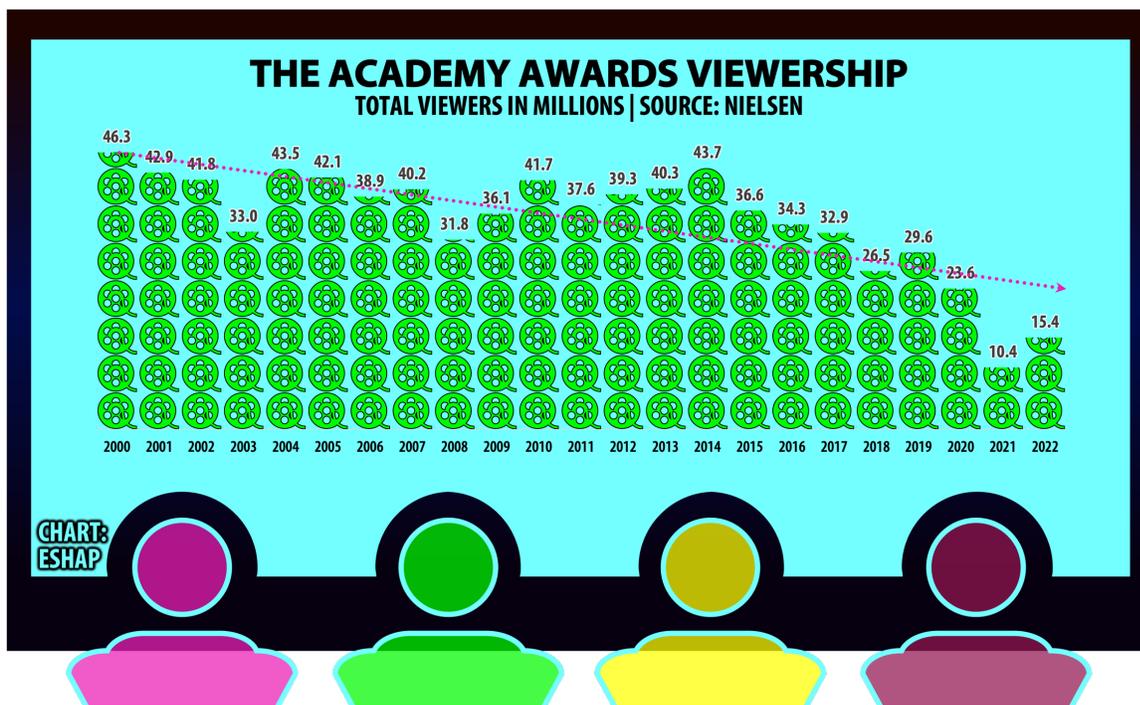


*Avatar* is the worldwide Box Office champ of 2022, with \$2 billion in tickets sold. Given that our sample was limited to adults 18+, Movie goers 13-18 are not represented, so *Avatar's* audience is likely underrepresented. However, *Avatar* is also unavailable on streaming, whereas *Top Gun* was top dog at the US Domestic box office and is now streamable on Paramount+ and virtually everywhere else on demand. Which is why Tom Cruise won the battle of the big sequels in our survey.

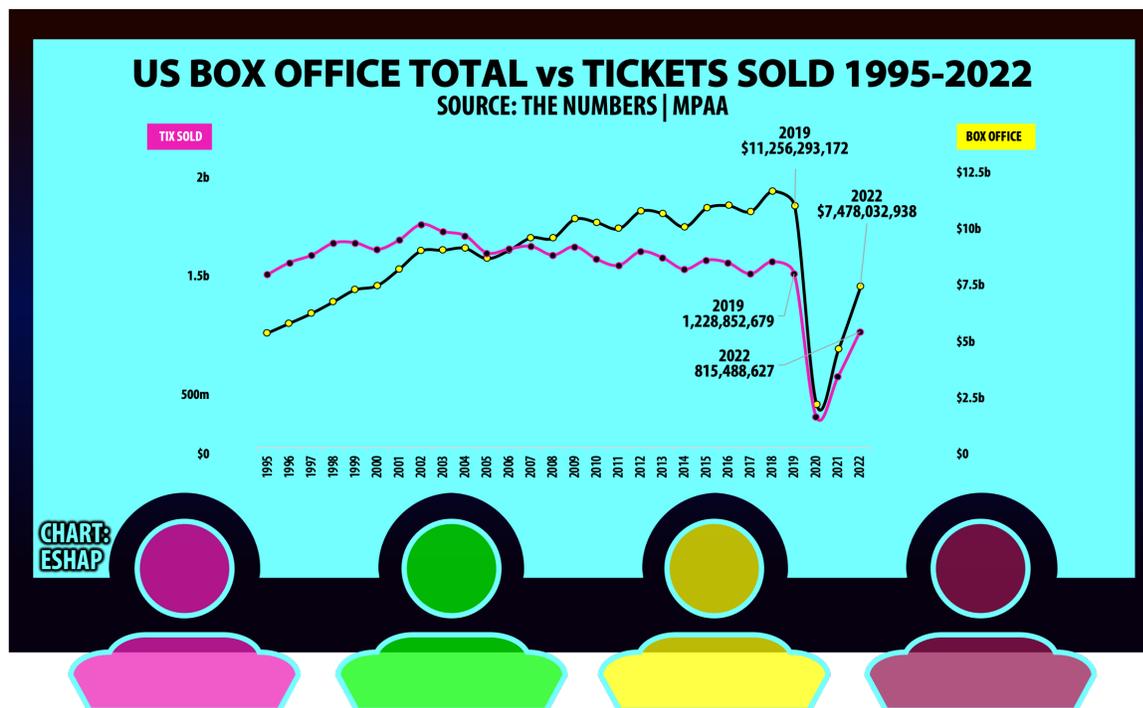
While *Maverick* and *Avatar* were the clear audience favorites among nominees, **twice as many people saw none of the nominated films for Best Picture than all the other Oscar nominated films.** There is a general and obvious lack of urgency among Americans for this year's Oscar films. And this ennui seems to carry over to The Oscars themselves.



By more than 2 to 1, Americans don't seem to care much if a movie wins the Academy Award for Best Picture, especially when determining to see it. This lack of interest in our survey gives well with the Oscars telecast viewing trajectory:



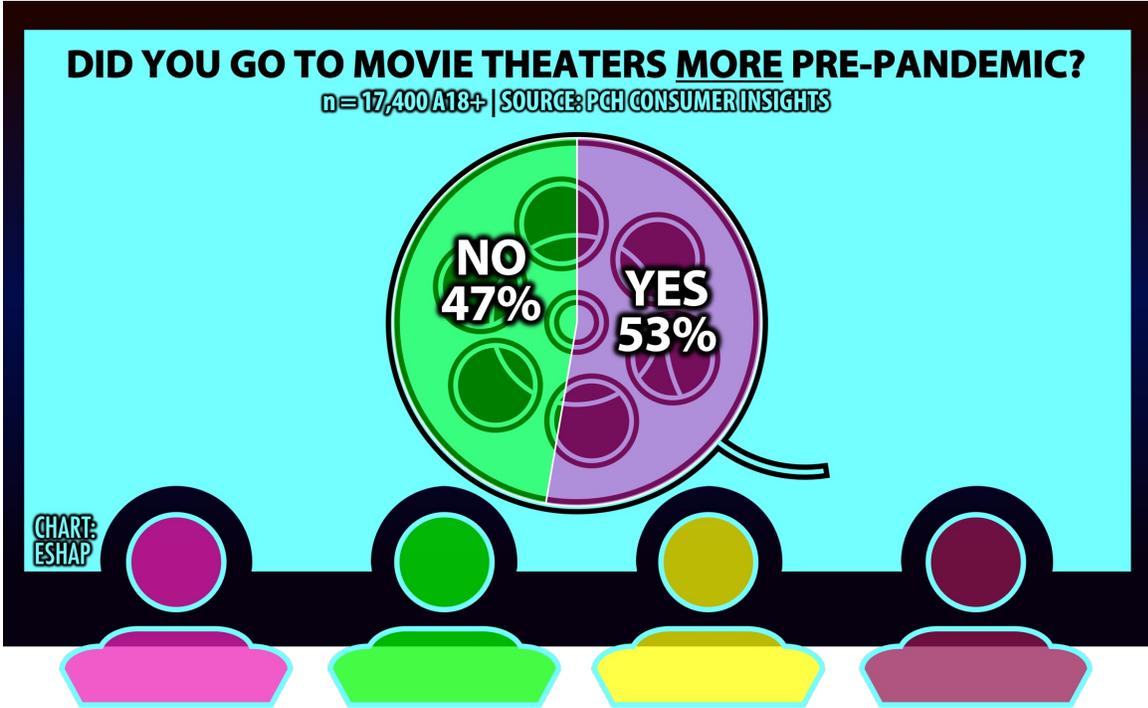
The “slap heard ‘round the world” helped jolt Oscar viewing a year ago. Perhaps the promise of seeing Tom Cruise jump out of something high on live TV will *Goose* this year’s audience. But for some time, Oscar viewing has been headed in the same direction as Movie theater sales: Down.



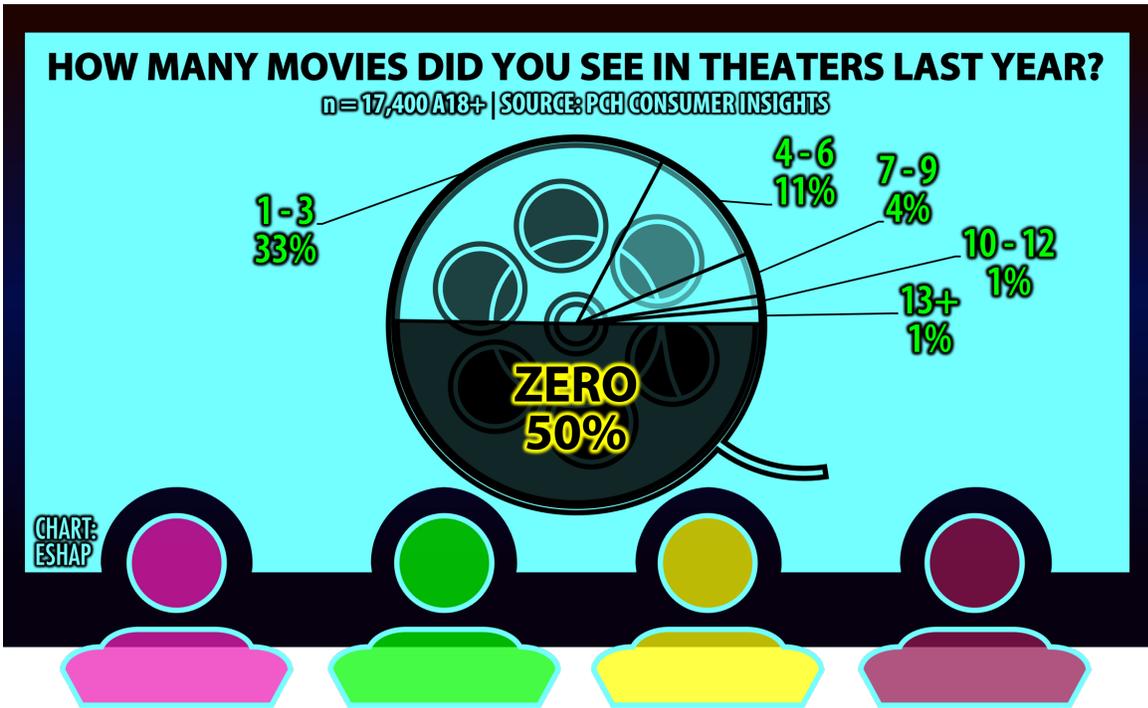
Ticket sales and box office receipts bounced back in 2022 - in large part because of Cruise and James Cameron. But domestic B.O. and total ticket sales were both still 34% below 2019 levels. Look more closely and you’ll see that tickets sold for US Movie theaters had been on a long, slow slide heading into 2019. Movie ticket sales plateaued more than twenty years ago. Theater owners addressed this by raising prices.

**In 2019, US Movie theaters sold 25% fewer tickets than in 2001, and tickets cost 60% more.**

This widening price dichotomy plays an important role in the current state of movie watching, as you will read later. By 2019 more and more consumers were learning to wait for the movies they wanted until they hit TV or streaming. Then the pandemic hit, and what was already a trend became a permanent behavioral shift.

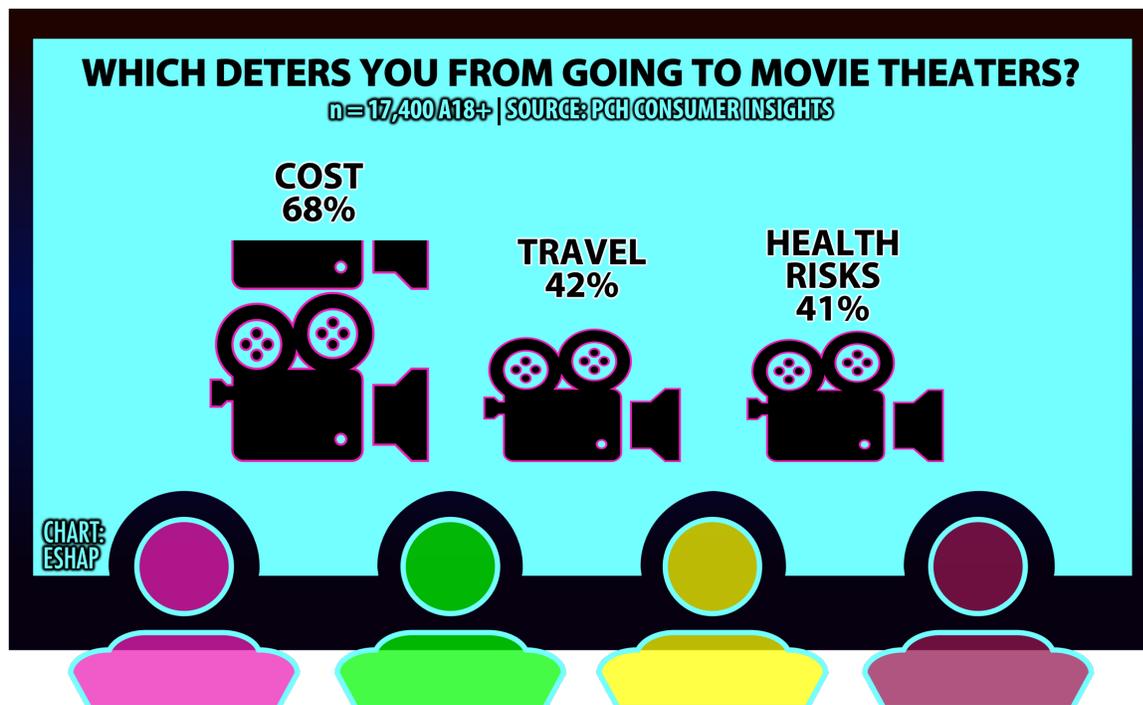


53% of Americans say they go out to the Movies less now, after restrictions have eased, than before lockdown. More pointedly...



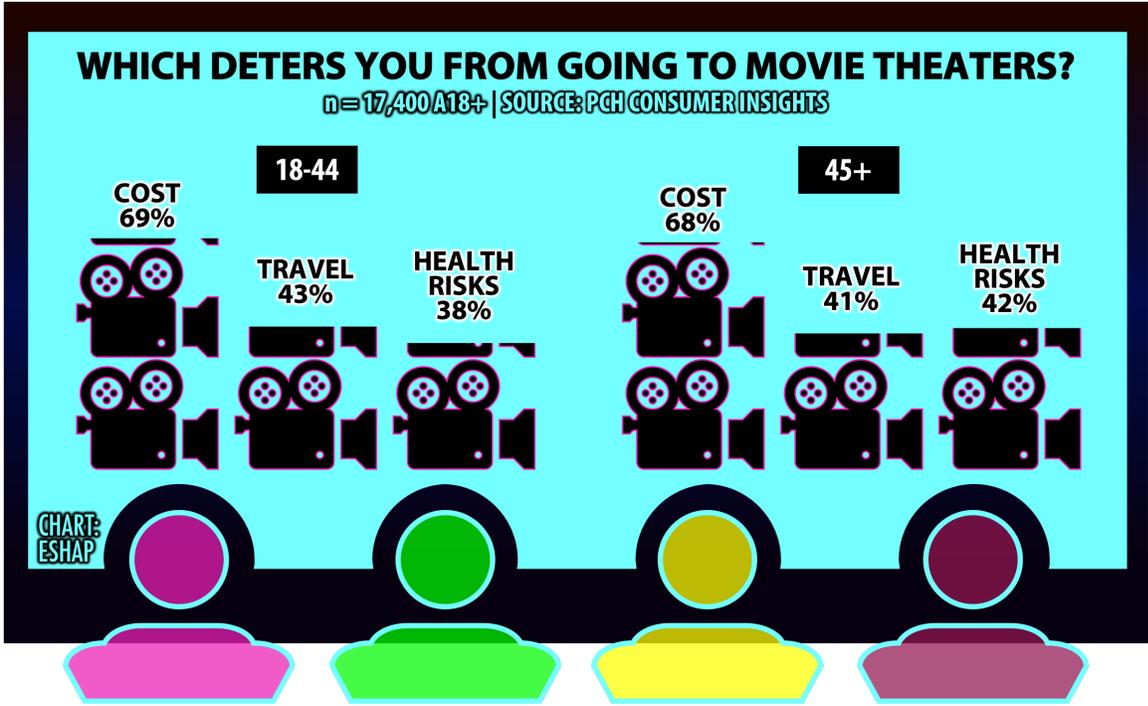
Half of Americans say they went to the Movies zero times in the last year, with 83% saying they went out to a Movie theater three or fewer times.

As much as COVID scares and lockdown life got consumers used to streaming Movies in windows once held sacred for cinema, neither health nor inconvenience were Americans' top complaint about Movie theaters.

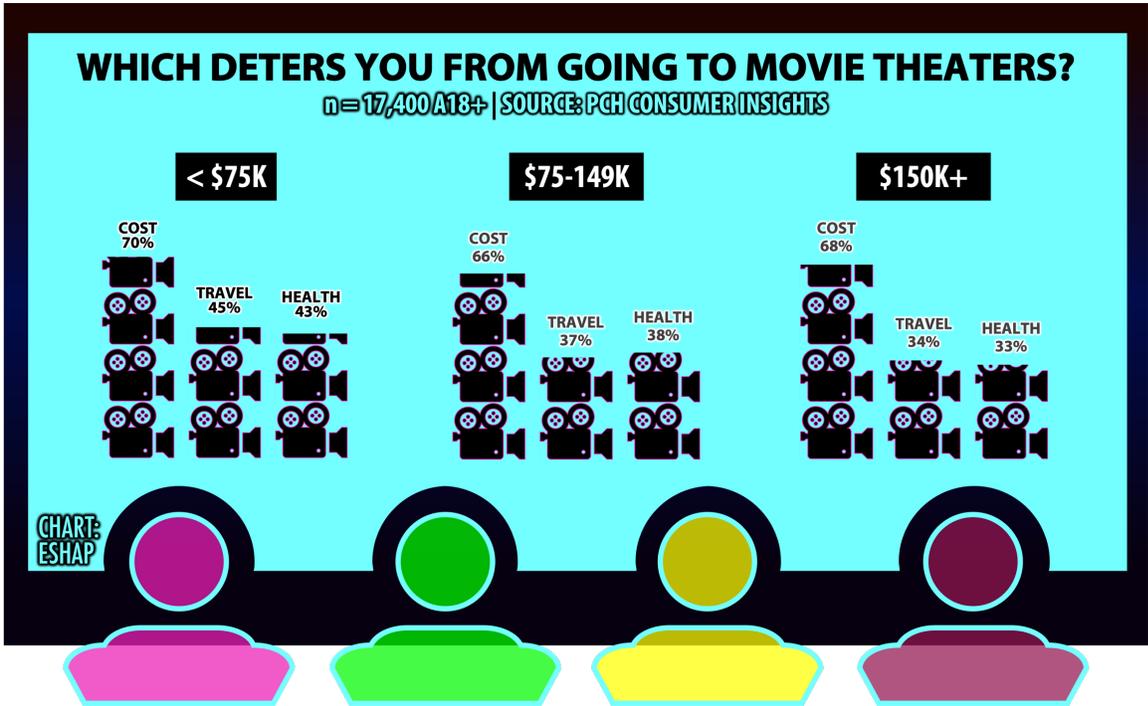


By far, the cost of going to the Movies is what stops Americans from going to the movies. The Pandemic obviously shifted Movie-going as a priority for American culture, but despite COVID concerns, the annoyance of leaving is more of a deterrent for theater-going than risks to our health, and the price of going to a theater is a far stronger force keeping people at home for their films.

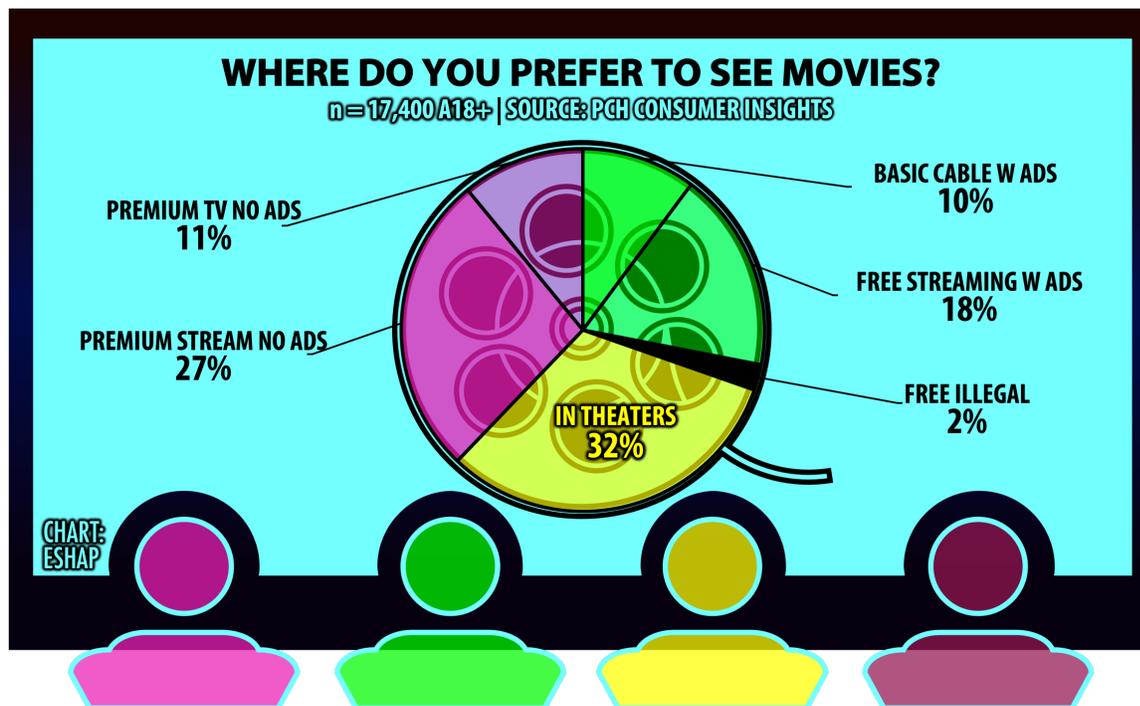
This plays out similarly across all ages...



And income levels...



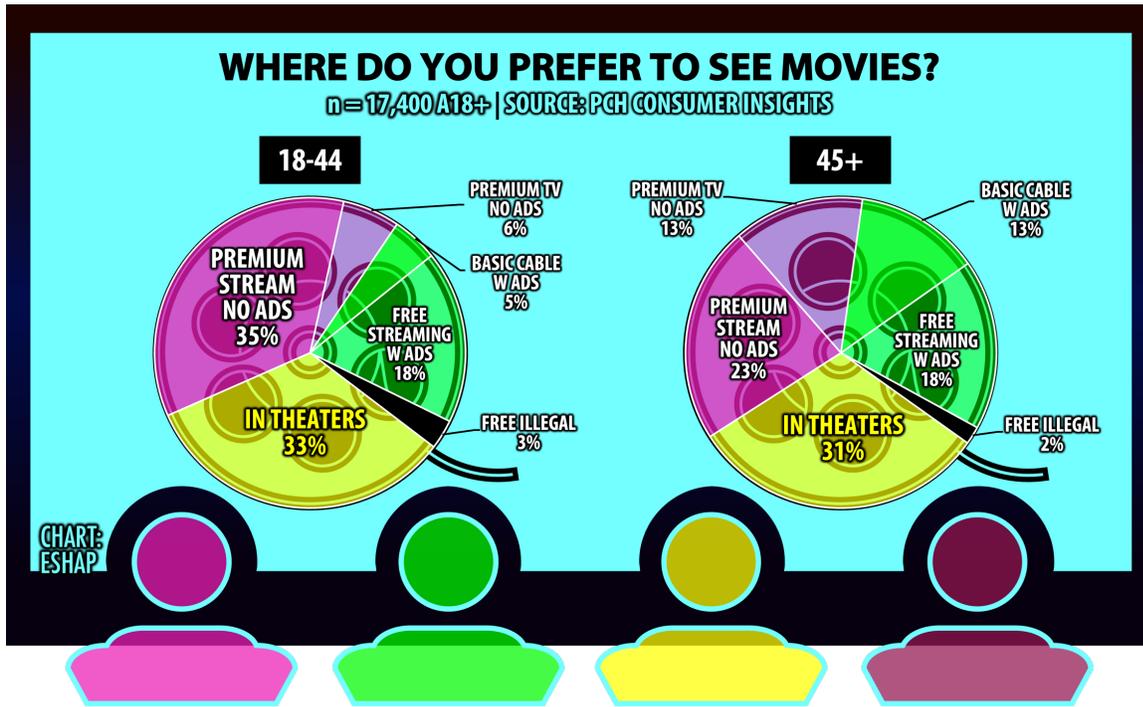
This data shows that the cost of the Movie theater experience is not just a concern, it's a calculation. Even at the highest income levels, price remains the biggest deterrent to Movie-going. And this price challenge lives in the minds of American Movie-lovers in context with all the other choices they now have for see the Movies they love.



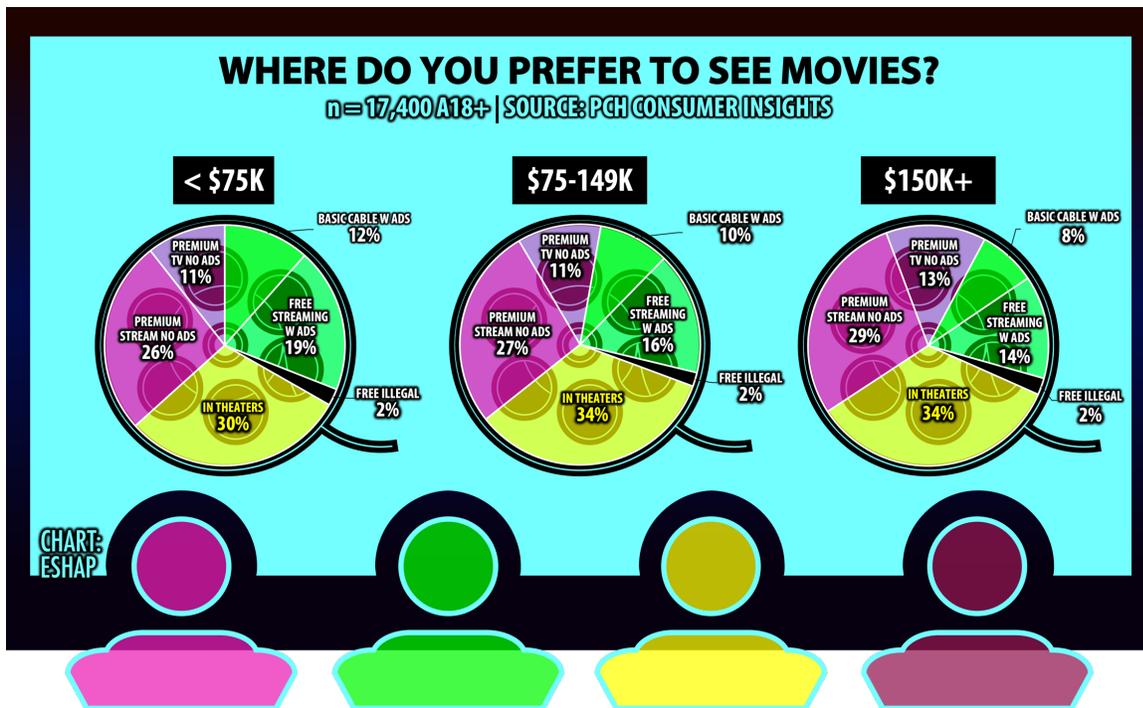
**32% of Americans do say they prefer to see Movies in theaters, and this is more than any other single choice. But 68% of consumers now choose options other than going to theaters for watching their Movies, and 45% of Americans now prefer streaming (free or paid) to the silver screen – more than all other choices.**

There is very clearly a sizable Movie-lover cohort. About one-third of Americans are *Movie-Goers*, who *go out* to the Movies. 32% say it's their preference. 33% say they saw at least one Movie in a theater in the last year. 30% say that a Best Pic Oscar will make them want to see a Movie more.

But going to the Movies appears to be a mindset. And, regardless of age or income, *Movie-going* seems capped at one-third of American Movie-watchers, while streaming is a growing blockbuster across all demographics.



Movie theaters pull similar segments from every age. Streaming Movies skews younger, but only because older audiences still watch “Movies on the TV.”



Higher incomes show slightly more Movie ticket-buying. This likely reflects both lower price sensitivity as well as a wider array of Movie theater choices in higher income neighborhoods. But, even at the highest incomes streaming Movies at home beats out Movie-going.

n=17,400 A18+ | SOURCE: PCH CONSUMER INSIGHTS

**HAVE YOU EVER  
SUBSCRIBED TO  
AN SVOD SERVICE  
BECAUSE A  
SPECIFIC MOVIE  
PREMIERED ON IT?**

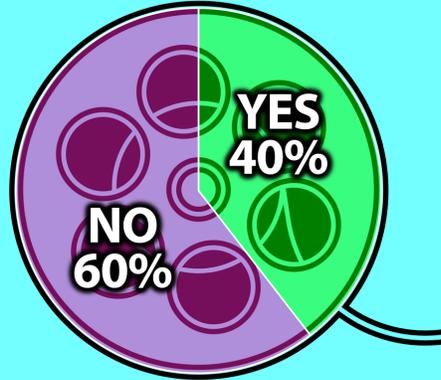
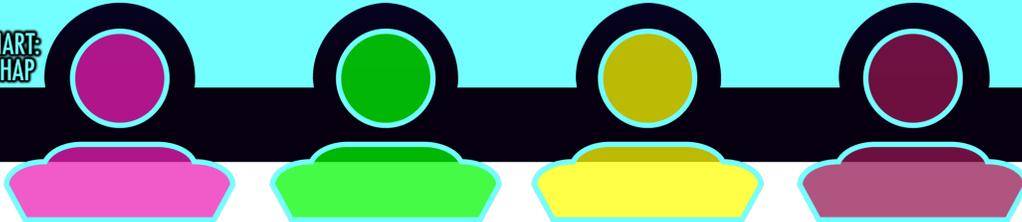
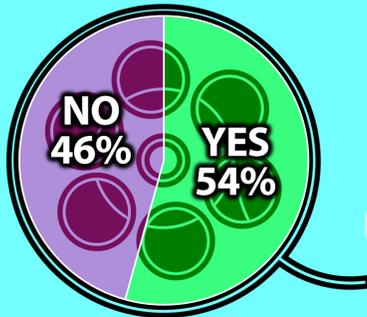


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n=17,400 A18+ | SOURCE: PCH CONSUMER INSIGHTS

18-44



**HAVE YOU EVER  
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45+

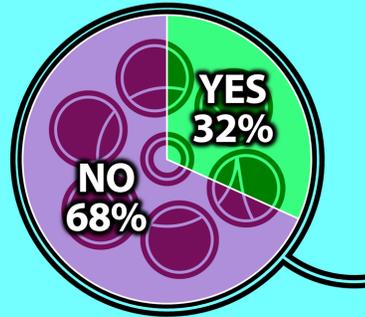
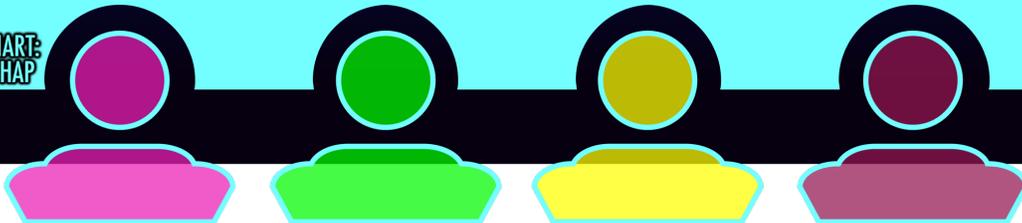
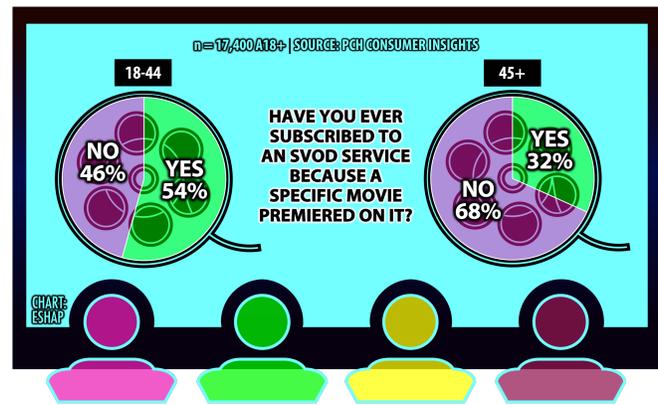


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Viewing of both *Everything, Everywhere, All at Once* and *Elvis* were very likely lifted by streaming on Amazon and HBOMax. Like many Movies these days, across all ages and incomes, even Best Pic honorees get a “wait for it” factor.

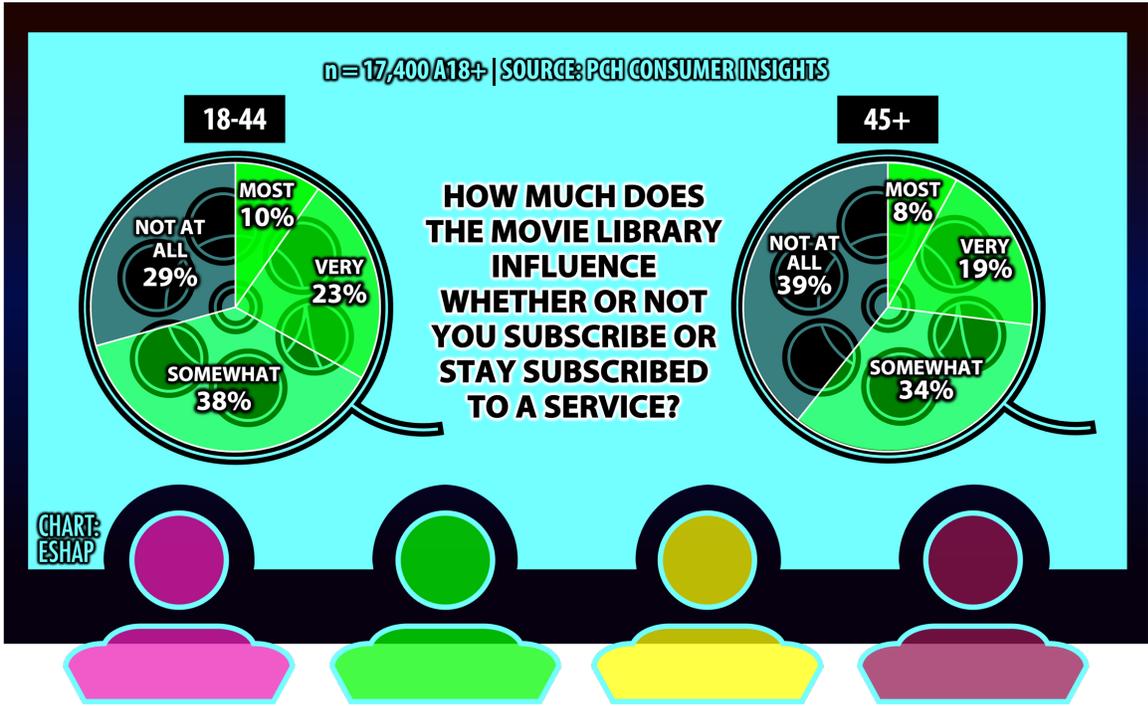
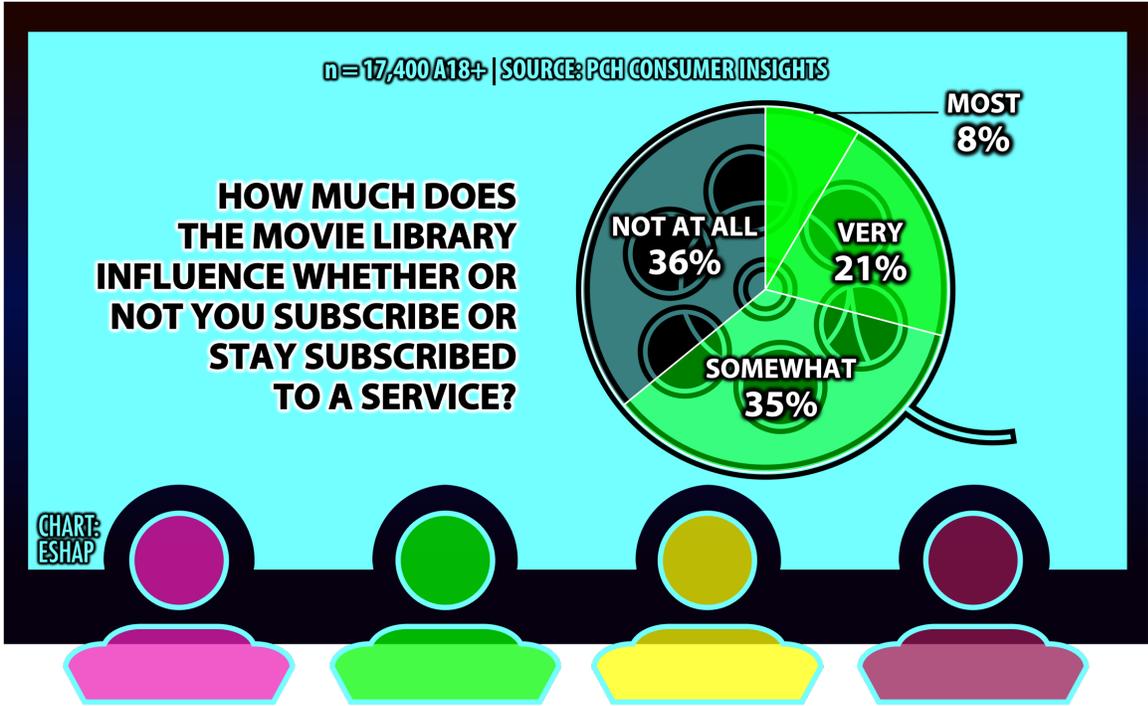
**40% of American Movie-lovers say they have subscribed to a premium streaming service for a specific Movie.**

**The Media industry has taught consumers how to plan to wait for Movies to leave theaters. Movie premieres matter to streaming audiences as much as theater-going matters to Movie-Goers.**

Unlike Movie-going, Movie streaming is not monolithic across all ages and stages. Subscribing to a premium streamer for a specific Movie premiere changes imperceptibly across incomes but signing up for a first-run Movie does have demographic sweet spot.

Americans over 45 do subscribe to streamers for Movie premieres, at a sizable 32% - more than say they regularly go out to a Movie theater. However, *the majority* of consumers under 45 (56%) have said they have subscribed for a specific Movie - that’s 26% more younger Americans than go to theaters. Streamers looking for younger consumers might do well to lean on Movies, but, based on our last major Media consumer study, there’s a real danger those consumers would come for a Movie and then churn out like hot butter on a large popcorn after watching.

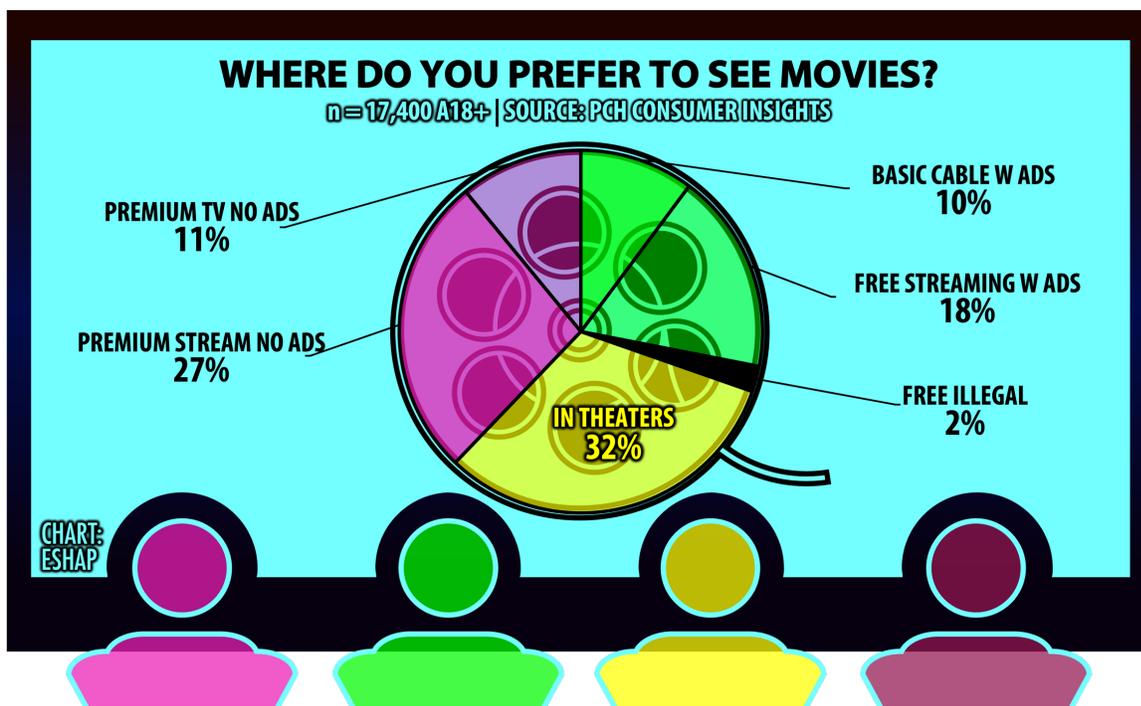
Like second run theaters, film libraries seem to matter less to streamers than big new releases. But they do seem to keep certain streaming subs from heading for the virtual exits, and again, there’s a sizable difference among age groups.

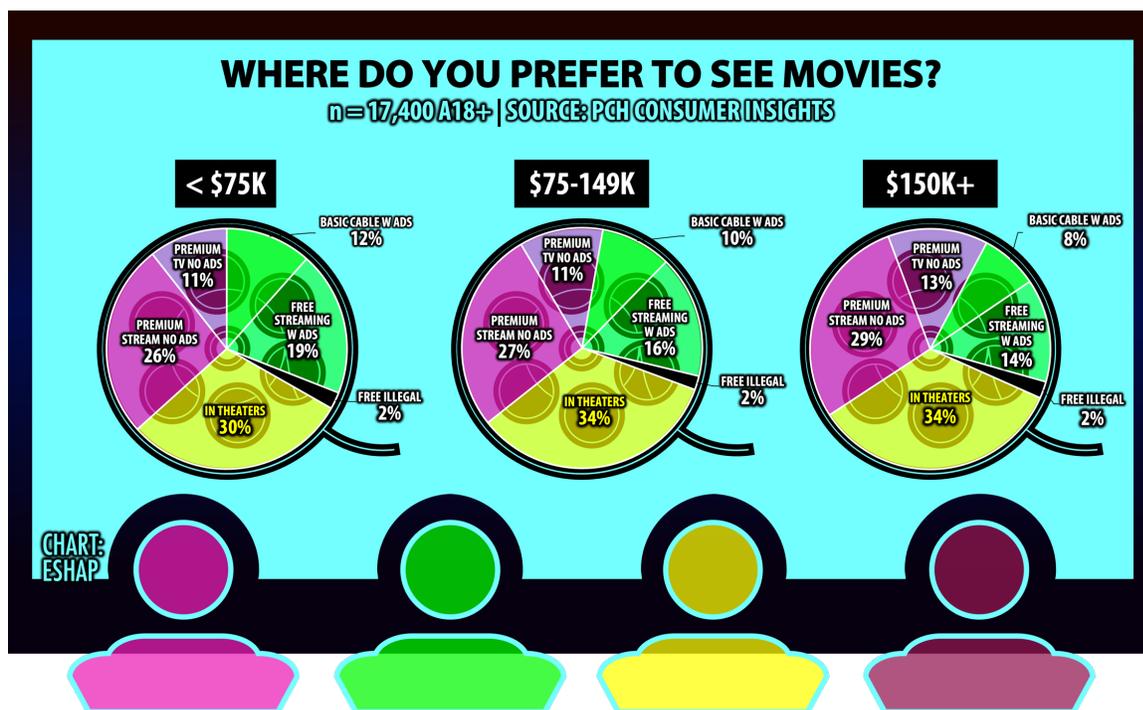


Like Movie premieres, Movie selection matters more to younger streamers than older audiences. One-third of subscribers under 45 say that a streamer's Movie library is either the most or very important thing keeping them subscribed. While it's lower for older subs, more than one quarter of all streaming audiences say that a platform's Movie catalog is very or most important to keeping them from canceling.

The lack of viewing for most of the Oscar nominated pictures, and a lack of urgency around who wins, seems to point to continued low viewership for the upcoming Oscars. But the data we've collected, when juxtaposed with the historical data of Movie box offices and ticket sales, indicates much bigger issues for America's theaters. Limited variety and consistently increasing prices were pushing Americans away from theaters and towards streaming options before the pandemic. The acceleration of streaming adoption and increased direct to streaming Movies over the past few years have combined with household economic calculations to create a new normal for Americans and their Movies.

There is a die-hard ticket buying community of Movie-loving theatergoers. They make up about one-third of American consumers. But cost and convenience has stopped even them from buying at the box office more. Meanwhile those same factors, along with a much wider array of content and payment options have made streaming the top way film-watchers watch Movies now.





Movie theater owners should take this data – and their own historical performances – as a wake up call to reinvent their value proposition. The third of consumers who push through price and inconvenience to go to theaters do not come from a particular demographic, or income level; rather they are, simply put, Cinephiles. Our data seems to indicate, that for this fandom, a richer and more profitable experience could be attractive, even if those consumers must pay a bit more for it. The data seems to indicate building a model to meet this demand will more likely deliver long-term success than hoping pre-pandemic downward trends will reverse. The ticket-buying consumer base is a loyal and lucrative one. Today’s theater business is not catered nearly enough towards them.

Streamers would also do well to dig into this data for their Movie horizons. Movies premieres now seem like table stakes in the Streaming Wars. However, there is a rising preference for free Movies on streaming. SVODs and FASTs can and should make Movies a significant part of their content strategies. But the alchemy between free and paid streaming is getting more complicated daily. For certain windows, big Movies are clearly effective at acquiring customers; yet there’s a point at which consumers just expect Movies to be free (or at least freely available).

While the Oscars may no longer hold the sway they once did, America’s fascination with “The Movies” is still as high as Maverick’s fighter jet. Yet, despite massive smash hits like *Avatar* and *Top Gun*, based on the changing nature of how Americans want to watch Movies, the economic underpinning of the film business is not currently on firm ground. Finding a new financial and creative balance for film is a Hollywood-sized task, one with an Oscar-worthy prize.

## **METHODOLOGY**

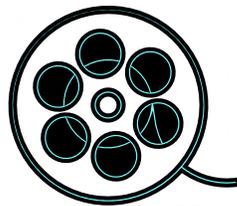
**PCH Consumer Insights surveyed 20,501 American adults 18+, recruited from Publishers Clearing House's 22 million registered Audience Members, in February 2022. The total responses were then weighted to adjust for age and income to come in line with US Census data for the American population, resulting in the 15,137 respondents represented in the data above.**

## **PCH CONSUMER INSIGHTS**

**Publishers Clearing House is one of Media's most iconic brands, and a top-ranked multi-category media property with a 100% logged-in audience of millions of registered users, each authenticated at an individual level. With uniquely engaging and interactive free-to-play chance-to-win content, PCH's signature experience delivers consumers who choose to provide accurate first-party data and information as they register and engage with the company. As a result, PCH has one of the largest authenticated audiences outside of the walled gardens, a foundation from which it can offer a variety of ways for publishers and advertisers to activate their identity and 1st party data for cookie-less targeting, buying, and measurement.**

## **ESHAP/EVAN SHAPIRO**

**Evan Shapiro is a professor of media studies at New York University and Fordham University, an Emmy and Peabody Award winning producer, and leader of the change agency ESHAP. His ongoing insights on the evolution of Media have made him one of the most sought-after thinkers in the space and earned him the moniker of "the official cartographer of the Media Universe."**



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