

# Theatrical Vs. Home

Film research study prepared by

**TheQuorum**

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# Introduction

While the box office recovery of 2022 was significant, there is still ground to make up before theatrical approaches reaches pre-pandemic levels.

Looking at the release schedule, 2023 holds great promise, but underlying systemic and behavioral challenges still lie ahead. Some segments of the population have yet to return to the theater. At the same time, studios are creating high-end films for their streaming services while foregoing the monetary upside of a theatrical release.

This study looks at these and other pressing issues facing Exhibition. What emerges is a story of hope (people feel that theatrical films are more important) and of ongoing obstacles (older women are still reluctant theatergoers).



# Study overview

Movie theaters are magical spaces. The majority of our study's respondents agree, with 65% saying that films that play in a theater feel more important.

And yet, there is a sizable group of people who will only watch movies at home. For this study, we surveyed 3,400 film fans to understand their thoughts on the theatrical versus in-home experience.

The study revealed that there is no one-size-fits all solution. Many respondents still want to watch theatrical releases at home, and, conversely, many wish they had the opportunity to watch streaming-only titles in a theater.

At the same time, the data show that the viewing experience is very different at home. People are three times as likely to be on their cell phone while watching a movie at home, and there are a myriad of distractions (food deliveries, cooking, taking care of family members, doing work) that don't exist in a theater.

The study also showed that audiences of all stripes are open to the idea of television episodes playing in a theater. Further, respondents like the idea of trailers for television shows playing before a movie, with many saying a good trailer would drive them to sign up for a streaming service just to watch that program.



# I. Methodology



# Study Sample

Respondents: 3,400 (U.S. only)

Women:	1,712
Men:	1,688
Under 35:	1,631
Over 35:	1,769

Those who don't watch movies were excluded from the study.

Respondents were sorted into one of three groups:

Frequents:	See a movie in a theater at least once a month
Casuals:	See a movie in a theater a few times a year
At Homes:	Only watch movies at home



# II. The Audience





# Audience overview

Little has changed over the past few months when it comes to audience composition. Men are still seeing movies in a theater more frequently than women.

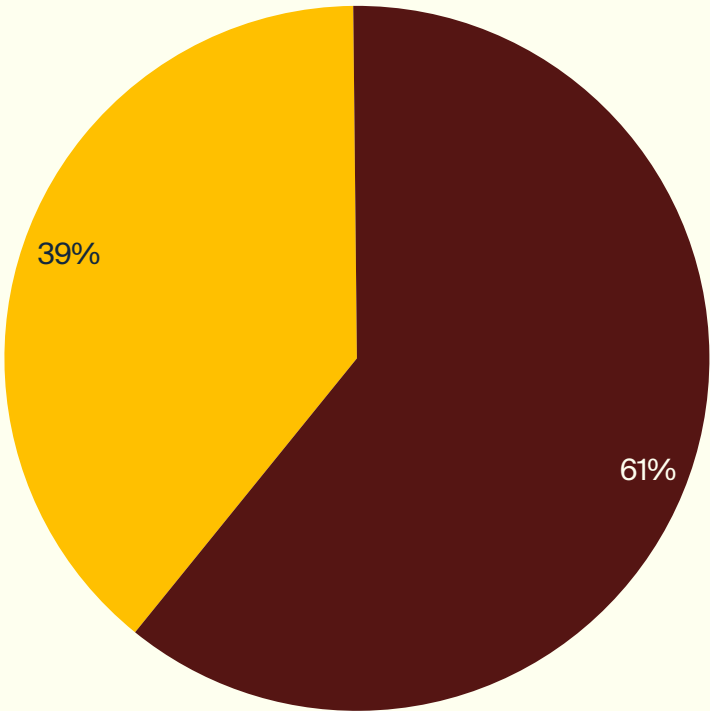
Specifically, women over the age of 35 have shown the greatest reluctance to go to the theater. They are also more likely to watch movies exclusively at home and forego the theater all together.

# Women still go to theater less often than men

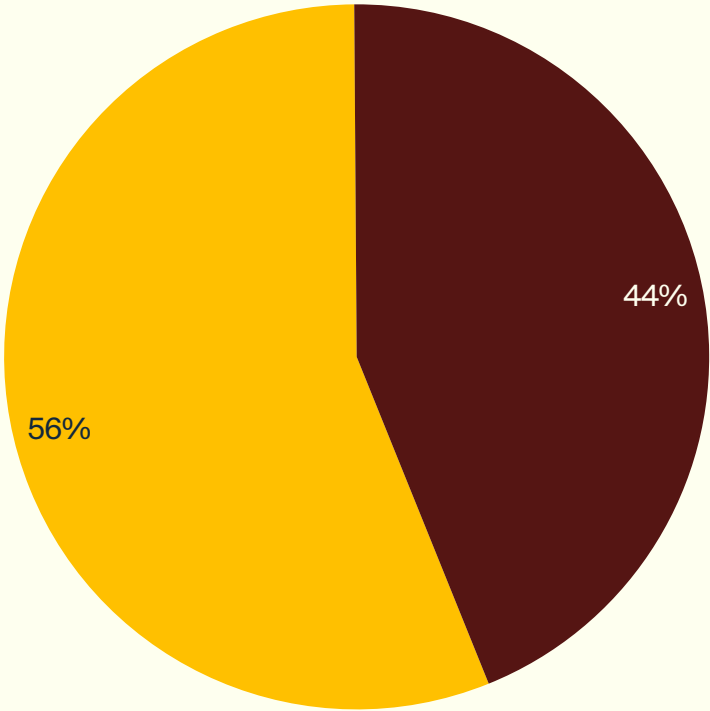
Only 39% of Frequent theatergoers (those who see a movie in a theater at least once a month) are women. The numbers flip when looking at those who only watch movies exclusively at home.

Casual filmgoers (those who go the theater a few times a year) skew more female.

Frequent Filmgoers

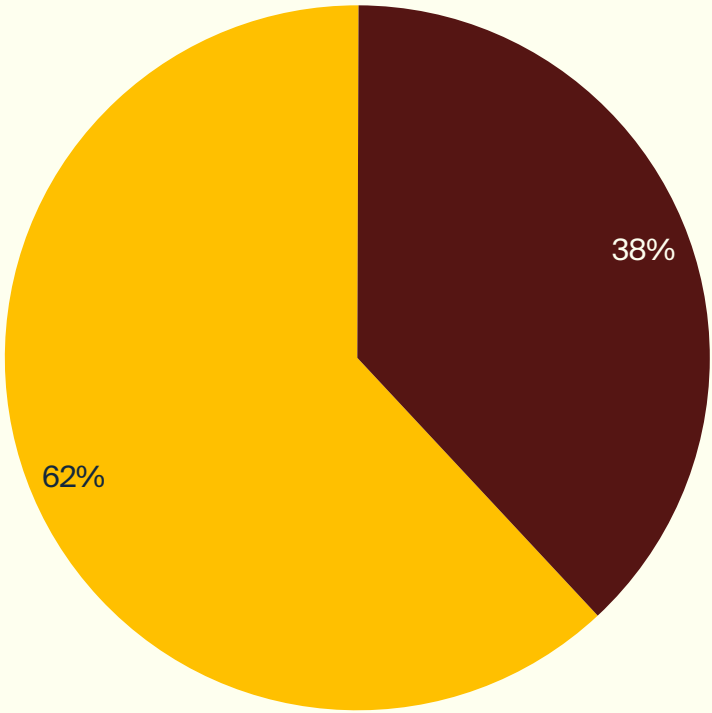


Casual Filmgoers



■ Women ■ Men

At Home Only

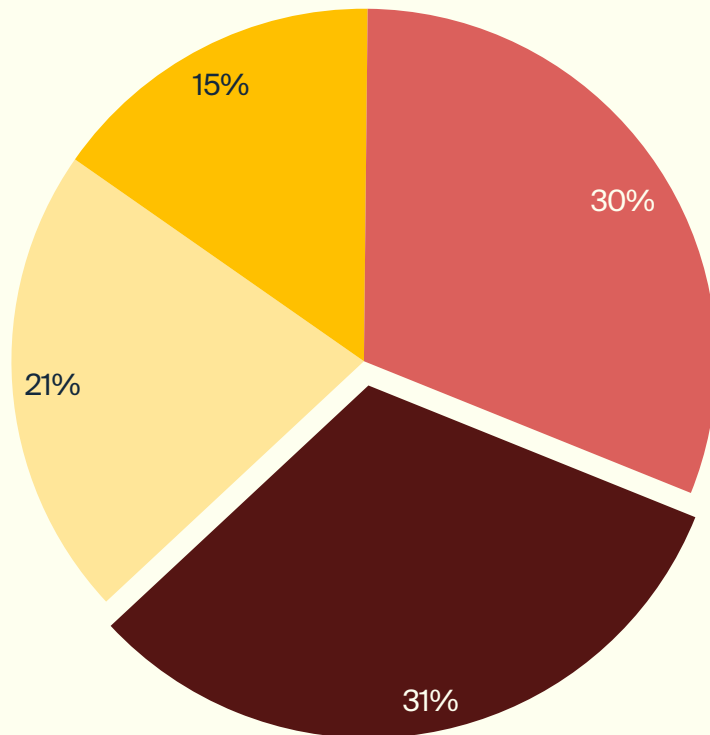




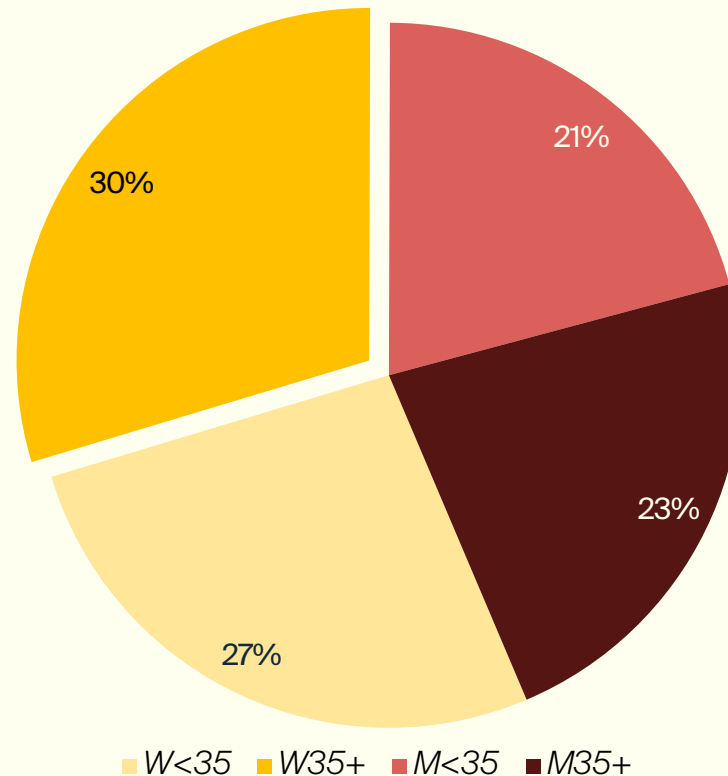
# Specifically, older women go to the theater less frequently

Men over 35 (red) make up the largest share of Frequenters. Women over 35 (dark yellow) make up the largest share of Casuals and nearly 40% of At Home viewers.

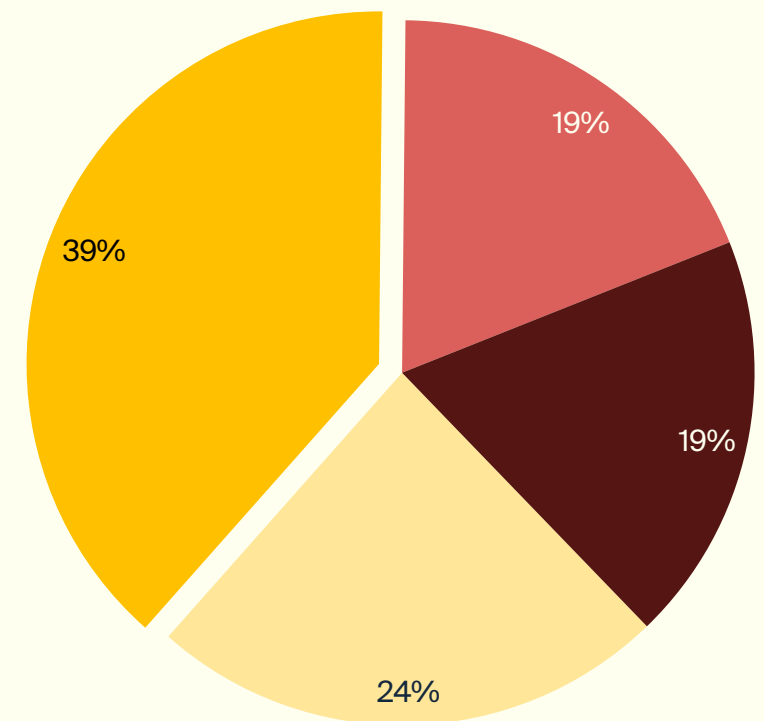
## Frequent Filmgoers



## Casual Filmgoers



## At Home Only



# III. Thoughts on Theatrical



# Overview

Movies released in theaters feel more important according to both Frequent and Casual filmgoers. But when we asked where people would prefer to watch upcoming releases (JOHN WICK CHAPTER 4, CREED III), the answers were mixed.

Despite a feeling that theatrical films feel more important, a sizable number of respondents would still choose to watch at home even if it meant paying for the film.

The desire for choice is evident when we look at recent streaming-only titles (HOCUS POCUS 2, THE ADAM PROJECT). Among people who watched these titles at home, approximately half said they would have preferred to have seen these films in a theater.

One big difference between viewing the two viewing options is that respondents are far more likely to be on their phones or distracted by other sources (cooking, taking care of children, etc.) when watching at home.

# 65%

“Movies in a theater feel  
more important”

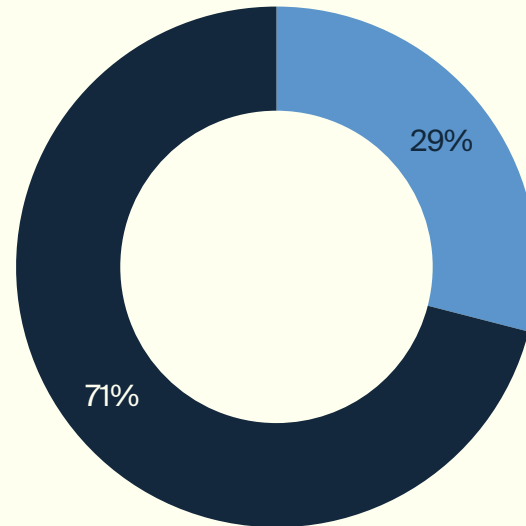


# At Homes disagree

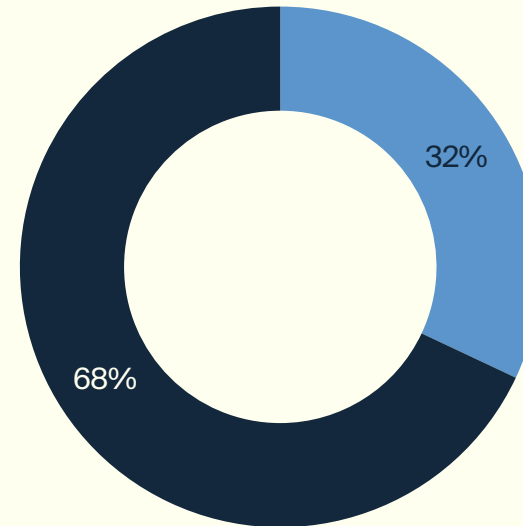
Frequents and Casuals are in alignment. Both groups overwhelmingly feel that films available in theaters feel more important. Not surprisingly, the majority of At Homes feel otherwise. Interestingly, 42% of At Homes still agree that theatrical releases feel more important, which suggests there are other barriers to them going to the theater.

“Which films feel more important: those available in theaters or those available at home?”

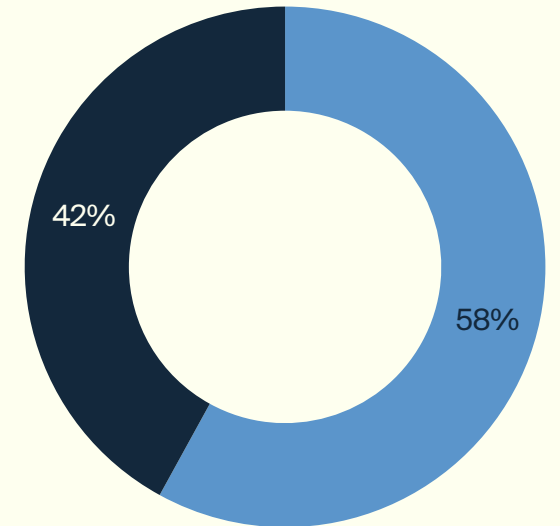
Frequents



Casuals



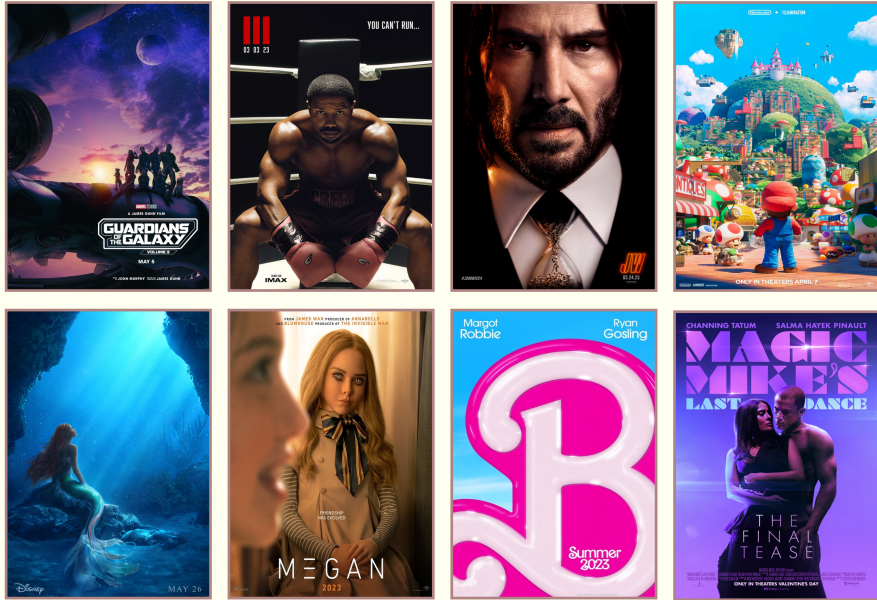
At Homes



■ Home ■ Theater

Where would  
people rather  
watch a movie?

# Where would you rather watch a movie?



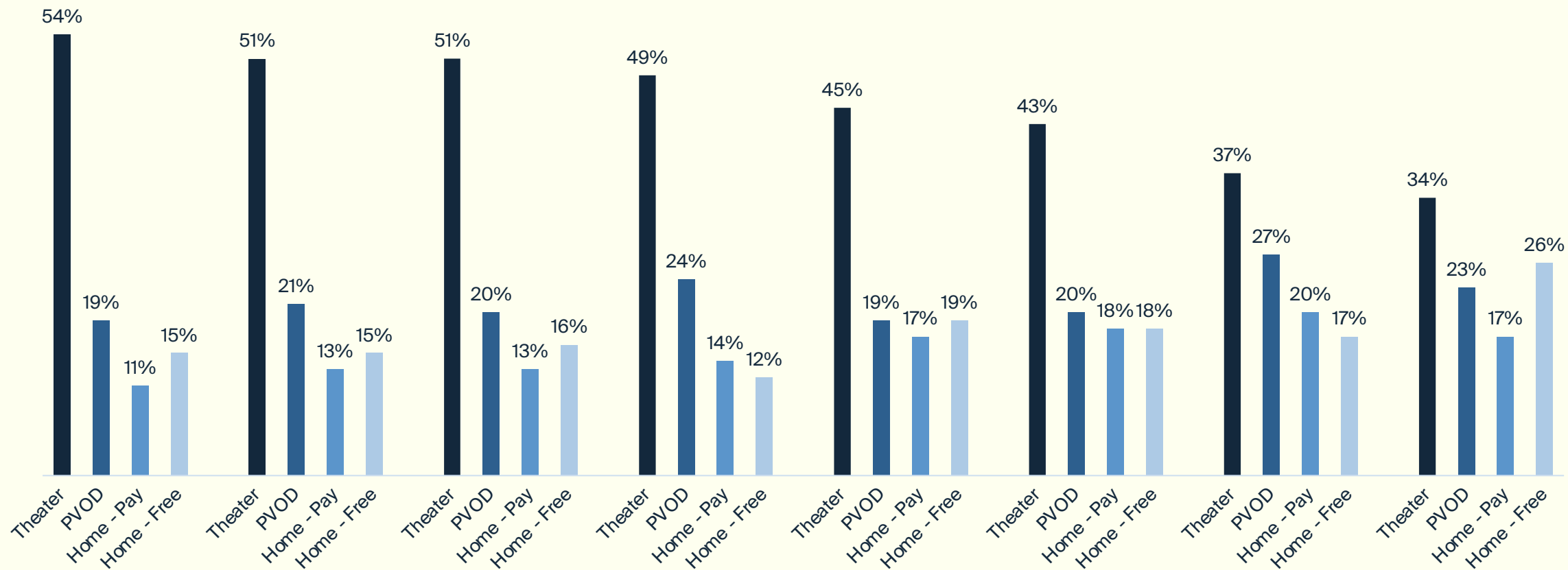
For this study, a poster and description for eight upcoming theatrical releases were presented to our respondents. First, we asked which of the films they were aware of. From there, we asked where they would prefer to watch the movie. Note that the second question was posed only to those aware of the given film.

In determining where they would prefer to watch the film, four choices were presented:

1. Theater: "In a theater."
2. PVO: "I would pay to watch this at home on-demand."
3. Home – Pay: "I'll watch at home, and I would pay to watch this if it is on a streaming service I don't currently subscribe to."
4. Home – Free: "I'll watch it at home if it's free or part of a streamer I currently subscribe to."
5. "I have no interest in watching this film."

Excluding those with no interest in seeing the film, the results are on the following page.





What about  
streaming-only  
titles?

# Coulda, woulda...

Was money left on the table for these streaming-only titles? Perhaps.  
Among those that watched these titles at home, about half would have seen it in a theater if given the opportunity.



50%



50%



49%

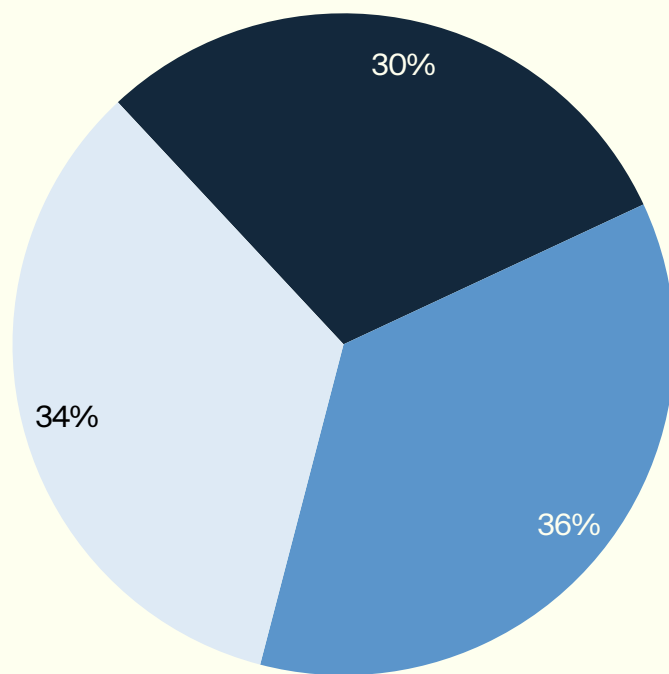


49%

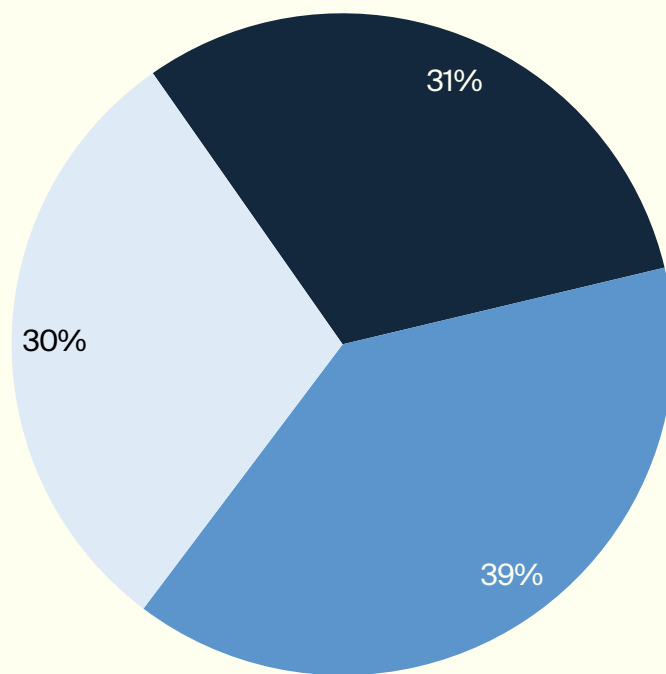


48%





■ Yes ■ No ■ Not Familiar with Movie

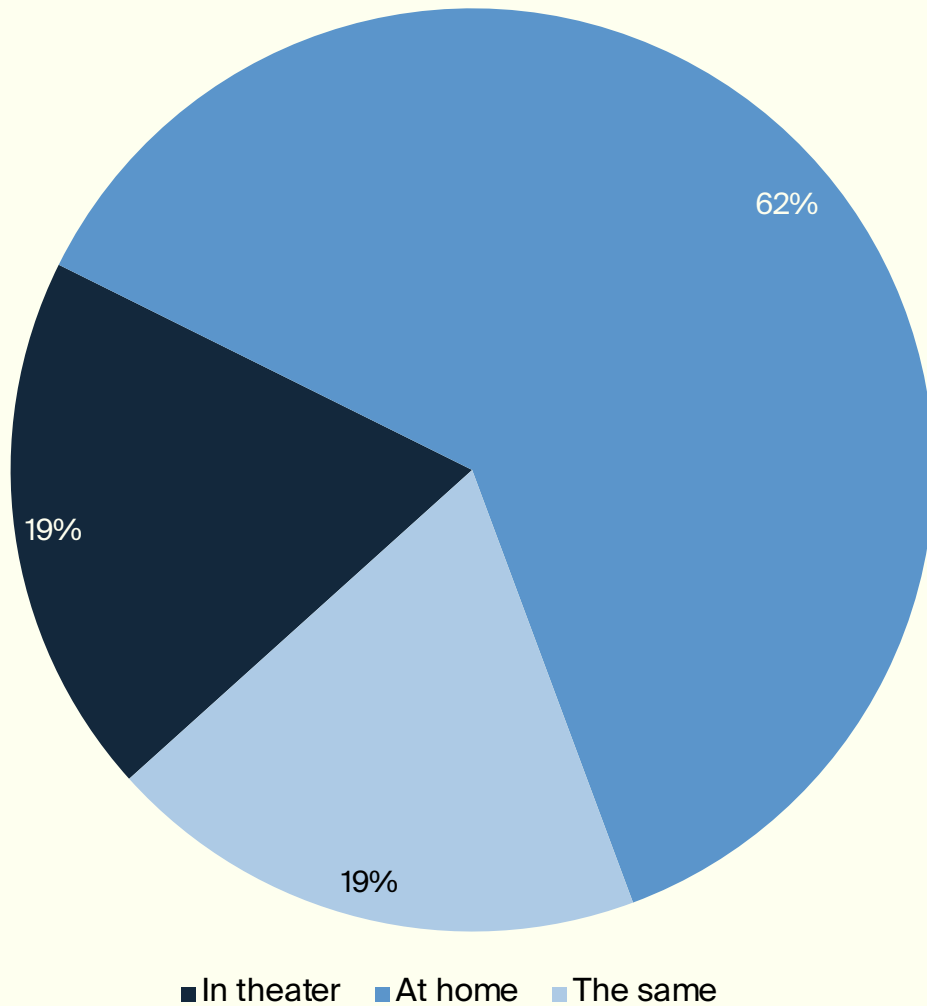


■ Yes ■ No ■ Not Familiar with Movie

## Awareness for theatrical runs

When asked if people knew that THE GRAY MAN and GLASS ONION: A KNIVES OUT MYSTERY—two high profile Netflix films—had limited theatrical runs, about 30% were aware of the one-week engagements.

More people, however, were not aware.



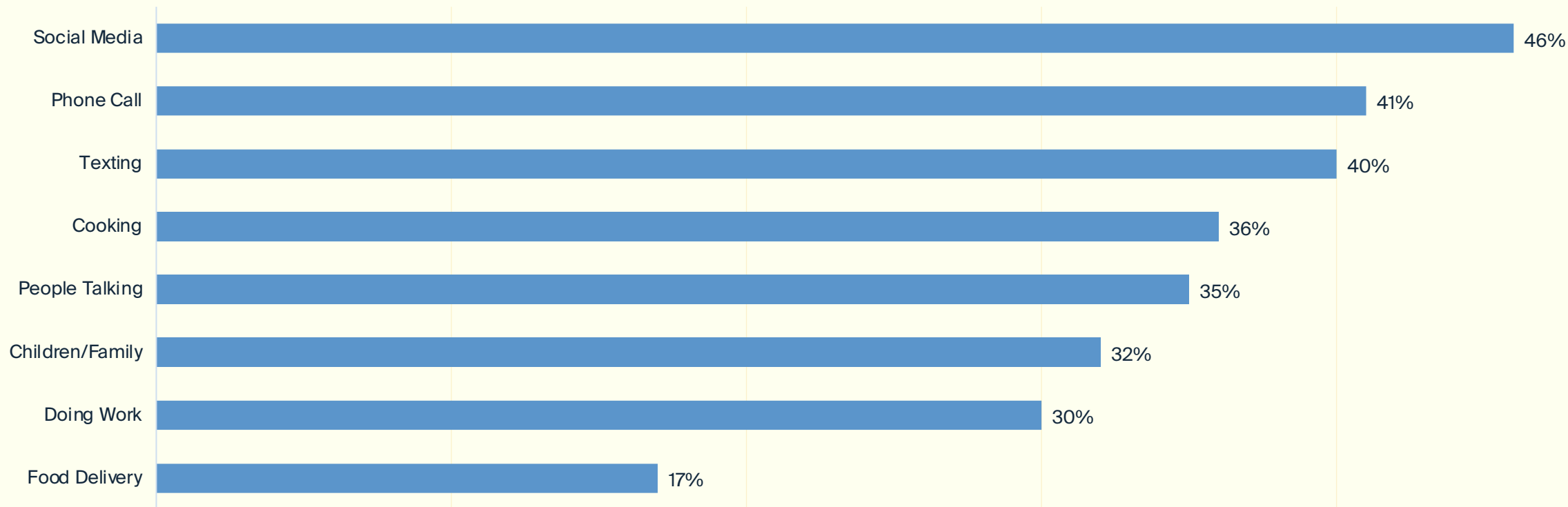
## More likely to use cell phone at home

Among those who watch movies in theaters and at home (N: 2,596), 62% said they are on their cell phone more often when watching a film at home. That's more than three times higher than the 19% who said they are on their phone more often in a theater.

# Distractions at home

While phones (checking social media, texting, calls) are the leading cause of distraction while watching movies at home, there are other things that divert attention. Cooking, talking to people, the needs of family members are also common distractions. Some respondents said they do work while they watch movies.

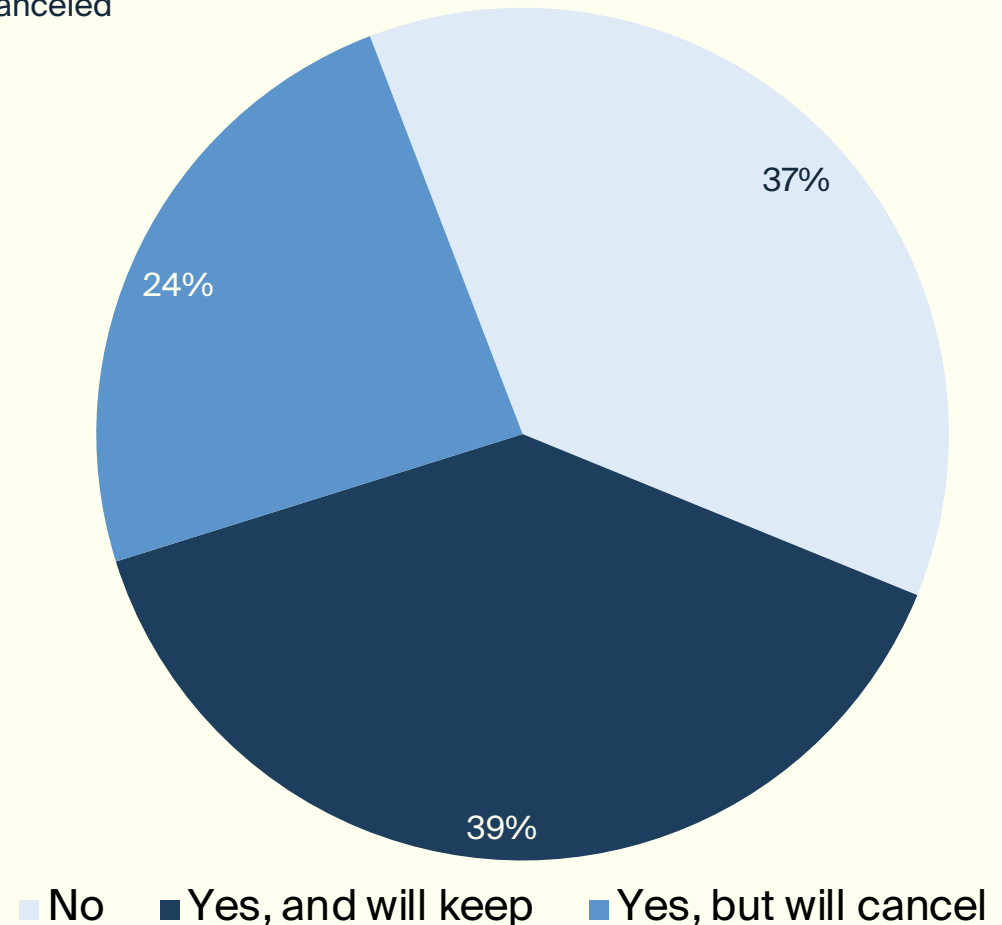
Sure, people use cell phones in a theater, but most of these distractions are non-issues when seeing a movie on the big screen.



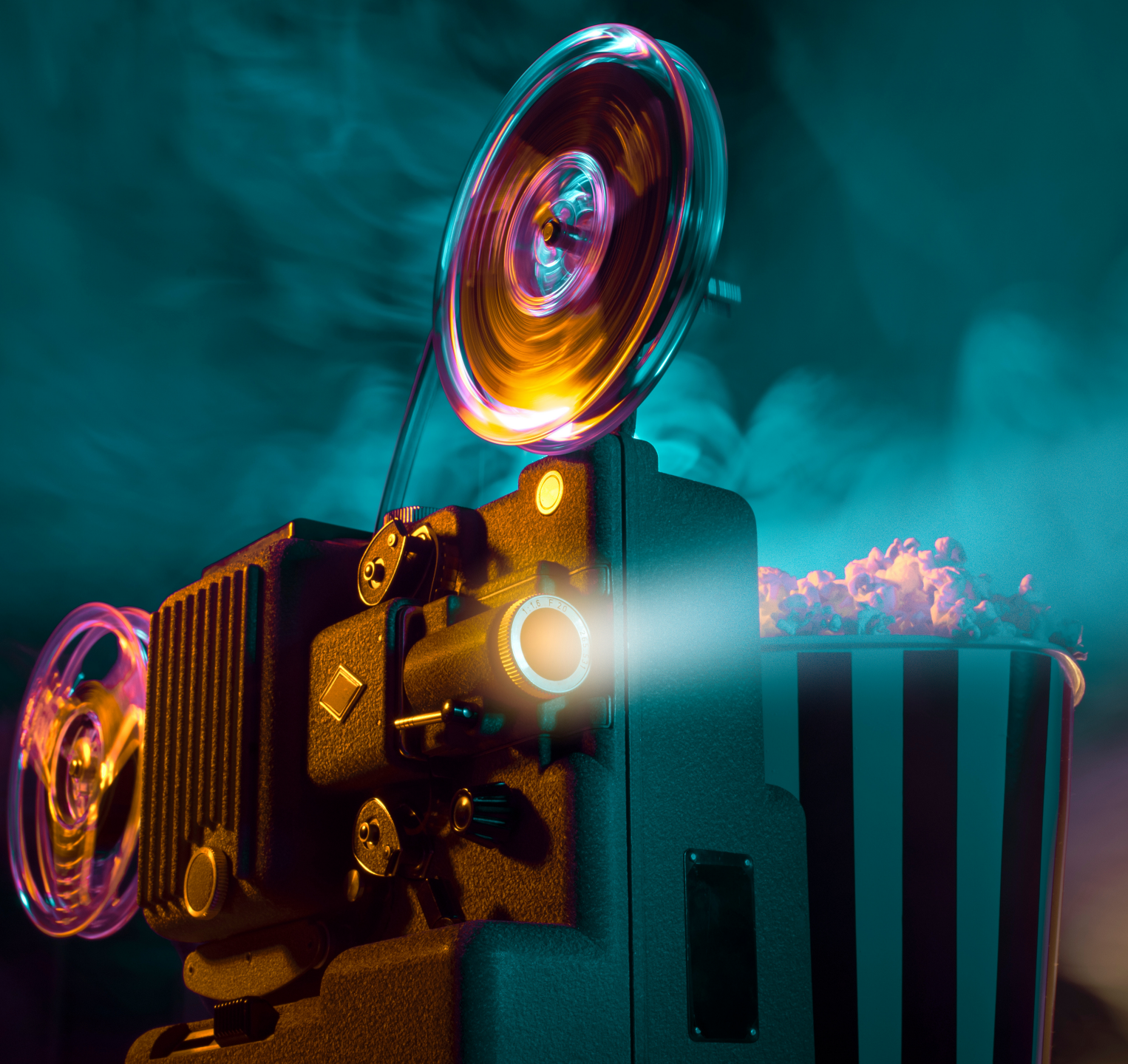


# Have you ever signed up for a streaming service to watch a specific film?

Over a third (37%) of respondents say they have not signed up for a streaming service to watch a specific film. Another 39% say they have signed up and kept that subscription, while another 24% say they have signed up then immediately canceled after watch the film they wanted to see.



# IV. Genres



# Overview

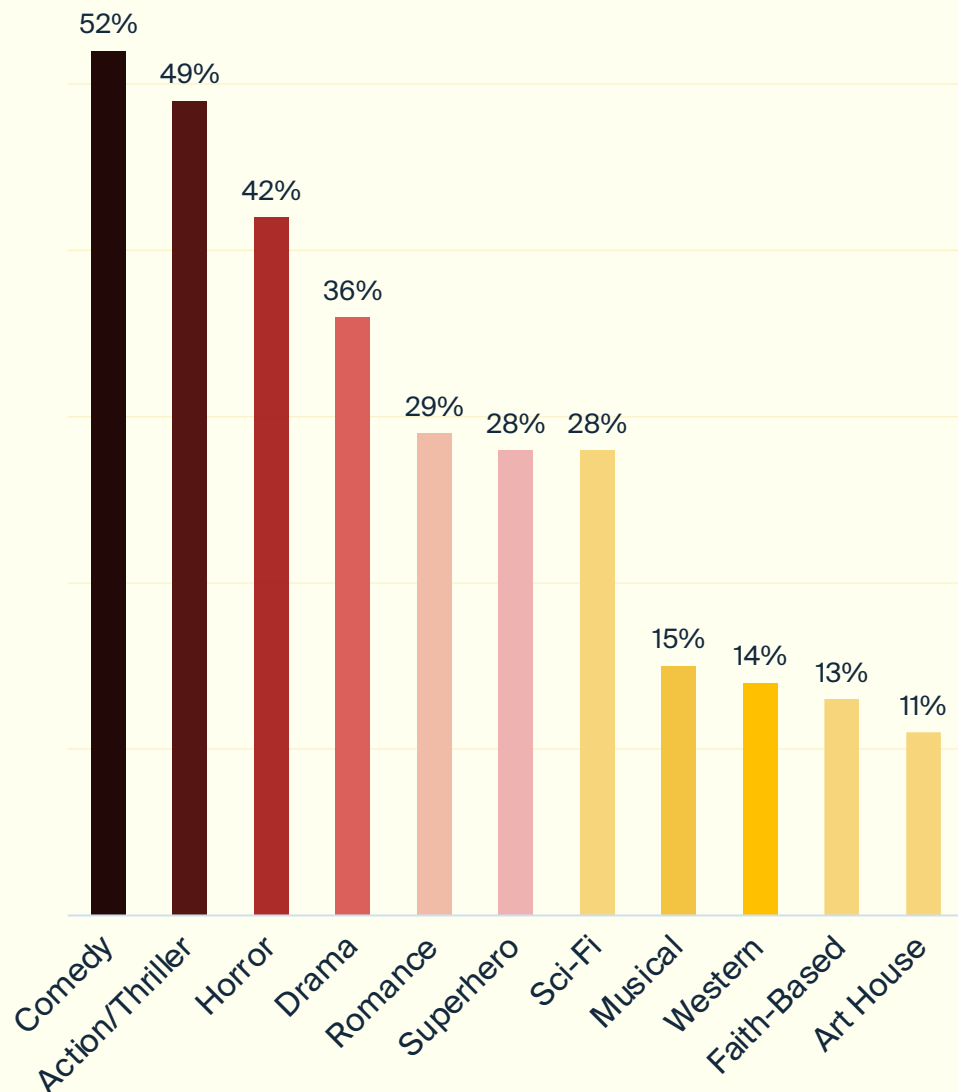
Are we past peak-superhero at the box office? Only time will tell, but the data suggests that there is an appetite for more than leggings and capes.

The appetite for comedies, a genre that has gone out of favor over the past decade, appears to be strong. When asked what genre people want to see more of, comedy rose to the top.

Superhero movies ranked 6<sup>th</sup>.



## All Respondents



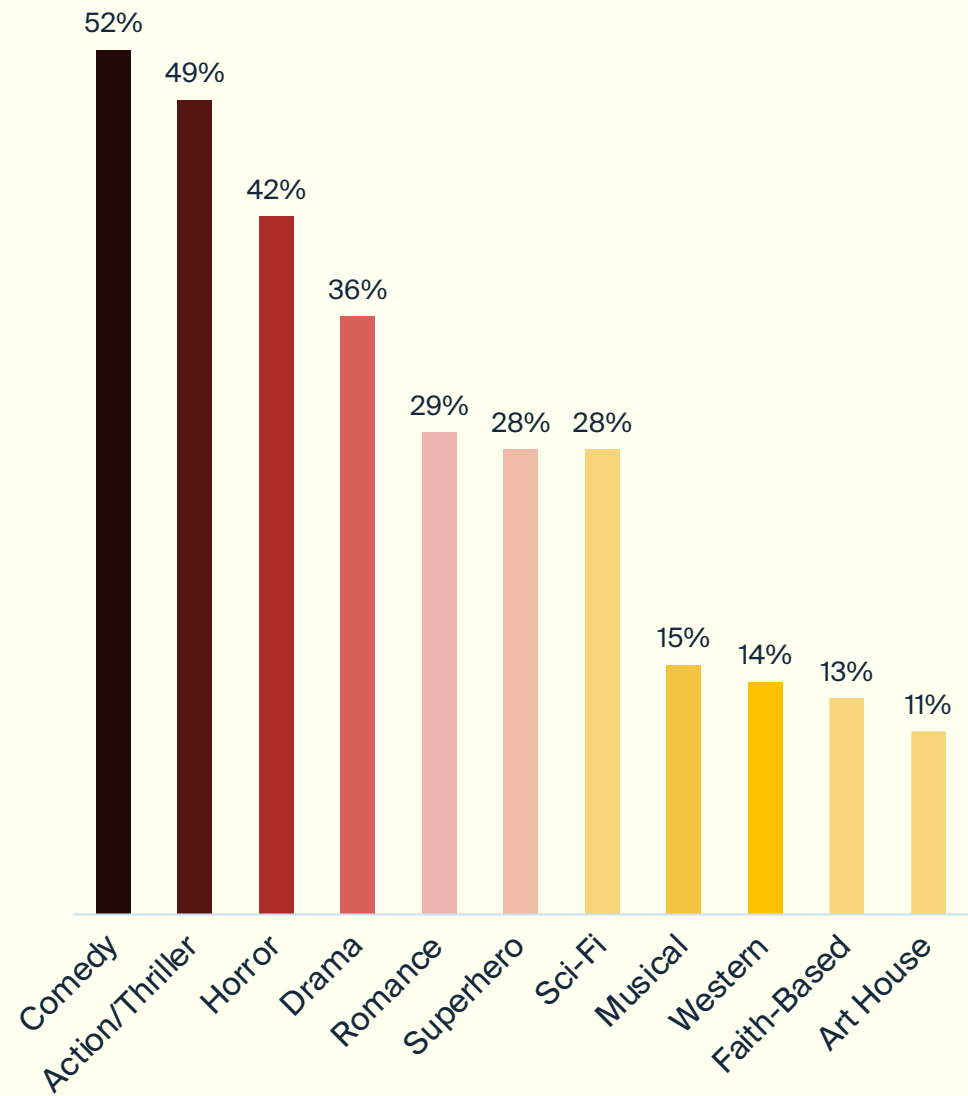
## More comedies, please

Back in 2014, three comedies opened above \$40M (22 JUMP STREET, NEIGHBORS, RIDE ALONG). That seems like a lifetime ago.

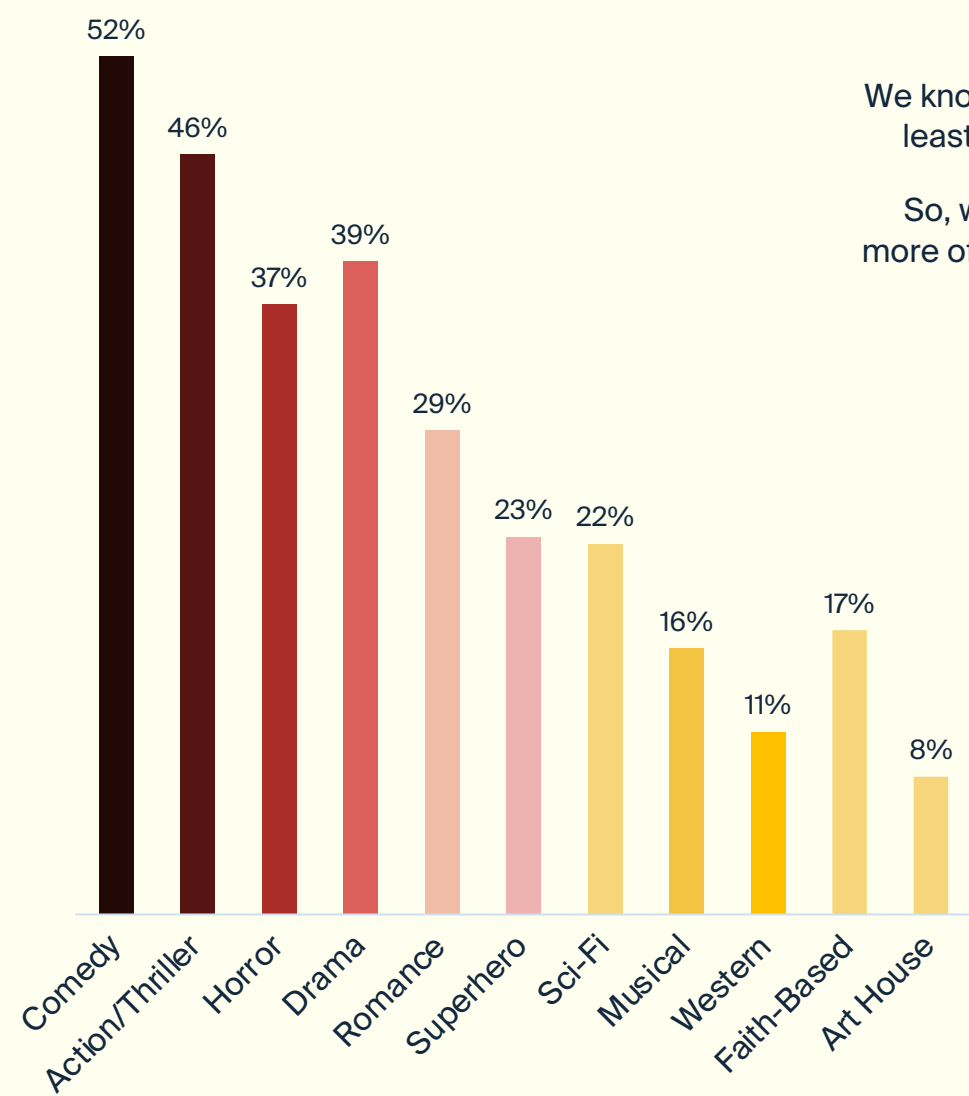
While BROS and EASTER SUNDAY didn't pull in big numbers, THE LOST CITY and TICKET TO RIDE demonstrated that star-driven comedies can still succeed. And that's a good thing, because 52% of respondents said they want to see more comedies in theaters.

Superhero movies, however, may have reached a saturation point. Only 28% of respondents want more from that genre.

All Respondents



Women >35



What about older women?

We know that women over 35 are least likely to go to the theater.

So, what would they like to see more of? Comedy is still tops, but drama and faith-based films over-index.

# V. TV Episodes in Theaters



# Overview

Television episodes in theaters may be a growth area. It's already beginning to happen. But awareness for TV shows is still low.

Frequent theatergoers know it exists, but the vast majority casual attendees are unaware.

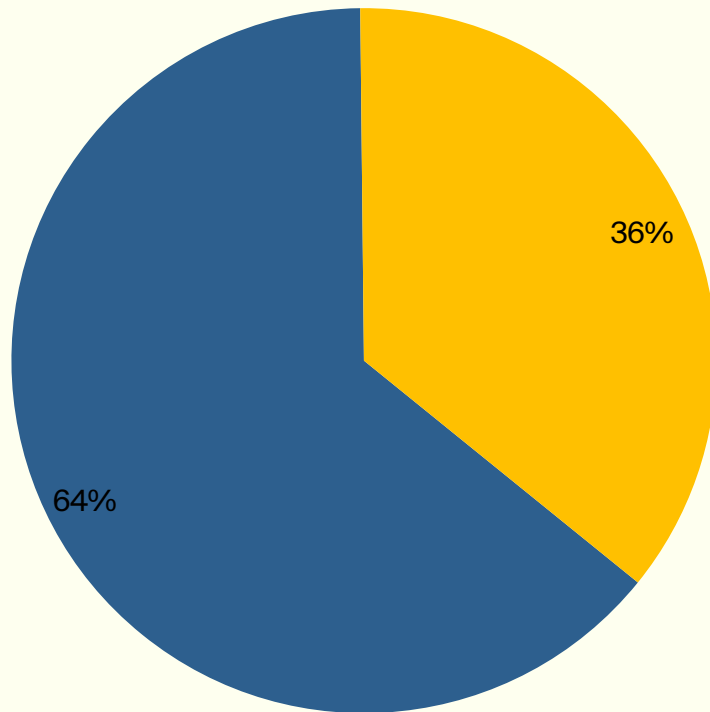
At the same time, audiences are open to the idea of trailers for TV shows playing before a movie with 64% saying they would be willing to sign up for a streaming service based on a television trailer.



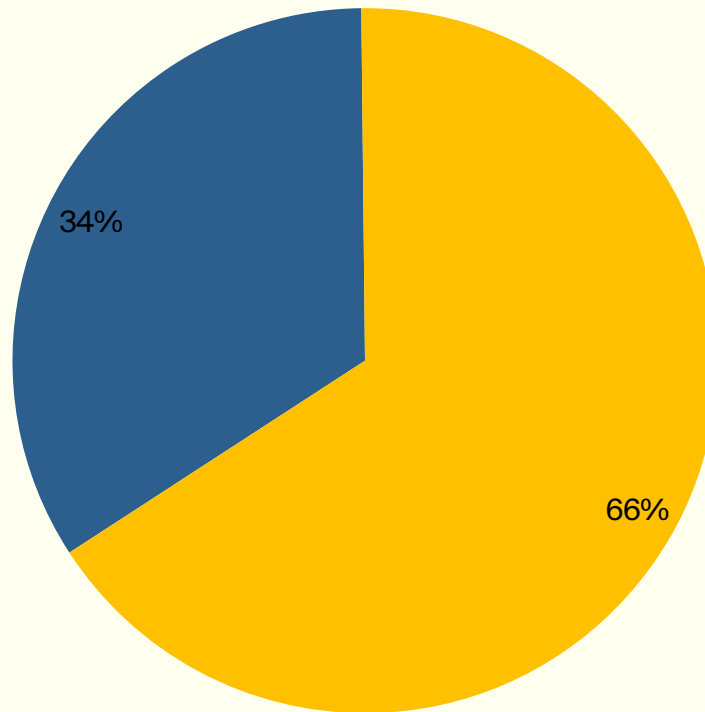
# Aware that theaters are now showing TV shows?

Nearly two thirds of Frequents are aware that TV shows are becoming available in theaters. The other two groups have much lower levels of awareness.

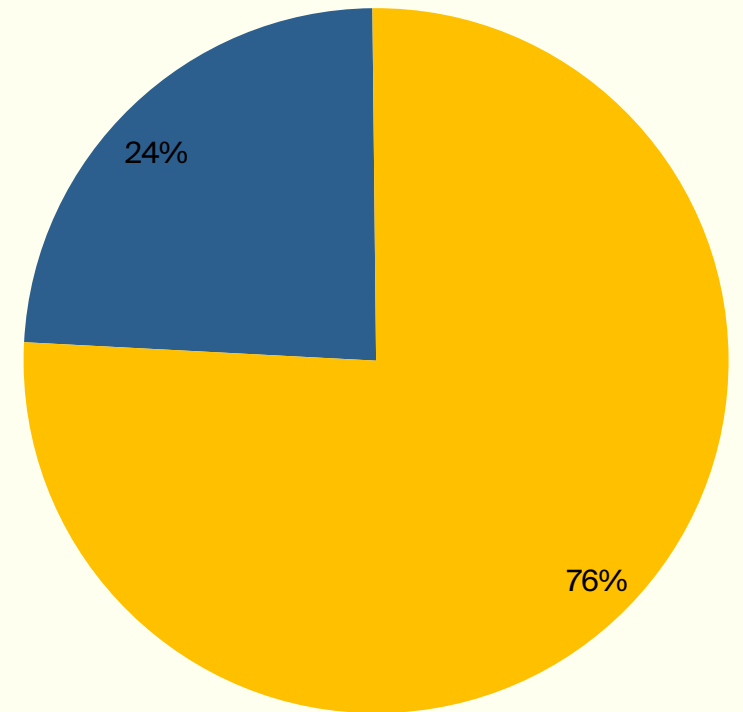
Frequents



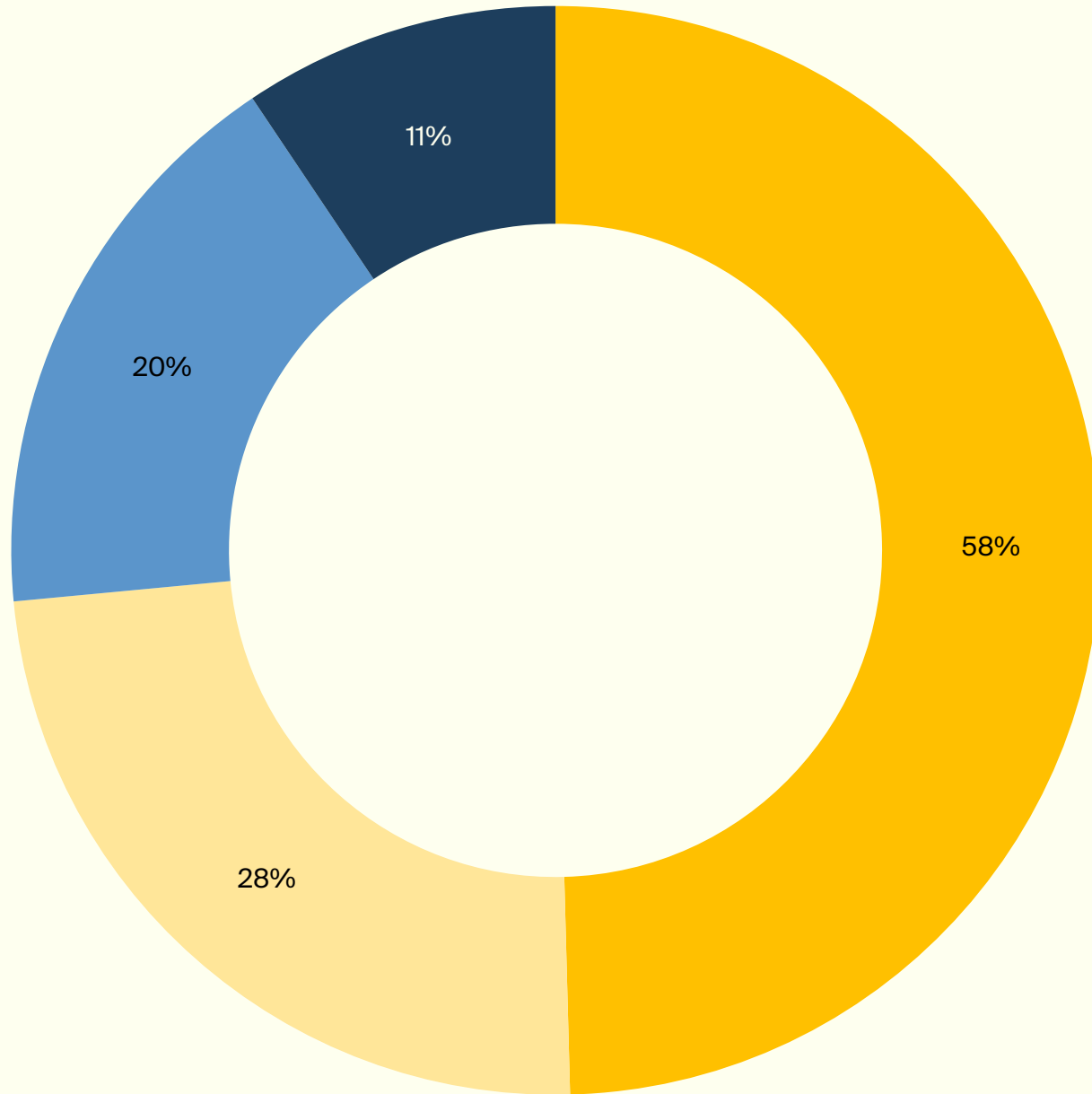
Casuals



At Homes



■ Aware ■ Not Aware



## Audiences are okay with TV trailers

Audiences, by a wide margin, are open to the idea of trailers for TV shows being aired in a theater. Over 58% like the idea while another 28% thinks it's okay as long as it doesn't reduce the number of film trailers.

“I would sign up for a streaming service if I liked the trailer”

64%



TheQuorum

David Herrin: [dherrin@thequorum.com](mailto:dherrin@thequorum.com)