



THEME REPORT

2019

A comprehensive analysis and survey of the theatrical and home/mobile entertainment market environment for 2019.





TABLE OF CONTENTS

Chairman's Letter	03
Research Note	04
Executive Summary	05
Total Theatrical & Home/Mobile Ent.	07
Theatrical: Global	10
Theatrical: United States & Canada	17
Theatrical Demographics	26
Home/Mobile Entertainment: Global	32
Home/Mobile Entertainment: United States	35
Home/Mobile Viewing Demographics	42
Appendix	48

2019 THEME REPORT

Chairman's Letter



Dear movie and TV fans,

What a year! For the first time ever, the combined global market for theatrical, home, and mobile entertainment has topped \$100 billion. Let that sink in. The global box office in 2019 climbed to \$42.2 billion, besting the previous year. Home/mobile entertainment, which includes streaming at home or on the go, grew by an astonishing 14 percent worldwide.

Our annual THEME report provides a comprehensive analysis of how our industry has performed and a survey of the audiences we serve. Once again, we have strived to better tell our own story – adding mobile viewing demographic data for the first time, among other improvements.



The film, television, and streaming industry continues to transform at a breakneck pace – and as this report will show, audiences are the big winners.

Streaming, which was once only a small part of our business, is without a doubt an increasingly large part of our industry's bright future. New streaming services were launched last year, with more on the way. The data affirms our commitment to providing content where, when, and on any device audiences want. Our survey found that more than 85 percent of children and more than 55 percent of adults in the U.S. watch movies and/or TV shows on their mobile device.

Meanwhile, the cinematic experience is still a major draw, as evidenced by the success of well-known blockbuster franchises, such as *Avengers: Endgame* and *Spider-Man: Far From Home*, as well as *Joker*, which put a dark, new twist on an iconic comic villain. We also saw how films that put diversity in front of the camera, including *Parasite*, *Us*, *Dora and the Lost City of Gold*, and *Hustlers*, won accolades from audiences and critics. Behind the camera, the number of female directors in 2019 more than doubled the previous year and tripled the number from 2007, according to USC Annenberg Inclusion Initiative. Our industry remains focused on better representation not only because it's the right thing to do, but because it's also good business.

As an association, we are changing, too. In January of 2019, we added Netflix as a new member. Disney and Fox became one. Our content protection arm, the Alliance for Creativity and Entertainment, grew to more than 30 global companies. We brought on new members of our senior leadership team and achieved policy wins for our studios in every part of the world.

When I look back on the incredible accomplishments of last year, it gives me great pride to see the strength, resilience, and cultural impact of our industry reflected in the following pages.

Best,

Charles H. Rivkin

Chairman and CEO





A NOTE FROM THE RESEARCH TEAM

Each year, the Motion Picture Association (MPA) research team produces the THEME Report by collecting and analyzing data from third party sources and conducting an audience survey of cinema and home/mobile entertainment.

Two years ago, we expanded the report to include the home/mobile entertainment market, both digital home/mobile entertainment (electronic sell-through [EST], video-on-demand, and subscription streaming), and physical home/mobile entertainment (Blu-ray and DVD rentals and sales). The report also provides estimates of subscriptions to pay television and online video services.

As part of our ongoing effort to make the THEME Report useful and comprehensive, the following updates are present in this year's edition:

MPA Members: In 2019, the Motion Picture Association's membership changed, with the addition of Netflix and the merger of two existing member studios, Disney and Fox. As a result, year-on-year comparisons for MPA member studio subtotals between 2019 and earlier years are not comparable and therefore percentage change is not presented.

Demographic Survey Update: We expanded the section on home/mobile viewing demographics in the United States this year to include specific survey results on mobile viewing. In the coming years, as more waves of our demographic survey are conducted, we will be able to add additional trending analysis to both the home/mobile entertainment and mobile viewing data.

Terminology: For clarity, this report uses the phrase "home/mobile entertainment", rather than "home entertainment" as used in previous reports. Home/mobile entertainment includes content viewed digitally or on disc on all devices – whether home-based or mobile. We also added a glossary to the Appendix to clarify our terms. We will continue to monitor the evolving terminology around digital home entertainment and further update terms and definitions in future reports as appropriate.

Methodological and Definition Refinements: We updated our global box office and home/mobile entertainment calculations to introduce greater precision. This includes expanded use of local sources for box office totals, as well as separating virtual pay television from online video subscriptions and excluding it from home/mobile entertainment. In all cases, we updated the historical figures so that the trends remain comparable. We also provided additional detail in breakouts of theatrical film releases (new releases/re-releases/non-features) and in information about the number of lower budget feature films produced. Given the declining role of disc product in the home/mobile entertainment market, we no longer include top titles on disc.

Currency Effects: In order to aggregate data from all the international markets covered by this report, measurements are conducted in U.S. dollars. That means from year to year, the relative strength or weakness of the U.S. dollar may directly impact the results of this report, particularly if there are unusual changes. For instance, if the U.S. dollar shows increasing strength, and currencies of major box office markets depreciate notably against the dollar, local box office growth reported may be reduced or even translated to a decline. In 2019, such currency depreciation occurred in key markets in the Asia Pacific region (Australia, China, and South Korea) and in European Union countries, reducing box office growth in U.S. dollars.

We hope this note – and the report itself – help to provide a better understanding of today's dynamic and evolving film, television, and streaming content landscape.

Julia Jenks

Vice President of Worldwide Research



TOTAL THEATRICAL & HOME/MOBILE ENTERTAINMENT

- In 2019, the combined global theatrical and home/mobile entertainment market surpassed \$100 billion for the first time, reaching \$101.0 billion, an eight percent increase compared to 2018 ([p. 8](#)) – Note: this figure does not include the pay television subscription market ([p. 34](#)).
- In the United States, theatrical and home/mobile entertainment reached \$36.6 billion in 2019, a four percent increase compared to 2018 and a 25 percent increase compared to 2015 ([p. 9](#)).

THEATRICAL

Global Trends

- The global box office market for all films released in each country around the world reached \$42.2 billion in 2019, up one percent over 2018's total. The international box office market (\$30.8 billion), which excludes U.S./Canada, increased three percent, surpassing \$30 billion for the first time ([p. 11](#)).
- In 2019, the top three box office markets outside the U.S./Canada were China (\$9.3 billion, including online ticketing fees), Japan (\$2.4 billion), and South Korea (\$1.6 billion). South Korea surpassed the U.K. in 2019 to reach the third position ([p. 13](#)).

U.S./Canada Trends

- The U.S./Canada box office market was \$11.4 billion in 2019, down four percent from the record high in 2018, and matching the previous high in 2016. U.S./Canada admissions, or tickets sold (1.24 billion), were down five percent compared to 2018. In the last ten years, domestic admissions have consistently ranged between 1.24 billion and 1.36 billion per year ([p. 18](#)).
- More than three-quarters (76%) of the U.S./Canada population – or 268 million people – went to the cinema at least once in 2019, up slightly compared to 2018 ([p. 27](#)). Per capita attendance, or the average number of times a person went to the cinema, was highest among the 12-17 (4.9) and 18-24 (4.7) year-old age groups, and among the Hispanic/Latino (4.7) and Asian (4.1) ethnicity categories. Per capita attendance in 2019 was down compared to 2018 across demographic categories ([p. 30](#)).
- Frequent moviegoers – individuals who go to the cinema once a month or more – continue to have a disproportionate impact on cinema admissions. Frequent moviegoers consist of 11 percent of the population (40 million people), but account for 47 percent of tickets sold ([p. 27](#)). Frequent moviegoers are more likely to be in younger age brackets ([p. 28](#)), and more likely to own key technology products, especially video game systems ([p. 31](#)), compared to the overall population.

HOME/MOBILE ENTERTAINMENT

Global Trends

- In 2019, the global home/mobile entertainment market (content released digitally and on disc) reached \$58.8 billion, a 14 percent increase compared to 2018. The growth was caused by the digital market. The U.S. digital market increased 18 percent, and the international digital market increased 29 percent, compared to 2018 ([p. 33](#)).
- The number of subscriptions to online video services around the world increased to 863.9 million in 2019, a 28 percent increase from 2018. Cable television remains the highest revenue pay television market globally at \$116 billion in 2019 ([p. 34](#)).



HOME/MOBILE ENTERTAINMENT (CONT'D)

U.S./Canada Trends

- In the United States, the home/mobile entertainment market (content released digitally and on disc) increased to \$25.2 billion in 2019, up eight percent compared to 2018, driven by the digital market ([p. 36](#)). The number of online video subscriptions in the United States increased to 237.2 million in 2019, a 26 percent increase compared to 2018 ([p. 39](#)).
- In 2019, the time Americans spent on their mobile phones (excluding voice activities) increased four percent to 3 hours and 43 minutes, surpassing the time spent watching television for the first time ([p. 41](#)).
- More than 80 percent of U.S. adults watch movies and TV shows via traditional television services, the highest proportion for any home/mobile viewing method, followed by online subscription services (more than 75%) ([p. 43](#)). More than 85 percent of children and more than 55 percent of adults watch movies and/or TV shows on their mobile device ([p. 46](#)). Daily viewers of TV shows and movies via mobile devices skew more heavily towards the 18-24 and 25-39 year age groups, as well as towards the Hispanic/Latino and African-American/Black ethnicity categories ([p. 47](#)).



**TOTAL THEATRICAL
& HOME/MOBILE
ENTERTAINMENT**

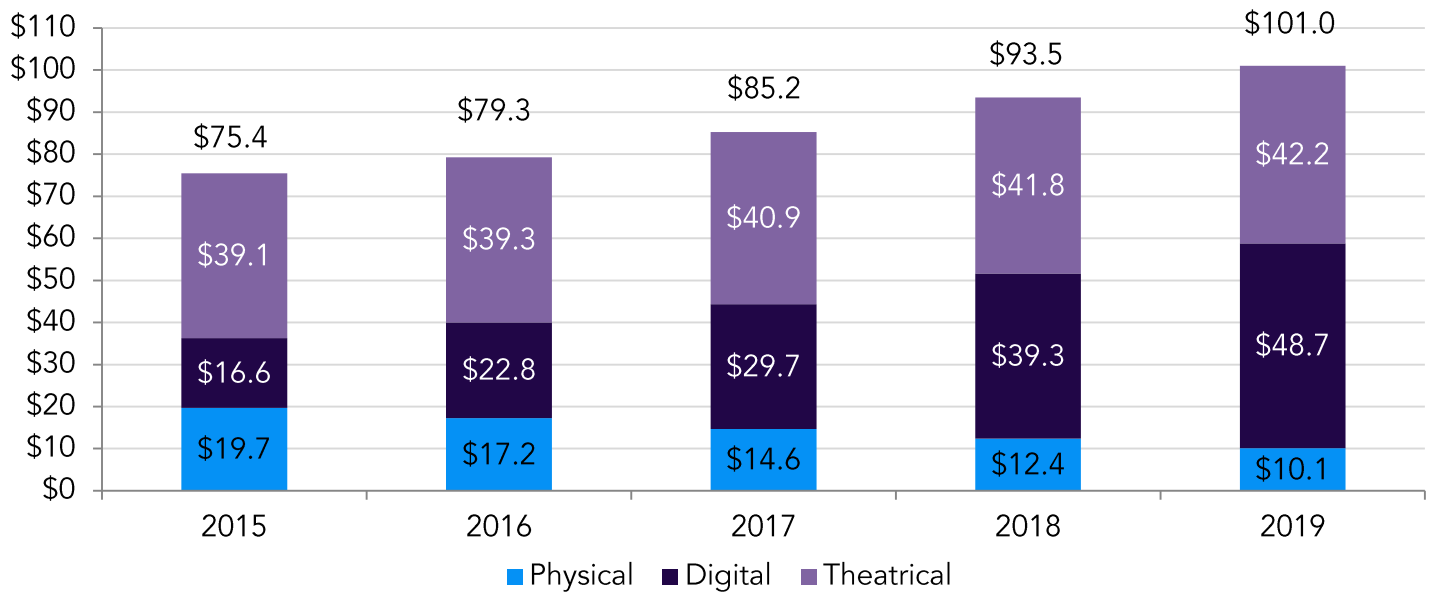


2019 THEME REPORT

Global Theatrical & Home/Mobile Entertainment

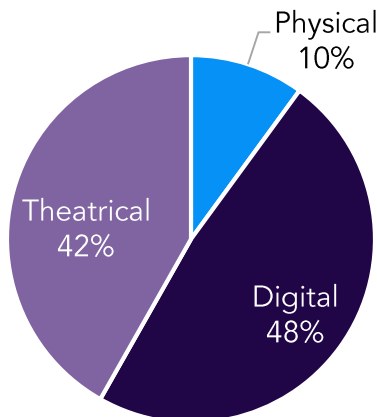
In 2019, the combined theatrical and home/mobile entertainment¹ market² globally surpassed the \$100 billion mark for the first time, reaching \$101.0 billion, an eight percent increase compared to 2018. This figure does not include the pay television subscription market. Since 2015, the global theatrical market (box office) has increased eight percent, while the home/mobile entertainment market (content released digitally and on disc) has increased 62 percent, due to digital.

Global Theatrical & Home/Mobile Entertainment Market (US\$ Billions)



In 2019, the theatrical market accounted for 42 percent of the combined theatrical and home/mobile entertainment market, with the digital market (48%) and the physical market (10%) making up the rest.

2019 Global Theatrical & Home/Mobile Entertainment Market (% Share)³



¹ Home/mobile entertainment refers to entertainment content viewed on all devices, whether home-based (e.g. TVs) or mobile-based (e.g. smart phones). This includes both digital methods (electronic sell through (EST), video on demand (VOD) and paid subscription streaming (SVOD) – excluding virtual pay TV – and physical methods (Blu-ray and DVD sales and rentals). Digital includes movies and TV, and excludes sports. Previous years’ estimates may be updated based on changes made by sources.

² Throughout this report, the term “market” refers to consumer spending.

³ The combined market for entertainment content at movie theaters and content released digitally and on disc. This excludes pay television subscription revenue (due to the role of sports and other live content) and licensing, and the advertising-based market.

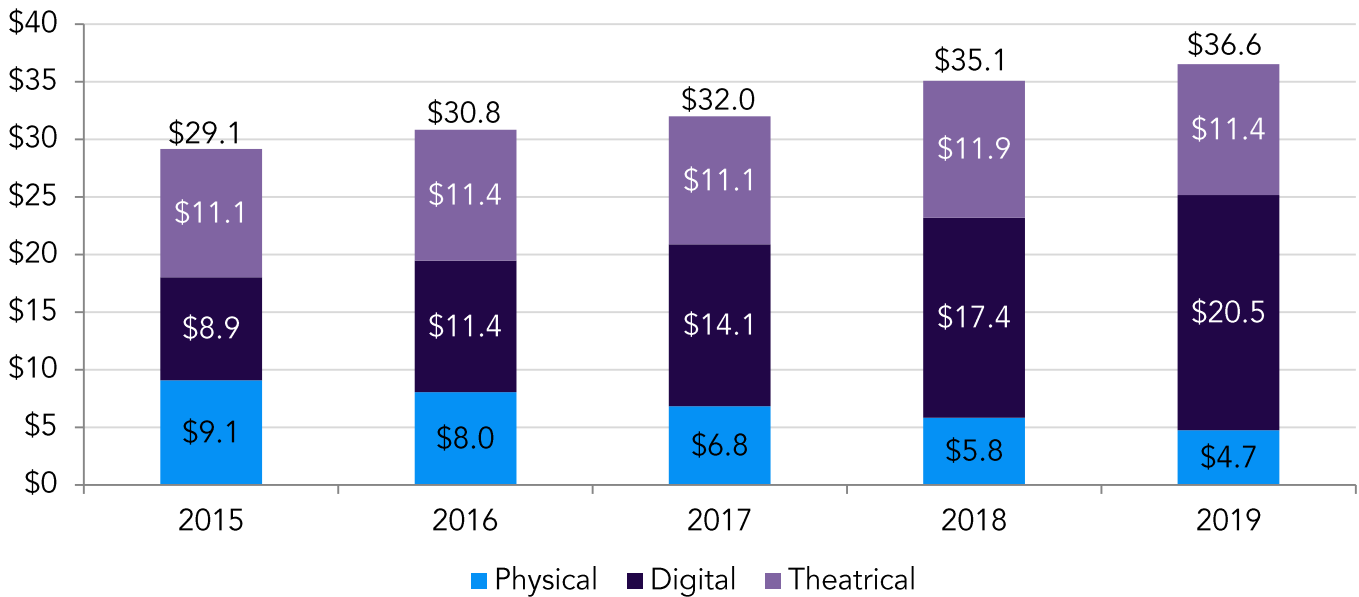


U.S. Theatrical & Home/Mobile Entertainment

In 2019, the combined theatrical and home/mobile entertainment market in the United States⁴ reached \$36.6 billion, a four percent increase compared to 2018 and a 25 percent increase compared to 2015. Since 2015, the U.S. theatrical market (box office) has increased two percent, while the home/mobile entertainment market has increased 40 percent, due to an increase in the digital market.

U.S. Theatrical & Home/Mobile Entertainment Market (US\$ Billions)

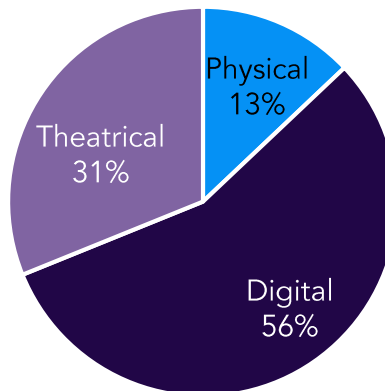
Source: Comscore – Box Office Essentials (Theatrical), Digital Entertainment Group (Home Entertainment)



In 2019, the digital market accounted for 56 percent of the combined theatrical and home/mobile entertainment market, followed by the theatrical market (31%) and the physical market (13%).

2019 U.S. Theatrical & Home/Mobile Entertainment Market (US\$ Share)

Source: Comscore – Box Office Essentials (Theatrical), Digital Entertainment Group (Home Entertainment)



⁴ U.S. home/mobile entertainment market data comes from Digital Entertainment Group (DEG), which only covers the U.S. DEG's definition of physical includes sell-through packaged goods, brick and mortar, subscription (physical only), and kiosk. Digital includes EST, VOD, and subscription streaming (SVOD). Theatrical market data comes from Comscore and includes both U.S. and Canada. Previous years' estimates may be updated based on changes made by source.



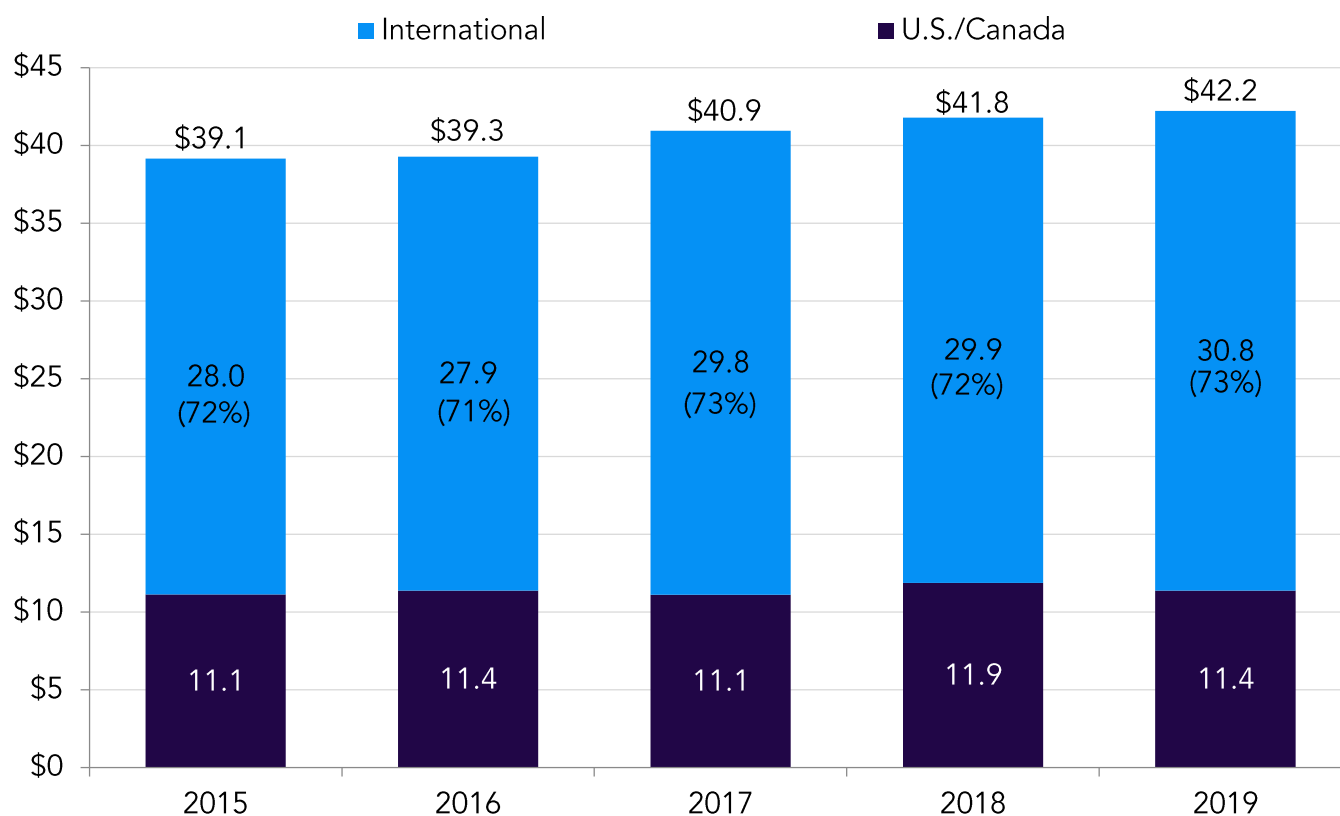
**THEATRICAL:
GLOBAL**



The global box office market for all films released in each country around the world⁵ reached \$42.2 billion in 2019, up one percent over 2018's total. The international box office market (\$30.8 billion) increased three percent, passing \$30.0 billion for the first time. The U.S./Canada box office market (\$11.4 billion) decreased four percent compared to 2018's record high. The international box office market accounted for 73 percent of the total box office market in 2019, up one percentage point from 2018.

The international box office market is up 10 percent compared to five years ago. The global box office market is up eight percent over the same period.

Global Box Office Market – All Films (US\$ Billions)



	2015	2016	2017	2018	2019	% Change ⁶ 19 vs. 18	% Change ⁶ 19 vs. 15
U.S./Canada ⁷	\$11.1	\$11.4	\$11.1	\$11.9	\$11.4	-4%	2%
International ⁸	\$28.0	\$27.9	\$29.8	\$29.9	\$30.8	3%	10%
Total	\$39.1	\$39.3	\$40.9	\$41.8	\$42.2	1%	8%

⁵ Values in the report reflect all films released, regardless of distributor or country of origin, except where specified as a subset.

⁶ Percentage change and international share (above) are calculated using values before rounding.

⁷ Source: Comscore – Box Office Essentials, calendar year from January 1-December 31.

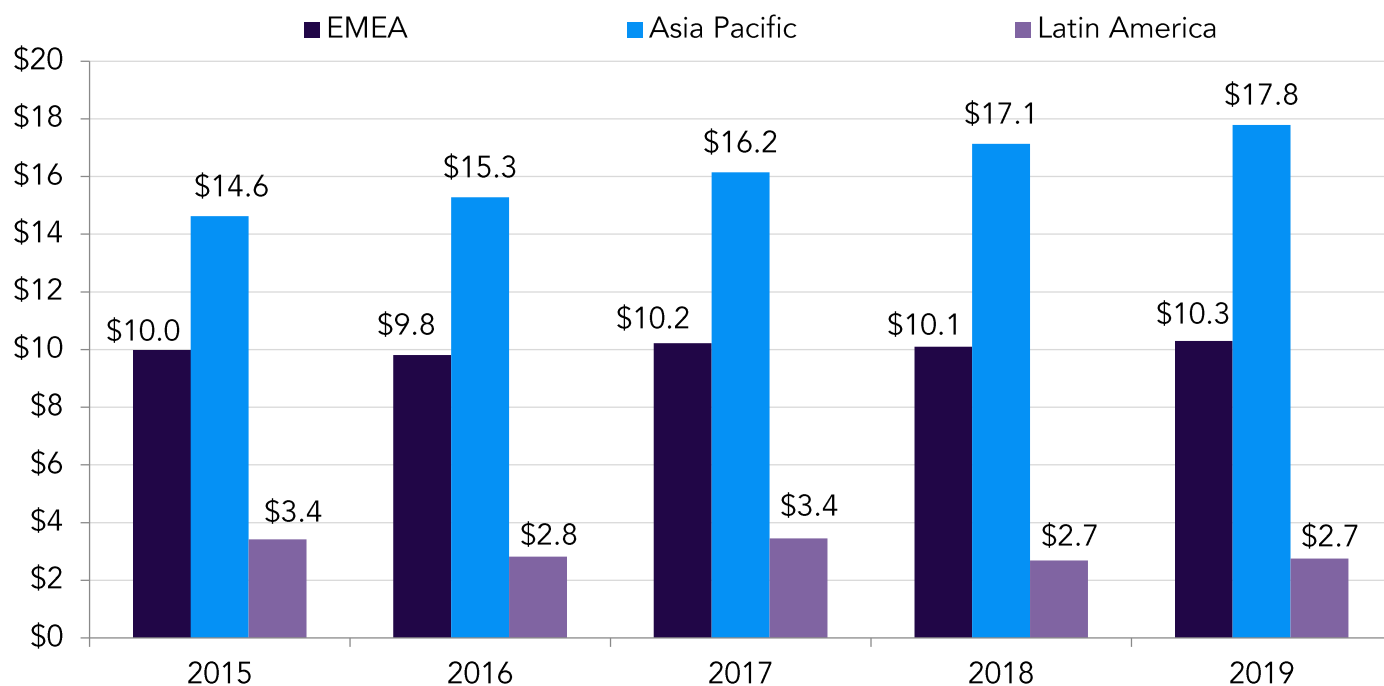
⁸ International box office excludes U.S./Canada throughout this report. MPA calculates international box office country-by-country based on a variety of data sources. Previous years' estimates may be updated based on changes made by sources. In the current report, previous years' estimates were updated due to increased use of local sourcing.

In 2019, the box office market in Asia Pacific (\$17.8 billion) increased four percent in U.S. dollars compared to 2018. The primary driver of growth was Japan, with a 19 percent increase in the box office market in U.S. dollars. India (+4%) and China (+1%) also experienced increases. Both countries' increases were even larger in local currency.

The Europe, Middle East & Africa (EMEA) box office market increased two percent in U.S. dollars over 2018. This was driven by increases in Germany (+9% in U.S. dollars), Italy (+9%) and Russia (+7%). These increases were larger in local currency terms as the Euro and the Ruble depreciated against the U.S. dollar in 2019.

Latin America's box office market increased three percent in U.S. dollars in 2019, driven by a 13 percent increase in the box office market in U.S. dollars in Mexico and a five percent increase in Brazil.

International Box Office Market by Region – All Films (US\$ Billions)⁹



	2015	2016	2017	2018	2019	% Change ¹⁰ 19 vs. 18	% Change ¹⁰ 19 vs. 15
Europe, Middle East & Africa	\$10.0	\$9.8	\$10.2	\$10.1	\$10.3	2%	3%
Asia Pacific	\$14.6	\$15.3	\$16.2	\$17.1	\$17.8	4%	22%
Latin America	\$3.4	\$2.8	\$3.4	\$2.7	\$2.7	3%	-19%
Total	\$28.0	\$27.9	\$29.8	\$29.9	\$30.8	3%	10%

⁹ Box office data is in U.S. dollars for analytical and comparative purposes. Previous years' estimates may be updated based on changes made by sources. In the current report, previous years' estimates were updated due to increased use of local sourcing. Note that local currency box office trends may differ due to exchange rate fluctuations.

¹⁰ Percentage change is calculated using table values before rounding.

In 2019, the top three box office markets outside the U.S./Canada were China (\$9.3 billion, including online ticketing fees), Japan (\$2.4 billion), and South Korea (\$1.6 billion). South Korea surpassed the U.K. in 2019 to reach the third position. The top 20 international markets remained the same as 2018, with some minor shifts in ranking.

2019 Top 20 International Box Office Markets – All Films (US\$ Billions)

Source: IHS Markit, local sources

1.	China ¹¹	\$9.3	11.	Italy	\$0.7
2.	Japan	\$2.4	12.	Spain	\$0.7
3.	South Korea	\$1.6	13.	Brazil	\$0.7
4.	U.K.	\$1.6	14.	Taiwan	\$0.4
5.	France	\$1.6	15.	Netherlands	\$0.4
6.	India	\$1.6	16.	Indonesia	\$0.4
7.	Germany	\$1.2	17.	Poland	\$0.3
8.	Mexico	\$1.0	18.	UAE	\$0.3
9.	Russia	\$0.9	19.	Malaysia	\$0.3
10.	Australia	\$0.9	20.	Hong Kong	\$0.3

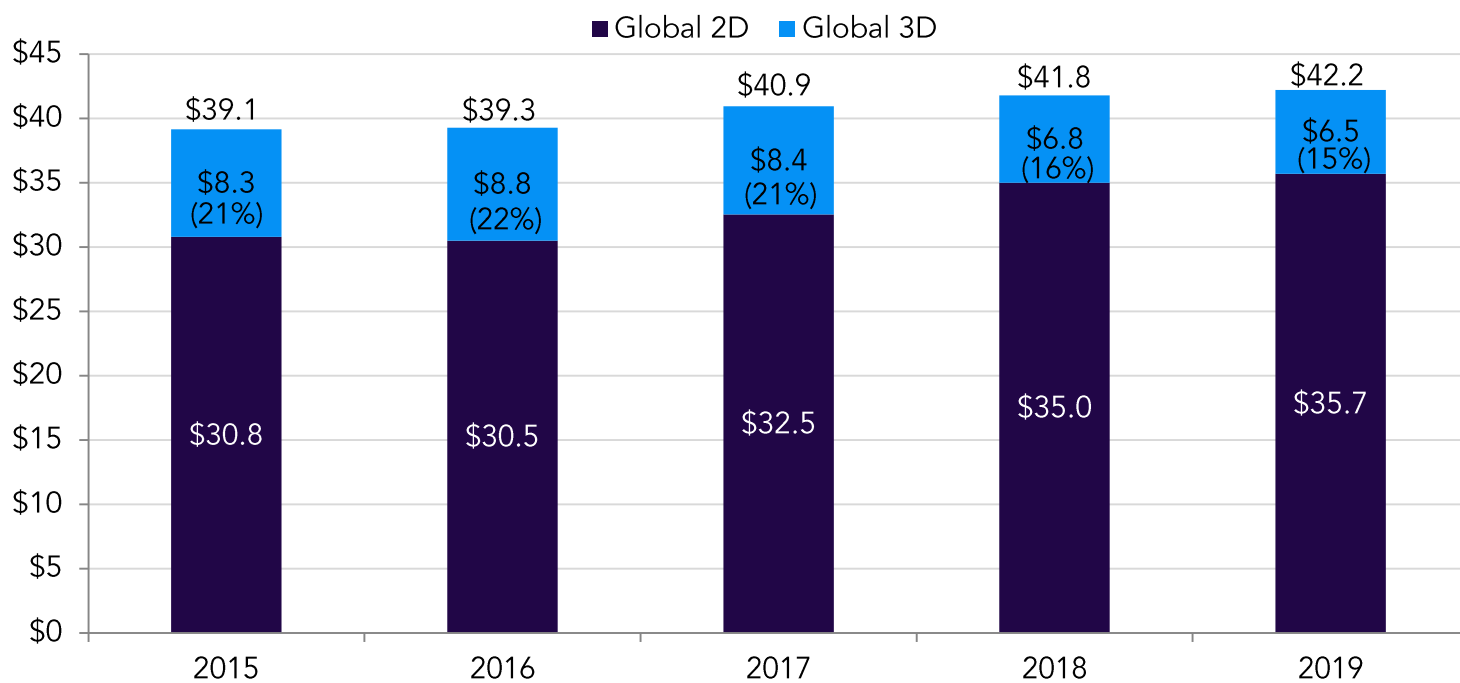
¹¹ China box office total includes online ticketing fees. The China box office total excluding ticketing fees is no longer made available.

2019 THEME REPORT

Global 3D Box Office

Of the total global box office market in 2019, 3D technology represented 15 percent, similar to 2018. The global 3D box office market totaled \$6.5 billion in 2019, a decrease of four percent compared to 2018. The Asia Pacific region saw a one percent increase in the 3D box office market in 2019, offset by decreases in all other regions, led by U.S./Canada (-21%).

Global 3D Box Office Market – All Films (US\$ Billions)¹²



	2015	2016	2017	2018	2019	% Change ¹³ 19 vs. 18	% Change ¹³ 19 vs. 15
Global 2D	\$30.8	\$30.5	\$32.5	\$35.0	\$35.7	2%	16%
Global 3D	\$8.3	\$8.8	\$8.4	\$6.8	\$6.5	-4%	-22%
Total	\$39.1	\$39.3	\$40.9	\$41.8	\$42.2	1%	8%

¹² Box office data is in U.S. dollars for analytical and comparative purposes. Previous years' estimates may be updated based on changes made by sources. Local currency box office trends may differ due to exchange rate fluctuations.

¹³ Percentage change and share of total box office is calculated using table values before rounding.



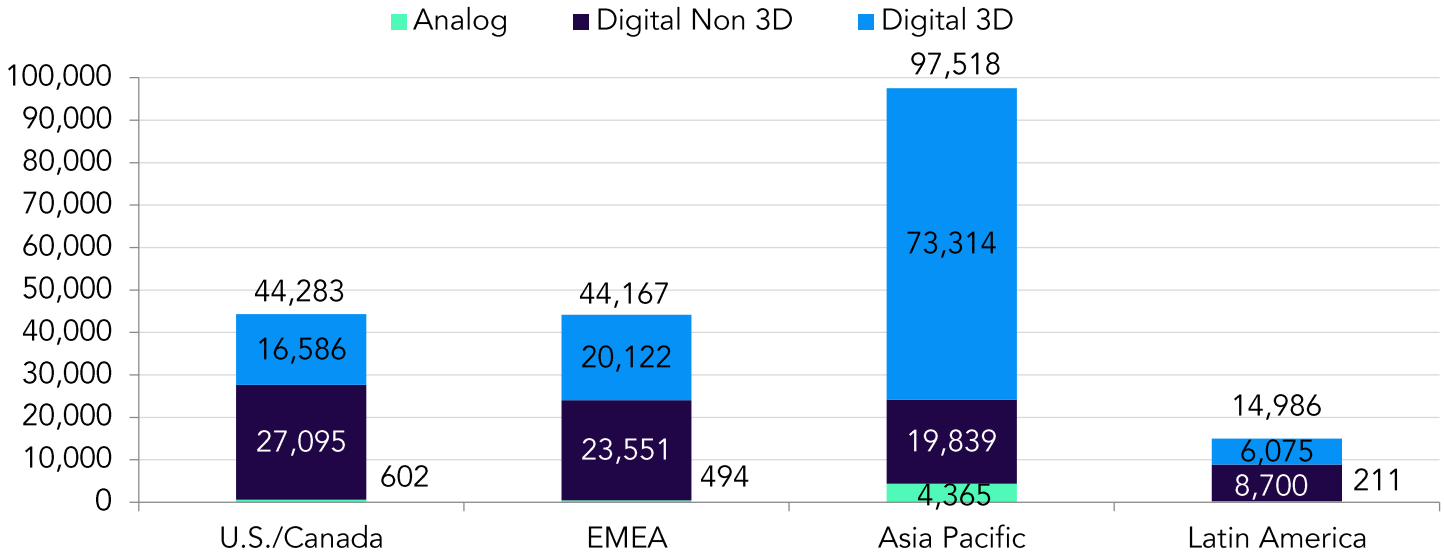
2019 THEME REPORT

Global Cinema Screens

Total cinema screens increased seven percent globally in 2019, surpassing 200,000, due to continued double digit growth in the Asia Pacific region (+12%). At the end of 2019, virtually all of the world's cinema screens were digital (97%), consistent with 2018.

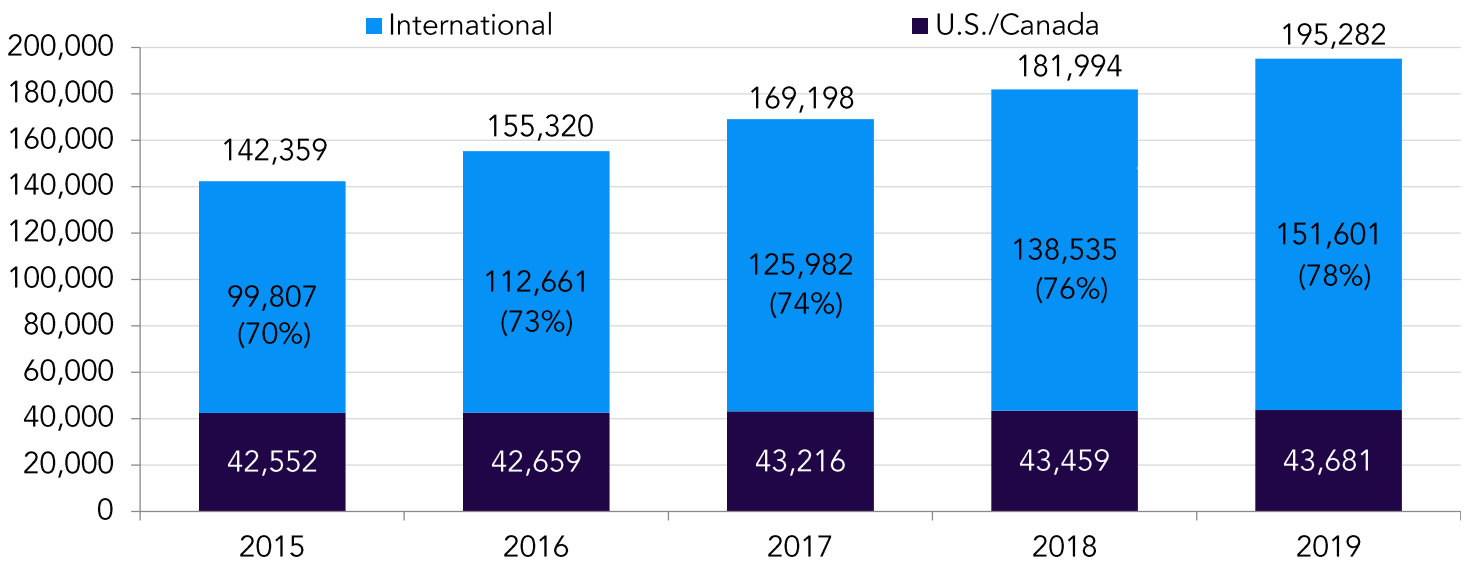
2019 Global Cinema Screens by Format and Region¹⁴

Source: IHS Markit



Global Digital Screens

Source: IHS Markit



¹⁴ 2019 total screens figures are estimates as of February 2020. Previous years' estimates may be updated based on changes made by source.



The number of digital 3D screens around the world surpassed 116,000 in 2019, an increase of nine percent compared to 2018. They account for 59 percent of all digital screens globally. Both the Asia Pacific and Latin America regions had a six percent increase in the number of digital 3D screens in 2019. Asia Pacific continues to have the highest ratio of 3D digital screens to digital screens – more than three out of four digital screens in Asia Pacific are 3D.

Global Digital 3D Screens¹⁵

Source: IHS Markit

	2015	2016	2017	2018	2019	2019 % of digital
U.S./Canada	16,441	16,744	16,978	16,972	16,586	38%
EMEA	17,580	18,278	18,971	20,476	20,122	46%
Asia Pacific	36,146	42,429	51,661	62,937	73,314	79%
Latin America	4,897	5,368	5,619	5,818	6,075	41%
Total	75,065	82,819	93,229	106,203	116,097	59%
% change vs. previous year	16%	10%	13%	14%	9%	

¹⁵ Previous years' estimates may be updated based on changes made by source.



**THEATRICAL:
U.S. & CANADA**



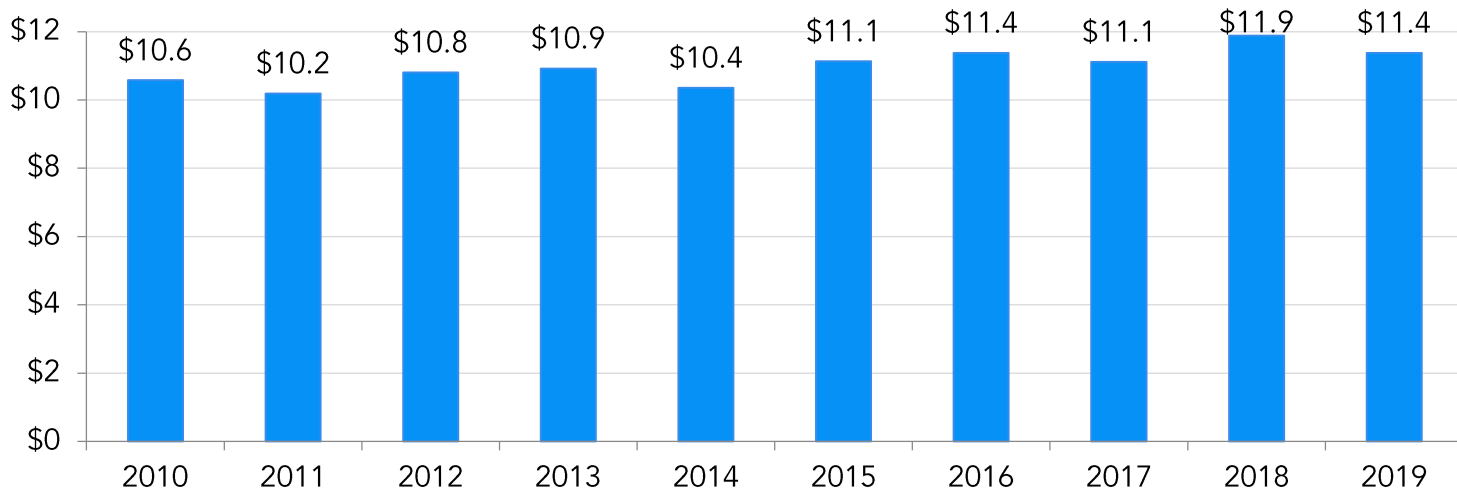
2019 THEME REPORT

U.S./Canada Box Office & Admissions

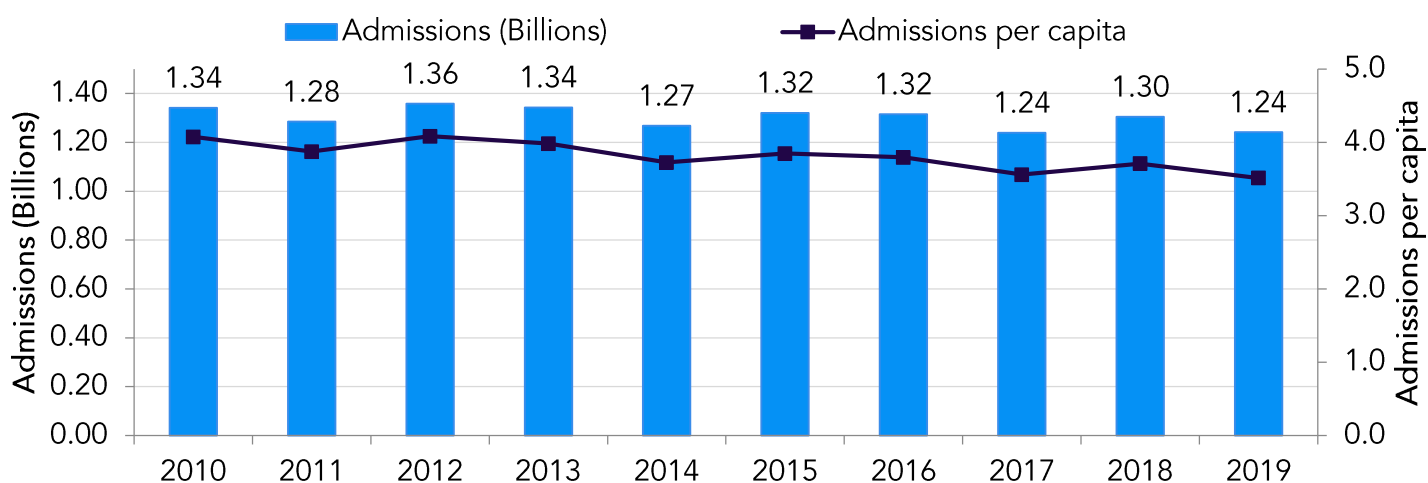
In 2019, the U.S./Canada box office market was \$11.4 billion, down four percent from the record high of \$11.9 billion in 2018 and matching the previous high in 2016.¹⁶ Admissions, or tickets sold (1.24 billion), were down five percent compared to 2018. In the last ten years, domestic admissions have consistently ranged between 1.24 billion and 1.36 billion per year.

U.S./Canada Box Office Market (US\$ Billions)

Source: Comscore Box Office Essentials



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	% Chg. 19 vs. 18
U.S./Can. box office (US\$B)	\$10.6	\$10.2	\$10.8	\$10.9	\$10.4	\$11.1	\$11.4	\$11.1	\$11.9	\$11.4	-4%



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	% Chg. 19 vs. 18
U.S./Can. admissions (Billions) ¹⁷	1.34	1.28	1.36	1.34	1.27	1.32	1.32	1.24	1.30	1.24	-5%
U.S./Can. admissions per capita ¹⁸	4.1	3.9	4.1	4.0	3.7	3.8	3.8	3.6	3.7	3.5	-5%

¹⁶ Percentage change is calculated using table values before rounding.

¹⁷ Admissions is calculated using Comscore – Box Office Essentials calendar year box office data, and National Association of Theatre Owners (NATO) average annual ticket price (see next page).

¹⁸ Admissions per capita is calculated using aggregated U.S. Census Bureau and Statistics Canada data for population aged 2+.

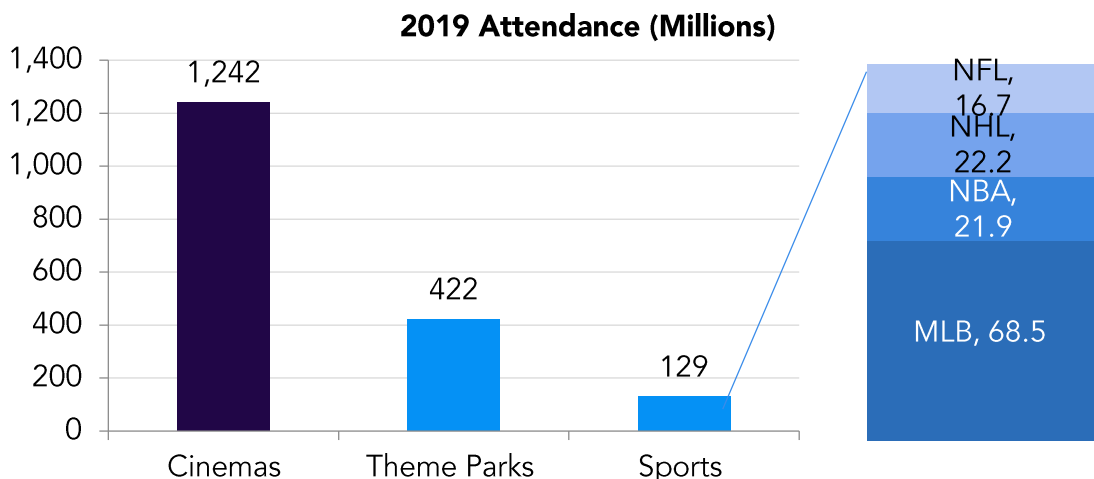


2019 THEME REPORT

U.S./Canada Admissions

In 2019, movie theaters drew more than twice as many people as all theme parks and major U.S. sports combined (baseball, basketball, hockey, and football).

Compared to these other forms of entertainment, a movie is still the most affordable option, costing a little over \$36 for a family of four. The average cinema ticket price nationwide increased by five cents (+1%) in 2019, compared to a two percent increase in inflation as measured by the Consumer Price Index (CPI).



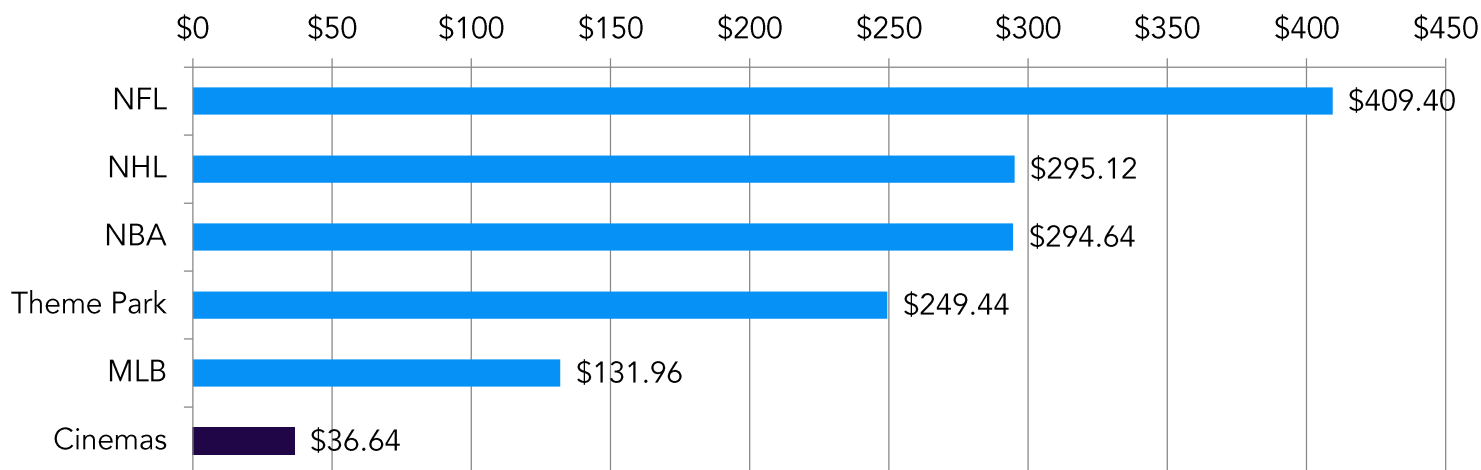
Average Cinema Ticket Price (US\$)

Source: National Association of Theatre Owners (NATO) (Ticket Price),
Bureau of Labor Statistics (BLS) (Consumer Price Index)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Average Ticket Price	\$7.89	\$7.93	\$7.96	\$8.13	\$8.17	\$8.43	\$8.65	\$8.97	\$9.11	\$9.16
% Change vs. Prior Year	5%	1%	0%	2%	0%	3%	3%	4%	2%	1%
% Change vs. 2019	16%	16%	15%	13%	12%	9%	6%	2%	1%	n/a
CPI % Change vs. Prior Year	2%	3%	2%	2%	2%	0%	1%	2%	3%	2%

2019 Average Ticket Price for a Family of Four (US\$)

Source: NATO, Team Marketing Report, International Theme Park Services



2019 THEME REPORT

Films Rated & Released

In 2019, the Classification and Ratings Administration (CARA) rated 488 films (including non-theatrical films). The number of MPA member films rated was 158 (32%) in 2019, while the number of non-MPA member films rated was 330 (68%), due to the large number of non-MPA member films produced/released.

Film Ratings¹⁹

Source: CARA

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Film ratings	698	758	726	713	708	613	605	563	564	488
-MPA members ²⁰	174	169	166	169	165	167	176	176	166	158
-Non-members	524	589	560	544	543	446	429	387	398	330

The number of films released in theaters in U.S./Canada reached 835 in 2019. Non-MPA affiliated independents continue to release the most films domestically (711) and were up 12 percent when comparing 2019 to 2018. Film attendance by moviegoers remains concentrated – the top 133 films made up 95% of the box office market in 2019.

Films Released

Source: Comscore – Box Office Essentials (Total), MPA (Subtotals)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Films released ²¹	563	609	678	658	706	707	732	785	765	835
- New feature films ²²	547	599	659	648	692	687	698	688	641	708
- Re-releases ²²	14	9	18	9	13	14	24	49	56	67
- Non-feature films ²²	2	1	1	1	1	6	10	48	68	60
- Large format releases	16	21	26	32	30	36	42	41	56	46
- 3D film releases	29	53	56	54	48	39	51	46	42	35
- 3D wide release films	22	35	34	33	31	28	36	34	27	27
MPA member total	141	141	128	114	135	147	143	132	128	124
- MPA studios	104	104	94	84	99	100	101	86	92	83
- MPA studio subsidiaries	37	37	34	30	36	47	42	44	36	41
Non-members	422	468	550	544	571	560	589	655	637	711

¹⁹ Note that films may be rated or re-rated months or even years after production. Includes non-theatrical films.

²⁰ MPA members include: Walt Disney Studios Motion Pictures, Netflix, Inc., Paramount Pictures Corporation, Sony Pictures Entertainment, Inc., Universal City Studios LLC, and Warner Bros. Entertainment Inc. Netflix included as an MPA member as of 2019 – therefore, comparisons are not feasible.

²¹ Source: Comscore – Box Office Essentials. Includes all titles that opened and earned any U.S./Canada box office in the year. Historical data is regularly updated by Comscore.

²² New feature films includes films released domestically for the first time, while re-releases includes any film released for the first time in previous years including anniversary releases and double-features. Non-feature films includes Oscar shorts, TV shows and event showings.



Films Produced

In 2019, the estimated number of U.S. films that entered production was 814, an increase of one percent compared to 2018 and 11 percent compared to 2015. Of these films, 178 films had an estimated budget greater than \$15 million, a four percent increase compared to 2018 and an 28 percent increase compared to 2015.

Note that 2019 was the first year that Netflix was counted a member studio. The number of MPA member studio films entering production in 2019 was 173, while the number of films counted as a non-MPA member studio films was 641.

Feature Films Entering Production²³

	2015	2016	2017	2018	2019 ²⁴
Films produced (est. \$15M+ budget)	139	135	162	171	178
Films produced (est. \$1M-\$15M budget)	356	376	387	405	423
Films produced (est. <\$1M budget)	237	277	263	232	213
Total films (all budgets)	732	788	812	808	814
MPA member sub-total	110	99	108	107	173
Non-MPA member sub-total	622	689	704	701	641

²³ These figures reflect full-length feature films in the English language that began production in the reported year, by a U.S. production company (including co-productions). The counts include films that were made for or by an online video service, but do not include student films, documentaries, films created for straight-to-DVD or Blu-ray release. The number for lower-budget films is variable and more difficult to track. Budgets are estimated from publicly available information. In the interest of accuracy, MPA compiles data from a wide range of sources.

²⁴ Data is provisional as of February 2020. Figures may be revised as more information becomes available. Netflix was added as a member in the 2019 count, past years include MPA member studios at that time.

Top 25 Films

PG-13 films comprised 11 of the top 25 films in release during 2019, more than any other rating, and down from 2018 (17). In 2019, the top 25 films accounted for 57 percent of the total box office market, with the top five films accounting for 24 percent, similar to 2018.

Top 25 Films by U.S./Canada Box Office Market in 2019

Source: Comscore – Box Office Essentials, CARA (Rating)

Rank	Title	Distributor	Box Office (US\$ MM)	Rating	3D
1	Avengers: Endgame	Disney	858.4	PG13	✓
2	The Lion King (2019)	Disney	543.6	PG	✓
3	Toy Story 4	Disney	434.0	G	✓
4	Frozen 2*	Disney	430.1	PG	✓
5	Captain Marvel	Disney	426.8	PG13	✓
6	Star Wars: The Rise of Skywalker*	Disney	390.7	PG13	✓
7	Spider-Man: Far From Home	Sony	390.5	PG13	✓
8	Aladdin (2019)	Disney	355.6	PG	✓
9	Joker*	Warner Bros.	333.8	R	
10	It Chapter Two	Warner Bros.	211.6	R	
11	Jumanji: The Next Level*	Sony	192.1	PG13	✓
12	Us	Universal	175.1	R	
13	Fast & Furious Presents: Hobbs & Shaw	Universal	174.0	PG13	
14	John Wick: Chapter 3 – Parabellum	Lionsgate	171.0	R	
15	How to Train Your Dragon: The Hidden World	Universal	160.8	PG	✓
16	The Secret Life of Pets 2	Universal	157.9	PG	✓
17	Pokémon Detective Pikachu	Warner Bros.	144.1	PG	✓
18	Once Upon A Time In... Hollywood*	Sony	141.1	R	
19	Shazam!	Warner Bros.	140.4	PG13	✓
20	Aquaman**	Warner Bros.	136.0	PG13	✓
21	Knives Out*	Lionsgate	115.7	PG13	
22	Dumbo (2019)	Disney	114.8	PG	✓
23	Maleficent: Mistress of Evil*	Disney	113.3	PG	✓
24	Glass	Universal	111.0	PG13	
25	Godzilla: King of the Monsters (2019)	Warner Bros.	110.5	PG13	✓

* Film still in theaters in 2020; total reflects box office earned from Jan. 1 – Dec. 31, 2019

** Film released in theaters in 2018; total reflects box office earned from Jan. 1 – Dec. 31, 2019

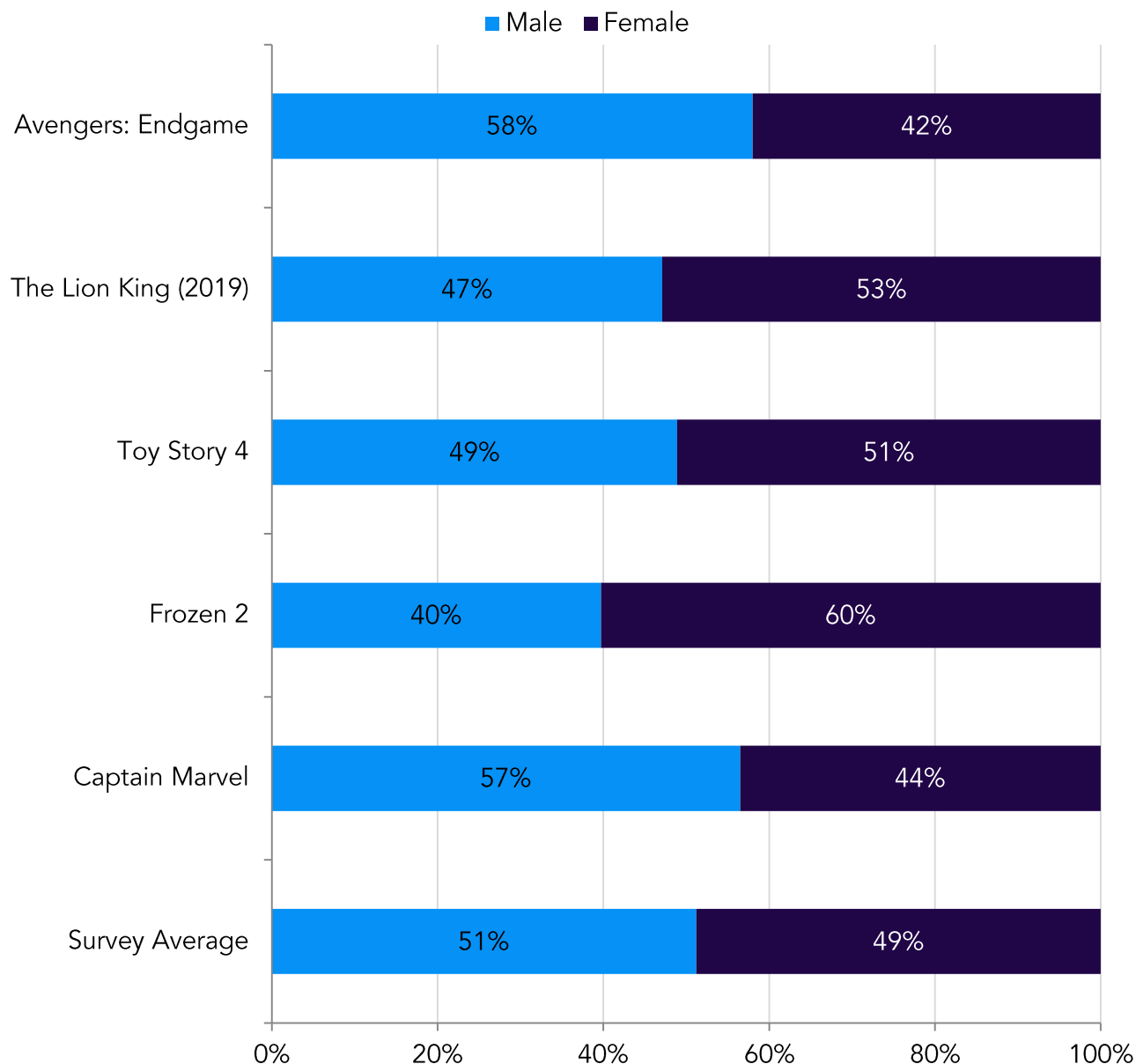
Top Film Demographics by Gender

Comscore and Screen Engine/ASI's PostTrak collects domestic survey data for all films in release in at least 800 theaters, which links box office grosses to gender and ethnicity of attendees. The surveys are conducted during the first two weeks of a film's wide release.²⁵

Toy Story 4, the third top grossing film in 2019, attracted a nearly equal split of female and male audiences. *Frozen 2* and *The Lion King* attracted majority female audiences, earning 60 percent and 53 percent of their box office from women, respectively. *Avengers: Endgame* and *Captain Marvel* both attracted majority male audiences.

2019 Gender Share of Top Grossing Films²⁶

Source: Comscore/Screen Engine/ASI



²⁵ More details about PostTrak's methodology can be found in the Appendix.

²⁶ Percentage values in table may not sum to 100 percent due to rounding.



2019 THEME REPORT

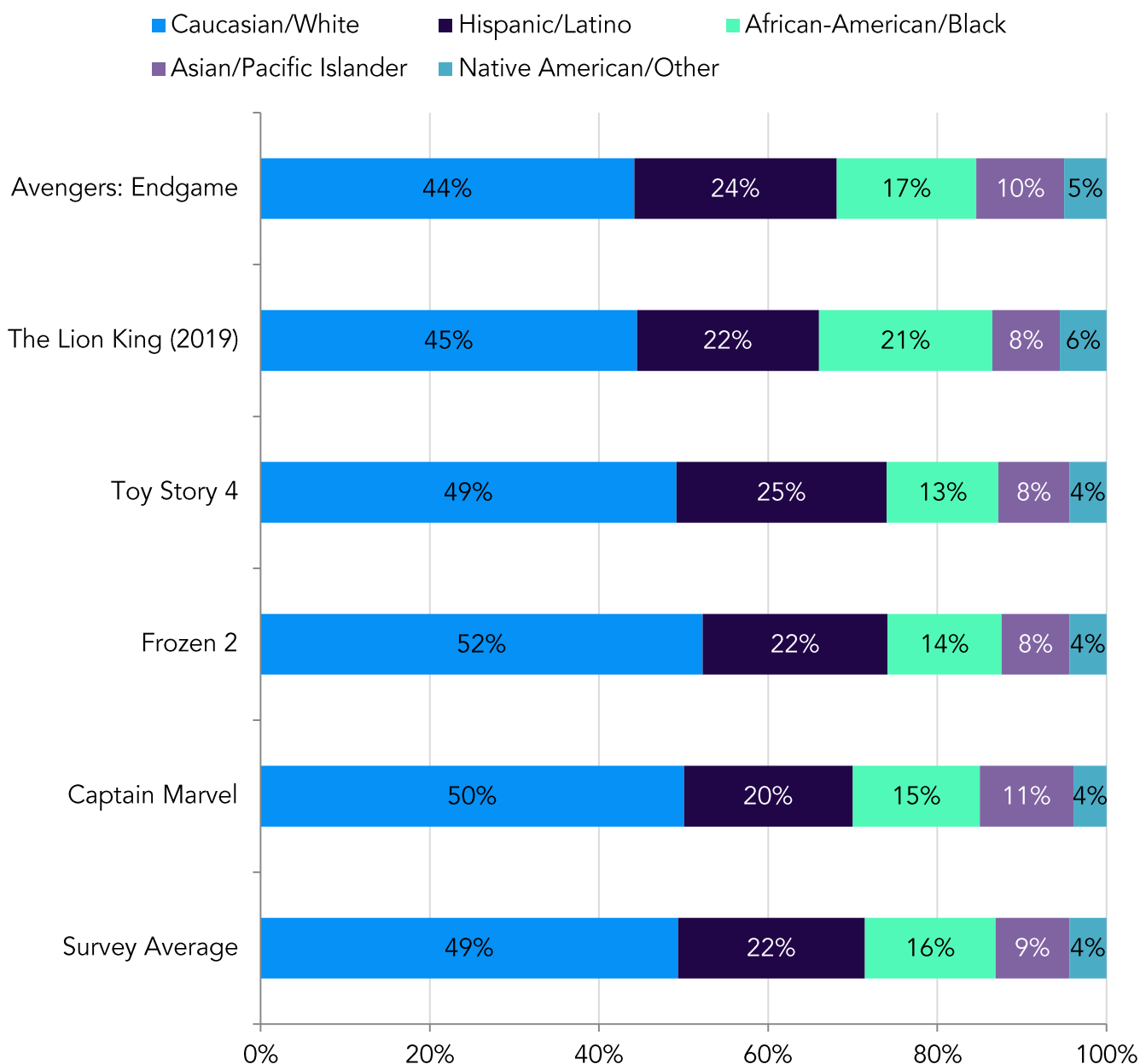
Top Film Demographics by Ethnicity

According to Comscore and Screen Engine/ASI's PostTrak, among the top grossing films, *Avengers: Endgame* drew the most ethnically diverse audience, followed by *The Lion King*.

Twenty-one percent of *The Lion King's* audience was African-American/Black, five percentage points higher than the survey average.

2019 Ethnicity Share of Top Grossing Films²⁷

Source: Comscore/Screen Engine/ASI



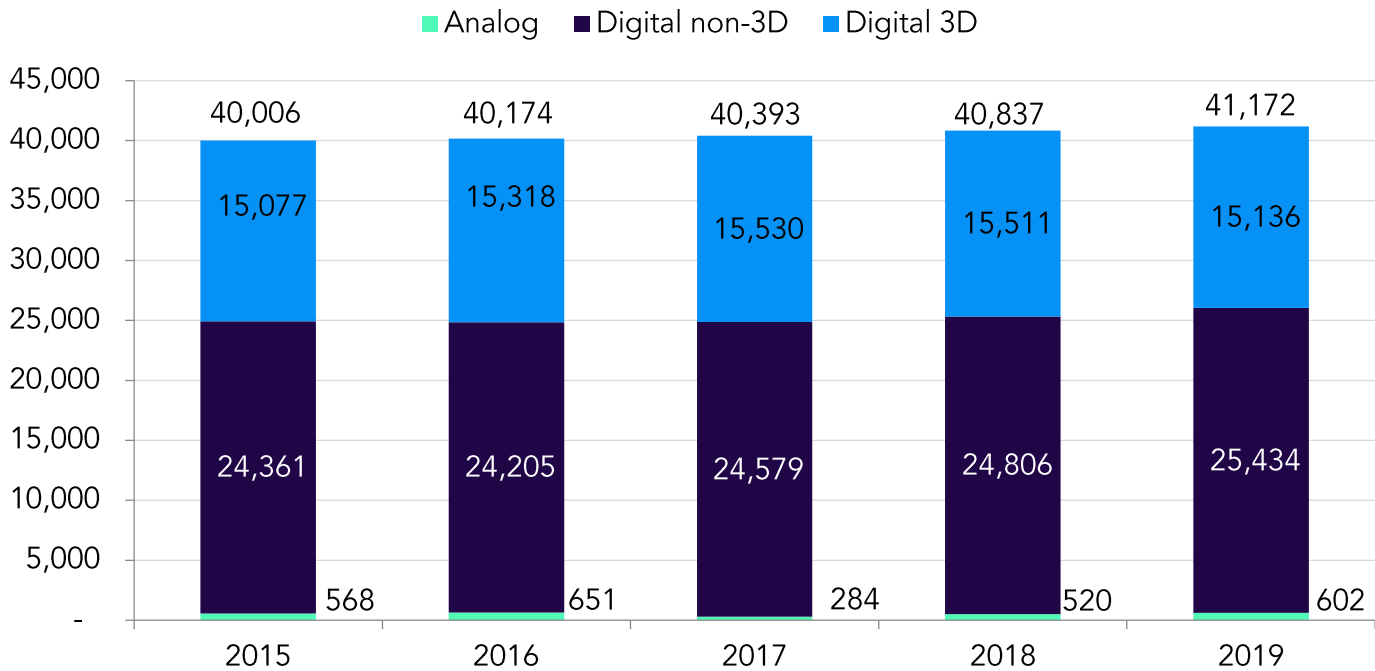
²⁷ Percentage values in table may not sum to 100 percent due to rounding.



U.S. Cinema Screens

The number of digital screens in the United States increased by one percent in 2019 compared to 2018, accounting for 99 percent of all U.S. screens. The number of digital non-3D screens increased by 628, up three percent from the previous year, and accounted for 62 percent of all screens. The number of digital 3D screens decreased two percent from 2018.

U.S. Screens by Type²⁸
Source: IHS Markit



²⁸ Previous years' estimates may be updated based on changes made by source.



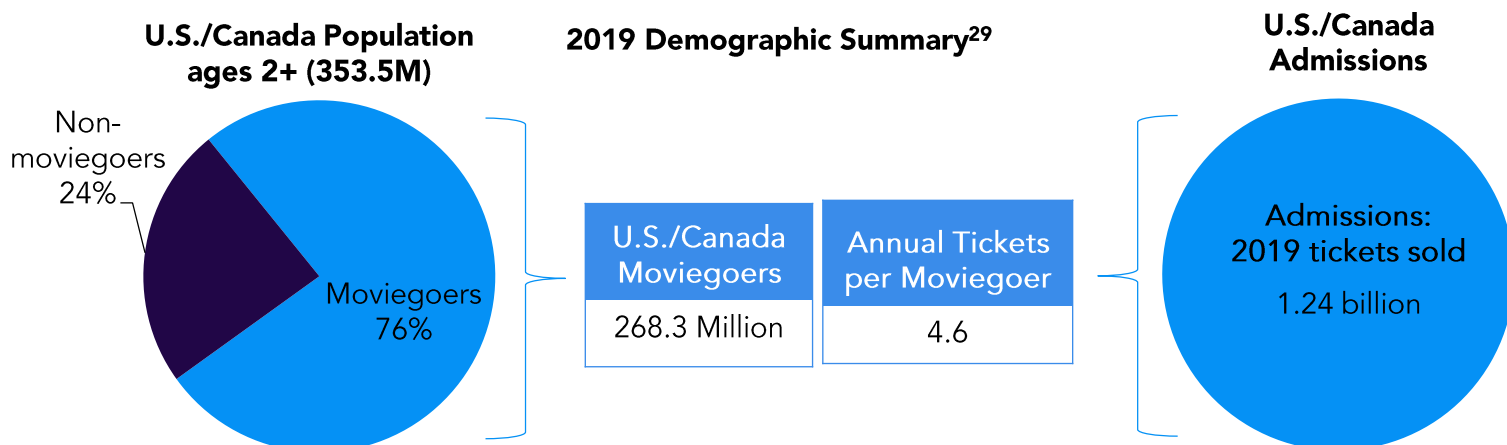
**THEATRICAL
DEMOGRAPHICS**



2019 THEME REPORT

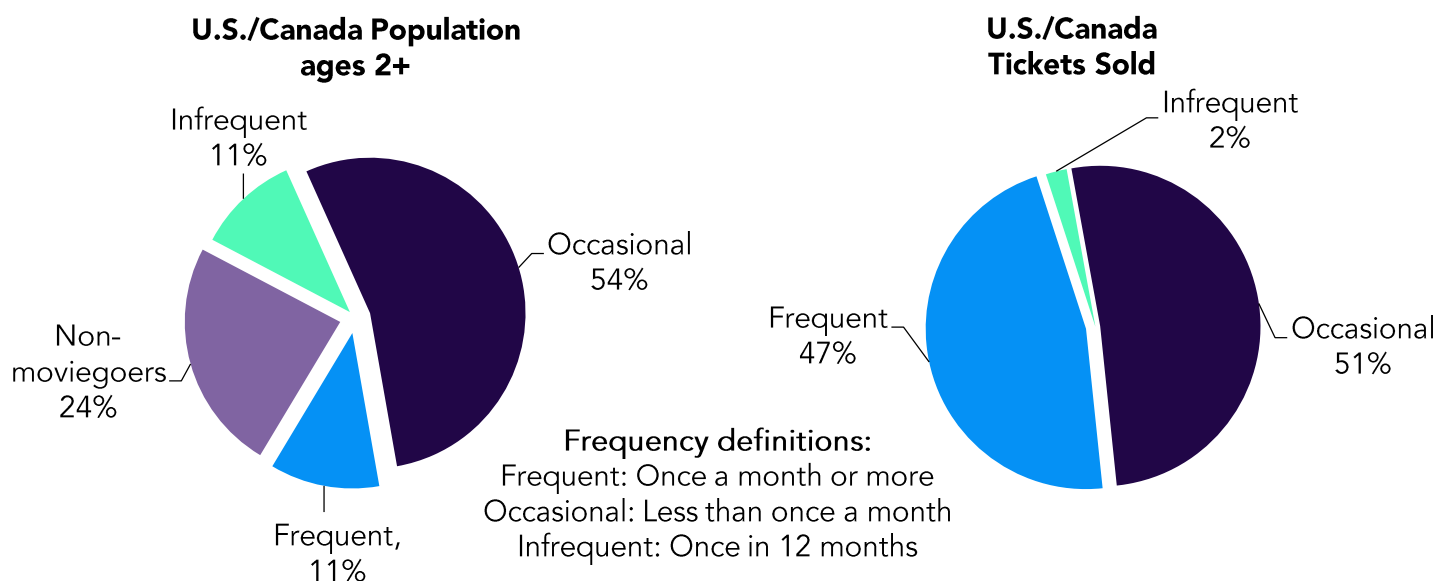
Theatrical Attendance Demographics

More than three-quarters (76%) of the U.S./Canada population aged two or older, or 268 million people, went to a movie at the cinema at least once in 2019 ("moviegoer"), slightly above 2018. The typical moviegoer bought 4.6 tickets per year in 2019, down from 5.0 tickets in 2018.



Eleven percent of the U.S./Canada population are frequent moviegoers who attend the cinema once a month or more. These individuals are responsible for 47 percent of all tickets sold. More than half of the population is occasional moviegoers (54%), who are responsible for 51 percent of all tickets. The remaining two percent of tickets were sold to infrequent moviegoers (11% of the population). The 2019 moviegoer shares were slightly more skewed to less frequent moviegoing categories.

2019 Moviegoer Share of Population and Tickets Sold



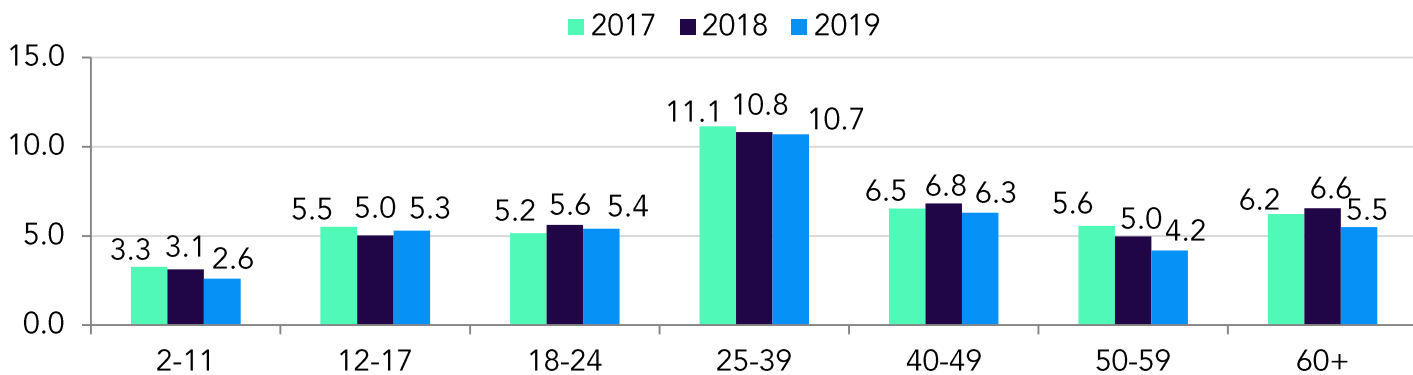
²⁹ MPA's analysis of attendance demographics is based on survey research and attendance projections by ENGINE. See Appendix for details. Surveying is conducted in the United States only, so the results assume the demographic composition of the U.S./Canada combined population is similar to U.S. only. In the 2017 survey, the methodology was changed to online survey only, so comparisons prior to 2017 are not feasible.

2019 THEME REPORT

Theatrical Frequent Moviegoers

In 2019, there were 40 million frequent moviegoers, slightly down versus 2018. The 25-39 year age group (10.7 million) had the most frequent moviegoers, followed by the 40-49 year age group (6.3 million), consistent with 2018. The 12-17, 18-24, 25-39, and 40-49 age groups were overrepresented among frequent moviegoers relative to their proportion of the overall population.

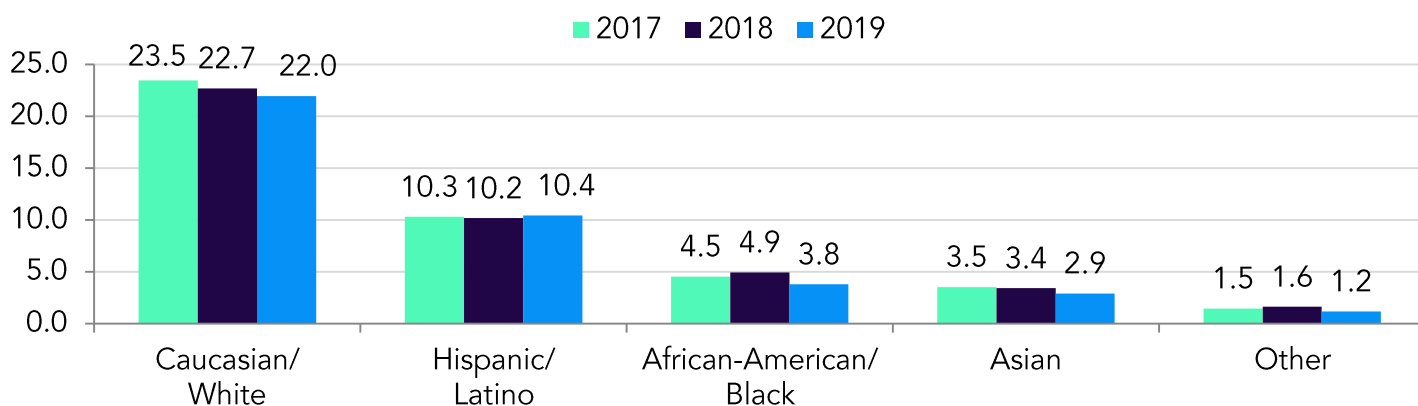
Frequent Moviegoers (Millions) by Age³⁰



	2-11	12-17	18-24	25-39	40-49	50-59	60+
% of Population 2019	13%	8%	9%	21%	13%	13%	23%
% of Frequent Moviegoers 2019	6%	13%	13%	27%	16%	11%	14%

In 2019, the Hispanic/Latino ethnicity was overrepresented in the population of frequent moviegoers (26%) relative to their proportion of the overall population (18%).

Frequent Moviegoers (Millions) by Ethnicity³⁰



	Caucasian/White	Hispanic/Latino	African-American/Black	Asian	Other
% of Population 2019	61%	18%	12%	6%	3%
% of Frequent Moviegoers 2019	55%	26%	9%	7%	3%

³⁰ The small size of frequent moviegoer subgroups may lead to large fluctuation in annual figures.

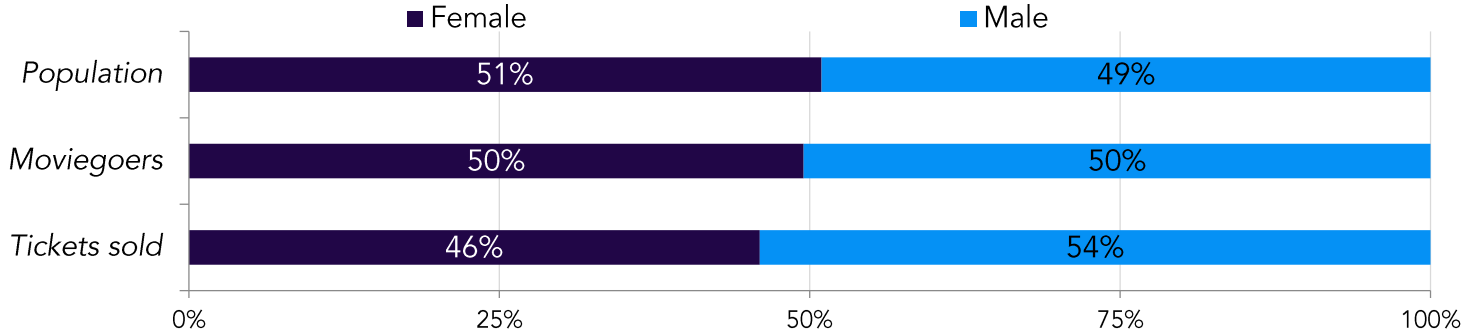


2019 THEME REPORT

Theatrical Demographic Shares

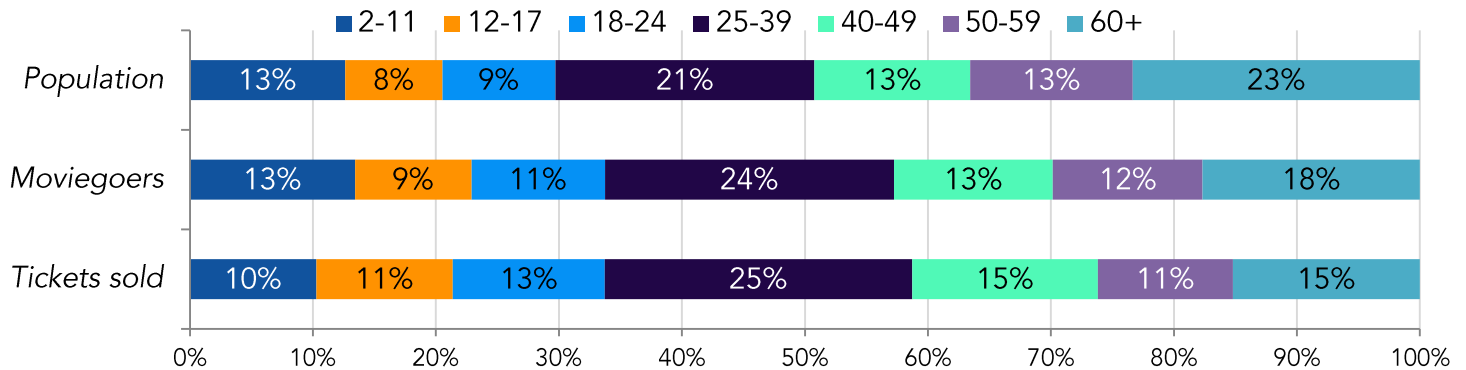
The gender composition of moviegoers (people who went to a movie at the cinema at least once in the year) was evenly split between men and women in 2019. The number of tickets sold skewed slightly toward men.

2019 Gender Share of Total Population, Moviegoers, and Tickets Sold



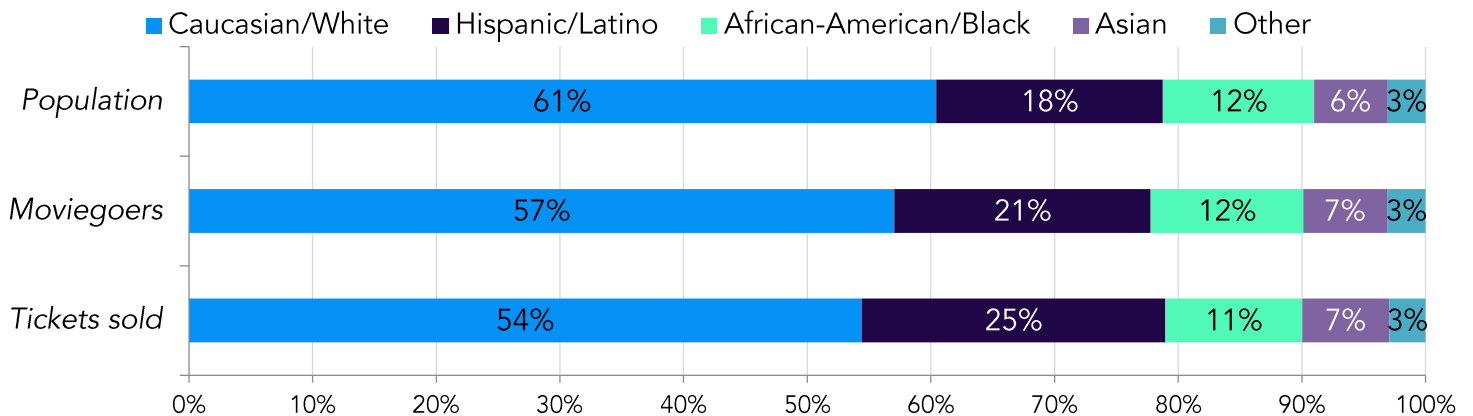
In 2019, the 18-24 and 25-39 age groups were overrepresented in terms of tickets sold, accounting for nine percent and 21 percent of the population, respectively, and 13 percent and 25 percent of tickets sold. Age group shares were similar to 2018.

2019 Age Group Share of Total Population, Moviegoers, and Tickets Sold



Although the Caucasian/White category makes up the majority of the population (61%) and moviegoers (57%), it represented a smaller share of 2019 ticket sales (54%). In 2019, the Hispanic/Latino category was overrepresented in share of movie tickets purchased (25%) relative to share of the population (18%), similar to 2018.

2019 Ethnicity Share of Total Population, Moviegoers, and Tickets Sold

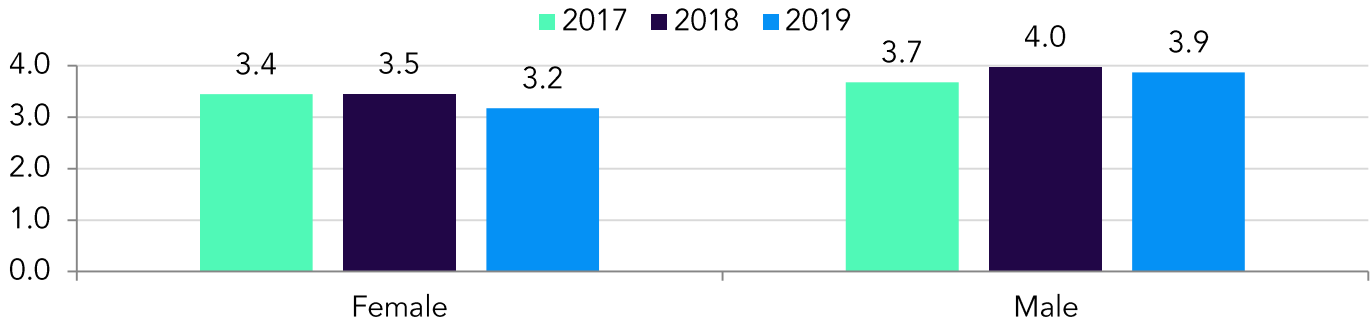


2019 THEME REPORT

Theatrical Per Capita Attendance

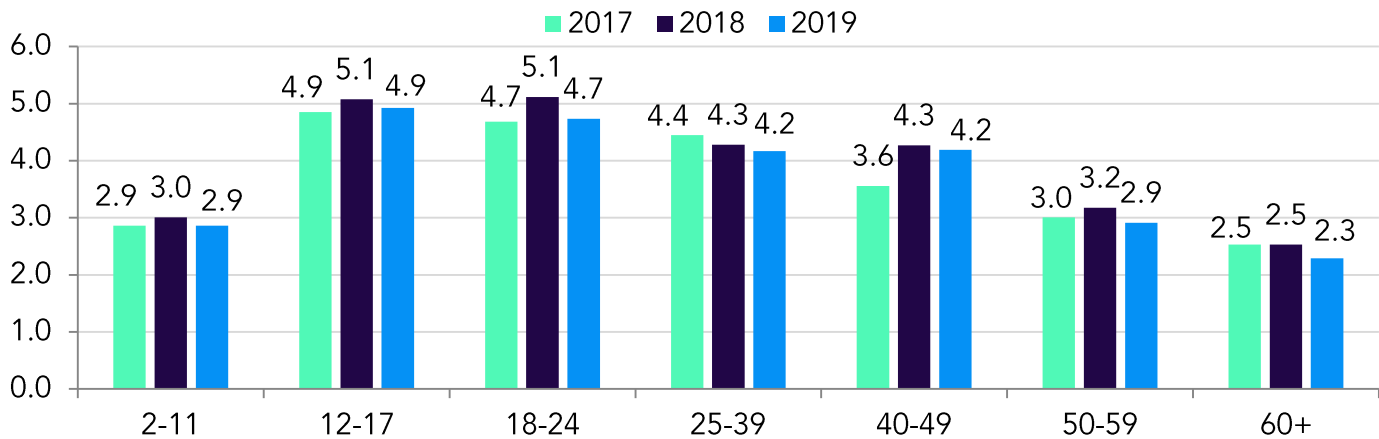
In 2019, per capita annual movie attendance (tickets sold per person) decreased for both females (3.2) and males (3.9) against 2018.

Per Capita Attendance by Gender



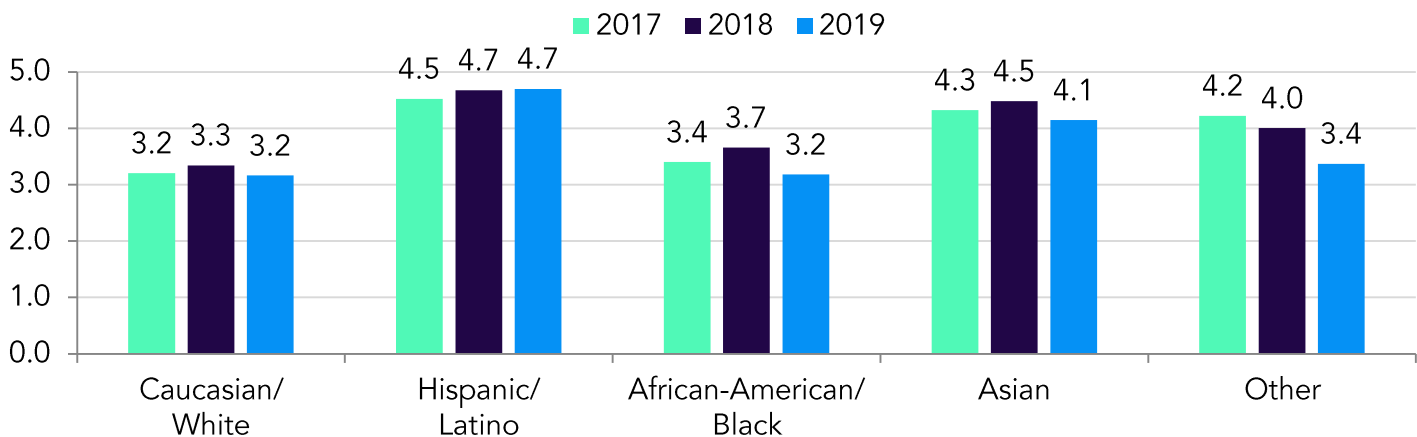
In 2019, the 12-17 and 18-24 age groups had the highest per capita attendance (4.9 and 4.7, respectively), followed by the 25-39 and 40-49 age groups (4.2). All age groups decreased their per capita attendance in 2019 compared to 2018.

Per Capita Attendance by Age



The Hispanic/Latino category reported the highest annual attendance per capita in 2019, going to the cinema an average of 4.7 times in the year, steady compared to 2018. Per capita attendance decreased for all other ethnicity categories in 2019 compared to 2018.

Per Capita Attendance by Ethnicity

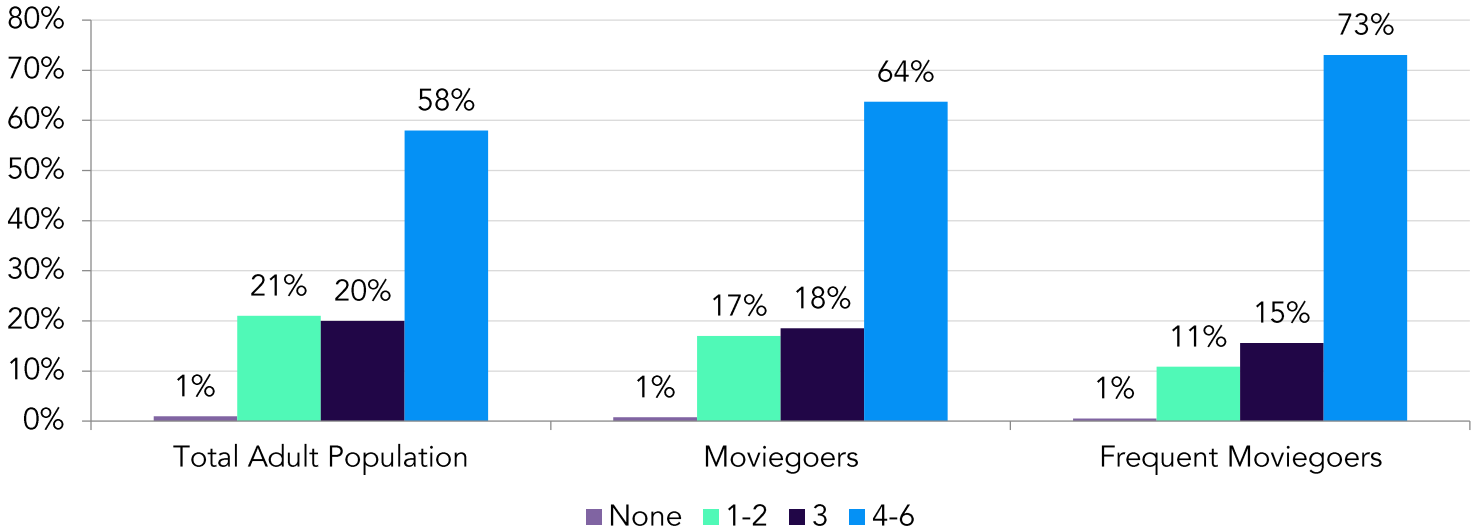


2019 THEME REPORT

Technology & Moviegoers

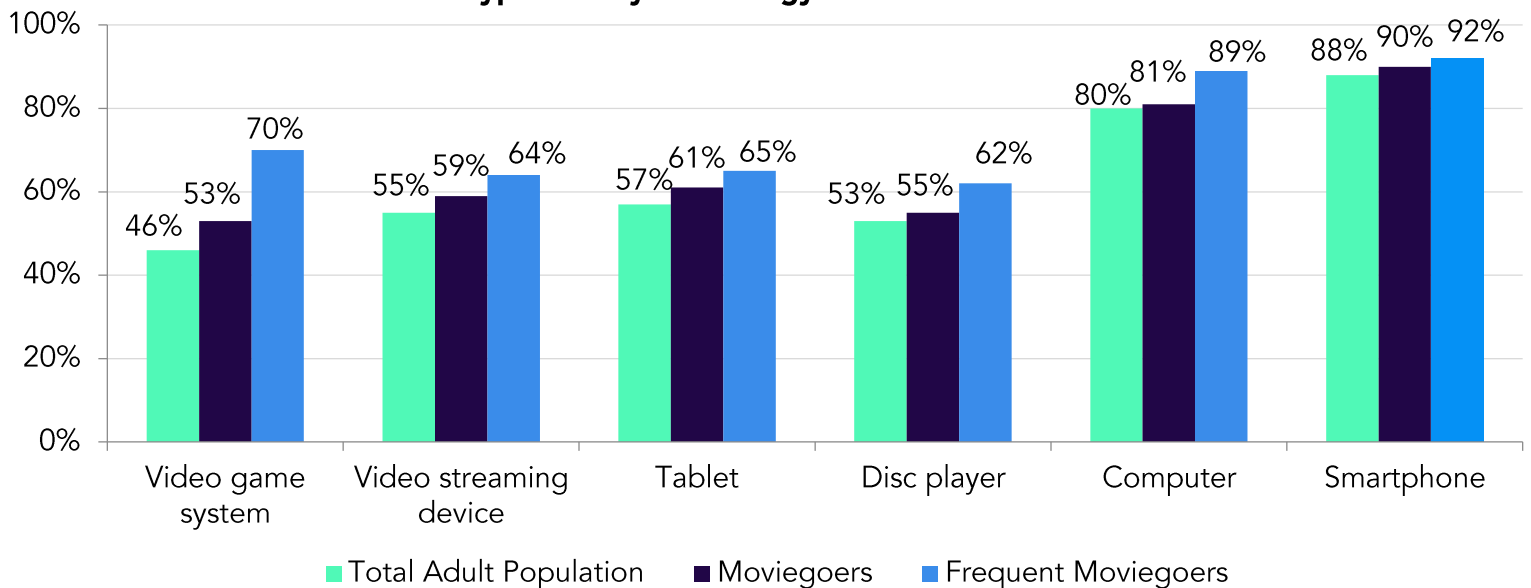
Frequent moviegoers tend to own more key technology products (computers, smartphones, disc players, tablets, video-streaming devices, and video game systems) than the general population of adults (18 years or older). Nearly three-quarters of all frequent moviegoers (73%) own at least four different types of key technology products, compared to 58 percent of the total adult population.

Number of Key Technology Products Owned



Frequent moviegoers have a higher share of ownership for each of the key technology products, when compared to the total adult population. Video game system (70%), video-streaming device (64%), disc player (62%), and computer (89%) ownership is particularly high among frequent moviegoers relative to the total adult population.

Types of Key Technology Products Owned³¹



³¹ People surveyed may own more than one type of technology product. Because product categories are not mutually exclusive, percentages will sum to more than 100%.





**HOME/MOBILE
ENTERTAINMENT:
GLOBAL**



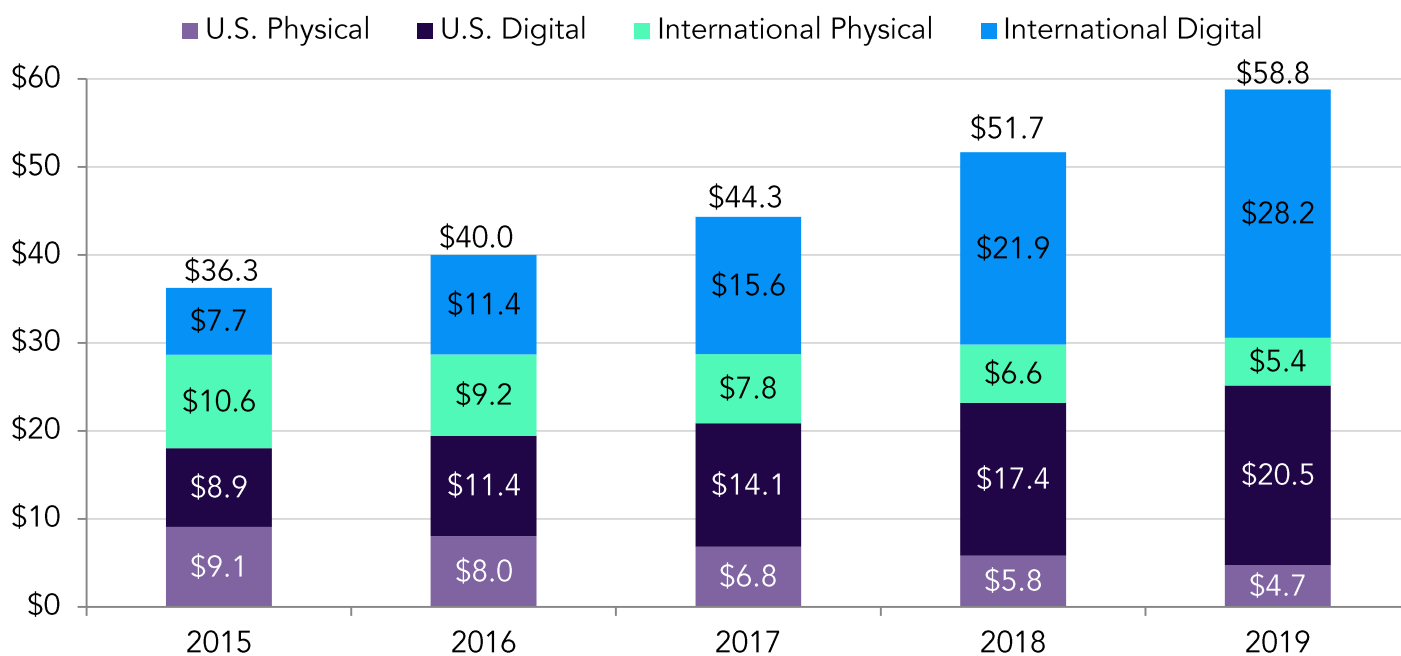
2019 THEME REPORT

Global Home/Mobile Entertainment

In 2019, the home/mobile entertainment³² market (content released digitally and on disc) reached \$58.8 billion globally, a 14 percent increase compared to 2018. The digital market was the driver of growth. The U.S. digital market increased 18 percent and the international digital market increased 29 percent, when compared to 2018.

Global Home/Mobile Entertainment Market (US\$ Billions)

Source: IHS Markit (International) and Digital Entertainment Group (U.S.)



		2015	2016	2017	2018	2019	19 vs. 18
International	Physical ³³	\$10.6	\$9.2	\$7.8	\$6.6	\$5.4	-18%
	Digital ³⁴	\$7.7	\$11.4	\$15.6	\$21.9	\$28.2	29%
U.S. ³⁵	Physical	\$9.1	\$8.0	\$6.8	\$5.8	\$4.7	-19%
	Digital	\$8.9	\$11.4	\$14.1	\$17.4	\$20.5	18%
Total		\$36.3	\$40.0	\$44.3	\$51.7	\$58.8	14%

³² Home/mobile entertainment refers to entertainment content viewed on all devices, whether home-based (e.g. TVs) or mobile-based (e.g. smart phones). This includes both digital methods (EST, VOD, and paid subscription streaming (SVOD) – excluding virtual pay TV – and physical methods (Blu-ray and DVD sales and rentals). Digital includes movies and TV, and excludes sport. Previous years' estimates may be updated based on changes made by sources.

³³ International Physical is sourced from IHS Markit and includes all countries except the United States. Includes Children's, Feature film, Other and TV genre rental and retail consumer spending. Previous years' estimates may be updated based on changes made by source.

³⁴ International Digital is sourced from IHS Markit and includes all countries except the United States. Includes Digital TV (excludes Sport) and Movie rental and retail, Pay TV On-demand Transactional Revenue for Blockbuster Movies, Library Movies and TV genres, and online video subscription revenue (excludes Sport genre and Virtual Pay TV type). Previous years' estimates may be updated based on changes made by source. In the current report, previous years' estimates were updated due to exclusion of virtual pay television (TV) and increased precision on genres included.

³⁵ The source of U.S. home/mobile entertainment data is Digital Entertainment Group (DEG), which covers the United States (not Canada). DEG's definition of physical includes sell-through packaged goods, brick and mortar, subscription (physical only), and kiosk. Digital includes EST, VOD, and subscription streaming (SVOD). Previous years' estimates may be updated based on changes made by source.



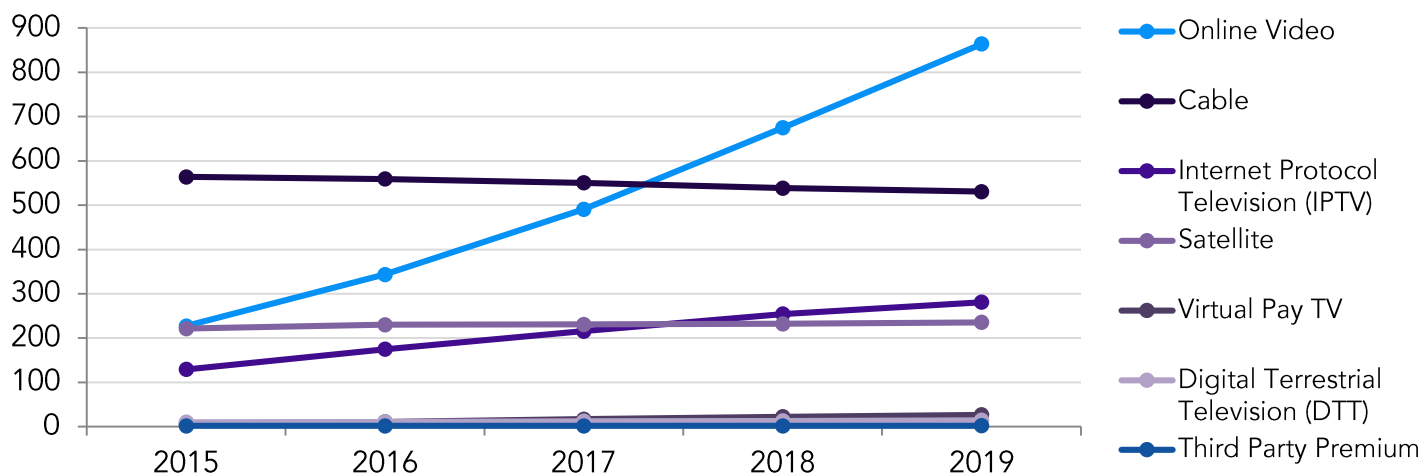
2019 THEME REPORT

Global Pay TV & Online Video Subscriptions

The global total of online video subscriptions (863.9 million), such as Netflix and Amazon Prime, increased by 28 percent, or 189.2 million, when comparing 2019 to 2018. The number of cable subscriptions decreased by two percent in 2019 to 530.6 million. Households with more than one type of subscription service are counted in each of the categories to which they subscribe. For example, the majority of households have both pay TV and online subscriptions³⁶, and are counted in both categories.

Global Pay TV & Online Video Subscriptions (Millions)³⁷

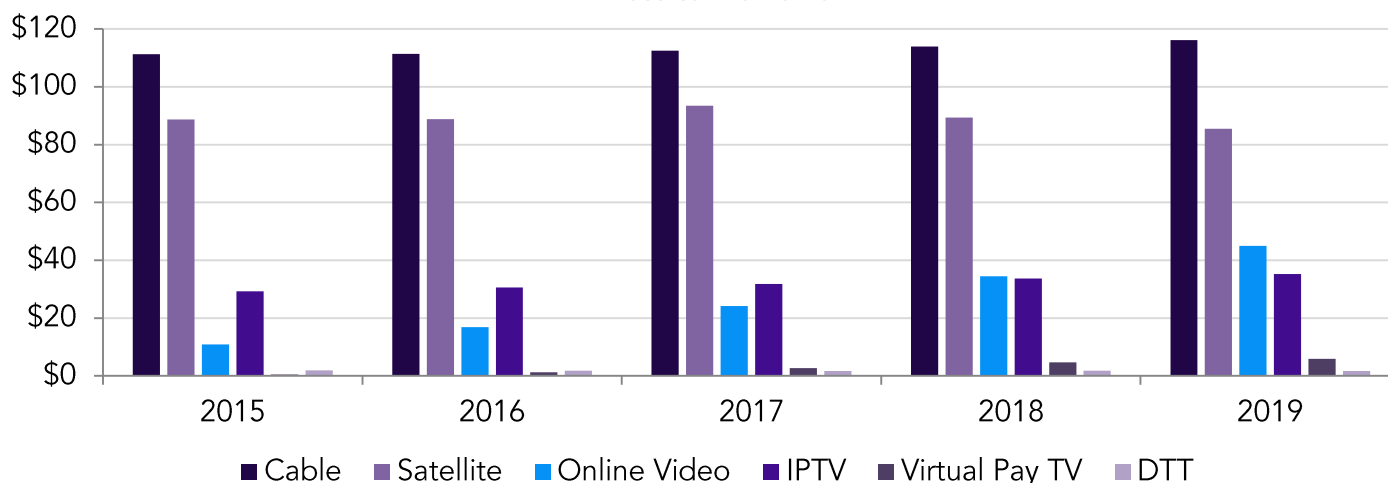
Source: IHS Markit



The pay TV subscription market (excluding online video) was \$244.6 billion globally in 2019. Cable remains the highest subscription video market, with an increase of \$2.2 billion to \$116 billion in 2019, despite the decrease in subscriptions. Online video, the third highest subscription market, had the largest increase in 2019 with a 31 percent increase or \$10.6 billion.

Global Pay TV Subscription & Online Subscription Markets (US\$ Billions)^{37, 38}

Source: IHS Markit



³⁶ Ampere Analysis graph (10/24/18), "SVoD-only households vs. pay TV-only households." Retrieved from <https://www.ampereanalysis.com/blog/aeee9a6c-e7eb-496c-bedc-e9e36f78ce1f>

³⁷ Online video includes Channel (e.g. SVOD), Multiscreen (e.g. TV Everywhere), and N/A (Others), and excludes Virtual Pay TV. Virtual Pay TV includes services such as AT&T Now and Hulu Live TV. Online and Virtual Pay TV both include movies, sports, and TV. Previous years' estimates may be updated based on changes made by source. In the current report, previous years' estimates were updated to separate virtual pay television (TV) from online video.

³⁸ Market includes monthly pay TV subscription fees and pay TV on-demand services, excluding set-top box rental or installation fees. Tiers included are basic, extended basic, premium, and a la carte. Previous years' estimates may be updated based on changes made by source.





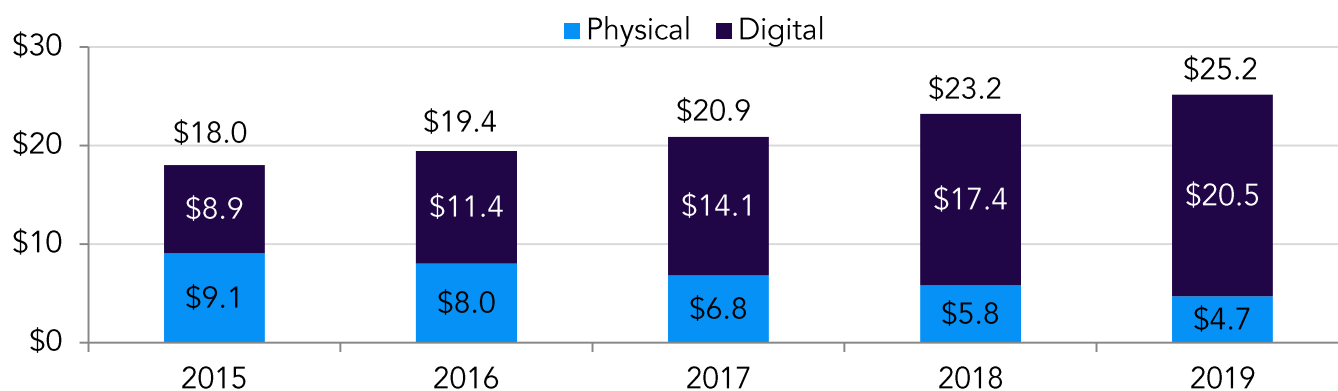
**HOME/MOBILE
ENTERTAINMENT:
UNITED STATES**



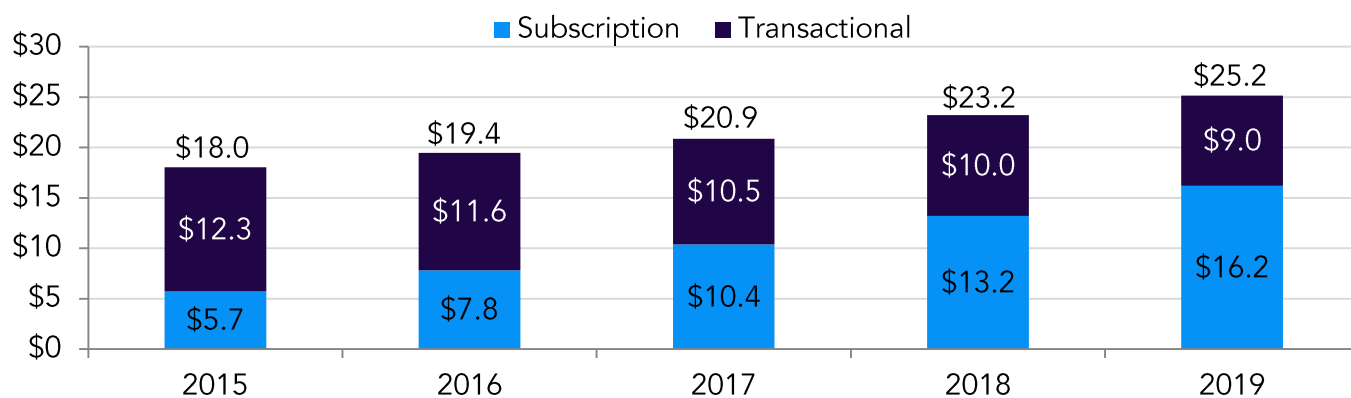
In 2019, the overall home/mobile entertainment market (content released digitally and on disc) in the United States was \$25.2 billion, up eight percent compared to 2018. The digital market increased by 18 percent compared to 2018, while the physical market decreased by 19 percent. The subscription market continues to increase (up 23% from 2018), while the transactional market continues to decrease (down 10% from 2018).

U.S. Home/Mobile Entertainment Market (US\$ Billions)³⁹

Source: Digital Entertainment Group



	2015	2016	2017	2018	2019	19 vs. 18
Physical	\$9.1	\$8.0	\$6.8	\$5.8	\$4.7	-19%
Digital	\$8.9	\$11.4	\$14.1	\$17.4	\$20.5	18%
Total	\$18.0	\$19.4	\$20.9	\$23.2	\$25.2	8%



	2015	2016	2017	2018	2019	19 vs. 18
Transactional ⁴⁰	\$12.3	\$11.6	\$10.5	\$10.0	\$9.0	-10%
Subscription ⁴⁰	\$5.7	\$7.8	\$10.4	\$13.2	\$16.2	23%
Total	\$18.0	\$19.4	\$20.9	\$23.2	\$25.2	8%

³⁹ The source of U.S. home/mobile entertainment data is Digital Entertainment Group (DEG), which covers the United States (not Canada). DEG's definition of physical includes sell-through packaged goods, brick and mortar, subscription (physical only), and kiosk. Digital includes EST, VOD, and subscription streaming (SVOD). Previous years' estimates may be updated based on changes made by source.

⁴⁰ Transactional includes sell-through packaged goods, brick and mortar rental, kiosk rental, EST, and VOD. Subscription includes physical and digital subscriptions.

2019 THEME REPORT

Top 25 Films (Digital)

2019 Top 25 U.S. Electronic Sell Through (EST)⁴¹

Source: Comscore Digital Download Essentials Industry Service

Rank	Title
1	Avengers: Endgame
2	Aquaman
3	Spider-Man: Into the Spider-Verse
4	A Star is Born (2018)
5	Captain Marvel
6	Spider-Man: Far From Home
7	Bohemian Rhapsody
8	Aladdin (2019)
9	Ralph Breaks the Internet
10	Joker
11	John Wick: Chapter 3 – Parabellum
12	Toy Story 4
13	How to Train Your Dragon: The Hidden World
14	Shazam!
15	Fantastic Beasts: The Crimes of Grindelwald
16	The Lion King (2019)
17	The Secret Life of Pets 2
18	Fast & Furious Presents: Hobbs & Shaw
19	Pokémon Detective Pickachu
20	Godzilla: King of the Monsters (2019)
21	Dr. Seuss' The Grinch
22	Bumblebee
23	It Chapter Two
24	The Little Mermaid (1989)
25	The Lion King (1994)

2019 Top 25 U.S. Digital Rentals⁴¹

Source: Comscore Dynamic Studio Share and Digital Download Essentials Industry Services

Rank	Title
1	Bohemian Rhapsody
2	A Star is Born (2018)
3	Aquaman
4	Captain Marvel
5	Green Book
6	Instant Family
7	Spider-Man: Into the Spider-Verse
8	Avengers: Endgame
9	Ralph Breaks the Internet
10	Night School
11	Creed II
12	John Wick: Chapter 3 – Parabellum
13	Spider-Man: Far From Home
14	Aladdin (2019)
15	The Mule
16	Shazam!
17	Dr. Seuss' The Grinch
18	Venom
19	Bumblebee
20	BlacKkKlansman
21	The Upside
22	Pokémon Detective Pickachu
23	Crazy Rich Asians
24	John Wick
25	Fast & Furious Presents: Hobbs & Shaw

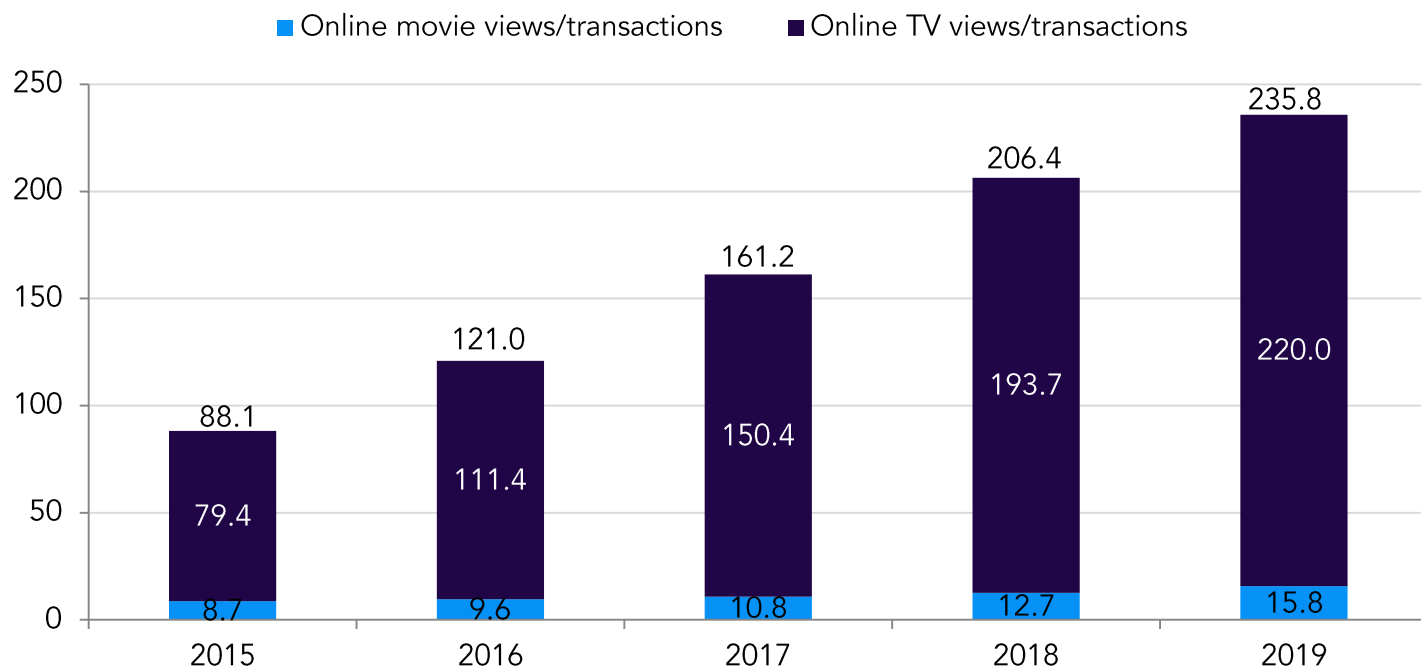
⁴¹ Does not include non-participating independent distributors.



Online video content viewing continued its upward trend in 2019, reaching 235.8 billion views/transactions in the United States, a 14 percent increase compared to 2018. Online movie views/transactions (+25%) and TV views/transactions (+14%) both increased from 2018. There are more than 140 online services providing movies and television shows to U.S. consumers.

U.S. Online Views/Transactions (Billions)

Source: IHS Markit



	2015	2016	2017	2018	2019	18 vs. 17
Online movie views/transactions ⁴²	8.7	9.6	10.8	12.7	15.8	25%
Online TV views/transactions ⁴³	79.4	111.4	150.4	193.7	220.0	14%
Total	88.1	121.0	161.2	206.4	235.8	14%

⁴²Online movie views/transactions includes views from subscription services, and digital transactions. Previous years' estimates may be updated based on changes made by source.

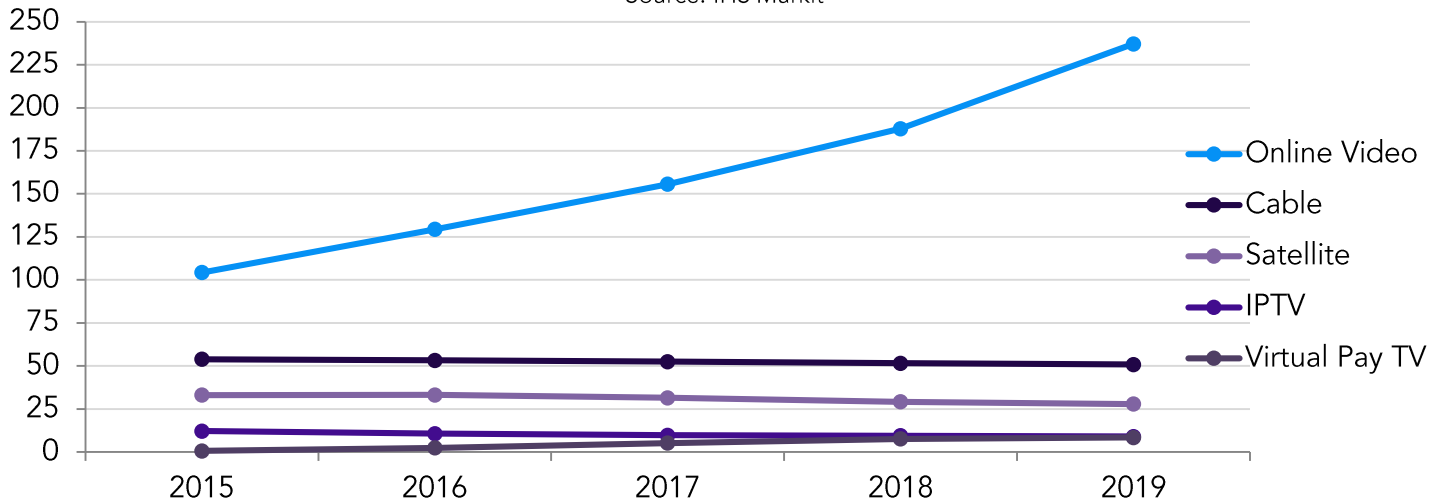
⁴³Online TV views/transactions includes free to view viewing, subscription services, and digital transactions. Previous years' estimates may be updated based on changes made by source.

U.S. Pay TV & Online Video Subscriptions

In 2019, the number of online video subscriptions in the United States increased to 237.2 million (+26%) and the number of Virtual Pay TV subscriptions increased to 8.4 million (+10%). Households with more than one type of subscription service are counted in each of the categories to which they subscribe. For example, the majority of households have both pay TV and online subscriptions⁴⁴ and are counted in both categories.

U.S. Pay TV & Online Video Subscriptions (Millions)⁴⁵

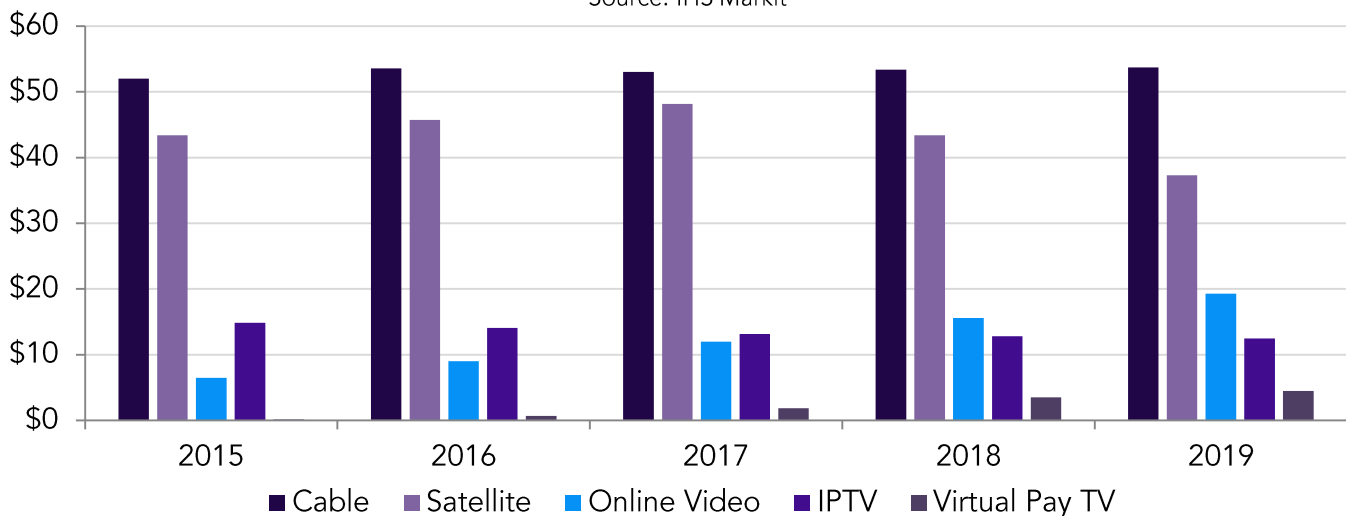
Source: IHS Markit



The pay TV subscription market (excluding online video) was \$107.9 billion in the United States in 2019. The market from cable subscriptions increased one percent to \$53.7 billion despite subscriptions decreasing one percent. Online video, the third largest subscription category after cable and satellite, increased 24 percent to \$19.3 billion in 2019.

U.S. Pay TV Subscription & Online Subscription Video Markets (US\$ Billions)^{45, 46}

Source: IHS Markit



⁴⁴ Ampere Analysis graph (10/24/18), "SVoD-only households vs. pay TV-only households." Retrieved from <https://www.ampereanalysis.com/blog/aace9a6c-e7eb-496c-bedc-e9e36f78ce1f>

⁴⁵ Online video includes Channel (e.g. SVOD), Multiscreen (e.g. TV Everywhere), and N/A (Others), and excludes Virtual Pay TV. Virtual Pay TV includes services such as AT&T Now and Hulu Live TV. Online and Virtual Pay TV both include movies, sports, and TV. Previous years' estimates may be updated based on changes made by source. In the current report, previous years' estimates were updated to separate virtual pay television (TV) from online video.

⁴⁶ Market includes monthly pay TV subscription fees and pay TV on-demand services, excluding set-top box rental or installation fees. Tiers included are basic, extended basic, premium, and a la carte. Previous years' estimates may be updated based on changes made by source.

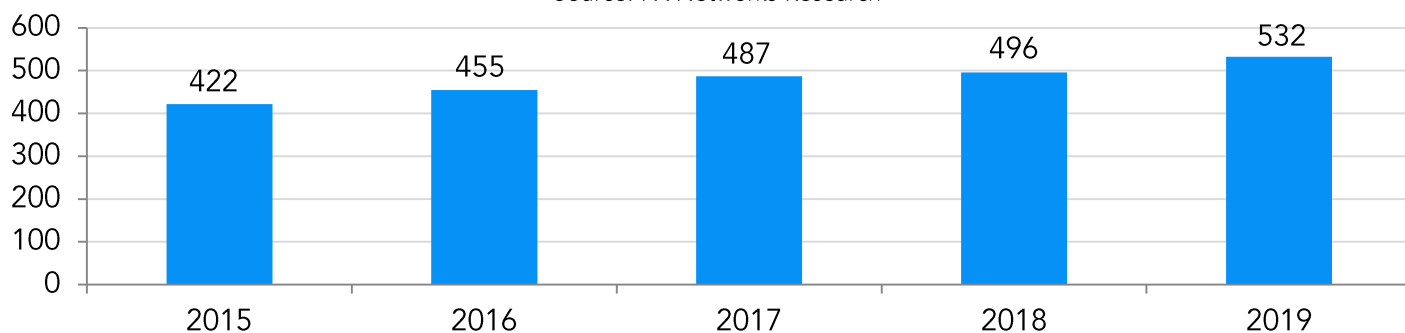
2019 THEME REPORT

Original Series Production

In 2019, there were 532 original scripted series on broadcast, pay TV, and online services aimed at U.S. audiences according to FX Networks Research, an increase of 26 percent compared to 2015.

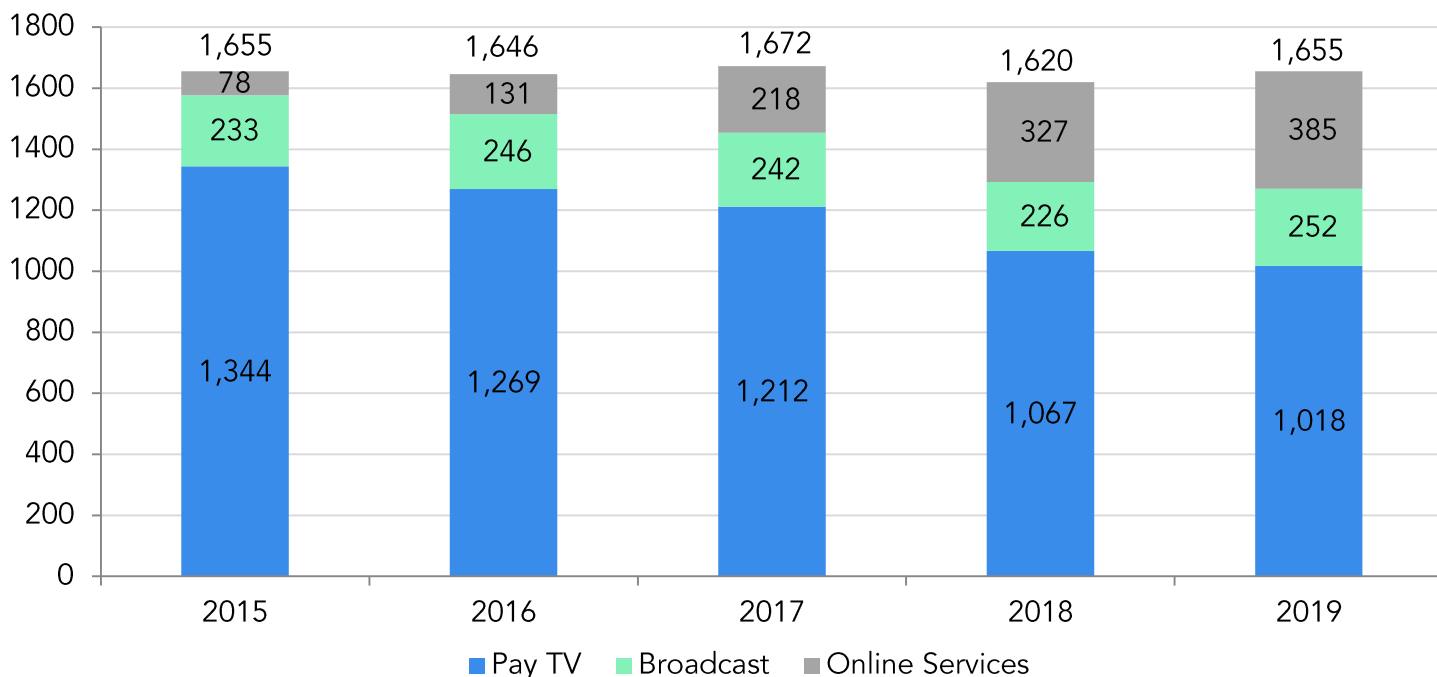
Estimated Number of Scripted Original Series⁴⁷

Source: FX Networks Research



Expanding the analysis to include additional categories of original series (unscripted shows, children's programs and daytime dramas), there were 1,655 total original series in 2019, up two percent from 2018. The increase was driven by the number of original series produced for online services, which reached 385 in 2019, up 18 percent from 2018, and more than quadruple the number in 2015.

Estimated Number of Total Original Series⁴⁸



⁴⁷ Estimated by FX Networks Research as of January 2020 based on third party data covering broadcast, cable and online outlets. Excludes library, daytime dramas, one-episode specials, non-English language/English-dubbed, children's programs, and short form content (<15 mins). FX Networks Research no longer provides subtotals by distribution channel.

⁴⁸ These estimates reflect full-length original scripted and unscripted series in the English language released in the reported year, by a U.S. production company (including co-productions). Compiled based on a number of sources, including MPA member studios, film offices, and third party sources, including Ampere Analysis and Variety Insight. In addition to FX coverage, these estimates include the following content types: daytime dramas, children's programs, and unscripted series including news and talk shows. Multiple seasons in one year for a series are counted only once. Previous years' estimates may be updated as more information becomes available.



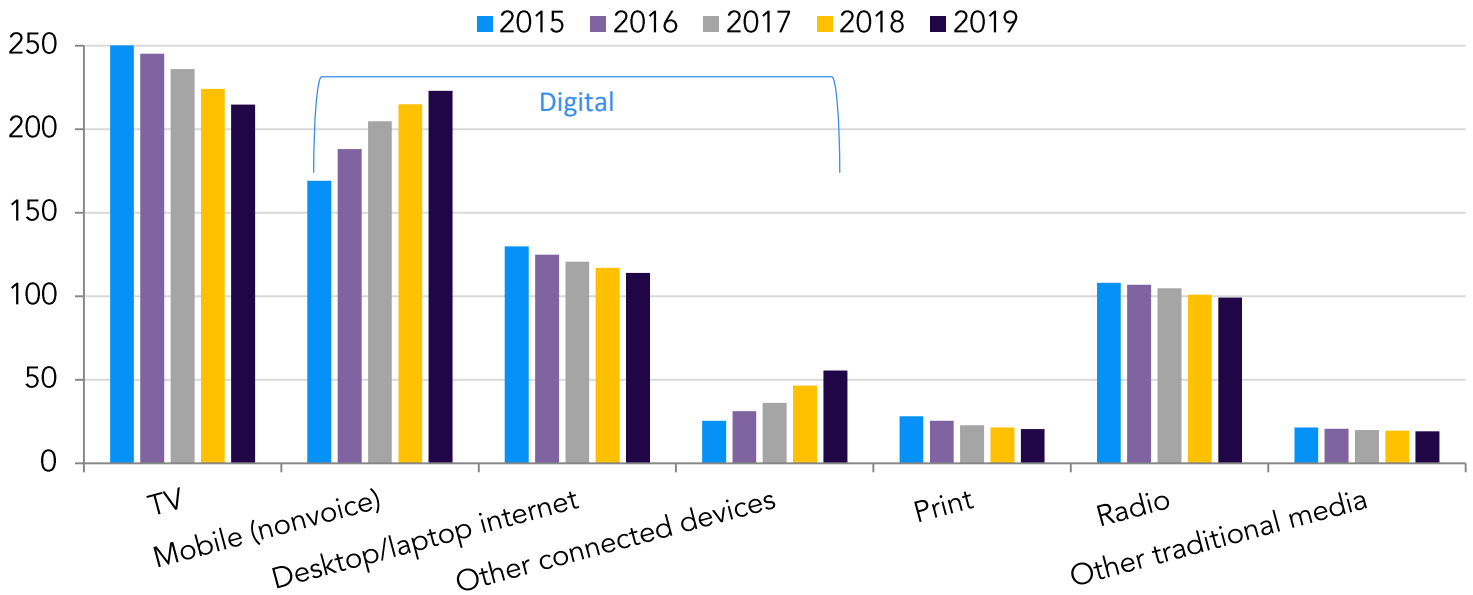
2019 THEME REPORT

U.S. Average Time Spent with Media

In 2019, the time Americans spent per day on their mobile phones (excluding voice activities) increased four percent to 3 hours and 43 minutes, surpassing the time spent watching television (3 hours and 34 minutes) for the first time. In aggregate, Americans spent 52 percent of their media time on a digital platform, with mobile (non-voice) as the largest digital category. Other connected devices, a category which includes connected TV devices, such as Apple TV and Roku, saw the largest percentage increase (20%) in 2019 compared to 2018.

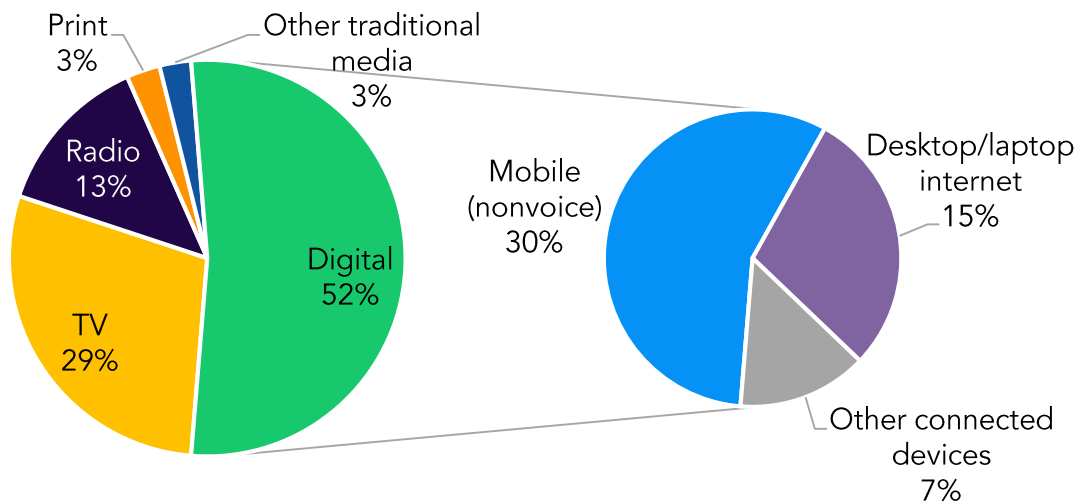
Average Time Spent per Day with Major Media by U.S. Adults (Minutes)⁴⁹

Source: eMarketer



2019 Average Time Spent per Day with Major Media by U.S. Adults (Minutes)⁴⁹

Source: eMarketer



⁴⁹ If two or more devices are being used at the same time, time is counted for all devices. Previous years' estimates may be updated based on changes made by source.





**HOME/MOBILE VIEWING
DEMOGRAPHICS**



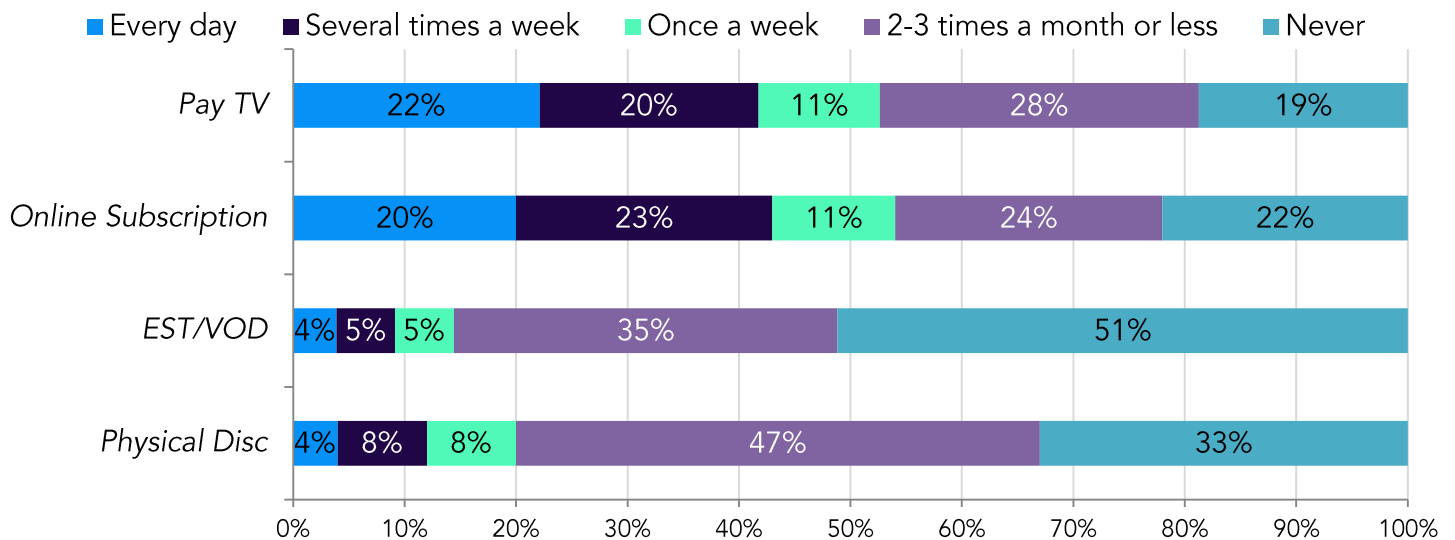
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Frequency of Home/Mobile Viewing: All Adults / All Devices

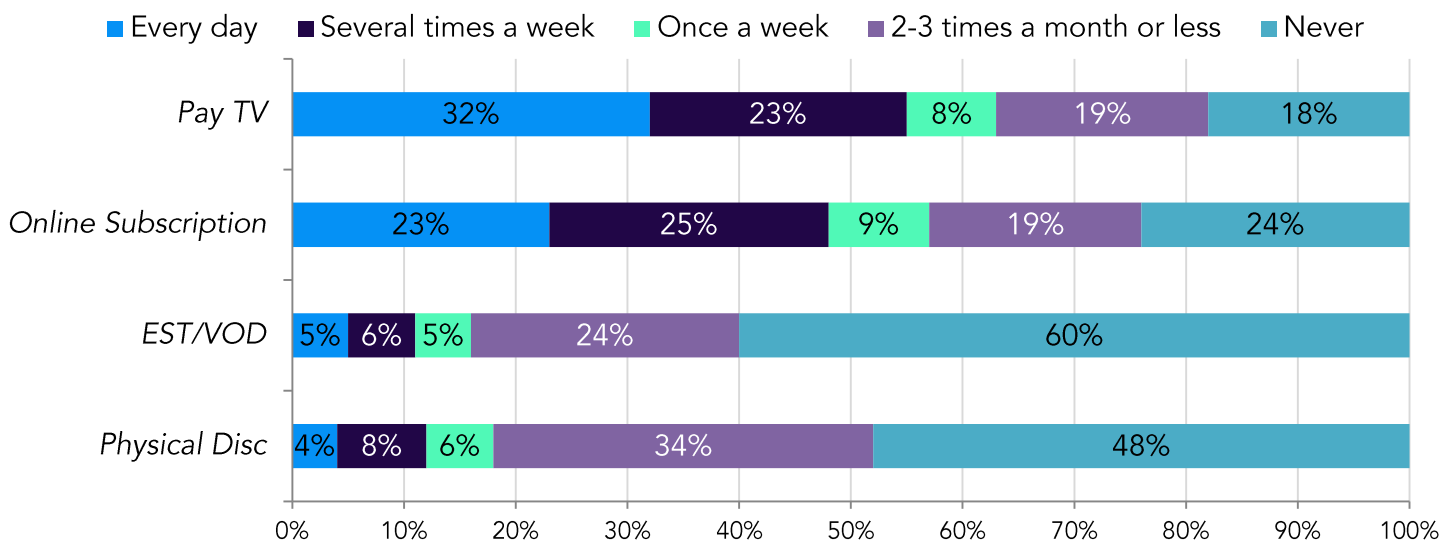
More than 80 percent of U.S. adults watch movies and TV shows via traditional television services, the highest proportion of the home/mobile viewing methods, similar to 2018. TV services also have the highest proportion of daily viewers: 32 percent of adults watch TV shows daily and 22 percent watch movies daily on traditional TV services. Online subscription services, which more than 75 percent of adults use, have similar but slightly lower viewing levels.

Physical discs are used more often for movies (67% of adults) than for TV shows (52%). Online Electronic Sell Through (EST)/video-on-demand (VOD) services are used by 40 percent of Americans to view TV shows and 49 percent to view movies, primarily two to three times a month or less.

2019 Share of Population Viewing Movies by Home/Mobile Distribution Channel⁵⁰



2019 Share of Population Viewing TV Shows by Home/Mobile Distribution Channel⁵⁰



⁵⁰ Pay TV includes regular television services (broadcast, cable and satellite), premium channels and pay-per-view through those services.

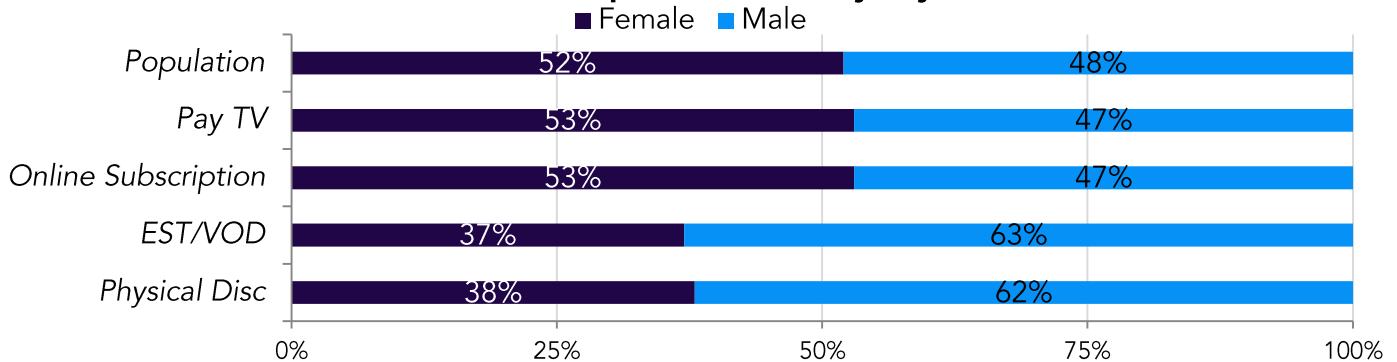


2019 THEME REPORT

Home/Mobile Viewing Demographics: Every Day Viewers

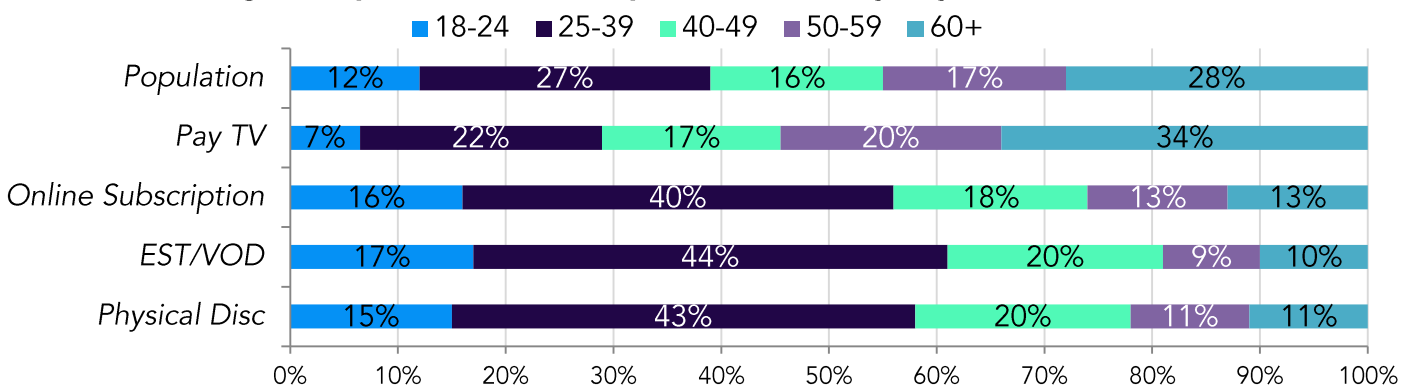
In 2019, the gender composition of traditional TV and online subscription viewers who watch every day (the highest frequency group) was nearly the same as the population, while the small group of EST/VOD and physical disc every day viewers skewed more toward men, relative to their share of the population.

2019 Gender Share of Adult Population and Every Day Home/Mobile Viewers



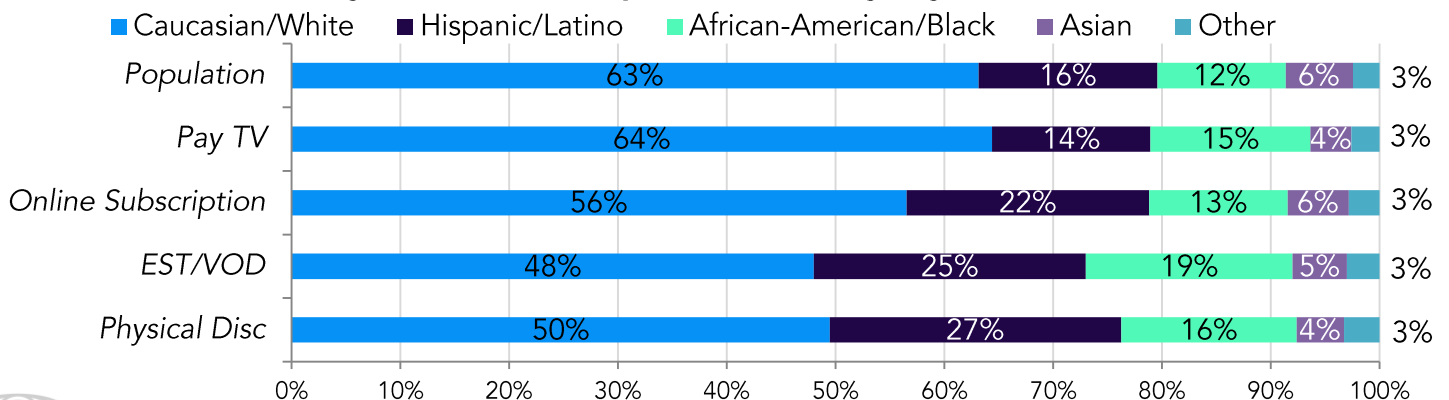
In 2019, the 50-59 and 60+ age groups were overrepresented in terms of every day viewers of traditional TV services, while the 25-39 age group was heavily overrepresented in terms of every day viewers to online subscription, EST/VOD and physical disc distribution channels.

2019 Age Group Share of Adult Population and Every Day Home/Mobile Viewers



In 2019, the Hispanic/Latino category was overrepresented in the population of every day viewers in the distribution channels of physical discs (27%), EST/VOD (25%), and online subscriptions (22%) relative to share of the population (16%).

2019 Ethnicity Share of Adult Population and Every Day Home/Mobile Viewers

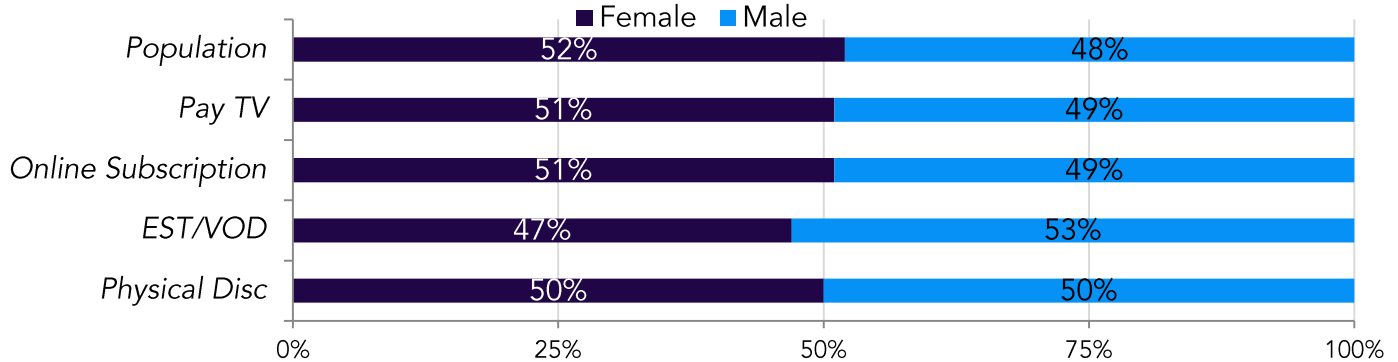


2019 THEME REPORT

Home/Mobile Viewing Demographics: All Viewers

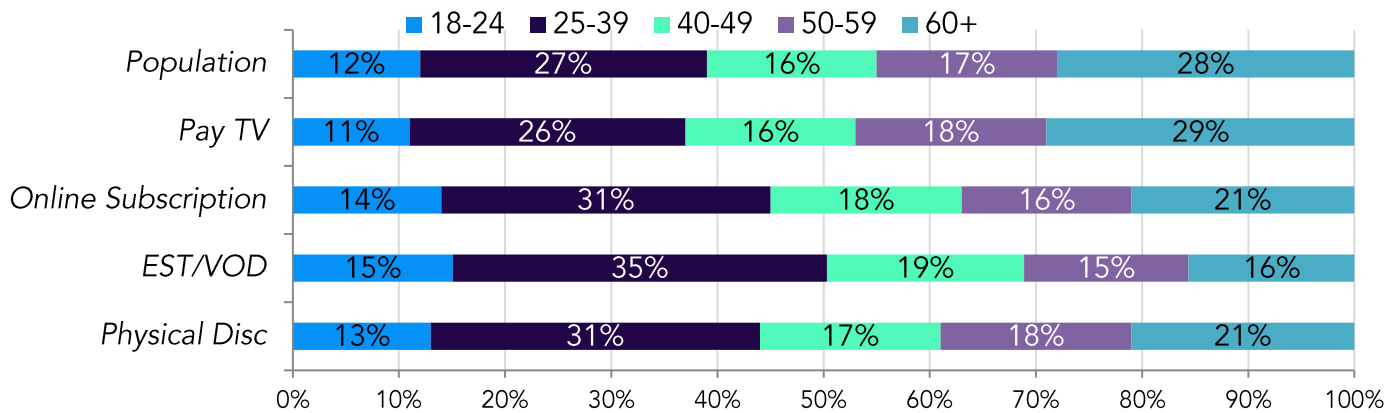
In 2019, the gender composition of all home/mobile viewers was generally similar to the population, although EST/VOD adult viewers skew slightly more toward men.

2019 Gender Share of Adult Population and Home/Mobile Viewers



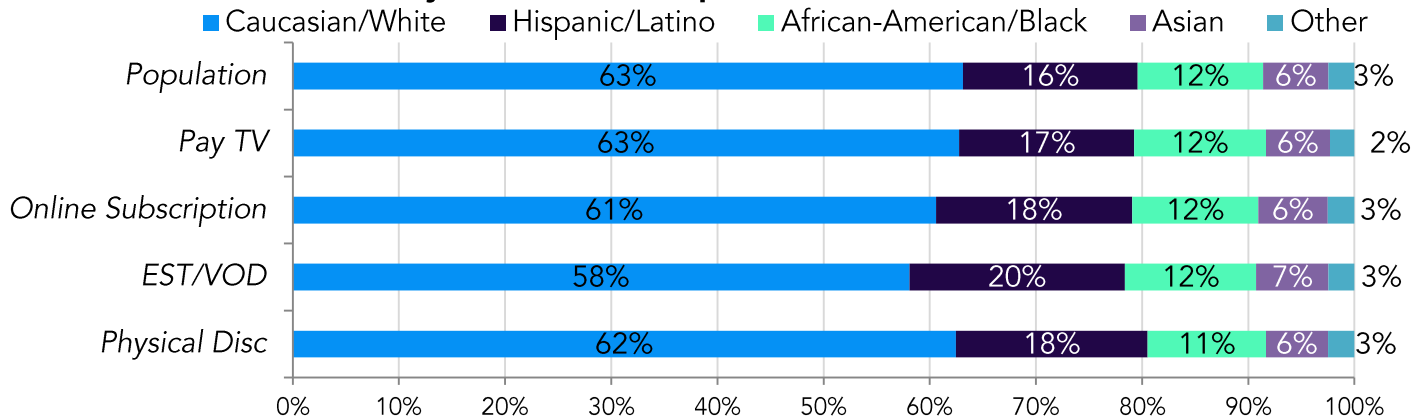
In 2019, the age group representation of viewers of traditional TV services was very similar to the population. The 25-39 age group was overrepresented in terms of viewers in the distribution channels of EST/VOD (35%), online subscriptions (31%) and physical discs (31%) relative to their share of the population (27%).

2019 Age Group Share of Adult Population and Home/Mobile Viewers



In 2019, the Hispanic/Latino category was overrepresented in terms of reported online subscription and EST/VOD viewing.

2019 Ethnicity Share of Adult Population and Home/Mobile Viewers



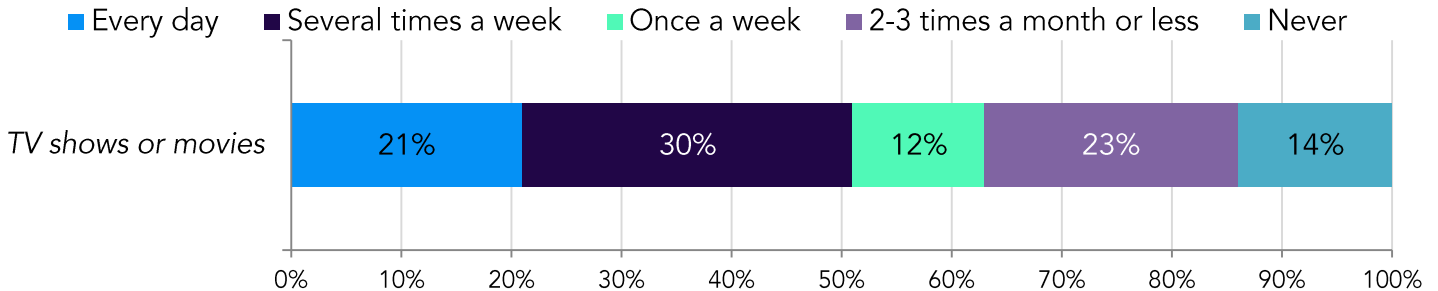
2019 THEME REPORT

Frequency of Mobile Viewing: All Adults and Children

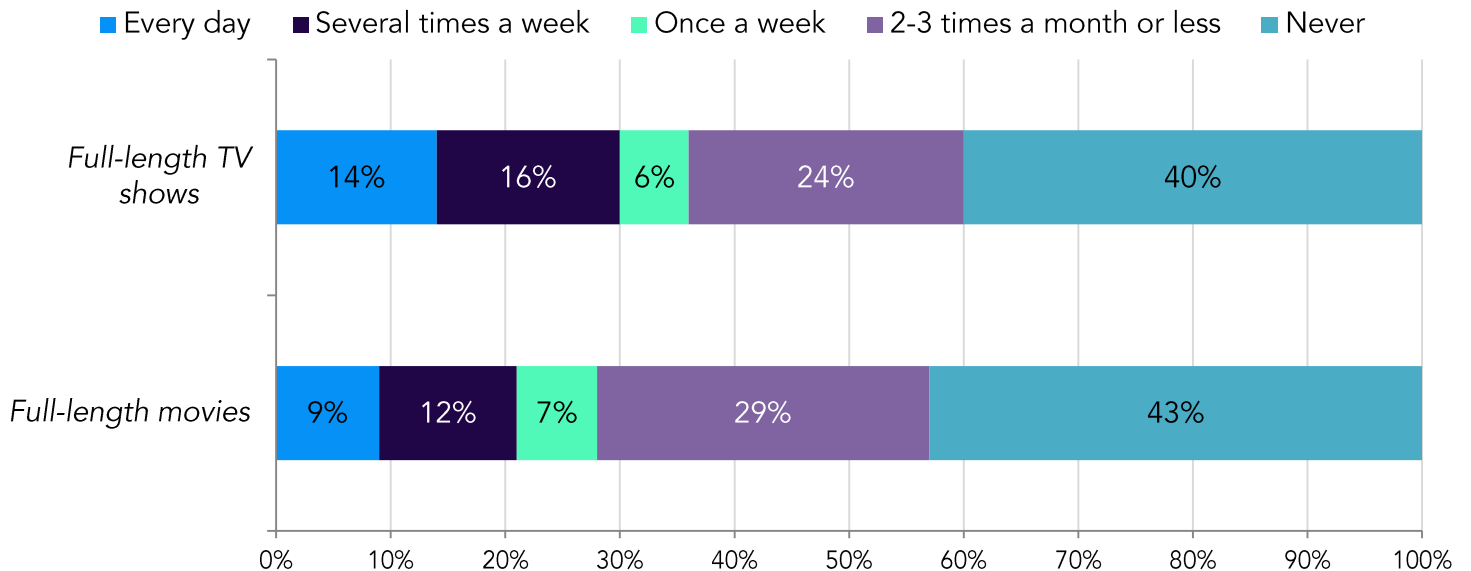
More than 85 percent of U.S. children (ages 2-17) watch full-length TV shows or movies on a mobile device. Twenty-one percent use a mobile device to view TV shows or movies daily. The highest proportion of children (30%) watch movies or TV shows on mobile devices several times a week.

Sixty percent of U.S. adults of all ages watch full-length TV shows, and 57 percent watch movies, on a mobile device. The percentage of adults who use a mobile device to watch TV shows or movies daily is 14 percent and 9 percent, respectively. The highest proportion of adults never watch on a mobile device – while those who watch are most likely to do so 2-3 times a month or less.

2019 Children Mobile Viewing Frequency



2019 Adult Mobile Viewing Frequency

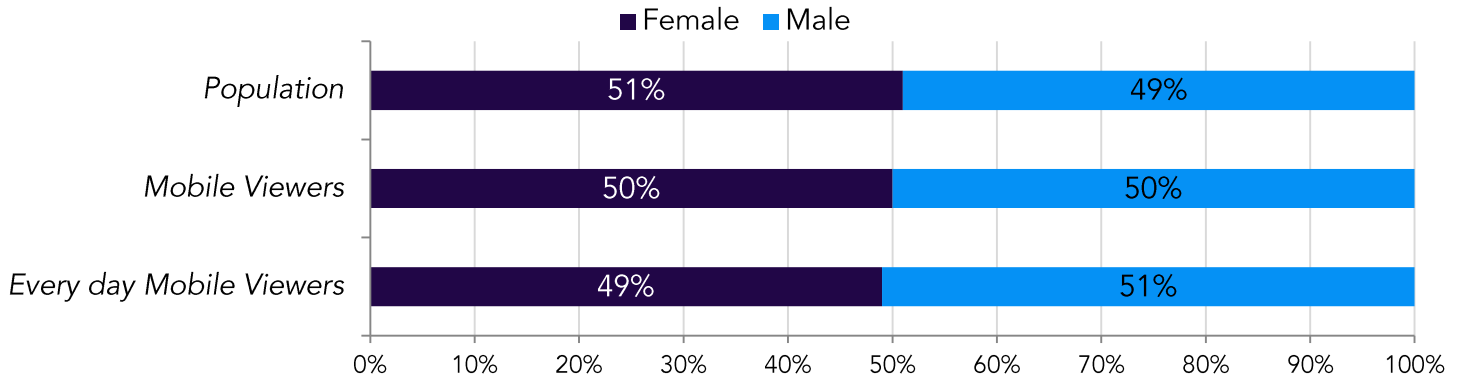


2019 THEME REPORT

Mobile Viewing Demographics

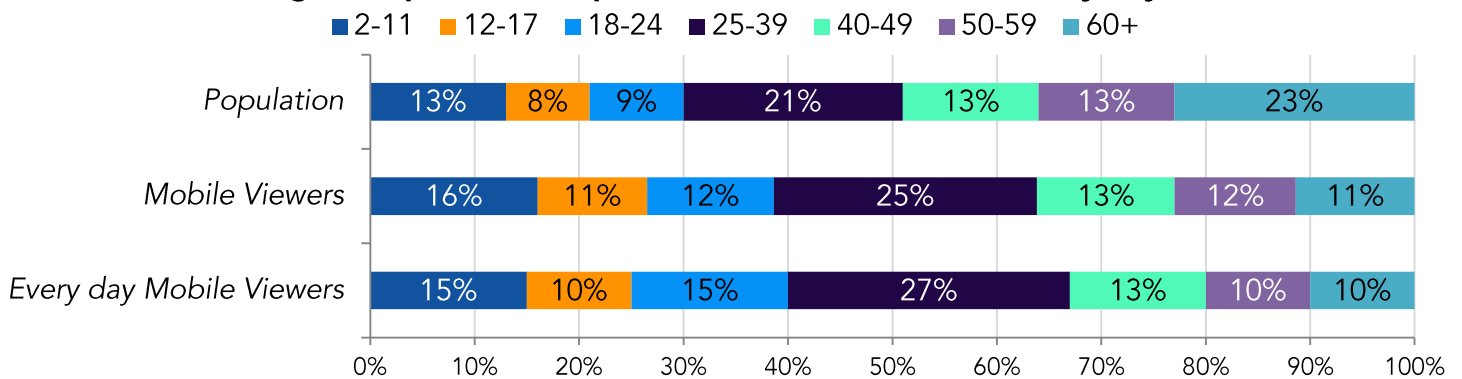
In 2019, the gender composition of every day TV show or movie viewers via a mobile device skewed slightly toward men compared to the total population.

2019 Gender Share of Population, Mobile Viewers, and Every Day Viewers



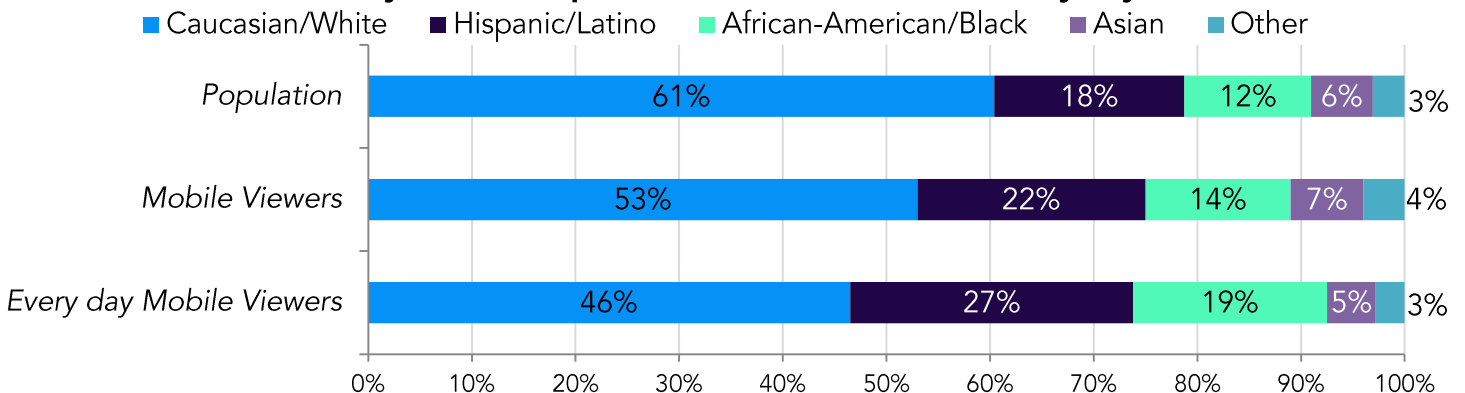
In 2019, the below 40 age groups (2-11, 12-17, 18-24, and 25-39) were all overrepresented in terms of mobile viewers and every day mobile viewers relative to their share of the total population.

2019 Age Group Share of Population, Mobile Viewers, and Every Day Viewers



In 2019, the Hispanic/Latino (27%) and African-American/Black (19%) categories were overrepresented in terms of every day TV show or movie viewers via a mobile device relative to their share of the total population (18% and 12%, respectively).

2019 Ethnicity Share of Population, Mobile Viewers, and Every Day Viewers





APPENDIX



THEME Report: Glossary of Terms

Term	Definition
Theatrical	Entertainment content viewed at movie theaters/cinemas.
Home/Mobile Entertainment	Entertainment content viewed on all devices, whether home-based (e.g. TVs) or mobile-based (e.g. smart phones). Home/mobile includes both digital methods and physical methods.
--Digital	Digital includes electronic sell through (EST), video-on-demand (VOD) and subscription streaming. This definition excludes virtual pay TV. Digital includes movies and TV, and excludes sports.
--Physical	Physical includes Blu-ray and DVD sales and rentals.
Combined Theatrical and Home/Mobile Entertainment Market	The combined market for entertainment content at movie theaters and content released digitally and on disc. This excludes pay television subscription revenue and licensing, and the advertising-based market.
Market	Throughout this report, the term market refers to consumer spending.

Attendance Demographics Study Methodology

Survey research

Motion Picture Association, Inc. (MPA) commissioned ENGINE (formerly ORC International) to study motion picture cinema attendance in the United States. A survey was conducted among a representative sample of 8,032 adults comprising 4,016 men and 4,016 women 18 years of age and older living in the United States. Interviewing was conducted beginning January 3, 2020, and ending January 29, 2020, via eight consecutive waves of CARAVAN®, ENGINE's national online omnibus survey. Respondents for the survey were selected from among those who have volunteered to participate in online surveys and polls.

This year marks the third time interviewing was completed via an online methodology. In all waves of the study prior to 2018, interviews were conducted via a dual frame landline/cell phone telephone methodology. The transition to online was made due to the increasing difficulty of reaching respondents on the telephone. As a result, phone data collection has become more impractical for the purpose of measuring annual movie attendance and could potentially lead to less accuracy in the data results among smaller demographic groups, and Asians in particular.

Due to the change in methodology and the differing demographic profiles of online versus telephone respondents, only comparisons to 2017 and 2018 have been made in this report.

Movie Attendance

The survey collected data on the frequency of adult motion picture attendance in the prior calendar year (January – December 2019).

- *"Think back to January 2019—about a year ago. During the 12-month period from January through December 2019, about how many times did you go to the movies at theaters?"*

Also, where the respondent indicated the presence of a child or children in the household ages 2-17, the respondent was asked to provide estimates of the frequency of each child's motion picture attendance, as well as the child's age and gender. The following question was repeated for each child in order of oldest to youngest:

- *"To better understand the make-up of the movie-going audience, we would also like to know about how frequently children 2 and older attended the movies in 2019, including all times they went with guardians or on their own. Now, thinking of your child at least 2 but under 18, how many times did he or she go to the movies at theaters in 2019?"*

In order to analyze the data for attendance levels for the entire population 2 years of age and older, the survey data is split into two data sets -- the original set of adult respondent data and a second set representing the child data. In order to create this child's data set, each child in the household is treated as a separate respondent. The child's age, gender and movie attendance are taken from the survey data provided by the parent. Each child's race/ethnicity is assumed to be the same as the parent, as is household information such as location and household income.

Once the two data sets are created, adult data is weighted by age, gender, region, race and education. The children's data is also separately weighted by age, gender, region and race. The data sets are combined and the data is reviewed to ensure that the proportions of children to adults match the overall population. The combined data usually demonstrates an overrepresentation of children vs. adults, as it does in 2020. In that case, the child's data is then re-weighted if necessary so that the ending proportions of children to adults corresponds to the actual population ratios. This is necessary because there can be more than one child in many households. This weighted data set is used to produce the attendance projections.

ENGINE weights data using a raking algorithm based on the demographics listed above to correct for differences between the survey sample and the target population. Our assertion is that weighted estimates are approximately unbiased. Estimated error ranges adjusted for the weighting design effect are located in a table at the end of the Demographic Survey Methodology section. Note: No analysis was conducted to validate the assertion of unbiased estimates.

Movie Attendance projections

The survey process yields a self-reported frequency of motion picture cinema attendance for the total sample and for each demographic group. When this frequency number is used to calculate total attendance in a calendar year, it typically produces a number that exceeds the attendance figure reported by MPA. This is due to over reporting on the part of the respondents, so an adjustment factor is calculated for the total sample and for each demographic group. This adjustment factor is derived by dividing the actual attendance number from MPA by the attendance number derived from the survey data for each demographic group. The resulting adjustment factor is typically a number slightly less than one. Attendance projections are then created for each demographic group, using the weighted total number of admissions derived from the survey data, multiplied by the adjustment factor.

Technology product ownership

The following question is also asked in the survey to measure ownership of key technology products among adults 18 years of age and older.

- Which of the following do you own? **[Select as many as apply for 01-06. Randomize 01-05]**
 - 01 A desktop, laptop or netbook computer
 - 02 A tablet such as an iPad, Galaxy Tab, Fire, G Pad, Surface, etc. (Includes all Android and Windows based tablets. Does not include an e-reader)
 - 03 A smartphone, such as an iPhone, Android phone, Microsoft phone, etc.
 - 04 A video game system – either console or portable (This includes any PlayStation or PSP, Xbox, Nintendo, etc.)
 - 05 A DVD or Blu-ray disc player (stand-alone, not built into a video game system or a PC/laptop)
 - 06 An internet-connected device that lets you stream video to your TV set (Includes a 'smart-TV', Roku, Google Chromecast, Amazon Fire TV, Apple TV, etc.)
 - 07 None of these **[EXCLUSIVE]**

Survey results for this question are presented using adult data only, weighted by age, gender, region, race and education.

Movie and TV show viewership across various channels

The following two questions were added to the survey in 2019 to compare the frequency of full-length movie and TV show viewership across various channels. These questions are also presented using adult data only, weighted by age, gender, region, race and education.

Now, please think about the different ways you watch movies and TV shows. These could be movies and TV shows that you watch on any type of device, such as on a TV, computer, phone, tablet, or other device.

- *How frequently do you watch **full-length movies** in each of the following ways? Please only think of full-length movies and do not include any trailers, clips or adult content.
[Select one answer for each. Randomize A-F, always asking G last]*

[SET UP AS GRID]

1. *Every day*
 2. *Several times a week*
 3. *Once a week*
 4. *2-3 times a month*
 5. *Once a month*
 6. *Several times a year*
 7. *Once a year*
 8. *Never*
-
- A. *See at the cinema*
 - B. *Watch through your regular television service (broadcast, cable or satellite channels), including paid movie channels and pay per view*
 - C. *Watch online through a website or app that you pay a subscription for like Netflix, Amazon Prime, HBO Now or Hulu, or that you have access to as part of your regular television subscription like Comcast Xfinity or HBO Go*
 - D. *Pay to download or rent online through a website or app where you pay per movie like iTunes, Amazon Video, Google Play Movies, or PlayStation Store*
 - E. *Watch on a Blu-ray or DVD disc that you bought or rented from an official retailer (please don't include second hand discs or bootleg/burned discs or files)*
 - F. *Watch via the YouTube site or app (again, just full-length movies)*
 - G. *Watch or download online for free on a website or app that is not an official source for the movie*

- How frequently do you watch **full-length TV shows** in each of the following ways? Please only think of full-length episodes of TV shows, and not other things like clips, sports, news or adult content. [Select one answer for each. Randomize A-E, always asking F-G last]

[SET UP AS GRID]

1. Every day
 2. Several times a week
 3. Once a week
 4. 2-3 times a month
 5. Once a month
 6. Several times a year
 7. Once a year
 8. Never
- A. Watch through your regular television service (broadcast, cable or satellite channels), whether at the time they air, on demand, or recorded on a digital video recorder or DVR
 - B. Watch online through a website or app that you pay a subscription for like Netflix, Amazon Prime, HBO Now or Hulu, or that you log-in and have access to as part of your regular television subscription like Comcast Xfinity or HBO Go
 - C. Pay to download or rent online through a website or app where you pay per show like iTunes, Amazon Video, Google Play Movies, or PlayStation Store
 - D. Watch on a Blu-ray or DVD disc that you bought or rented from an official retailer (please don't include second hand discs or bootleg/burned discs or files)
 - E. Watch via the YouTube site or app (again, just full-length TV shows)
 - F. Watch for free on a catch up TV service or website that shows videos of advertising during the show
 - G. Watch or download online for free, on a website or app that is not an official website and doesn't show regular video ads during the show

Movie and TV show viewership on a mobile device

Two questions were added to the survey in 2020 to measure the frequency of watching full-length movies and full-length TV shows on a mobile device, such as a smartphone or tablet, among both adults and children.

- *And how frequently do you watch the following on a mobile device, such as a smartphone or tablet? [Select one answer for each]*

[SET UP AS GRID]

1. *Every day*
 2. *Several times a week*
 3. *Once a week*
 4. *2-3 times a month*
 5. *Once a month*
 6. *Several times a year*
 7. *Once a year*
 8. *Never*
- A. *Full-length movies*
B. *Full-length TV shows*

Asked of those with children ages 2-17 in the household...

- *Now, thinking of your child(ren) at least 2 but under 18, how frequently does your child watch **full-length movies and/or full-length TV shows** on a mobile device, such as a smartphone or tablet? Please just make your best estimate. [Select one answer for each]*

[SET UP AS GRID]

1. *Every day*
 2. *Several times a week*
 3. *Once a week*
 4. *2-3 times a month*
 5. *Once a month*
 6. *Several times a year*
 7. *Once a year*
 8. *Never*
- A. *Oldest child*
B. *Second oldest child*
C. *Third oldest child*
D. *Fourth oldest child*
E. *Fifth oldest child*
F. *Sixth oldest child*
G. *Seventh oldest child*

Demographics

The race/ethnicity questions in Online CARAVAN® are asked as follows:

- *Do you consider yourself to be of Hispanic/Spanish/Latino descent? [Select one answer]*
 - 01 Yes
 - 02 No
- *What race do you consider yourself? [Select as many as apply]*
 - 01 White
 - 02 Black or African-American
 - 03 Native American or Alaska Native
 - 04 Asian
 - 05 Other

If respondents answer “yes” to the first question, they are included in the Hispanic/Latino category, regardless of their answer to the second question. In the analysis stage, respondents who select multiple races are grouped in the Other analysis category.

Table of Adjusted Sampling Error for Demographic Subgroups

Subgroup	Adjusted* Error Range
All adults	+/- 1.2 percentage points
Children 2-17	+/- 1.6 percentage points
Ages 2-11	+/- 1.9 percentage points
Ages 12-17	+/- 2.7 percentage points
Ages 18-24	+/- 3.8 percentage points
Ages 25-39	+/- 2.1 percentage points
Ages 40-49	+/- 3.0 percentage points
Ages 50-59	+/- 3.0 percentage points
Ages 60+	+/- 2.5 percentage points
White, non-Hispanic	+/- 1.2 percentage points
Black, non-Hispanic	+/- 3.0 percentage points
Asian/Other, non-Hispanic	+/- 3.3 percentage points
Hispanic (any race)	+/- 2.7 percentage points
Asian, non-Hispanic	+/- 4.5 percentage points
Other, non-Hispanic excluding Asian	+/- 4.7 percentage points
<25K HH income	+/- 2.5 percentage points
25K-<50K HH income	+/- 1.9 percentage points
50K-<75K HH income	+/- 2.3 percentage points
75K+ HH income	+/- 1.5 percentage points
Male	+/- 1.3 percentage points
Female	+/- 1.4 percentage points

*Adjusted for weighting design effect

Top Films Demographic Methodology

Survey Research

Comscore and Screen Engine/ASI's PostTrak is conducted every week for all films in their first and second week of wide release. Twenty-one theaters in unique locations were chosen to participate and are demographically representative of the U.S. Census population. Wide release includes all films playing in more than 800 theaters.

Sample sizes are as follows:

- 1st weekend –
 - For Family titles, a minimum of N=1200 (which includes a mix of general audience, parents, and kids),
 - For purely General Audience titles, a minimum of N=800.
- 2nd weekend –
 - For Family titles, a minimum of N=600 (which includes a mix of general audience, parents, and kids),
 - For purely General Audience titles, a minimum of N=400.

PostTrak collects data via mobile tablet, which is then entered into Comscore's system within one hour of data collection for near-immediate reporting. To ensure the audience composition is representative, audience audits are conducted at each location by field personnel. These audits are then applied to the collected data and weighted to the measured demographic of the actual moviegoing audience for each movie.

Note that the "race/ethnicity" question is asked as follows:

Which race or ethnic group do you most identify with? Choose only one.

African-American/Black

Asian/Pacific Islander

Caucasian/White

Hispanic/Latino

Native American

Other⁵¹

All survey methodologies involve sampling a universe of potential respondents. The PostTrak surveys are subject to a sampling error determined by the sample size for each film. The PostTrak method was designed to minimize the sources of sampling error, as well as coverage error and errors due to response rate.

⁵¹ "Other" includes those who self-identify as a "mixed race or ethnicity" or "some other race." For example, a person's ethnicity may be Hispanic, but they may also characterize themselves as a member of the Caucasian race. Consequently, when forced to make only one selection, they will identify themselves as "Other" rather than choosing to only identify with one race or one ethnic group individually.

Average Time Spent per Day with Major Media Methodology

Third Party Data

eMarketer's U.S. time spent with media estimates involve the collection of third party data, primarily survey data with adult respondents, which asks them about their media use habits. Data is also sourced from online and mobile activity tracking services and government data, as well as interviews with industry experts. This data is assessed and normalized to the eMarketer definition (i.e. 18+ U.S. population), and then aggregated to the baseline Average Time Spent with Media estimate. eMarketer also creates forecasted growth rates using their assessments of historical and expected future growth patterns with regard to device adoption, multiple/overlapping device usage, population/demographic factors, and competitors to existing devices and activities in order to arrive at our forecasted growth rates by media and by device.

The major media categories include:

- Desktop/laptop internet: ages 18+; includes all time spent with internet activities on desktop/laptop computers, regardless of multitasking
- Digital: ages 18+; includes all time spent with internet activities on desktop/laptop computers and mobile devices, regardless of multitasking
- Mobile (non-voice): ages 18+; includes all time spent with non-voice activities on mobile devices, regardless of multitasking
- Other connected devices: ages 18+; includes connected TV devices such as Apple TV, Boxee, connected Blu-ray devices, connected game consoles, Google Chromecast, Roku, smart TVs and other internet-connected devices; includes all time spent with these devices, regardless of multitasking
- Other traditional media: ages 18+; includes offline video gaming, cinema, out-of-home, etc.; includes all time spent with each media, regardless of multitasking; excludes internet-connected activities
- Print: ages 18+; includes magazines and newspapers; includes all time spent with print mediums, regardless of multitasking; offline reading only
- Radio: ages 18+; includes all time spent listening to radio, regardless of multitasking; excludes digital radio
- TV: ages 18+; includes live, DVR, and other prerecorded video (such as video downloaded from the internet but saved locally); includes all time spent watching TV, regardless of multitasking

2019

THEME REPORT

Photo Credits

Hustlers. Courtesy of STXfilms.
Joker. Courtesy of Warner Bros. Pictures.
Us. Courtesy of Universal Pictures. Credit: Claudette Barius.
Queer Eye. Courtesy of Netflix. Credit: Christopher Smith.
Parasite. Courtesy of NEON, CJ Entertainment.
Charles H. Rivkin, Motion Picture Association Chairman and CEO. Credit: Eli Meir Kaplan
Avengers: Endgame. Courtesy of Marvel Studios.
1917. Courtesy of Universal Pictures and Dreamworks Pictures. Credit: François Duhamel.
The Farewell. Courtesy of A24.
Once Upon a Time in Hollywood. Courtesy of Sony Pictures Entertainment. Credit: Andrew Cooper.
Little Women. Courtesy of Sony Pictures Entertainment.
Jumanji: The Next Level. Courtesy of Sony Pictures Entertainment. Credit: Frank Masi.
Men in Black: International. Courtesy of Sony Pictures Entertainment. Credit: Giles Keyte.
Dora and the Lost City of Gold. Courtesy of Paramount Pictures. Credit: Vince Valitutti.
Queen & Slim. Courtesy of Universal Pictures.
Fleabag. Courtesy of BBC, Two Brothers. Credit: Luke Varley.
Game of Thrones. Courtesy of HBO.
The Mandalorian. Courtesy of Lucasfilm, Disney.
Watchmen. Courtesy of HBO. Credit: Mark Hill.
Homecoming: A Film by Beyoncé. Courtesy of Parkwood Entertainment via Netflix.
The Good Place. Courtesy of NBC. Credit: Colleen Hayes
When They See Us. Courtesy of Netflix. Credit: Atsushi Nishijima.
Frozen II. Courtesy of Walt Disney Animation Studios.
Terminator: Dark Fate. Courtesy of Paramount Pictures. Credit: Kerry Brown.
The Lion King. Courtesy of Walt Disney Pictures.
Aladdin. Courtesy of Walt Disney Studios. Credit: Daniel Smith.
What Men Want. Courtesy of Paramount Pictures. Credit: Jess Miglio.
Marriage Story. Courtesy of Netflix. Credit: Wilson Webb.
Rocketman. Courtesy of Paramount Pictures. Credit: David Appleby.
Motherless Brooklyn. Courtesy of Warner Bros. Pictures. Credit: Glen Wilson.



ABOUT THE MOTION PICTURE ASSOCIATION

The Motion Picture Association, Inc. (MPA) serves as the global voice and advocate of the film, television, and streaming content industry. It works in every corner of the world to advance the creative industry, protect its members' content across all screens, defend the creative and artistic freedoms of storytellers, and support innovative distribution models that bring an expansion of viewing choices to audiences everywhere and on any screen.

The association's members are: Walt Disney Studios Motion Pictures; Netflix, Inc.; Paramount Pictures Corporation; Sony Pictures Entertainment Inc.; Universal City Studios LLC; and Warner Bros. Entertainment Inc. Charles Rivkin is Chairman and CEO.