

## Movie Theaters - US - November 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Both theater owners and studio executives continue to see moderate revenue growth. While consumers remain hesitant about the overall cost of going to the movies, they are willing to spend around \$20 per person for the entire experience. Theater selection is still mainly based on the convenience of the location."

**Jennifer White Boehm, Associate Director,  
Financial Services**

This report looks at the following areas:

- Expense continues to be an issue
- One third are going to the movies less frequently than they did five years ago
- Convenience still trumps innovation for theater selection

This report examines the US consumer decision-making process for selecting a movie theater:

- What motivates people to select a movie in the theater?
- What factors are influencing the consumer's choice of theater/movie?
- How much are consumers willing to pay for their movie-going experience?
- What are the barriers for lapsed movie goers?

For the purposes of this Report, Mintel concentrates on commercial cinema venues. Festivals, army bases, schools, museums, libraries, prisons, airlines, restaurants, cafés, and other venues that license films for profit are not included; only sites whose primary day-to-day function is the commercial display of cinema are considered.

Companies that own, lease, manage, or operate facilities for the day-to-day commercial display of films are the subject of this Report, and will be referred to as "movie theaters" or "movie theater owners and operators."

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://store.mintel.com)

**CALL:**  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Movie Theaters - US - November 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Overview

What you need to know

Definition

### Executive Summary

The issues

Expense continues to be an issue

Figure 1: Top reasons for not going to the movies, September 2016

One third are going to the movies less frequently than they did five years ago

Figure 2: Frequency of movie theater attendance, by age, September 2016

Convenience still trumps innovation for theater selection

Figure 3: Top reasons for movie theater selection, September 2016

The opportunities

Consumers are interested in screenings that cater to their lifestyle

Kid-free

Figure 4: Interest in "kid-free" screening times, by presence of children in household, September 2016

Use of social media

Figure 5: Interest in use of social media in theater, by gender, generation, Hispanic origin, September 2016

Challenge the stigma of going to the movies alone

Figure 6: Interest in choosing own movie, by gender, September 2016

Create a movie-going experience that begins as patrons walk in the door

There is a concession sales opportunity in adding local specialties and soft pretzels to the theater menu

Figure 7: Interest in concession purchases, September 2016

Catch theatergoers as they leave with innovative advertising

Figure 8: Interest in movie posters/displays, by parent status, September 2016

What it means

### The Market – What You Need to Know

Moderate revenue growth continues for movie theaters

Increases in 2015 to level off in 2016

Admissions not keeping up with the increasing price of tickets

Studios continue to rely on sequels to attract consumers to the theater

Binge watching still popular with consumers

### Market Size and Forecast

Moderate revenue growth continues across categories

Figure 9: Total US sales and fan chart forecast of movie theater revenues, at current prices, 2011-21

Figure 10: Total US movie theater revenues and forecast, at current prices, 2011-21

### Market Breakdown

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Movie Theaters - US - November 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Increases in 2015 to level off in 2016

Figure 11: Total US movie theater box office receipts and fan chart forecast, at current prices, 2011-21

Figure 12: Total US movie theater box office receipts and forecast, at current prices, 2011-21

### Concessions

Figure 13: Total US movie theater concession revenues and fan chart forecast, at current prices, 2011-21

### Advertising and other revenues

Figure 14: Total US movie theater advertising and other revenues and fan chart forecast, at current prices, 2011-21

## Market Perspective

### Admissions not keeping up with the increasing price of tickets

Figure 15: Average ticket price and US/Canada admissions, 2010-15

### Netflix, Amazon release 100s of hours of new content

### Subscription service membership maintains steady growth

Figure 16: Subscription to Netflix and Amazon Instant Video, May 2015

### Binge watching still popular with consumers

Figure 17: Attitudes of bingeing and browsing, May 2015

## Market Factors

### Consumers continue to expect to spend more on experiences, leisure and entertainment

Figure 18: Perceived change in spending – spending more, by category, 2013-16

### Extra money spent on going out, entertainment

Figure 19: Where extra money is spent, January 2016

### Studios continue to rely on sequels to attract consumers to the theater

Figure 20: Top grossing films in the United States, 2015-16\*

### Box office gross climbs in 2015

Figure 21: US and Canada box office gross, 2000-15

## Key Players – Overview

### Three out of four top theater groups increase footprint

Figure 22: Number of theaters and screens for major theater groups in the US, 2014-15

Figure 23: Annual revenues for major theater groups, in millions, 2015

## Key Players – What You Need to Know

Regal Entertainment Group

AMC

Carmike

Cinemark

## What's Working?

Studios capitalizing on 90s nostalgia

IMAX brings back Harry Potter for limited time

Netflix agrees to simultaneous streaming and in-theater release

Ticket Twosdays with AT&T

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Movie Theaters - US - November 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Improvements in cloud technology will help make movies clearer

### What's Struggling?

Theaters rebelling against shorter window to on-demand video

Theaters may not be masking their screens properly

Media keeps focusing on the "death" of the movie

Attention span may be an ongoing problem

### What's Next?

Screening Room seeks to stream movies still in theater

Movie-watching experience enhanced by interactive ads

National CineMedia looks to connect media effectiveness to ticket sales

Virtual reality: coming to a movie theater and lobby near you

Niche, customized snack offerings coming to the concessions stand

### The Consumer – What You Need to Know

Most consumers have gone to the movies in the past six months

The full movie experience is worth up to \$22

Millennials, Hispanics most in favor of in-theater social media use

Younger consumers don't want to go to the movies alone

### Movie Theater Attendance

Most consumers have gone to the movies in the past six months

Figure 24: Timing of most recent trip to the movies, September 2016

Young men are the most regular moviegoers

Figure 25: Timing of most recent trip to the movies, by gender and age, September 2016

Younger consumers attend the movies more frequently

Figure 26: Frequency of movie theater attendance, by age, September 2016

Hispanics significantly more likely to attend more frequently

Figure 27: Frequency of movie theater attendance – More frequently, by race/Hispanic origin, September 2016

Lower-income households cutting back on visits to the movie theater

Figure 28: Rate of movie theater attendance, by household income, September 2016

### Choosing a Theater

Convenience still trumps innovation for theater selection

Figure 29: Reasons for movie theater selection, September 2016

Older moviegoers particularly interested in location

Figure 30: Reasons for movie theater selection based on proximity, by age, September 2016

Women more interested in proximity; men, in online reviews and format

Figure 31: Reasons for movie theater selection, by gender, September 2016

### How Much are Moviegoers Willing to Pay?

Moviegoers indicate willingness to pay up to \$22 for their movie experience

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Movie Theaters - US - November 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 32: Price of movie experience – Optimal price, September 2016

Strong disagreement in price expectations between moviegoers, non-moviegoers

Figure 33: Price of movie experience – Bargain, by moviegoers vs non-moviegoers, September 2016

Anything more than \$26 per person is too expensive

Figure 34: Price of movie experience – Threshold prices among moviegoers, September 2016

Price sensitivity analysis methodology

More than half of Hispanics would consider dynamic movie pricing

Figure 35: Agreement with dynamic movie pricing, by race/Hispanic origin, September 2016

### Choosing a Movie

Young men are the most spontaneous movie selectors

Figure 36: Best way to select a movie, by gender and age, September 2016

Are sequels, franchises beginning to wear out their welcome?

Figure 37: Interest in new, original movies, by generation, September 2016

One third of moviegoers want to be the one who chooses the movie

Figure 38: Interest in choosing own movie, by gender, September 2016

### What to Eat in the Theater

Traditional movie concessions still reign supreme

Figure 39: Concession purchases, September 2016

Movie theater is a place to splurge on calories

Figure 40: Interest in concession purchases, September 2016

Younger consumers more willing to consider new concessions options

Figure 41: Interest in concession purchases –Interested, by generation, September 2016

### Theater Ambiance

Millennials, Hispanics most in favor of in-theater social media use

Figure 42: Interest in use of social media in theater, by gender, generation, Hispanic origin, September 2016

Most moviegoers, even parents, are looking for “kid-free” screening times

Figure 43: Interest in “kid-free” screening times, by gender and presence of children in household, September 2016

Parents looking to posters/displays for movie selection guidance

Figure 44: Interest in movie posters/displays, by parent status, September 2016

### Reasons for Not Going to the Movies

Ticket expense remains top obstacle for non-moviegoers

Figure 45: Reasons for not going to the movies, all, August 2016

Attention span may be an ongoing problem

Figure 46: Reasons for not going to the movies, by age, August 2016

Younger consumers don't think they have time to go to the movies

Figure 47: Lack of companion or time as theater attendance obstacle, by generation, September 2016

### Appendix – Data Sources and Abbreviations

Data sources

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Movie Theaters - US - November 2016

Report Price: £2466.89 | \$3995.00 | €3133.71

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Sales data

Fan chart forecast

Consumer survey data

Abbreviations and terms

Abbreviations

Terms

### Appendix – Market

Figure 48: Total US movie theater revenues and forecast, at inflation-adjusted prices, 2011-21

Figure 49: Total US movie theater box office revenues and forecast, at inflation-adjusted prices, 2011-21

Figure 50: Total US movie theater concession revenues and forecast, at current prices, 2011-21

Figure 51: Total US movie theater concession revenues and forecast, at inflation-adjusted prices, 2011-21

Figure 52: Total US movie theater advertising and other revenues and forecast, at current prices, 2011-21

Figure 53: Total US movie theater advertising and other revenues and forecast, at inflation-adjusted prices, 2011-21

### Appendix – Consumer

Figure 54: Timing of movie attendance, by generation, October 2015-June 2016

Figure 55: Selection of 3-D movie format if available, by generation, October 2015-June 2016

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)