



# 2018

# THEME REPORT

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A comprehensive analysis and survey of the theatrical and home entertainment market environment (THEME) for 2018.



MOTION PICTURE ASSOCIATION OF AMERICA



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Dear Movie and TV Fans,

We live in a golden age of stories. In communities of all sizes, in all parts of the world, stories bring us together, challenge our assumptions, and inspire us in so many ways.

Today, stories come to life for audiences in theaters, at home, and on the go. It is a dynamic marketplace that delivers creative content how, when, and where audiences want it.

As Chairman and CEO of the Motion Picture Association of America (MPAA), I am proud to lead our global mission to advance the business of storytelling, and support the film, television, and streaming content industry.



Our work on behalf of these visionary creators also offers unique opportunities for our own storytelling. And in our annual THEME (Theatrical and Home Entertainment Market Environment) Report, we chronicle the global results for the industry as well as audience demographics and trends. This is the second year of our expanded publication, and I want to thank our team, led by VP of Worldwide Research Julia Jenks, for producing another insightful analysis of the ever-changing entertainment marketplace.

In 2018, the story of this marketplace – is growth.

Last year, the combined theatrical and home entertainment market was \$96.8 billion. This represents a nine percent increase over 2017, and it is up 25 percent from five years ago.

The total global box office topped \$41 billion and the U.S./Canada box office reached a new record high of \$11.9 billion. Total cinema screens worldwide increased seven percent, reaching nearly 190,000. There is no question that in this ever-complex world of media, theaters are vital to overall entertainment industry success.

In the home entertainment segment, global consumer spending grew 16 percent to \$55.7 billion, while U.S. spending grew 12 percent. More than 80 percent of U.S. adults watch movies and television shows via traditional services, while more than 70 percent watch via online subscriptions services. Thanks to innovations and ever-expanding opportunities for creators, more stories of all kinds are available in our homes every day.

Other highlights of this year's report include:

- U.S./Canada admissions (tickets sold) rose five percent compared to 2017.
- Outside the U.S./Canada, seven international markets had \$1 billion or more in box office sales.
- There were 613 million subscriptions to online video subscriptions around the world, a 27 percent increase from 2017.

This is a marketplace that offers new possibilities to creators and audiences everywhere. And it delivers the economic and cultural benefits of film and television that enrich our lives in so many ways.

On behalf of the MPAA and our member companies, we are pleased to bring this story to you.

Best,

Charles H. Rivkin  
Chairman and CEO

### ***A NOTE FROM THE RESEARCH TEAM***

Each year, the Motion Picture Association of America (MPAA) reports on the state of the film and television industry by collecting and analyzing data from third party sources and a survey of moviegoers and home entertainment viewers. In 2018, we expanded the scope of the report to include the home entertainment market, both digital home entertainment (electronic sell-through (EST), video-on-demand, and subscription streaming); and physical home entertainment (Blu-ray and DVD rentals and sales). The report also provides estimates of subscriptions to pay TV and online video services.

To continue our ongoing efforts to make the THEME report useful and comprehensive, the following updates are present in this year's edition.

**New Data Points:** We added several new components to provide a more complete picture of the state of the industry: global 3D box office estimates, data on the volume of original series production for television and online video services, and demographics of home entertainment viewing in the United States.

**Demographic Survey:** The home viewing demographics are based on an expansion of our demographic survey, which was re-launched with an online questionnaire last year. As more annual waves of this new survey are conducted, we'll be able to add additional trending analysis.

**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, in 2016, the U.S. dollar showed increasing strength, with currencies of major box office markets depreciating notably against the dollar. As a result, some local box office growth reported that year was reduced or even translated to a decline. In 2018, fluctuations in local currencies had some impacts that varied by country, lifting box office in U.S. dollars in Europe and reducing it in Latin America.

**MPAA Members:** In early 2019, Netflix joined the MPAA. Given that this report covers the years 2018 and earlier, for the purposes of this publication, figures that specifically reference the MPAA member companies do not yet include Netflix. Next year's report will reflect a new definition for member companies.

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

Julia Jenks

Vice President of Worldwide Research

## **TOTAL THEATRICAL & HOME ENTERTAINMENT**

- In 2018, combined theatrical and home entertainment consumer spending globally reached \$96.8 billion, a nine percent increase compared to 2017 and a 25 percent increase compared to 2014 ([p. 45](#)).
- In the United States, combined theatrical and home entertainment consumer spending reached \$35.2 billion in 2018, a 10 percent increase compared to 2017 and a 24 percent increase compared to 2014 ([p. 46](#)).

## **THEATRICAL**

### **Global Trends**

- Global box office for all films released in each country around the world reached \$41.1 billion in 2018, up one percent over 2017's total. International box office (\$29.2 billion), which excludes U.S./Canada, decreased one percent, while U.S./Canada box office (\$11.9 billion) increased seven percent compared to 2017 ([p. 8](#)).

### **U.S./Canada Trends**

- U.S./Canada box office of \$11.9 billion was a record high, up four percent from 2016, the previous record. U.S./Canada admissions, or tickets sold (1.30 billion), were up five percent compared to 2017 ([p. 15](#)).
- Three-quarters (75%) of the U.S./Canada population – or 263 million people – went to the cinema at least once in 2018 ([p. 24](#)). Per capita attendance, or the average number of times a person went to the cinema, was highest among the 12-17 and 18-24-year-old age groups at 5.1 films per year, and among the Hispanic/Latino (4.7) and Asian (4.5) ethnicity categories. All age groups except 25-39 and 60+ increased their attendance in 2018 compared to 2017 ([p. 27](#)).
- 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 12 percent of the population (43 million people) but account for 49 percent of tickets sold ([p. 24](#)). Frequent moviegoers are more likely to be in younger age brackets ([p. 25](#)), and more likely to own key technology products, especially video streaming devices ([p. 28](#)), compared to the overall population.

## **HOME ENTERTAINMENT**

### **Global Trends**

- In 2018, global home entertainment consumer spending (content released digitally and on disc) reached \$55.7 billion, a 16 percent increase compared to 2017. Digital home entertainment was the driver of growth. U.S. digital spending increased 24 percent and international digital spending increased 34 percent, compared to 2017 ([p. 30](#)).
- The number of subscriptions to online video services around the world increased to 613.3 million in 2018, a 27 percent increase from 2017, passing the number of cable subscriptions (556.0 millions) for the first time. Cable television remains the highest revenue platform globally with \$118 billion in revenue in 2018 ([p. 31](#)).



### **HOME ENTERTAINMENT (CONT'D)**

#### **U.S./Canada Trends**

- In the United States, home entertainment consumer spending increased to \$23.3 billion ([p. 33](#)), accounting for 66 percent of combined theatrical and home entertainment consumer spending. Digital home entertainment accounted for the highest share (50%) ([p. 46](#)). The number of online video subscriptions in the United States increased to 186.9 million in 2018, a 17 percent increase compared to 2017 ([p. 37](#)).
- More than 80 percent of U.S. adults watch movies and TV shows via traditional television services, the highest proportion for any home viewing method, followed by online subscription services (more than 70%). TV services also have the highest proportion of daily viewers: 33 percent of adults watch TV shows daily, and 21 percent watch movies daily on TV services ([p. 41](#)). Home viewers of movies and TV shows via traditional TV and physical discs are generally similar to the overall population, while online subscription and Electronic Sell Through (EST)/ video-on-demand (VOD) viewers skew younger, especially to the 18-24 and 25-39 age groups ([p. 43](#)).

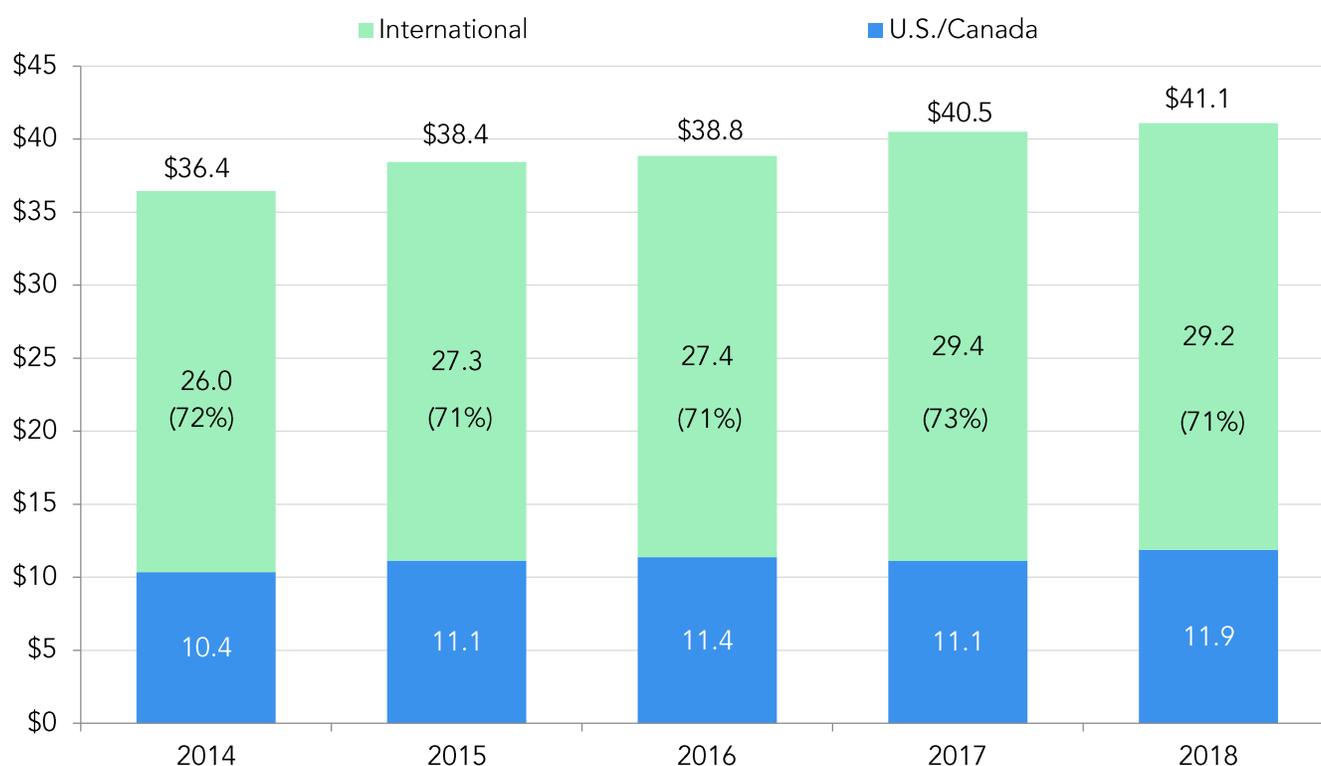


**THEATRICAL:  
GLOBAL**

Global box office for all films released in each country around the world<sup>1</sup> reached \$41.1 billion in 2018, up one percent over 2017's total. International box office (\$29.2 billion) decreased one percent, while U.S./Canada box office (\$11.9 billion) increased seven percent compared to 2017. International box office accounted for 71 percent of total box office in 2018, down two percentage points from 2017.

International box office is up 12 percent compared to five years ago. Global box office is up 13 percent over the same period.

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



|                            | 2014          | 2015          | 2016          | 2017          | 2018          | % Change <sup>2</sup><br>18 vs. 17 | % Change <sup>2</sup><br>18 vs. 14 |
|----------------------------|---------------|---------------|---------------|---------------|---------------|------------------------------------|------------------------------------|
| U.S./Canada <sup>3</sup>   | \$10.4        | \$11.1        | \$11.4        | \$11.1        | \$11.9        | 7%                                 | 15%                                |
| International <sup>4</sup> | \$26.0        | \$27.3        | \$27.4        | \$29.4        | \$29.2        | -1%                                | 12%                                |
| <b>Total</b>               | <b>\$36.4</b> | <b>\$38.4</b> | <b>\$38.8</b> | <b>\$40.5</b> | <b>\$41.1</b> | <b>1%</b>                          | <b>13%</b>                         |

<sup>1</sup> Values in the report reflect all films released, regardless of distributor or country of origin, except where specified as a subset.

<sup>2</sup> Percentage change and international share (above) are calculated using values before rounding.

<sup>3</sup> Source: comScore – Box Office Essentials, calendar year from January 1-December 31.

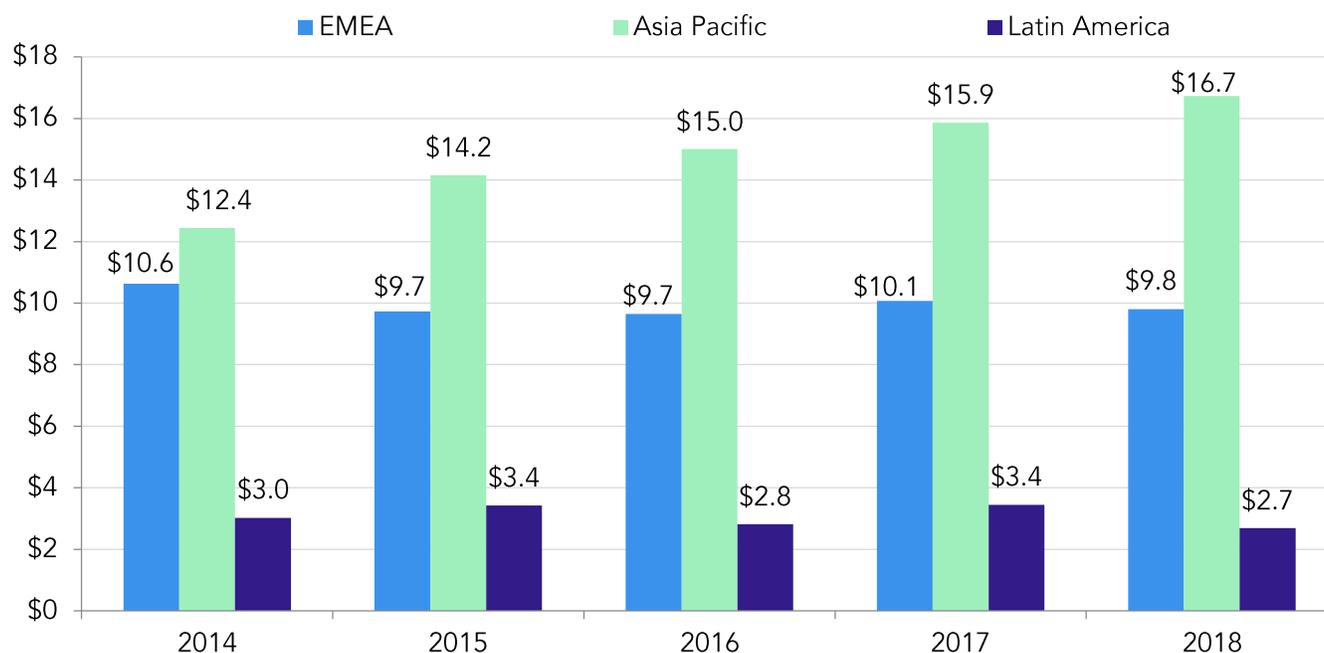
<sup>4</sup> International box office excludes U.S./Canada throughout this report. MPAA calculates international box office country-by-country based on a variety of data sources. Prior years' estimates may be updated based on changes made by sources.

In 2018, box office in Asia Pacific (\$16.7 billion) increased five percent in U.S. dollars compared to 2017. The primary driver of growth was China, with a 12 percent increase in box office in U.S. dollars.

Europe, Middle East & Africa (EMEA) box office decreased three percent in U.S. dollars over 2017. This was driven by decreases in Germany and Russia (-14% each in U.S. dollar terms), while U.K. box office increased two percent in U.S. dollar terms.

After a 22 percent increase in 2017, Latin America's box office decreased 22 percent in U.S. dollars in 2018, with a similar decline in Brazil (-22%). The depreciation of currencies in Argentina (-41%) and Mexico (-2%), contributed to the overall decline in regional box office.

**International Box Office by Region – All Films (US\$ Billions)<sup>5</sup>**



|                              | 2014          | 2015          | 2016          | 2017          | 2018          | % Change <sup>6</sup><br>18 vs. 17 | % Change <sup>6</sup><br>18 vs. 14 |
|------------------------------|---------------|---------------|---------------|---------------|---------------|------------------------------------|------------------------------------|
| Europe, Middle East & Africa | \$10.6        | \$9.7         | \$9.6         | \$10.1        | \$9.8         | -3%                                | -8%                                |
| Asia Pacific                 | \$12.4        | \$14.2        | \$15.0        | \$15.9        | \$16.7        | 5%                                 | 35%                                |
| Latin America                | \$3.0         | \$3.4         | \$2.8         | \$3.4         | \$2.7         | -22%                               | -11%                               |
| <b>Total</b>                 | <b>\$26.0</b> | <b>\$27.3</b> | <b>\$27.4</b> | <b>\$29.4</b> | <b>\$29.2</b> | <b>-1%</b>                         | <b>12%</b>                         |

<sup>5</sup> Box office data is in U.S. dollars for analytical and comparative purposes. Local currency box office trends may differ due to exchange rate fluctuations.

<sup>6</sup> Percentage change is calculated using table values before rounding.

In 2018, the top three box office markets outside the U.S./Canada were China (\$9.0 billion, including online ticketing fees), Japan (\$2.0 billion) and the U.K. (\$1.7 billion), consistent with 2017. Malaysia and UAE entered the top 20 international box office markets, replacing Argentina and Turkey.

### 2018 Top 20 International Box Office Markets – All Films (US\$ Billions)

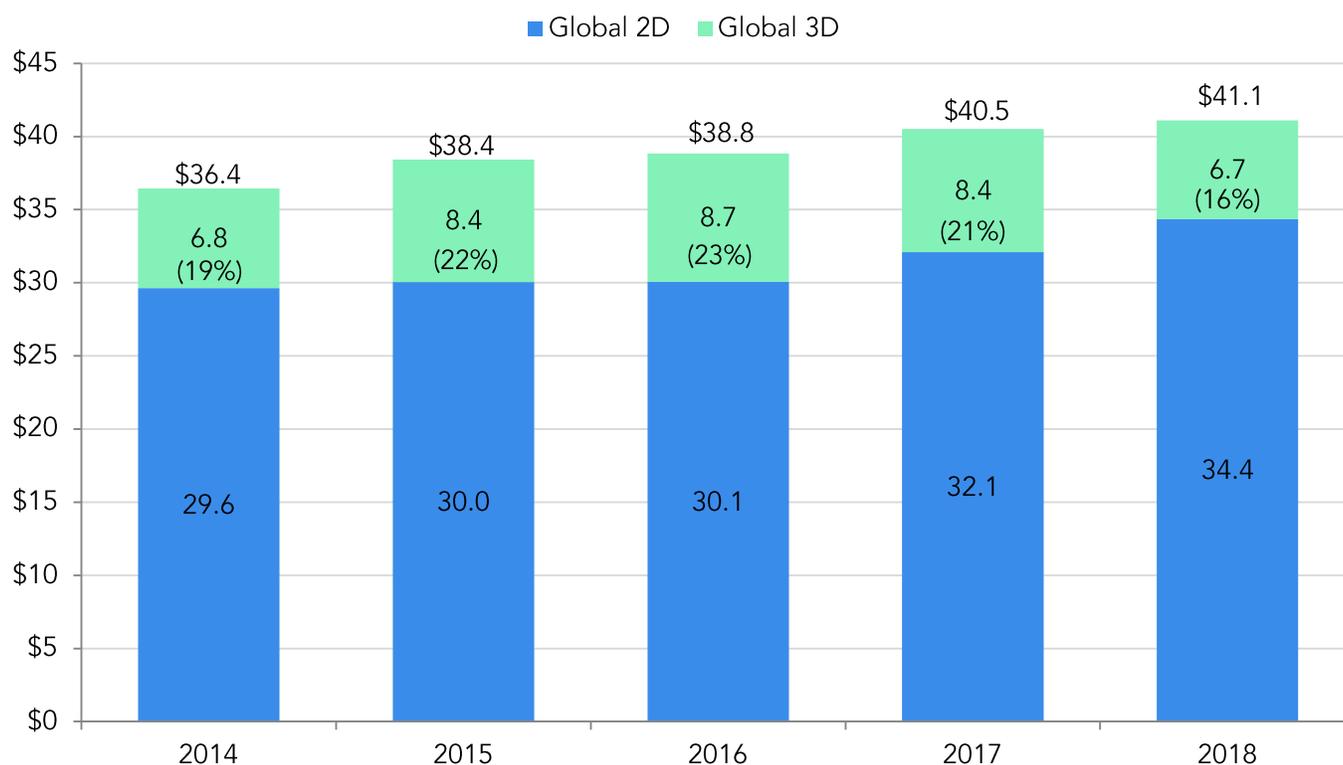
Source: IHS Markit, local sources

|     |                    |       |     |             |       |
|-----|--------------------|-------|-----|-------------|-------|
| 1.  | China <sup>7</sup> | \$9.0 | 11. | Spain       | \$0.7 |
| 2.  | Japan              | \$2.0 | 12. | Brazil      | \$0.7 |
| 3.  | U.K.               | \$1.7 | 13. | Italy       | \$0.7 |
| 4.  | South Korea        | \$1.6 | 14. | Netherlands | \$0.4 |
| 5.  | France             | \$1.6 | 15. | Indonesia   | \$0.4 |
| 6.  | India              | \$1.5 | 16. | Taiwan      | \$0.3 |
| 7.  | Germany            | \$1.0 | 17. | Poland      | \$0.3 |
| 8.  | Australia          | \$0.9 | 18. | UAE         | \$0.3 |
| 9.  | Mexico             | \$0.9 | 19. | Malaysia    | \$0.3 |
| 10. | Russia             | \$0.9 | 20. | Hong Kong   | \$0.3 |

<sup>7</sup> China box office total includes online ticketing fees. The China box office total excluding ticketing fees is no longer made available.

Global 3D box office was \$6.7 billion in 2018, a decrease of 20 percent compared to 2017. The decrease occurred across all regions. The smallest decrease in percentage terms was in the Asia Pacific region (-14%), where China's 3D box office the prior year (2017) included the top box office film in Chinese history, and the largest was in U.S./Canada (-34%), where 3D wide releases decreased 21% over 2017 (p. 17). Global 3D box office was 16 percent of total box office in 2018.

**Global 3D Box Office – All Films (US\$ Billions)<sup>8</sup>**



|              | 2014          | 2015          | 2016          | 2017          | 2018          | % Change <sup>9</sup><br>18 vs. 17 | % Change <sup>9</sup><br>18 vs. 14 |
|--------------|---------------|---------------|---------------|---------------|---------------|------------------------------------|------------------------------------|
| Global 2D    | \$29.6        | \$30.0        | \$30.1        | \$32.1        | \$34.4        | 7%                                 | 16%                                |
| Global 3D    | \$6.8         | \$8.4         | \$8.7         | \$8.4         | \$6.7         | -20%                               | -1%                                |
| <b>Total</b> | <b>\$36.4</b> | <b>\$38.4</b> | <b>\$38.8</b> | <b>\$40.5</b> | <b>\$41.1</b> | <b>2%</b>                          | <b>13%</b>                         |

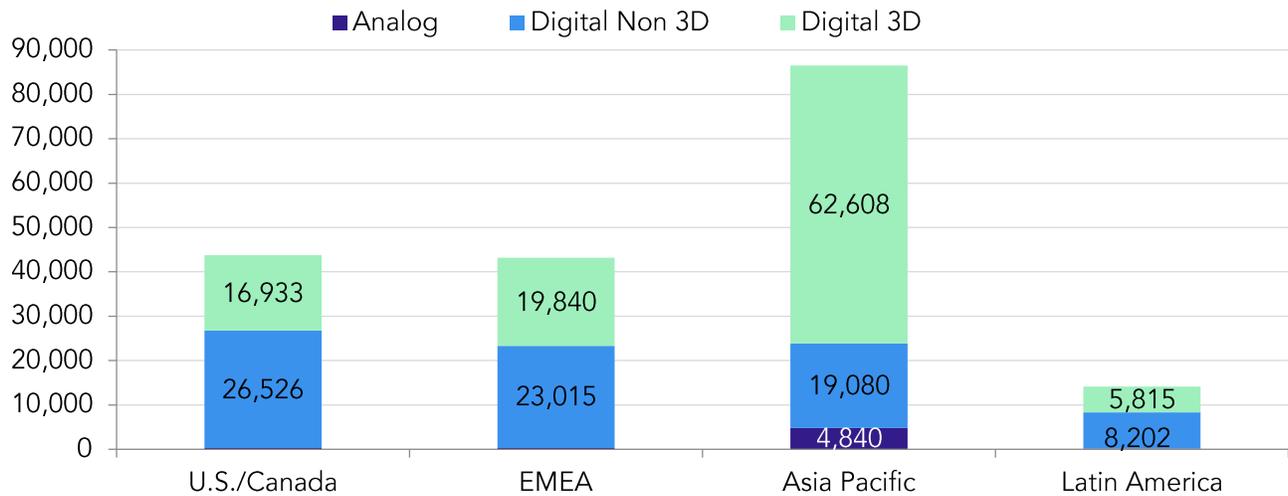
<sup>8</sup> Box office data is in U.S. dollars for analytical and comparative purposes. Local currency box office trends may differ due to exchange rate fluctuations.

<sup>9</sup> Percentage change and share of total box office is calculated using table values before rounding.

Total cinema screens increased seven percent globally in 2018, nearly reaching 190,000, due in large part to continued double digit growth in the Asia Pacific region (+13%). At the end of 2018, virtually all of the world's cinema screens were digital (97%), consistent with 2017.

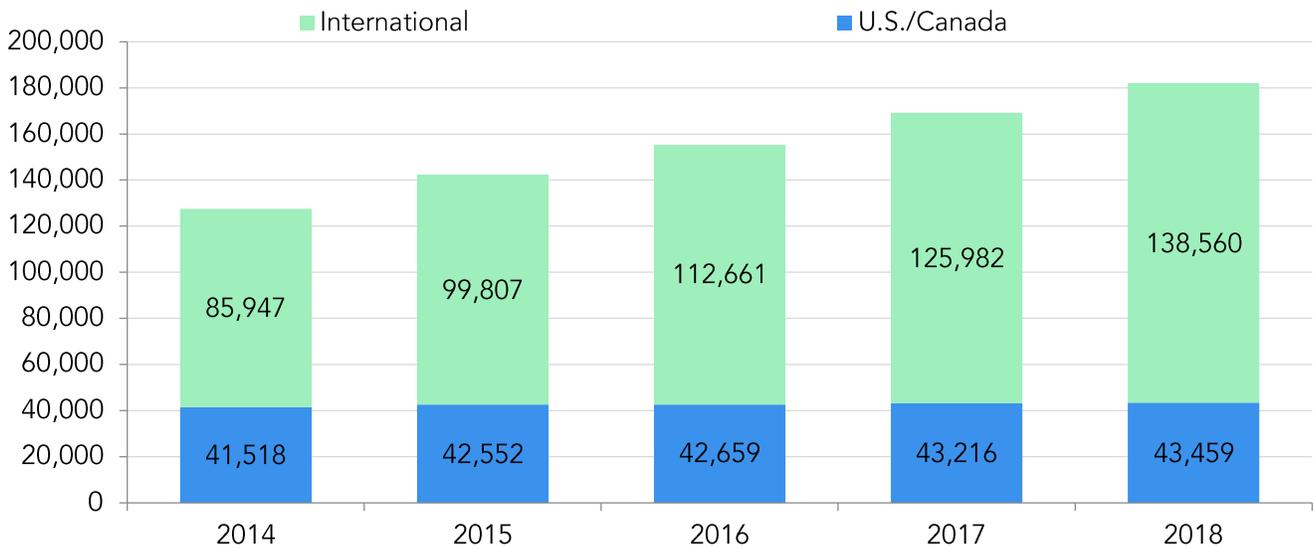
### 2018 Global Cinema Screens by Format and Region<sup>10</sup>

Source: IHS Markit



### Global Digital Screens

Source: IHS Markit



<sup>10</sup>2018 total screens figures are estimates as of February 2019. Screen figures for previous years have been revised by source.



The number of 3D digital screens around the world increased 13 percent, surpassing 105,000 in 2018. They now account for 58 percent of all digital screens globally. All regions except U.S./Canada saw growth in the number of digital 3D screens in 2018. 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 Screens

Source: IHS Markit

|                            | 2014   | 2015   | 2016   | 2017   | 2018    | 2018<br>% of digital |
|----------------------------|--------|--------|--------|--------|---------|----------------------|
| U.S./Canada                | 16,143 | 16,441 | 16,745 | 16,978 | 16,933  | 39%                  |
| EMEA                       | 16,880 | 17,580 | 18,278 | 18,971 | 19,840  | 46%                  |
| Asia Pacific               | 27,472 | 36,146 | 42,429 | 51,660 | 62,608  | 77%                  |
| Latin America              | 4,294  | 4,897  | 5,368  | 5,619  | 5,815   | 41%                  |
| Total                      | 64,788 | 75,065 | 82,819 | 93,228 | 105,196 | 58%                  |
| % change vs. previous year | 22%    | 16%    | 10%    | 13%    | 13%     |                      |



**THEATRICAL:  
U.S./CANADA**

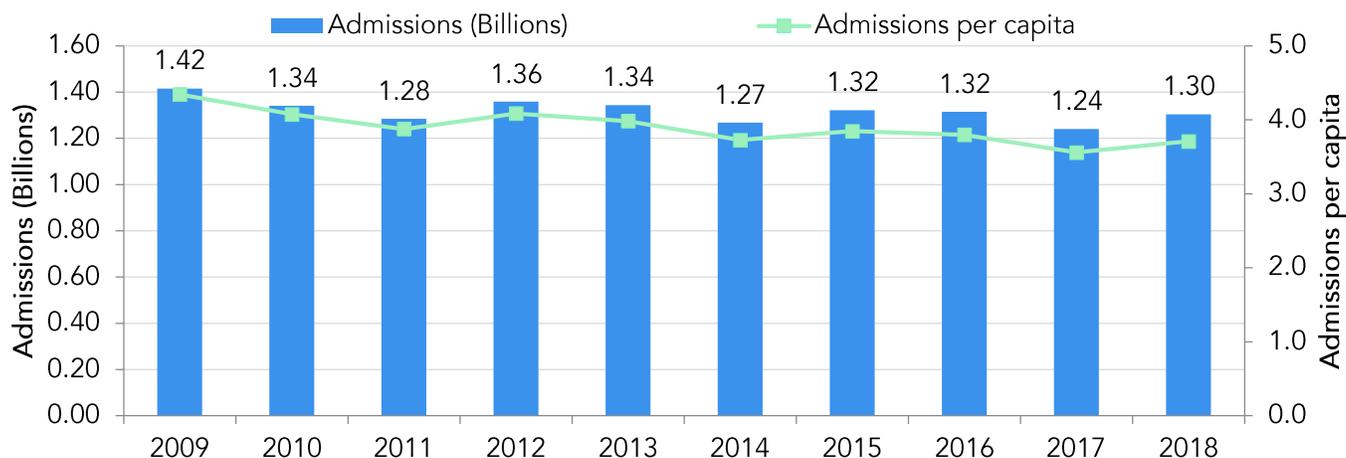
In 2018, U.S./Canada box office reached a high of \$11.9 billion, up seven percent from last year and up four percent from 2016, the previous record year.<sup>11</sup> Admissions, or tickets sold (1.30 billion), were up five percent compared to 2017.

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

Source: Comscore Box Office Essentials



|                              | 2009   | 2010   | 2011   | 2012   | 2013   | 2014   | 2015   | 2016   | 2017   | 2018   | % Chg.<br>18 vs. 17 |
|------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------------------|
| U.S./Can. box office (US\$B) | \$10.6 | \$10.6 | \$10.2 | \$10.8 | \$10.9 | \$10.4 | \$11.1 | \$11.4 | \$11.1 | \$11.9 | 7%                  |



|   | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | % Chg.<br>18 vs. 17 |
|---|------|------|------|------|------|------|------|------|------|------|---------------------|
| U.S./Can. admissions (Billions) <sup>12</sup> | 1.42 | 1.34 | 1.28 | 1.36 | 1.34 | 1.27 | 1.32 | 1.32 | 1.24 | 1.30 | 5%                  |
| U.S./Can. admissions per capita <sup>13</sup> | 4.3  | 4.1  | 3.9  | 4.1  | 4.0  | 3.7  | 3.8  | 3.8  | 3.6  | 3.7  | 4%                  |

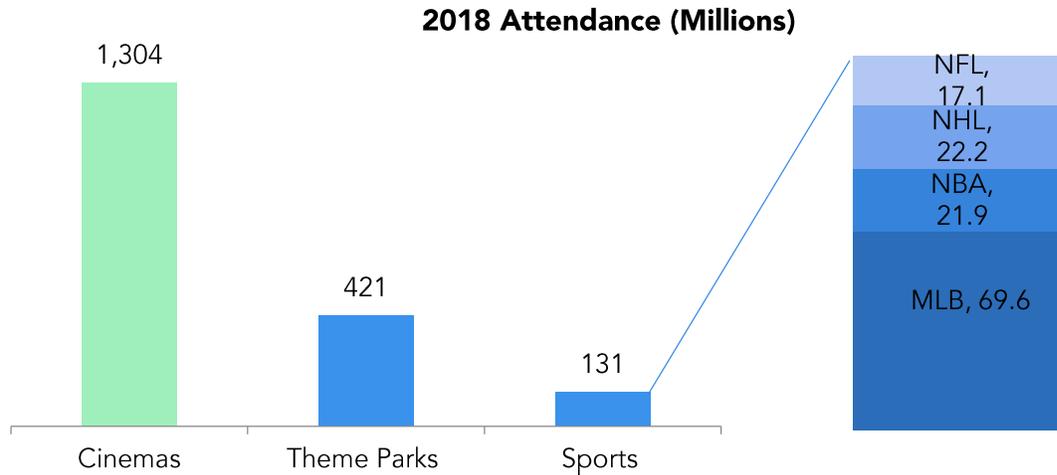
<sup>11</sup> Percentage change is calculated using table values before rounding.

<sup>12</sup> Admissions 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).

<sup>13</sup> Admissions per capita calculated using aggregated U.S. Census Bureau and Statistics Canada data for population aged 2+.

In 2018, 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 14 cents (+2%) in 2018, compared to a three percent increase in inflation as measured by the Consumer Price Index (CPI).



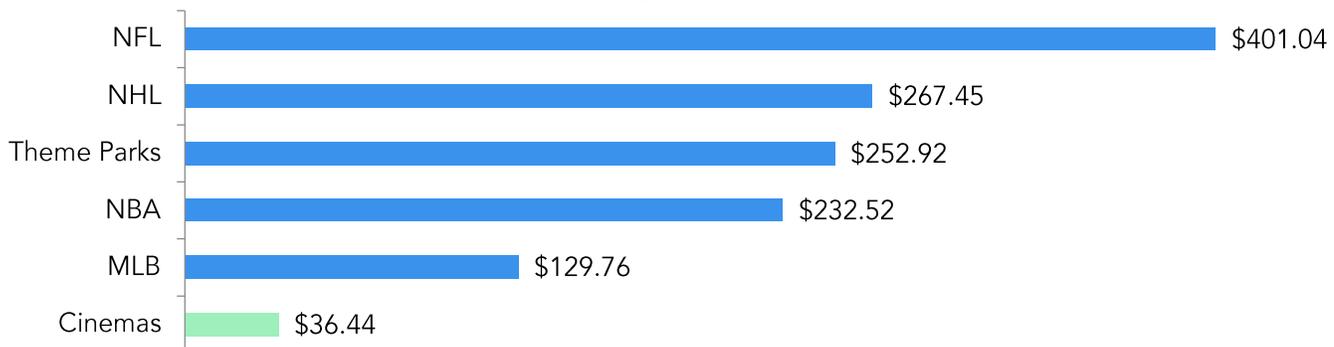
### Average Cinema Ticket Price (US\$)

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

|                             | 2009   | 2010   | 2011   | 2012   | 2013   | 2014   | 2015   | 2016   | 2017   | 2018   |
|-----------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Average Ticket Price        | \$7.50 | \$7.89 | \$7.93 | \$7.96 | \$8.13 | \$8.17 | \$8.43 | \$8.65 | \$8.97 | \$9.11 |
| % Change vs. Prior Year     | 4%     | 5%     | 1%     | 0%     | 2%     | 0%     | 3%     | 3%     | 4%     | 2%     |
| % Change vs. 2018           | 22%    | 15%    | 15%    | 14%    | 12%    | 12%    | 8%     | 5%     | 2%     | n/a    |
| CPI % Change vs. Prior Year | 0%     | 2%     | 3%     | 2%     | 2%     | 2%     | 0%     | 1%     | 2%     | 3%     |

### 2018 Average Ticket Price for a Family of Four (US\$)<sup>14</sup>

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



<sup>14</sup> Average sports ticket prices were calculated using the most recent year average ticket price available for each league, with an adjustment based on the CPI rate specific to admissions to sporting events.

In 2018, the Classification and Ratings Administration (CARA) rated 564 films (including non-theatrical films), consistent with 2017. After a large decrease in 2017, the number of non-MPAA member films rated increased three percent in 2018, while MPAA member films decreased six percent during the same time period.

### Film Ratings<sup>15</sup>

Source: CARA (Film ratings), MPAA (Subtotals)

|                             | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 18 vs. 17 | 18 vs. 09 |
|-----------------------------|------|------|------|------|------|------|------|------|------|------|-----------|-----------|
| Film ratings                | 790  | 698  | 758  | 726  | 713  | 708  | 613  | 605  | 563  | 564  | 0%        | -29%      |
| -MPAA members <sup>16</sup> | 177  | 174  | 169  | 166  | 169  | 165  | 167  | 176  | 176  | 166  | -6%       | -6%       |
| -Non-members                | 613  | 524  | 589  | 560  | 544  | 543  | 446  | 429  | 387  | 398  | 3%        | -35%      |

The number of films released in theaters in U.S./Canada (758) was down by three percent compared to 2017 (785), but was up 36 percent compared to ten years ago.

Non-MPAA affiliated independents continue to release the most films domestically (631) but were down four percent when comparing 2018 to 2017. Films released by MPAA member studios (127) decreased two percent, caused by a 20 percent decrease in films released by studio subsidiaries. Film attendance by moviegoers remains concentrated: the top 139 films made up 95% of the box office in 2018.

### Films Released

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

|                              | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 18 vs. 17 | 18 vs. 09 |
|------------------------------|------|------|------|------|------|------|------|------|------|------|-----------|-----------|
| Films released <sup>17</sup> | 557  | 563  | 609  | 678  | 658  | 706  | 707  | 732  | 785  | 758  | -3%       | 36%       |
| - Large format releases      | 14   | 16   | 21   | 26   | 32   | 30   | 36   | 42   | 41   | 56   | 37%       | 300%      |
| - 3D film releases           | 18   | 29   | 53   | 56   | 54   | 48   | 39   | 51   | 46   | 42   | -9%       | 133%      |
| - 3D wide release films      | 14   | 22   | 35   | 34   | 33   | 31   | 28   | 36   | 34   | 27   | -21%      | 93%       |
| MPAA member total            | 158  | 141  | 141  | 128  | 114  | 135  | 147  | 143  | 130  | 127  | -2%       | -20%      |
| - MPAA studios               | 111  | 104  | 104  | 94   | 84   | 99   | 100  | 101  | 86   | 92   | 7%        | -17%      |
| - MPAA studio subsidiaries   | 47   | 37   | 37   | 34   | 30   | 36   | 47   | 42   | 44   | 35   | -20%      | -26%      |
| Non-members                  | 399  | 422  | 468  | 550  | 544  | 571  | 560  | 589  | 655  | 631  | -4%       | 58%       |

<sup>15</sup> Note that films may be rated or re-rated months or even years after production. Includes non-theatrical films.

<sup>16</sup> MPAA members include: Walt Disney Studios Motion Pictures, Paramount Pictures Corporation, Sony Pictures Entertainment, Inc. Twentieth Century Fox Film Corporation, Universal City Studios LLC, and Warner Bros. Entertainment Inc. Netflix is not included as a member since they joined in 2019, after the last year of data.

<sup>17</sup> 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.



In 2018, the estimated number of U.S. films above a \$1 million minimum budget threshold that entered production was 576, an increase of five percent compared to 2017 and 20 percent compared to 2014. Of these films, 171 films had an estimated budget greater than \$15 million, a six percent increase compared to 2017 and an 11 percent increase compared to 2014.

The number of MPAA member studio films entering production in 2018 was 107, consistent with 2017, while the number of non-MPAA member studio films (469) was up six percent compared to 2017 and 29 percent compared to 2014.

### Films Entering Production for Future Theatrical Release<sup>18</sup>

|   | 2014       | 2015       | 2016       | 2017       | 2018 <sup>19</sup> | 18 vs.<br>17 | 18 vs.<br>14 |
|---|------------|------------|------------|------------|--------------------|--------------|--------------|
| Films produced (est. \$15M+ budget)     | 154        | 139        | 135        | 162        | 171                | 6%           | 11%          |
| Films produced (est. \$1M-\$15M budget) | 328        | 356        | 376        | 387        | 405                | 5%           | 23%          |
| <b>Total films (est. \$1M+ budget)</b>  | <b>482</b> | <b>495</b> | <b>511</b> | <b>549</b> | <b>576</b>         | <b>5%</b>    | <b>20%</b>   |
| MPAA member sub-total                   | 119        | 110        | 99         | 108        | 107                | -1%          | -10%         |
| Non-MPAA member sub-total               | 363        | 385        | 412        | 441        | 469                | 6%           | 29%          |

<sup>18</sup> 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-video video release, or films with estimated budgets below \$1 million. 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, MPAA compiles data from a wide range of sources.

<sup>19</sup> Data is provisional as of March 2019. Figures may be revised as more information becomes available.

PG-13 films comprised 17 of the top 25 films in release during 2018, more than any other rating, and up from 2017 (15). In 2018, the top 25 films accounted for 54 percent of total box office, with the top five films accounting for 23 percent.

### Top 25 Films by U.S./Canada Box Office Earned in 2018

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

| Rank | Title                                    | Distributor                  | Box Office (US\$ MM) | Rating | 3D |
|------|--|------------------------------|----------------------|--------|----|
| 1    | Black Panther                            | Disney                       | 700.1                | PG13   | ✓  |
| 2    | Avengers: Infinity War                   | Disney                       | 678.8                | PG13   | ✓  |
| 3    | Incredibles 2                            | Disney                       | 608.6                | PG     | ✓  |
| 4    | Jurassic World: Fallen Kingdom           | Universal                    | 417.7                | PG13   | ✓  |
| 5    | Deadpool 2                               | 20 <sup>th</sup> Century Fox | 324.5                | R      |    |
| 6    | Dr. Suess' The Grinch*                   | Universal                    | 266.3                | PG     | ✓  |
| 7    | Jumanji: Welcome to the Jungle**         | Sony                         | 235.5                | PG13   | ✓  |
| 8    | Mission: Impossible – Fallout            | Paramount                    | 220.2                | PG13   | ✓  |
| 9    | Ant-Man and the Wasp                     | Disney                       | 216.6                | PG13   | ✓  |
| 10   | Solo: A Star Wars Story                  | Disney                       | 213.8                | PG13   | ✓  |
| 11   | Venom*                                   | Sony                         | 213.3                | PG13   | ✓  |
| 12   | A Star is Born*                          | Warner Bros.                 | 201.2                | R      |    |
| 13   | Aquaman*                                 | Warner Bros.                 | 199.1                | PG13   | ✓  |
| 14   | Bohemian Rhapsody*                       | 20 <sup>th</sup> Century Fox | 189.8                | PG13   |    |
| 15   | A Quiet Place                            | Paramount                    | 188.0                | PG13   |    |
| 16   | Ralph Breaks the Internet*               | Disney                       | 177.6                | PG     | ✓  |
| 17   | Crazy Rich Asians                        | Warner Bros.                 | 174.0                | PG13   |    |
| 18   | Hotel Transylvania 3: Summer Vacation    | Sony                         | 166.2                | PG     | ✓  |
| 19   | Halloween                                | Universal                    | 159.3                | R      |    |
| 20   | Fantastic Beasts: Crimes of Grindelwald* | Warner Bros.                 | 156.8                | PG13   | ✓  |
| 21   | The Meg                                  | Warner Bros.                 | 145.4                | PG13   | ✓  |
| 22   | Ocean's 8                                | Warner Bros.                 | 140.2                | PG13   |    |
| 23   | Ready Player One                         | Warner Bros.                 | 137.7                | PG13   | ✓  |
| 24   | The Greatest Showman**                   | 20 <sup>th</sup> Century Fox | 125.3                | PG     |    |
| 25   | Mamma Mia! Here We Go Again              | Universal                    | 120.6                | PG13   |    |

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

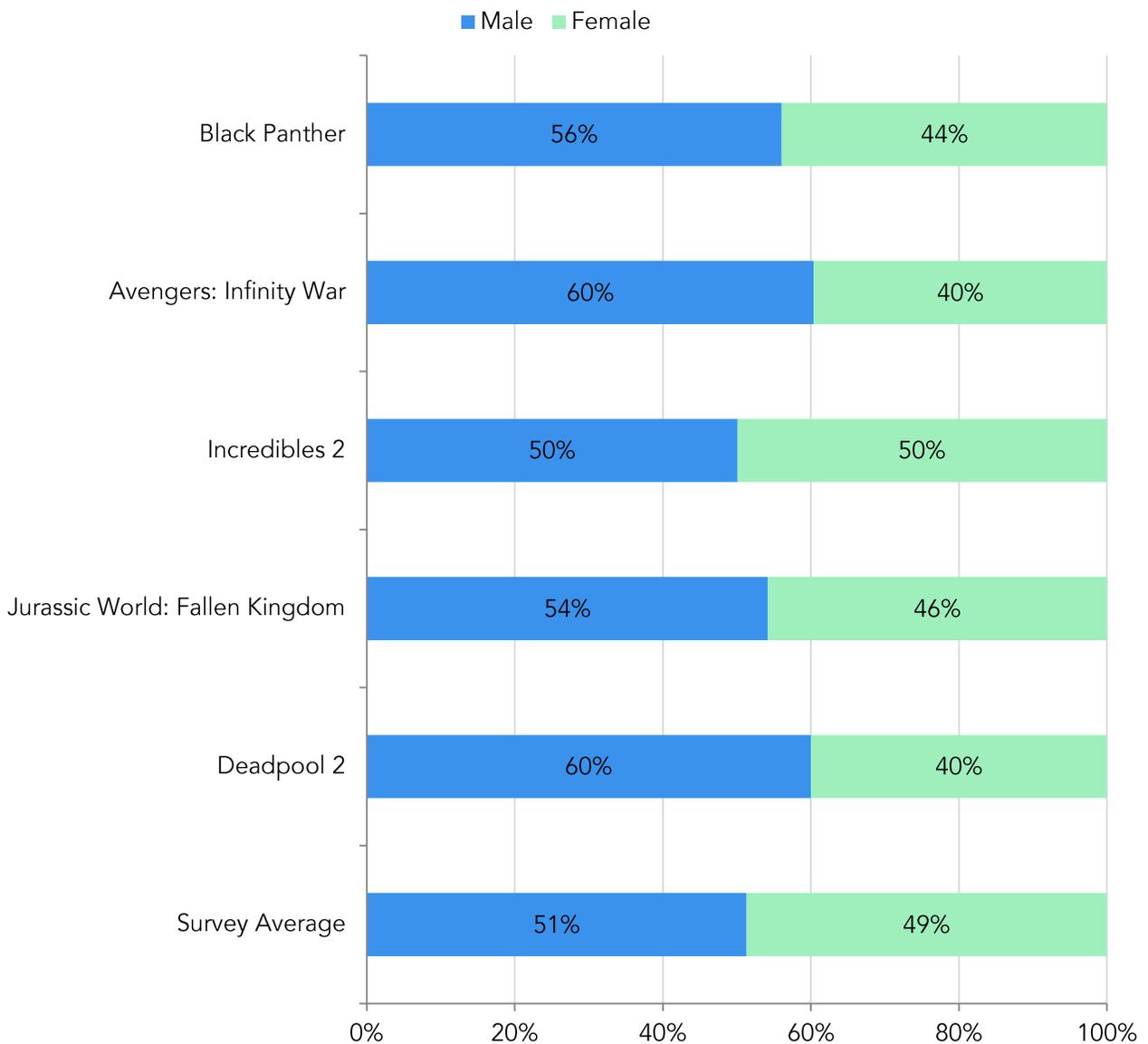
\*\* Film released in theaters in 2017; total reflects box office earned from Jan. 1 – Dec. 31, 2018

Comscore/Screen Engine'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.<sup>20</sup>

*Incredibles 2*, the third top grossing film in 2018, attracted an equal split of female and male audiences. The other films in the top five grossing films of 2018 attracted majority male audiences, including *Avengers: Infinity War* and *Deadpool 2*, which earned 60 percent of their box office from men.

### 2018 Gender Share of Top Grossing Films

Source: Comscore/Screen Engine



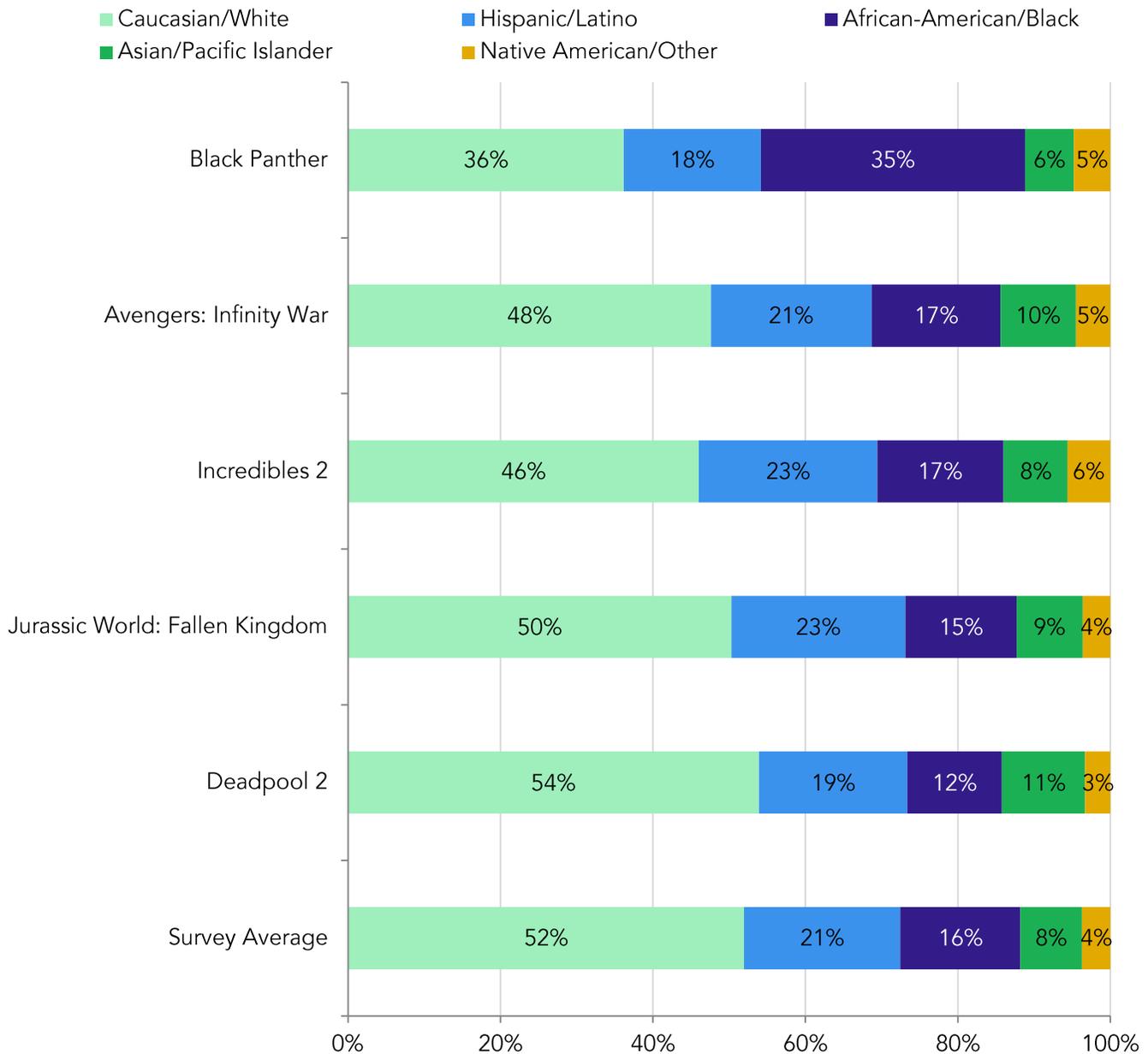
<sup>20</sup> More details about PostTrak's methodology can be found in the Appendix.

According to Comscore/Screen Engine's "PostTrak," among the top grossing films, *Black Panther* drew the most ethnically diverse audience, followed by *Incredibles 2*.

Thirty-five percent of *Black Panther*'s audience was African-American/Black, 19 percentage points higher than the survey average.

### 2018 Ethnicity Share of Top Grossing Films<sup>21</sup>

Source: Comscore/Screen Engine



<sup>21</sup> Percentage values in table may not sum to 100 percent due to rounding.

In 2018, there were nearly 40,600 screens in the United States, a slight increase from 2017. The majority of screens (89%) were located at venues with five or more screens.

### U.S. Screens by Type of Venue

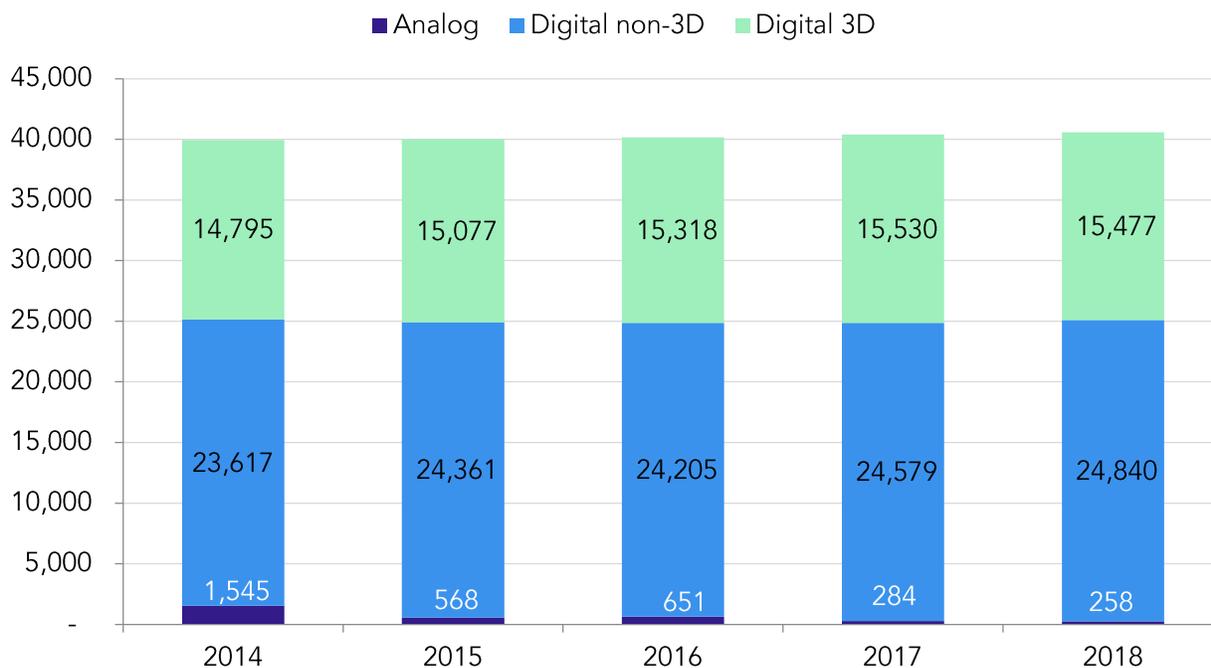
Source: IHS Markit

|                   | 2014          | 2015          | 2016          | 2017          | 2018          |
|-------------------|---------------|---------------|---------------|---------------|---------------|
| 1-4 screen venues | 5,488         | 4,707         | 4,554         | 4,443         | 4,355         |
| 5+ screen venues  | 34,468        | 35,299        | 35,620        | 35,950        | 36,220        |
| <b>Total</b>      | <b>39,956</b> | <b>40,006</b> | <b>40,174</b> | <b>40,393</b> | <b>40,575</b> |

In 2018, the number of digital screens in the United States increased by one percent from 2017, accounting for 99 percent of all U.S. screens. The number of digital, non-3D screens increased by 261, up one percent from the previous year, and accounted for 61 percent of all screens. The number of digital 3D screens remained roughly the same as in 2017.

### U.S. Screens by Type

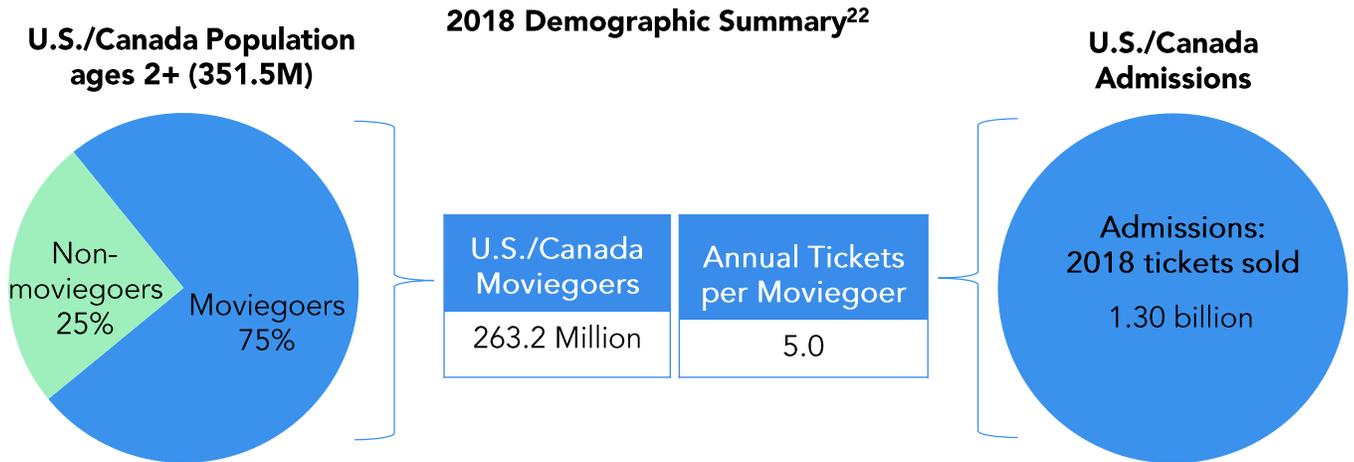
Source: IHS Markit





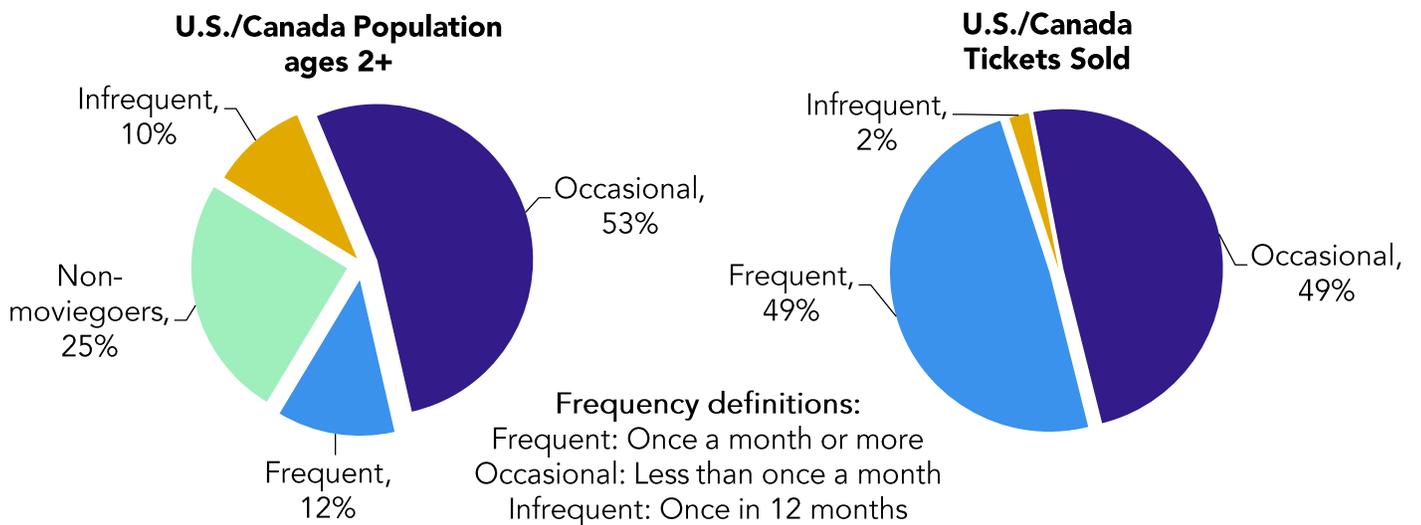
**THEATRICAL  
DEMOGRAPHICS**

Three-quarters (75%) of the U.S./Canada population aged two or older, or 263 million people, went to a movie at the cinema at least once in 2018 ("moviegoer"), similar to 2017. The typical moviegoer bought 5.0 tickets per year in 2018, up from 4.7 tickets in 2017.



Twelve percent of the U.S./Canada population is frequent moviegoers who attend the cinema once a month or more. These individuals are responsible for 49 percent of all tickets sold. More than half of the population is occasional moviegoers (53%), who are also responsible for 49 percent of all tickets. The remaining two percent of tickets were sold to infrequent moviegoers (10% of the population). The 2018 moviegoer shares were similar to 2017.

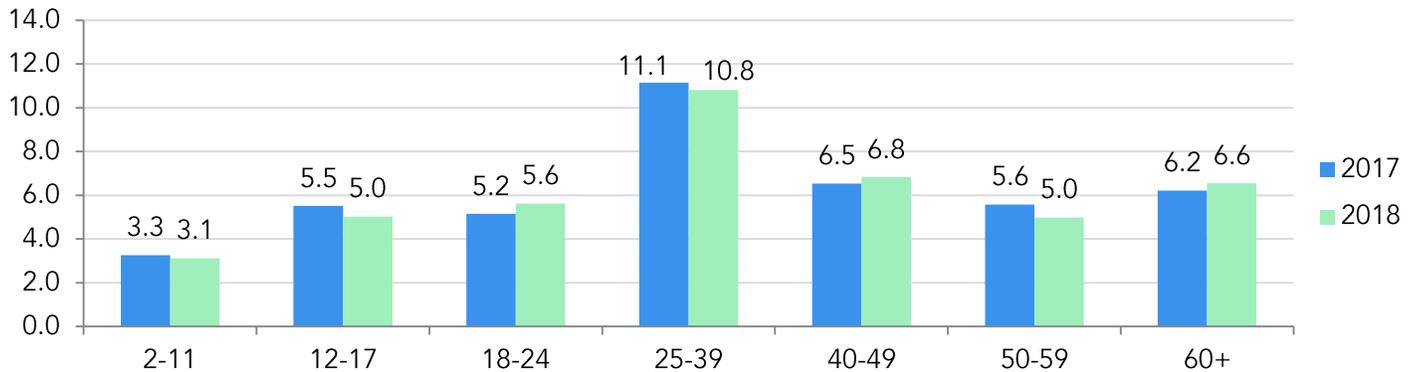
### 2018 Moviegoer Share of Population and Tickets Sold



<sup>22</sup> MPAA'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.

In 2018, there were 43 million frequent moviegoers. The 25-39 year age group (10.8 million) had the most frequent moviegoers, followed by the 40-49 year age group (6.8 million), consistent with 2017. 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.

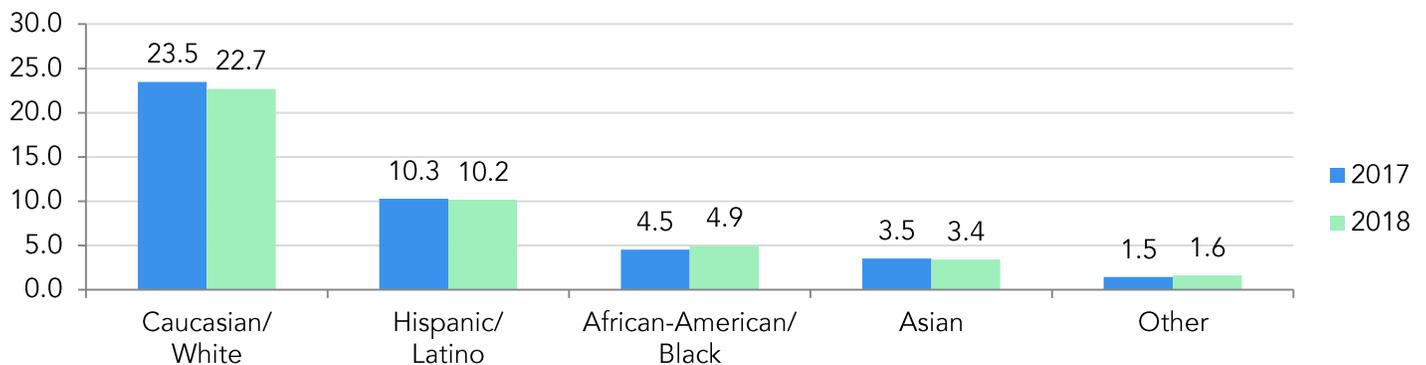
**Frequent Moviegoers (Millions) by Age<sup>23</sup>**



|                               | 2-11 | 12-17 | 18-24 | 25-39 | 40-49 | 50-59 | 60+ |
|-------------------------------|------|-------|-------|-------|-------|-------|-----|
| % of Population 2018          | 13%  | 8%    | 9%    | 21%   | 13%   | 13%   | 23% |
| % of Frequent Moviegoers 2018 | 7%   | 12%   | 13%   | 25%   | 16%   | 12%   | 15% |

In 2018, the Hispanic/Latino ethnicity was overrepresented in the population of frequent moviegoers (24%) relative to their proportion of the overall population (18%).

**Frequent Moviegoers (Millions) by Ethnicity<sup>23</sup>**

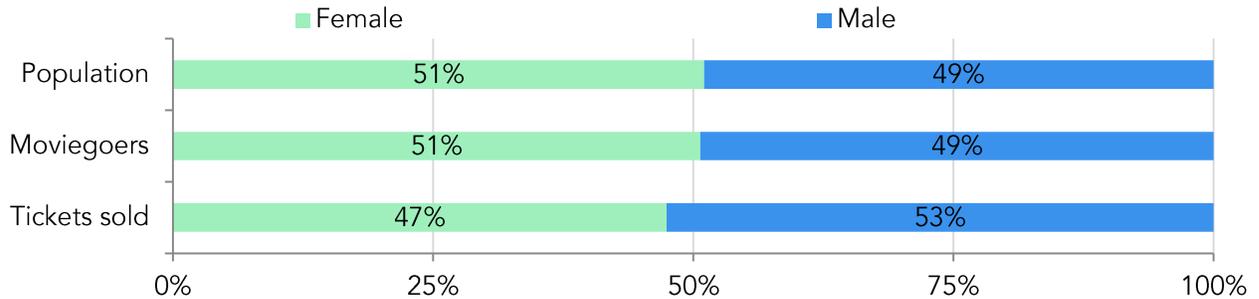


|                               | Caucasian/White | Hispanic/Latino | African-American/Black | Asian | Other |
|-------------------------------|-----------------|-----------------|------------------------|-------|-------|
| % of Population 2018          | 61%             | 18%             | 12%                    | 6%    | 3%    |
| % of Frequent Moviegoers 2018 | 53%             | 24%             | 11%                    | 8%    | 4%    |

<sup>23</sup> The small size of frequent moviegoer subgroups may lead to large fluctuation in annual figures.

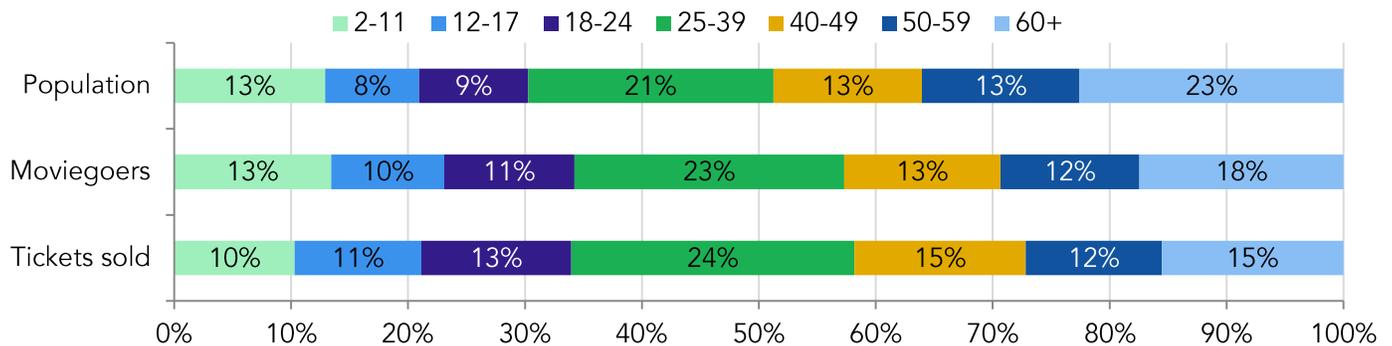
The gender composition of moviegoers (people who went to a movie at the cinema at least once in the year) skewed slightly toward women in 2018, while the number of tickets sold skewed slightly toward men.

### 2018 Gender Share of Total Population, Moviegoers, and Tickets Sold



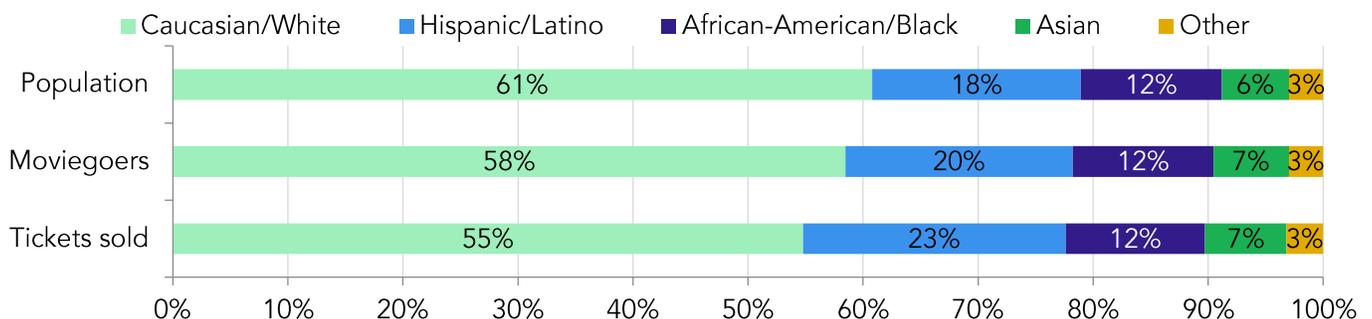
In 2018, the 18-24 age group was overrepresented in terms of tickets sold, accounting for nine percent of the population and 13 percent of tickets sold. To a lesser extent, the 12-17 and 25-39 age groups are also overrepresented for tickets sold (11% and 24%) relative to their share of the population (8% and 21%). Age group shares were similar to 2017.

### 2018 Age Group Share of Total Population, Moviegoers, and Tickets Sold



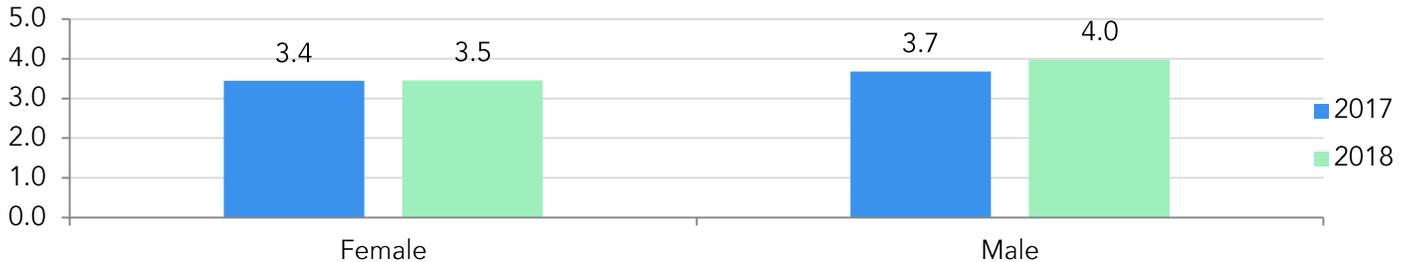
Although the Caucasian/White category makes up the majority of the population (61%) and moviegoers (58%), it represented a smaller share of 2018 ticket sales (55%). In 2018, the Hispanic/Latino category was overrepresented in share of movie tickets purchased (23%) relative to share of the population (18%), similar to 2017.

### 2018 Ethnicity Share of Total Population, Moviegoers, and Tickets Sold



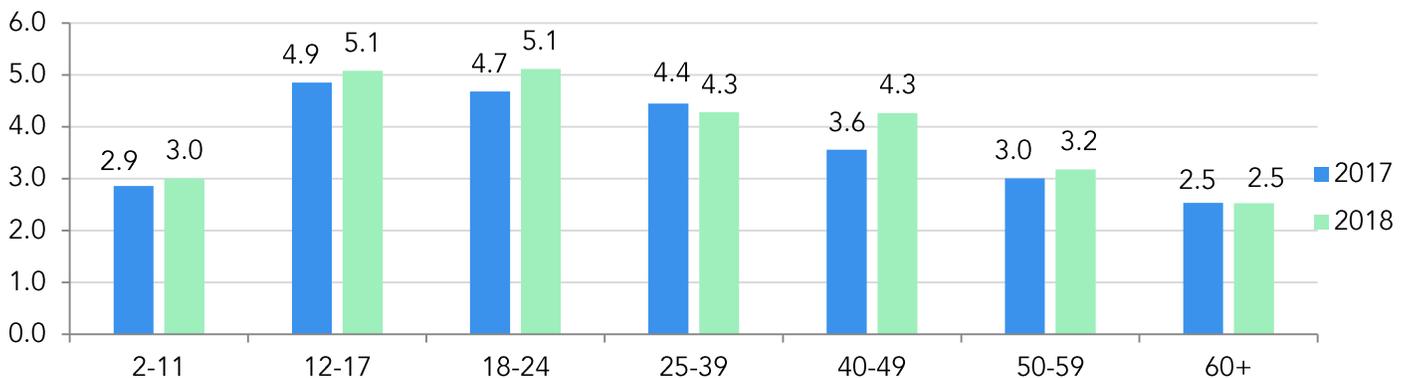
In 2018, per capita annual movie attendance (tickets sold per person) increased for both females (3.5) and males (4.0).

**Per Capita Attendance by Gender**



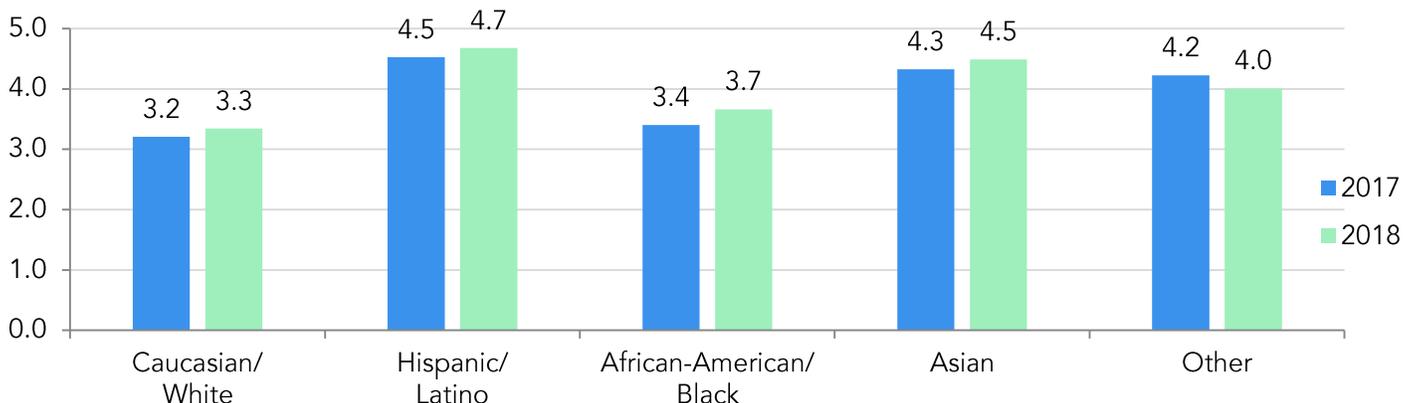
In 2018, the 12-17 and 18-24 age groups had the highest per capita attendance (5.1), followed by the 25-39 and 40-49 age groups (4.3). All age groups except 25-39 and 60+ increased their attendance in 2018 compared to 2017.

**Per Capita Attendance by Age**



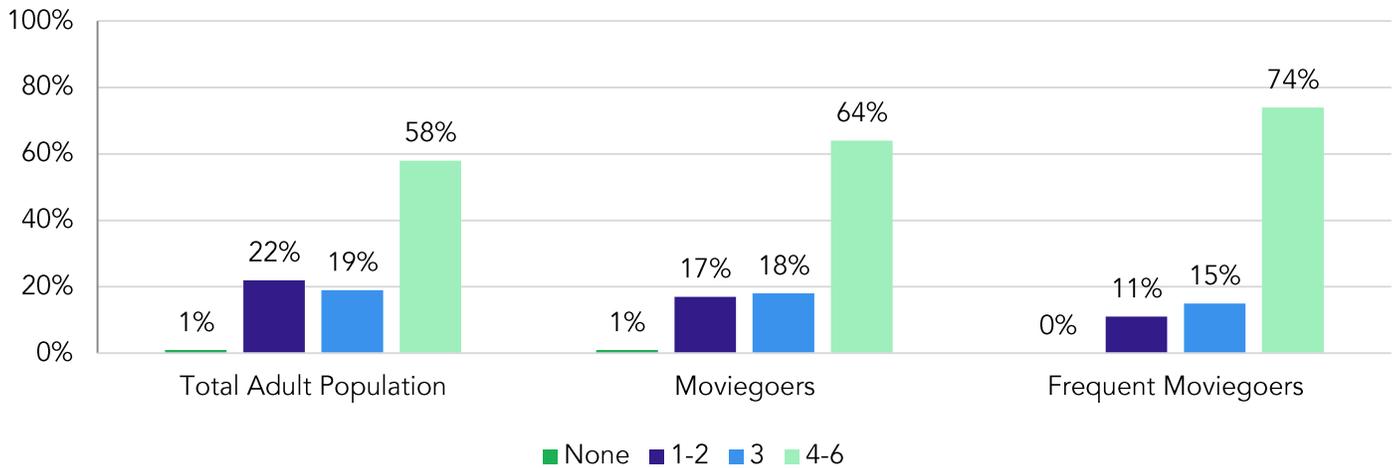
The Hispanic/Latino category reported the highest annual attendance per capita in 2018, going to the cinema an average of 4.7 times in the year. Per capita attendance increased for all ethnicity categories (excluding Other) in 2018 compared to 2017.

**Per Capita Attendance by Ethnicity**



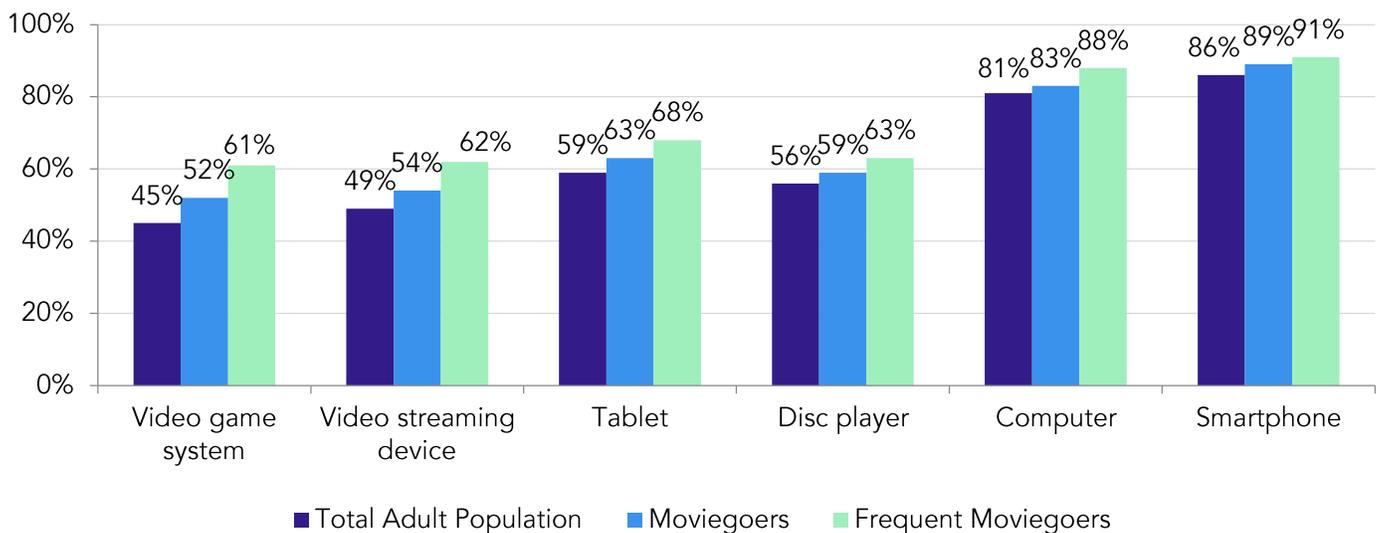
Frequent moviegoers tend to own more key technology products (computers, smartphones, disc players, tablets, video-streaming devices, and video game systems) than the general population of adults (18 years or older). Nearly three-quarters of all frequent moviegoers (74%) own at least four different types of key technology products, compared to 58 percent of the total adult population.

### Number of Key Technology Products Owned

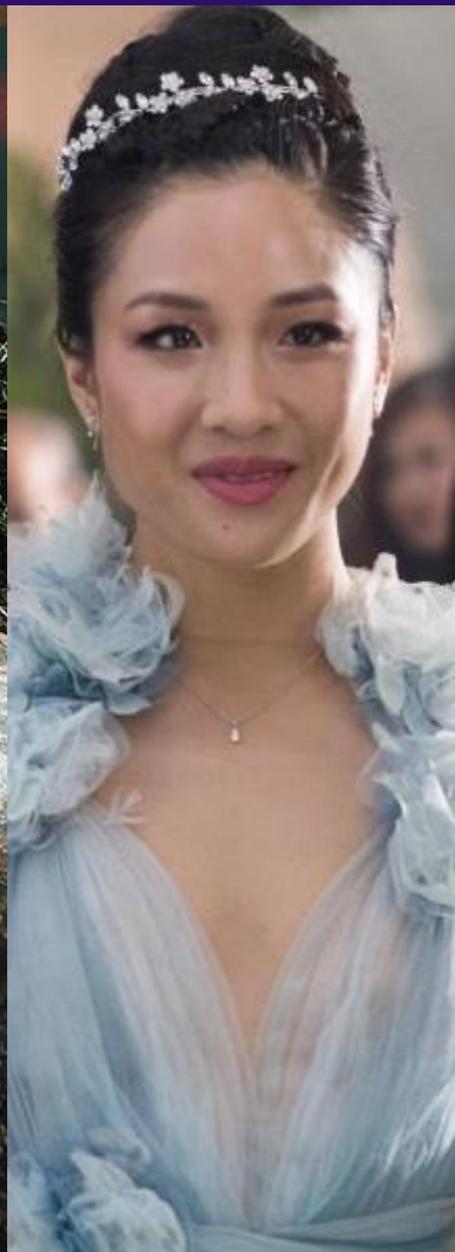


Frequent moviegoers have a higher share of ownership for each of the key technology products, when compared to the total adult population. Tablet (68%), video-streaming device (62%), and video game system (61%) ownership is particularly high among frequent moviegoers relative to the total adult population.

### Types of Key Technology Products Owned<sup>24</sup>



<sup>24</sup> 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%.

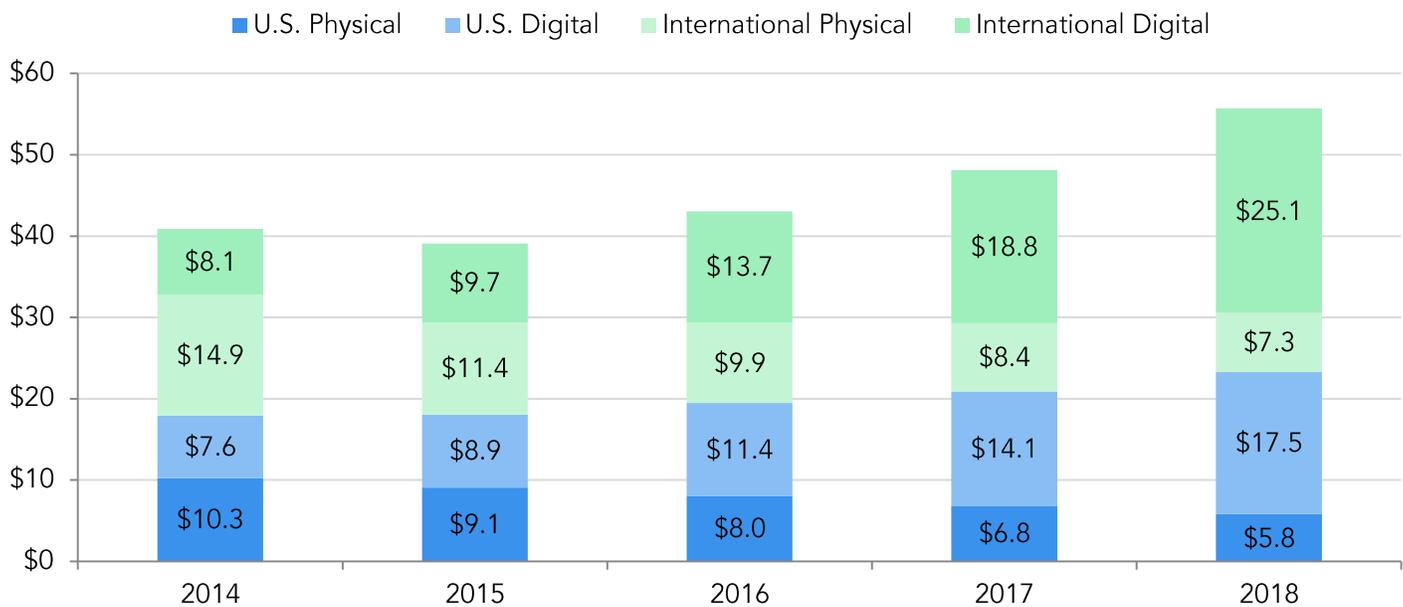


**HOME  
ENTERTAINMENT:  
GLOBAL**

In 2018, home entertainment consumer spending (content released digitally and on disc) reached \$55.7 billion globally, a 16 percent increase compared to 2017. Digital home entertainment<sup>25</sup> was the driver of growth. U.S. digital spending increased 24 percent and international digital spending increased 34 percent, when compared to 2017. Since 2014, digital spending has increased by 170 percent globally, while physical spending has decreased by 48 percent during the same period, reflecting the shift toward digital viewing choices.

### Global Home Entertainment Consumer Spending (US\$ Billions)

Source: IHS Markit and Digital Entertainment Group



|                             |          | 2014          | 2015          | 2016          | 2017          | 2018          | 18 vs. 17  |
|-----------------------------|----------|---------------|---------------|---------------|---------------|---------------|------------|
| International <sup>26</sup> | Physical | \$14.9        | \$11.4        | \$9.9         | \$8.4         | \$7.3         | -14%       |
|                             | Digital  | \$8.1         | \$9.7         | \$13.7        | \$18.8        | \$25.1        | 34%        |
| U.S. <sup>27</sup>          | Physical | \$10.3        | \$9.1         | \$8.0         | \$6.8         | \$5.8         | -15%       |
|                             | Digital  | \$7.6         | \$8.9         | \$11.4        | \$14.1        | \$17.5        | 24%        |
| <b>Total</b>                |          | <b>\$40.9</b> | <b>\$39.1</b> | <b>\$43.0</b> | <b>\$48.1</b> | <b>\$55.7</b> | <b>16%</b> |

<sup>25</sup> Digital includes Electronic Sell-Through (EST), video-on-demand (VOD), and subscription streaming (paid subscribers only).

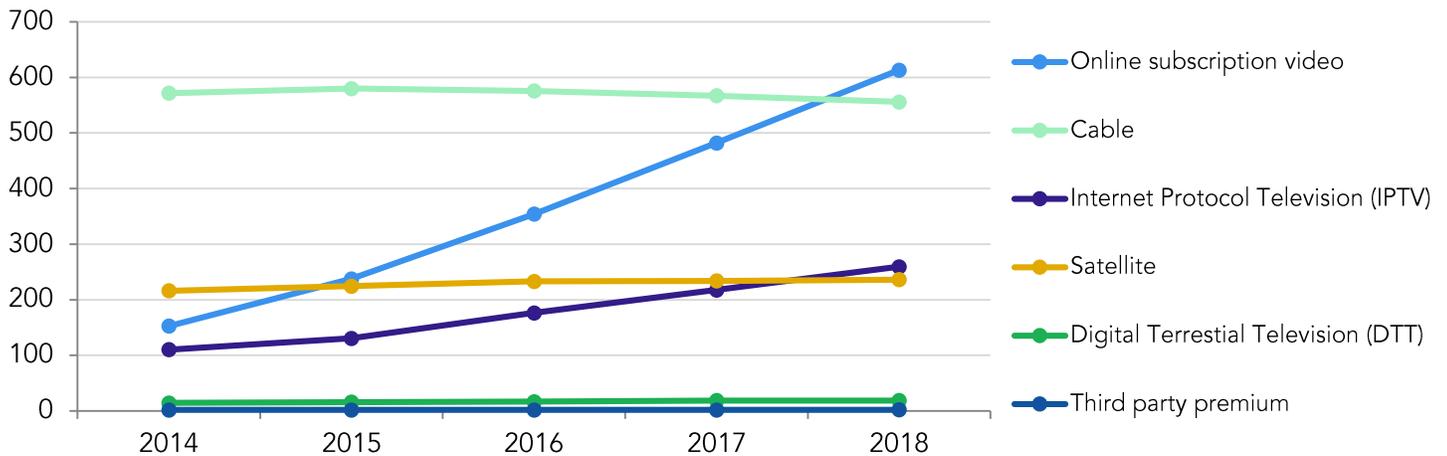
<sup>26</sup> The source of global data is IHS Markit. International is calculated by subtracting United States from Global. International digital data (IHS Markit) refers to consumer level revenue and may exclude value added tax (VAT). Subscription streaming does not include spending from sports.

<sup>27</sup> The source of U.S. data is Digital Entertainment Group, which includes the United States only (not Canada).

Globally, the number of subscriptions to online video services (613.3 million) such as Netflix and Amazon Prime increased by 27 percent, or 131.2 million, when comparing 2018 to 2017. Subscriptions to online video services surpassed cable subscriptions for the first time in 2018, as cable subscriptions (556.0 million) decreased two percent. 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 subscriptions<sup>28</sup>, and are counted in both categories.

### Global Pay TV & Online Video Subscriptions (Millions)<sup>29</sup>

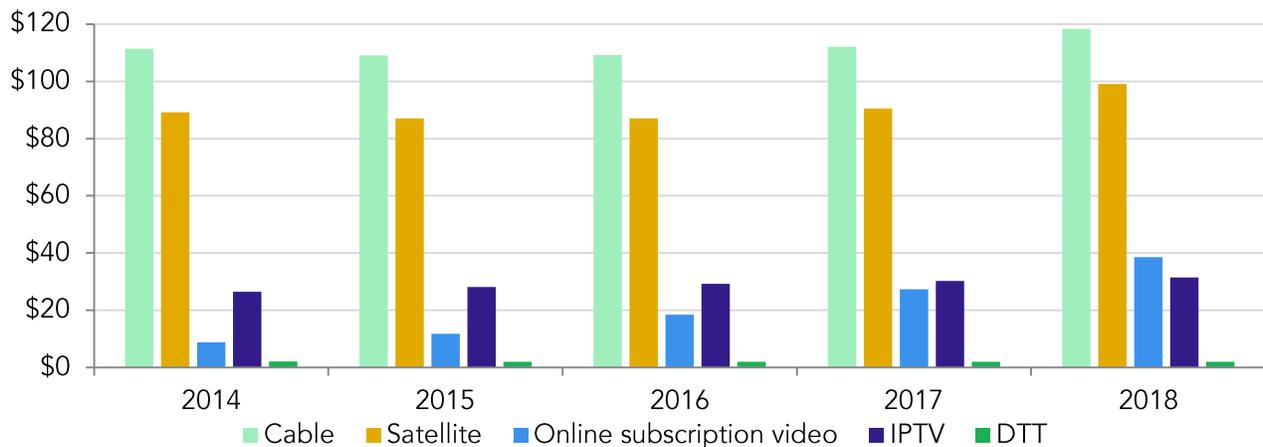
Source: IHS Markit



Cable remains the highest revenue video platform, with an increase of \$6.2 billion to \$118 billion in 2018, despite the decrease in subscriptions. While the amount of subscriptions to online video services is now higher than the amount of cable subscriptions, online subscription video represents a lower proportion of revenue.

### Global Pay TV & Online Subscription Revenue (US\$ Billions)<sup>29, 30</sup>

Source: IHS Markit



<sup>28</sup> Ampere Analysis graph (10/24/18), SVoD-only households vs. pay TV-only households. Retrieved from <https://www.ampereanalysis.com/blog/a4ee9a6c-e7eb-496c-bec-e9e36f78ce1f>

<sup>29</sup> Online subscription video includes movies, sports, and TV.

<sup>30</sup> Revenue 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.

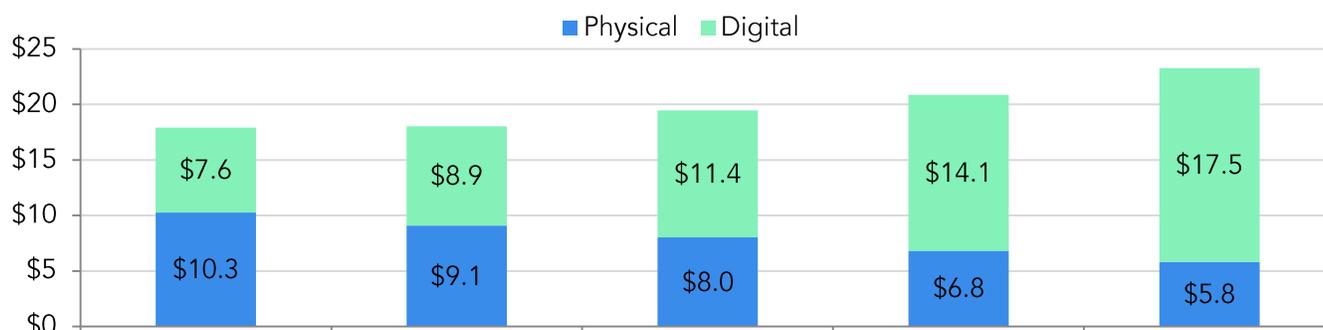


**HOME  
ENTERTAINMENT:  
U.S.**

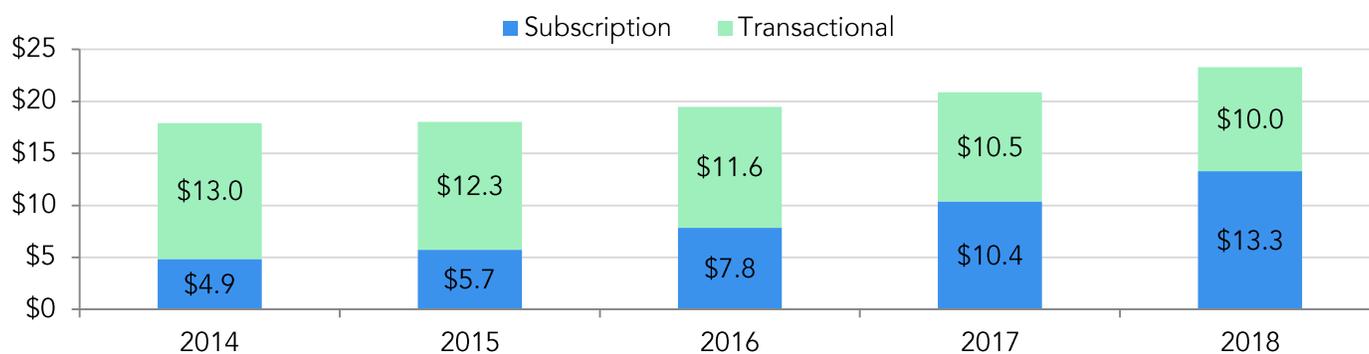
In 2018, overall spending on home entertainment (content released digitally and on disc) in the United States increased to \$23.3 billion, up 12 percent compared to 2017. Spending on digital home entertainment increased by 24 percent compared to 2017, while spending on physical entertainment decreased by 15 percent. Transactional spending continues to decrease (down 5% from 2017), while subscription spending continues to increase (up 28% from 2017).

### U.S. Home Entertainment Consumer Spending (US\$ Billions)<sup>31</sup>

Source: Digital Entertainment Group



|                             | 2014          | 2015          | 2016          | 2017          | 2018          | 18 vs. 17  |
|-----------------------------|---------------|---------------|---------------|---------------|---------------|------------|
| Physical home entertainment | \$10.3        | \$9.1         | \$8.0         | \$6.8         | \$5.8         | -15%       |
| Digital home entertainment  | \$7.6         | \$8.9         | \$11.4        | \$14.1        | \$17.5        | 24%        |
| <b>Total</b>                | <b>\$17.9</b> | <b>\$18.0</b> | <b>\$19.4</b> | <b>\$20.9</b> | <b>\$23.3</b> | <b>12%</b> |



|                             | 2014          | 2015          | 2016          | 2017          | 2018          | 18 vs. 17  |
|-----------------------------|---------------|---------------|---------------|---------------|---------------|------------|
| Transactional <sup>32</sup> | \$13.0        | \$12.3        | \$11.6        | \$10.5        | \$10.0        | -5%        |
| Subscription <sup>32</sup>  | \$4.9         | \$5.7         | \$7.8         | \$10.4        | \$13.3        | 28%        |
| <b>Total</b>                | <b>\$17.9</b> | <b>\$18.0</b> | <b>\$19.4</b> | <b>\$20.9</b> | <b>\$23.3</b> | <b>12%</b> |

<sup>31</sup> The source of U.S. home entertainment data is Digital Entertainment Group, which covers the United States (not Canada). Digital includes Electronic Sell-Through (EST), video-on-demand (VOD), and subscription streaming (paid subscribers only). Physical includes Sell-Thru packaged goods, brick and mortar rental, physical subscription, and kiosk rental.

<sup>32</sup> Transactional includes Sell-Through packaged goods, brick and mortar rental, kiosk rental, EST, and VOD. Subscription includes physical and digital subscriptions.

### 2018 Top 25 U.S. DVD & Blu-ray Sales<sup>33</sup>

Source: The Numbers

| Rank | Title                                 |
|------|---------------------------------------|
| 1    | Black Panther                         |
| 2    | The Greatest Showman                  |
| 3    | Star Wars Episode VIII: The Last Jedi |
| 4    | Coco                                  |
| 5    | Avengers: Infinity War                |
| 6    | Incredibles 2                         |
| 7    | Jumanji: Welcome to the Jungle        |
| 8    | Deadpool 2                            |
| 9    | Thor: Ragnarok                        |
| 10   | Jurassic World: Fallen Kingdom        |
| 11   | Justice League                        |
| 12   | It (2017)                             |
| 13   | Solo: A Star Wars Story               |
| 14   | Hotel Transylvania 3: Summer Vacation |
| 15   | Ant-Man and the Wasp                  |
| 16   | Ferdinand                             |
| 17   | Venom                                 |
| 18   | Fifty Shades Freed                    |
| 19   | Wonder                                |
| 20   | Hocus Pocus                           |
| 21   | Ready Player One                      |
| 22   | I Can Only Imagine                    |
| 23   | Spider-Man: Homecoming                |
| 24   | Rampage                               |
| 25   | Wonder Woman                          |

### 2018 Top 25 U.S. DVD & Blu-ray Rentals<sup>34</sup>

Source: Comscore

| Rank | Title                                 |
|------|---------------------------------------|
| 1    | Jumanji: Welcome to the Jungle        |
| 2    | Rampage                               |
| 3    | Thor: Ragnarok                        |
| 4    | Jurassic World: Fallen Kingdom        |
| 5    | Black Panther                         |
| 6    | Game Night                            |
| 7    | Deadpool 2                            |
| 8    | Justice League                        |
| 9    | Daddy's Home 2                        |
| 10   | Avengers: Infinity War                |
| 11   | Coco                                  |
| 12   | Skyscraper                            |
| 13   | Wonder                                |
| 14   | The Greatest Showman                  |
| 15   | American Made                         |
| 16   | Ocean's 8                             |
| 17   | The Commuter                          |
| 18   | Ready Player One                      |
| 19   | Hotel Transylvania 3: Summer Vacation |
| 20   | It (2017)                             |
| 21   | Ferdinand                             |
| 22   | Life of the Party                     |
| 23   | A Quiet Place                         |
| 24   | Tag                                   |
| 25   | 12 Strong                             |

<sup>33</sup> Ranked by the number of units sold.

<sup>34</sup> Title rentals are ranked by the combined estimated consumer rental revenue for the U.S. brick-and-mortar, subscription-by-mail, and kiosk channels. © Copyright 2019 - Comscore

### 2018 Top 25 U.S. Electronic Sell Through (EST)<sup>35</sup>

Source: Comscore Digital Download Essentials Industry Service

| Rank | Title                                 |
|------|---------------------------------------|
| 1    | Avengers: Infinity War                |
| 2    | Black Panther                         |
| 3    | Jumanji: Welcome to the Jungle        |
| 4    | Deadpool 2                            |
| 5    | Thor: Ragnarok                        |
| 6    | Justice League                        |
| 7    | Star Wars Episode VIII: The Last Jedi |
| 8    | The Greatest Showman                  |
| 9    | Incredibles 2                         |
| 10   | Coco                                  |
| 11   | Jurassic World: Fallen Kingdom        |
| 12   | Ready Player One                      |
| 13   | Solo: A Star Wars Story               |
| 14   | Fifty Shades Freed                    |
| 15   | Ant-Man and the Wasp                  |
| 16   | Venom                                 |
| 17   | Hotel Transylvania 3: Summer Vacation |
| 18   | Spider-Man: Homecoming                |
| 19   | Rampage                               |
| 20   | Pitch Perfect 3                       |
| 21   | The Equalizer 2                       |
| 22   | Mission: Impossible – Fallout         |
| 23   | Ferdinand                             |
| 24   | It (2017)                             |
| 25   | The Shape of Water                    |

### 2018 Top 25 U.S. Digital Rentals<sup>35</sup>

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

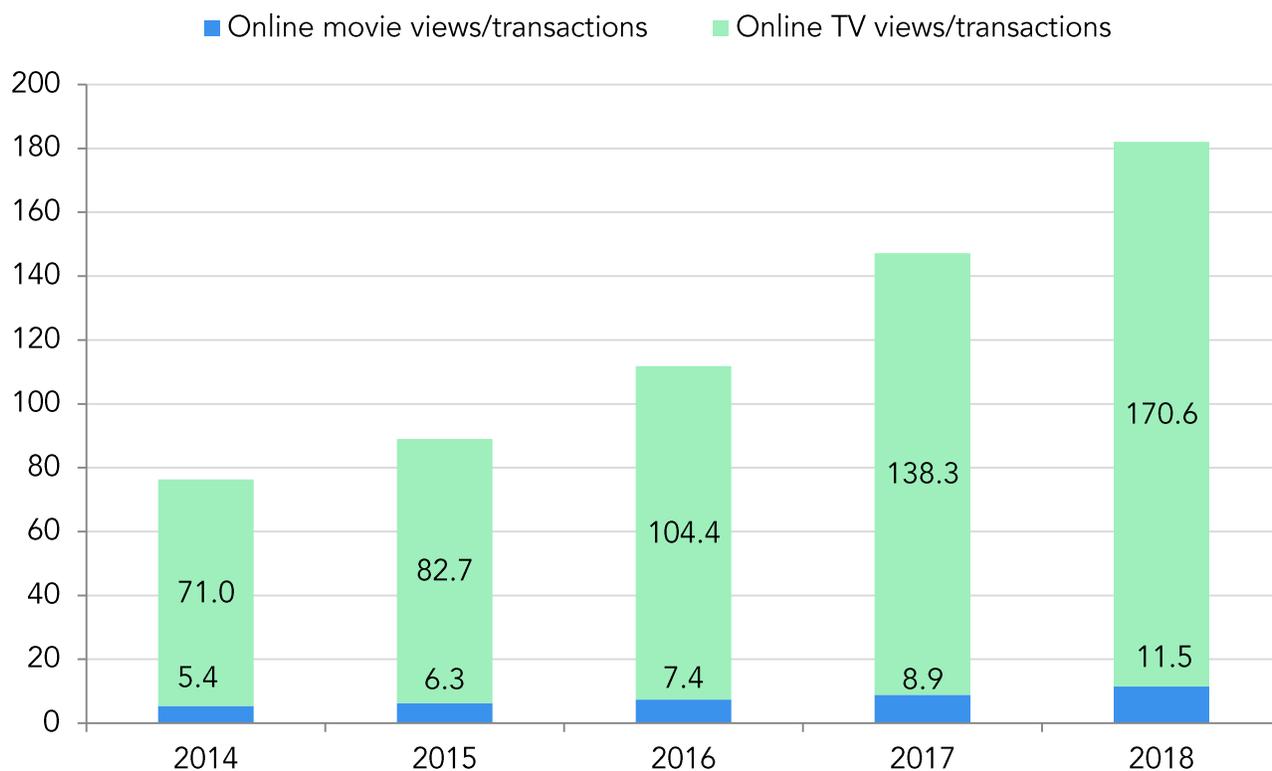
| Rank | Title                                     |
|------|---|
| 1    | Jumanji: Welcome to the Jungle            |
| 2    | Black Panther                             |
| 3    | Avengers: Infinity War                    |
| 4    | Thor: Ragnarok                            |
| 5    | Deadpool 2                                |
| 6    | The Greatest Showman                      |
| 7    | A Quiet Place                             |
| 8    | Coco                                      |
| 9    | Jurassic World: Fallen Kingdom            |
| 10   | Game Night                                |
| 11   | Crazy Rich Asians                         |
| 12   | Incredibles 2                             |
| 13   | Wonder                                    |
| 14   | Ocean's 8                                 |
| 15   | Daddy's Home 2                            |
| 16   | Three Billboards Outside Ebbing, Missouri |
| 17   | American Made                             |
| 18   | The Incredibles                           |
| 19   | It (2017)                                 |
| 20   | Justice League                            |
| 21   | Ready Player One                          |
| 22   | Rampage                                   |
| 23   | Tag                                       |
| 24   | Blockers                                  |
| 25   | Red Sparrow                               |

<sup>35</sup> Does not include non-participating independent distributors.

Online video content viewing continued its upward trend in 2018, reaching 182.1 billion views/transactions in the United States, a 24 percent increase compared to 2017. Online movie views/transactions (+29%) and TV views/transactions (+23%) both increased from 2017. 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



|   | 2014        | 2015        | 2016         | 2017         | 2018         | 18 vs. 17  |
|---|-------------|-------------|--------------|--------------|--------------|------------|
| Online movie views/transactions <sup>36</sup> | 5.4         | 6.3         | 7.4          | 8.9          | 11.5         | 29%        |
| Online TV views/transactions <sup>37</sup>    | 71.0        | 82.7        | 104.4        | 138.3        | 170.6        | 23%        |
| <b>Total</b>                                  | <b>76.4</b> | <b>89.0</b> | <b>111.9</b> | <b>147.2</b> | <b>182.1</b> | <b>24%</b> |

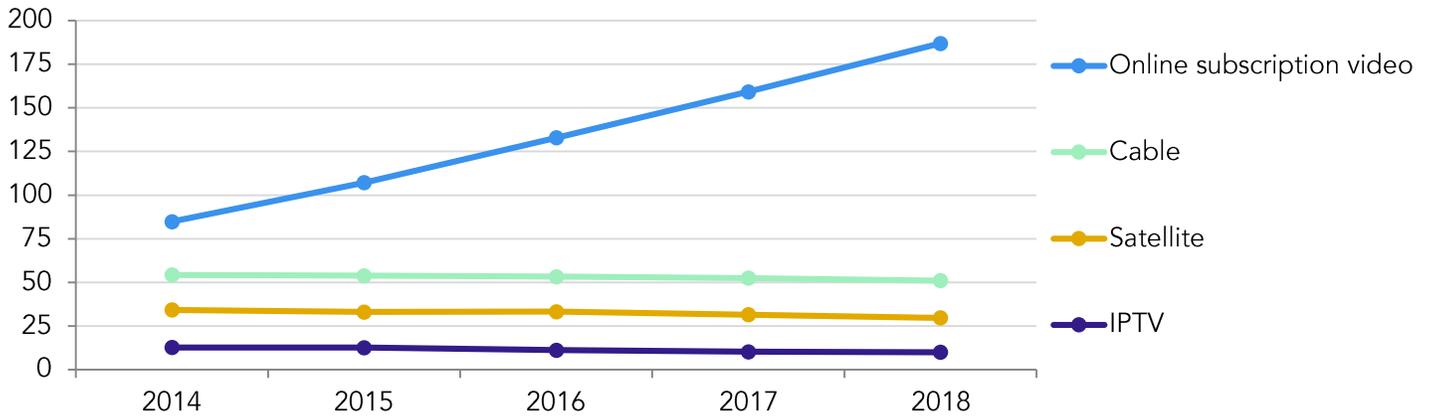
<sup>36</sup> Online movie views/transactions includes views from subscription services, and digital transactions. Past years have been updated.

<sup>37</sup> Online TV views/transactions includes ad-supported viewing, subscription services, and digital transactions. Past years have been updated.

In 2018, the number of subscriptions to online video services in the United States increased to 186.9 million (+17%), while subscriptions to other types of pay TV service decreased. 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 subscriptions<sup>38</sup>, and are counted in both categories.

### U.S. Pay TV & Online Video Subscriptions (Millions)<sup>39</sup>

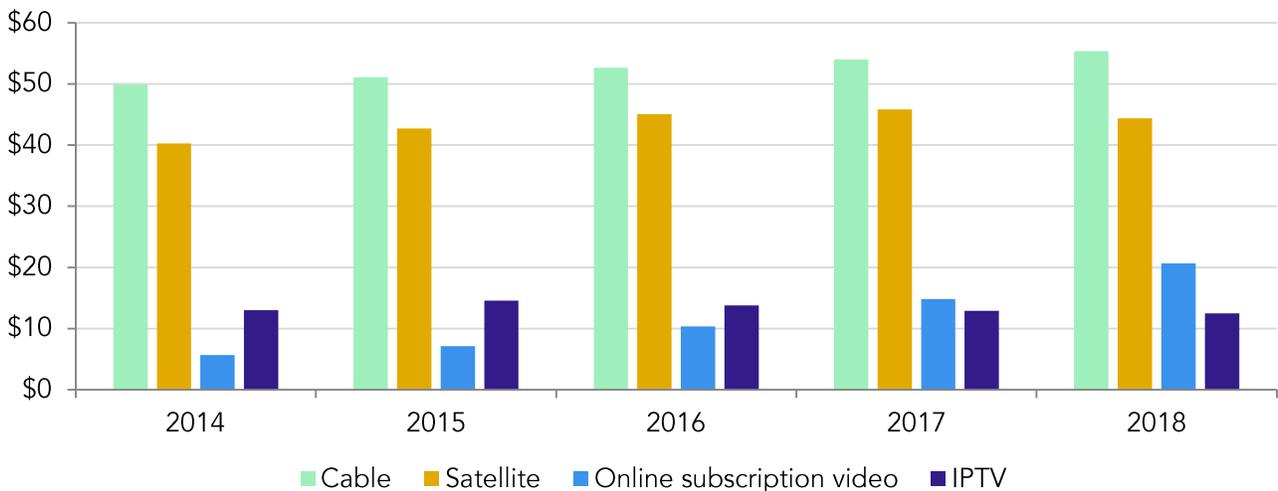
Source: IHS Markit



Despite fewer subscriptions than online services, cable remained the largest category in revenue terms (\$55.4 billion), increasing three percent in 2018. The third largest category in revenue terms after cable and satellite, online subscription video increased 39 percent to \$20.6 billion in 2018.

### U.S. Pay TV & Online Subscription Video Revenue (US\$ Billions)<sup>39, 40</sup>

Source: IHS Markit



<sup>38</sup> Ampere Analysis graph (10/24/18), SVoD-only households vs. pay TV-only households. Retrieved from <https://www.ampereanalysis.com/blog/aaee9a6c-e7eb-496c-bedc-e9e36f78ce1f>

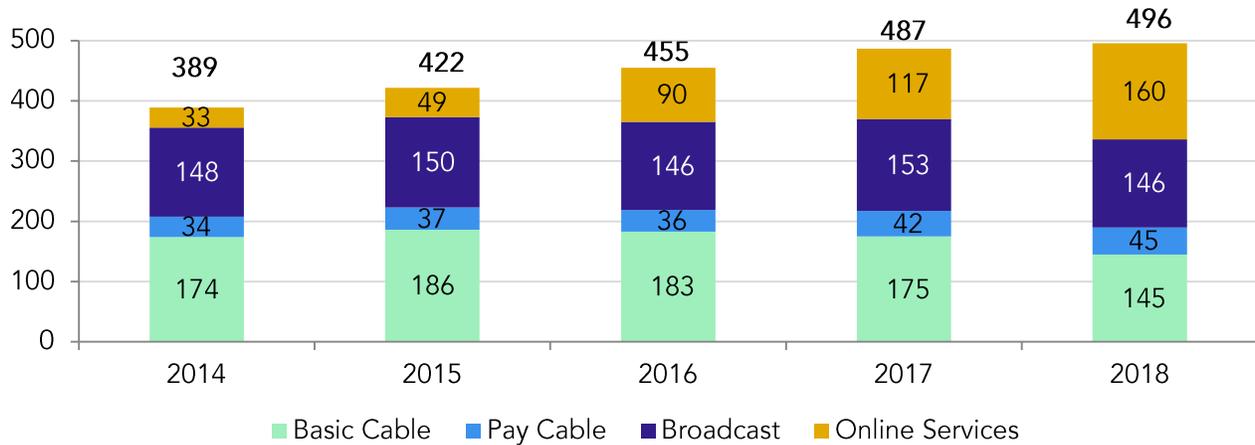
<sup>39</sup> Online subscription video includes movies, sports, and TV.

<sup>40</sup> Revenue 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.

In 2018, there were 496 original scripted series on broadcast, cable, and online services aimed at U.S. audiences according to FX Networks Research, an increase of 28 percent compared to 2014. The five-year increase was driven by the increase in scripted original series for online services (+385%), while basic cable volume peaked in 2015.

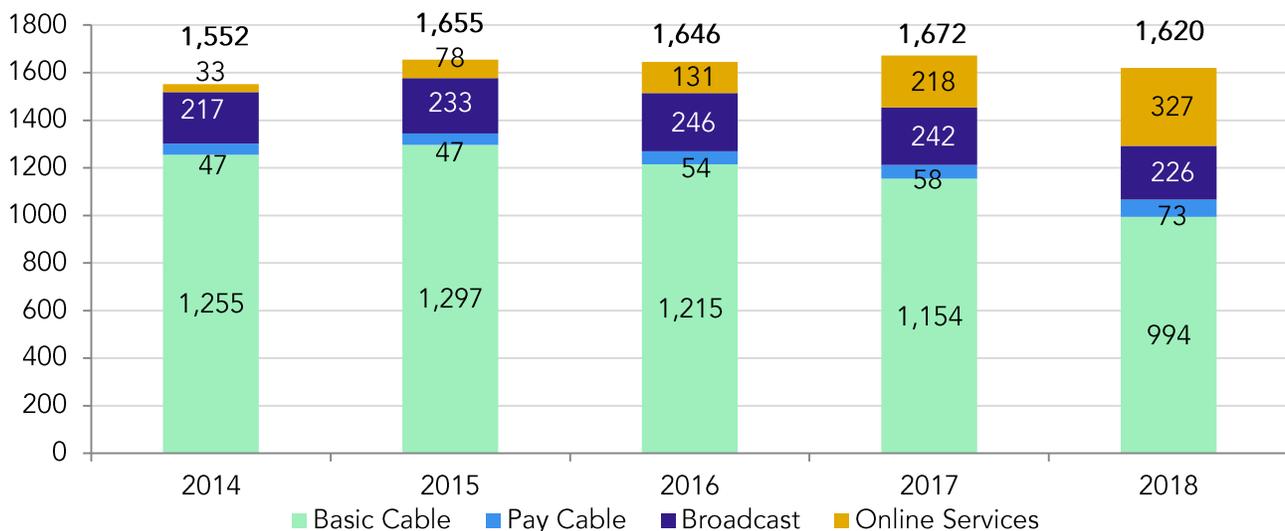
### Estimated Number of Scripted Original Series<sup>41</sup>

Source: FX Networks Research



Expanding the analysis to include additional categories of original series (unscripted shows, children's programs and daytime dramas), there were 1,620 total original series in 2018, an increase of four percent compared to 2014. The overall original series increase was driven by series produced for online services, which jumped 891% to 327 in 2018.

### Estimated Number of Total Original Series<sup>42</sup>



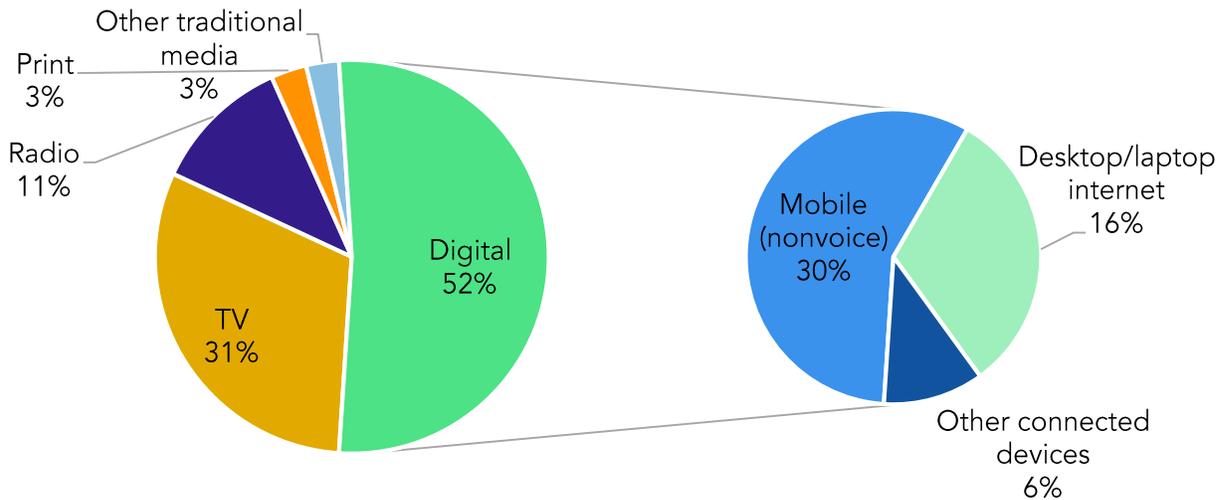
<sup>41</sup> Estimated by FX Networks Research as of 12/5/18; culled from Nielsen Online Services, Futon Critic, Wikipedia, Epguides, et al. Broadcast includes PBS and Basic Cable includes Audience Network (DIRECTV). Online Services = Acorn TV (as of 2018), Amazon Prime, Britbox, Crackle, DC Universe, Facebook Watch, Hulu, Netflix, PlayStation, Seeso (through 2017), Shudder (as of 2018), Sundance Now, Vimeo, Yahoo and YouTube Premium. Excludes library, daytime dramas, one-episode specials, non-English language/English-dubbed, children's programs, and short form content (<15 mins).

<sup>42</sup> 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 MPAA member studios, film offices, and third party sources, including Ampere Analysis and Variety Insight. In addition to FX coverage, these estimates include Apple Originals/iTunes, CBS All Access, Comedycentral.com, NBC.com, Ora TV and the following content types: daytime dramas, children's programs, and unscripted. Multiple seasons in one year for a series are counted only once.

Americans continued to spend more time watching television (3 hours and 45 minutes) than any other single form of media in 2018, despite decreasing by five percent (11 minutes) compared to 2017. In aggregate, Americans now spend 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 (15%) in 2018 compared to 2017.

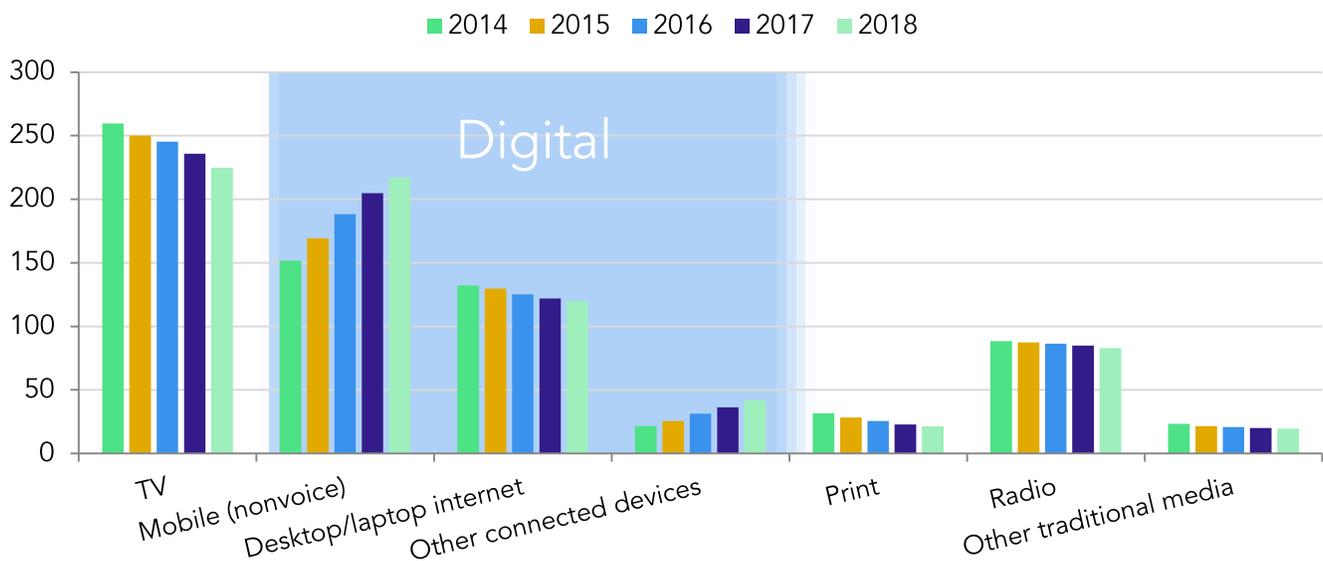
### 2018 Average Time Spent per Day with Major Media by U.S. Adults (Minutes)<sup>43</sup>

Source: eMarketer



### Average Time Spent per Day with Major Media by U.S. Adults (Minutes)<sup>43</sup>

Source: eMarketer



<sup>43</sup> If two or more devices are being used at the same time, time is counted for all devices.

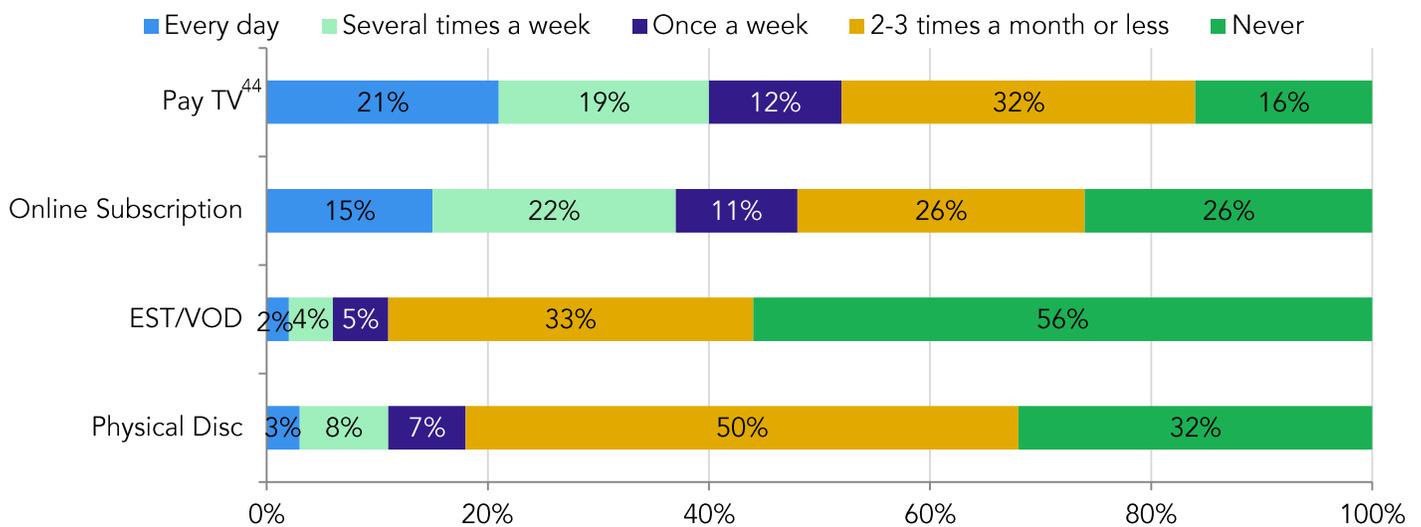


**HOME VIEWING  
DEMOGRAPHICS**

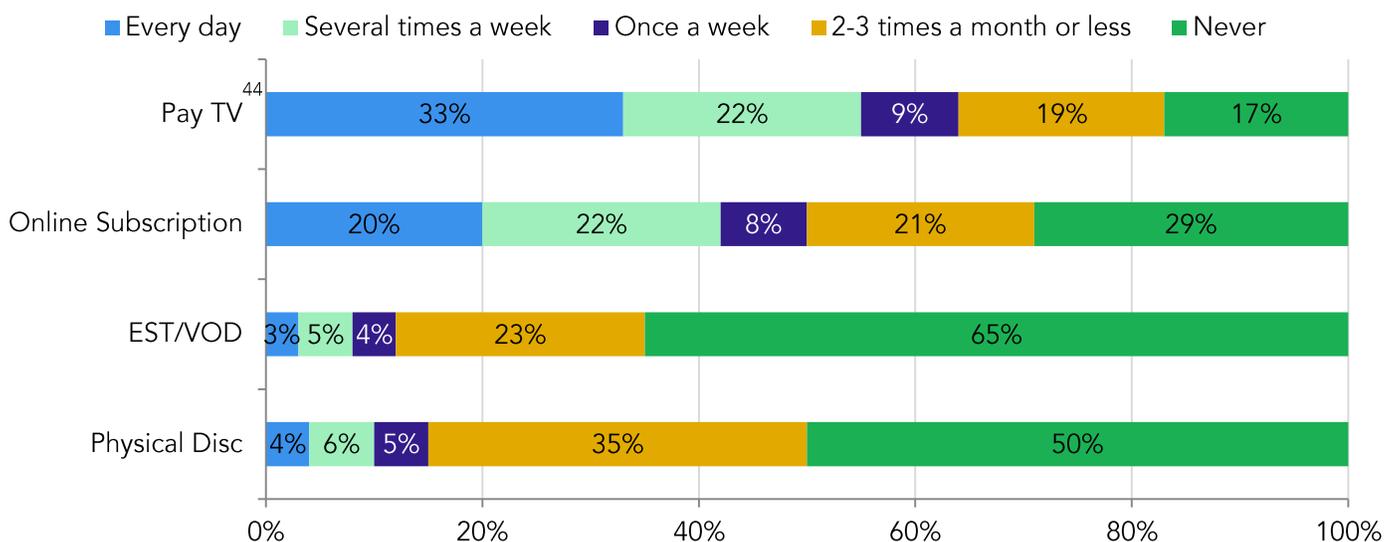
More than 80 percent of U.S. adults watch movies and TV shows via traditional television services, the highest proportion of the home viewing methods. TV services also have the highest proportion of daily viewers: 33 percent of adults watch TV shows daily, and 21 percent watch movies daily on traditional TV services. Online subscription services, which more than 70 percent of adults use, have similar but slightly lower viewing levels.

Physical discs are used more often for movies (68% of adults) than for TV shows (50%). Online Electronic Sell Through (EST)/video-on-demand (VOD) services are used by 35 percent of Americans to view TV shows and 44 percent to view movies, primarily two to three times a month or less.

### 2018 Share of Population Viewing Movies by Home Distribution Channel



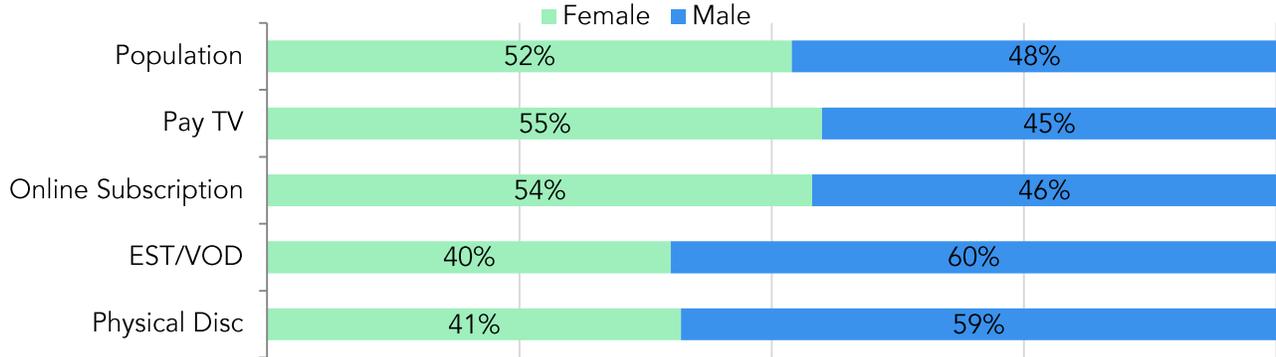
### 2018 Share of Population Viewing TV Shows by Home Distribution Channel



<sup>44</sup> Pay TV includes regular television services (broadcast, cable and satellite), premium channels and pay-per-view through those services.

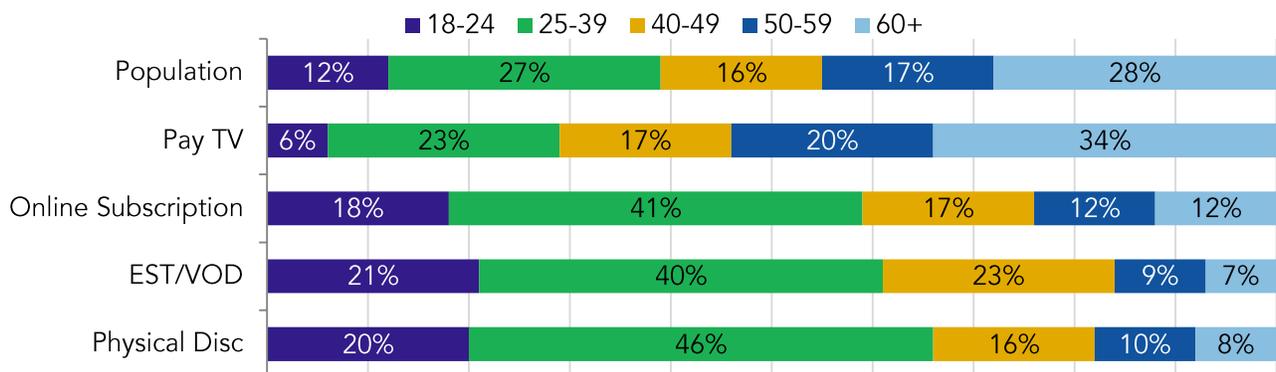
In 2018, the gender composition of traditional TV and online subscription viewers who watch every day (the highest frequency group) skewed more toward women, while the small group of EST/VOD and physical disc every day viewers skewed more toward men, relative to their share of the population.

### 2018 Gender Share of Total Population and Every Day Home Viewers



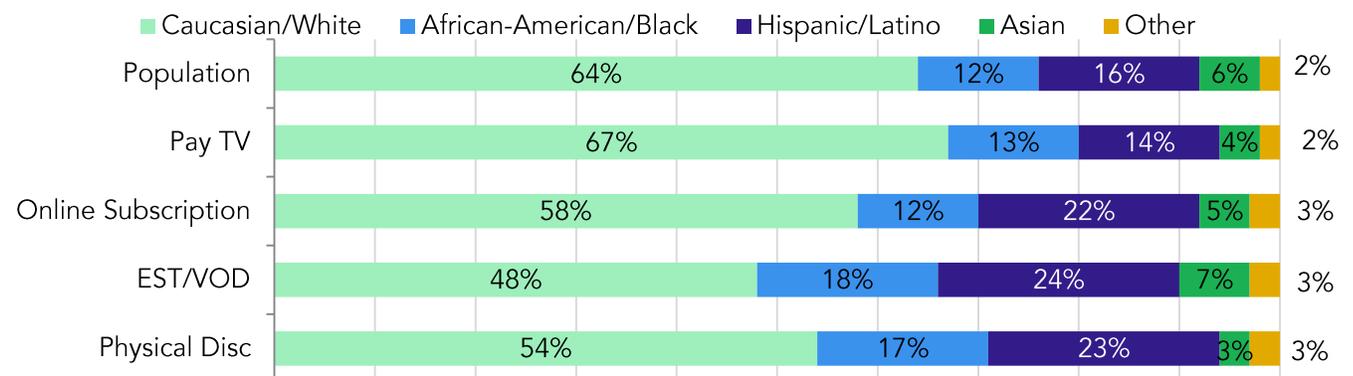
In 2018, the 50+ age groups were overrepresented in terms of every day viewers of traditional TV services, while the age categories 18-24 and 25-39 were heavily overrepresented in terms of every day viewers to online subscription, EST/VOD and physical disc categories.

### 2018 Age Group Share of Total Population and Every Day Home Viewers



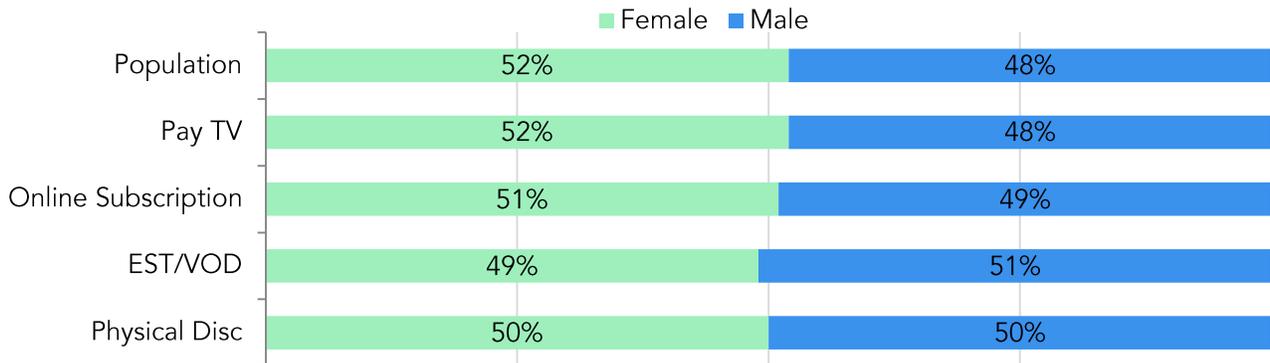
In 2018, the Hispanic/Latino category was overrepresented in the population of every day home viewers in the distribution channels of EST/VOD (24%), physical discs (23%), and online subscriptions (22%) relative to share of the population (16%).

### 2018 Ethnicity Share of Total Population and Every Day Home Viewers



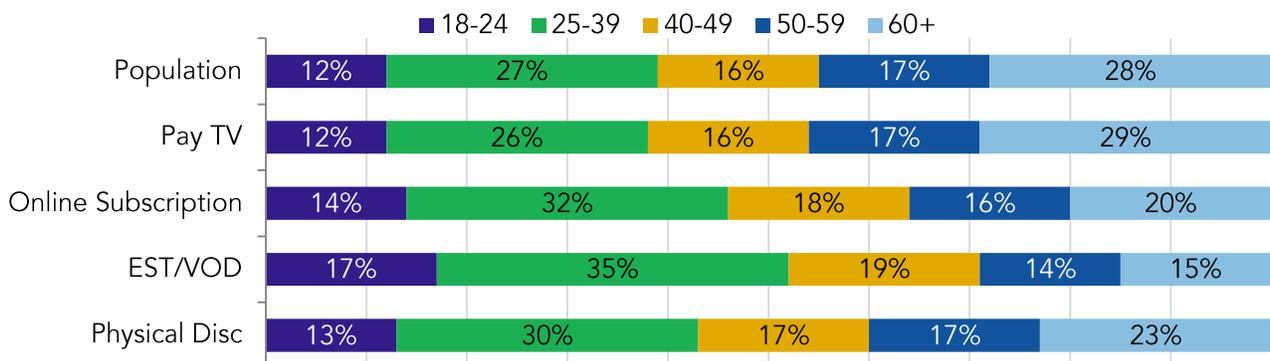
In 2018, the gender composition of all home viewers was generally similar to the population, although EST/VOD viewers skew slightly more toward men.

### 2018 Gender Share of Total Population and Home Viewers



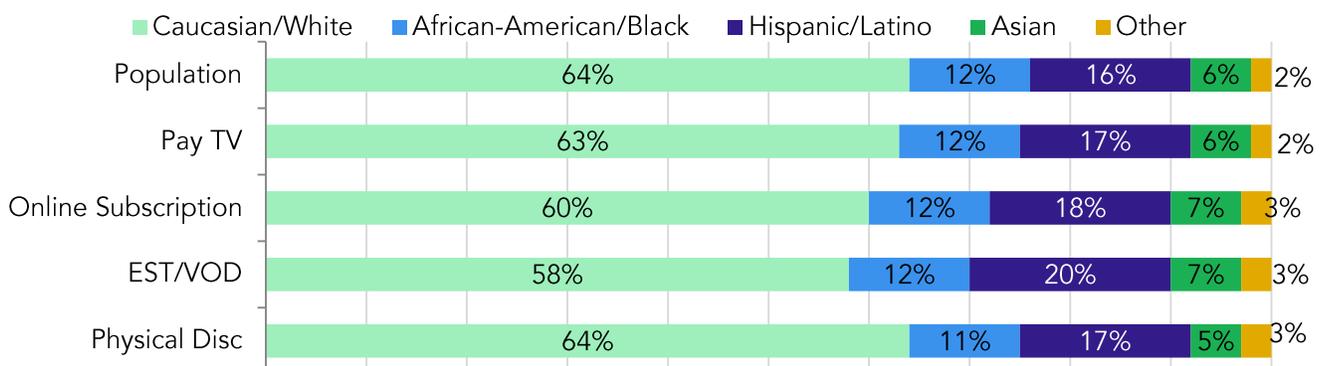
In 2018, the age group representation of viewers of traditional TV services and viewers of physical discs was relatively similar to the overall population. Viewers of online subscription and EST/VOD skewed toward the 25-39 age group: 35 percent of EST/VOD viewers and 32 percent of online subscription viewers were aged 25-39, compared to 27 percent of the population.

### 2018 Age Group Share of Total Population and Home Viewers



Although the Caucasian/White category makes up the majority of the population (64%), it represented a smaller share of online subscription and EST/VOD viewers, while the Hispanic/Latino category was overrepresented in these two viewing methods.

### 2018 Ethnicity Share of Total Population and Home Viewers

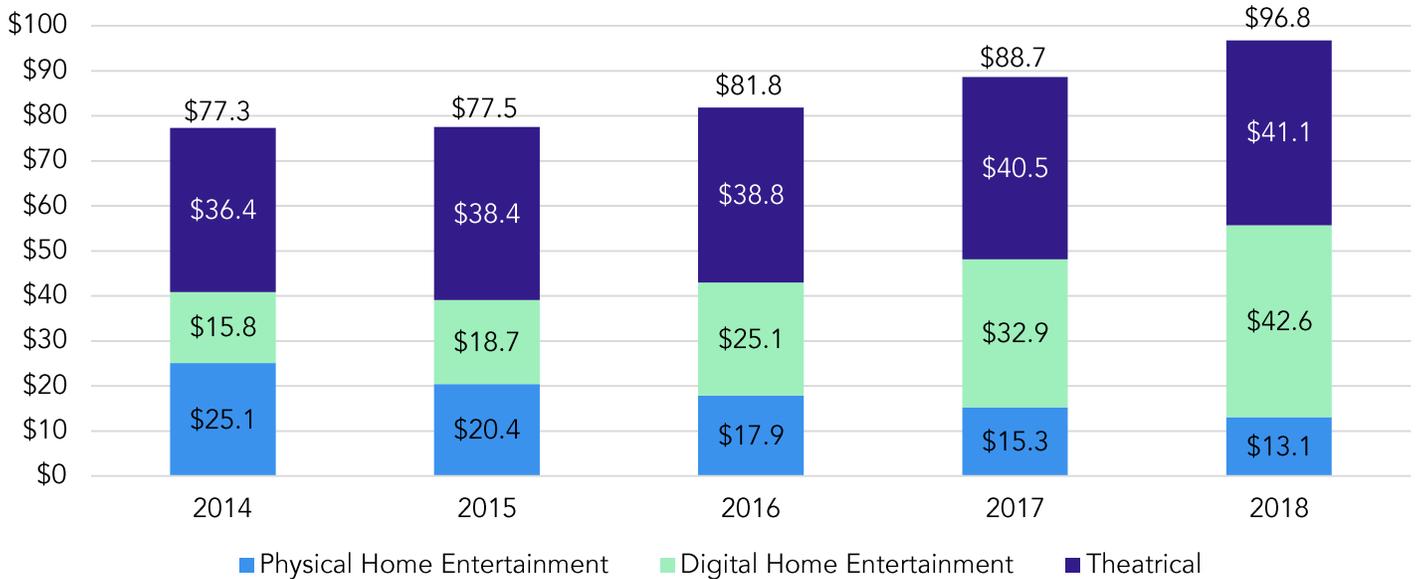




**TOTAL THEATRICAL &  
HOME ENTERTAINMENT**

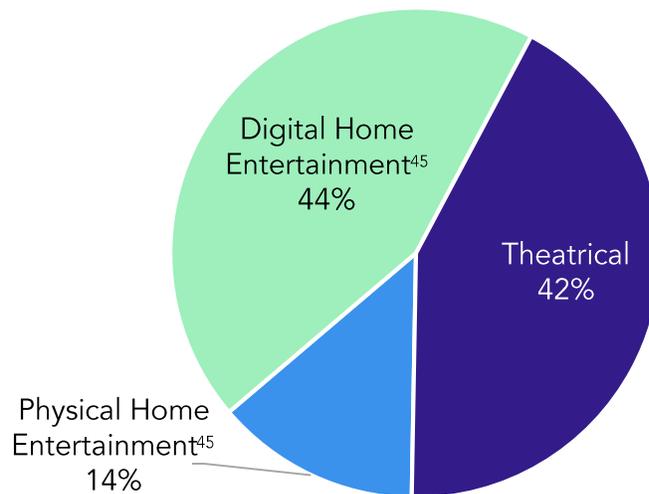
In 2018, combined theatrical and home entertainment consumer spending globally reached \$96.8 billion, a nine percent increase compared to 2017 and a 25 percent increase compared to 2014. Since 2014, global theatrical consumer spending (box office) has increased 13 percent, while home entertainment has increased 36 percent, due to an increase in digital home entertainment.

**Global Theatrical & Home Entertainment Consumer Spending (US\$ Billions)**



In 2018, theatrical accounted for 42 percent of combined theatrical and home entertainment consumer spending, with digital home entertainment (44%) and physical home entertainment (14%) making up the rest.

**2018 Global Theatrical & Home Entertainment Consumer Spending (% Share)**

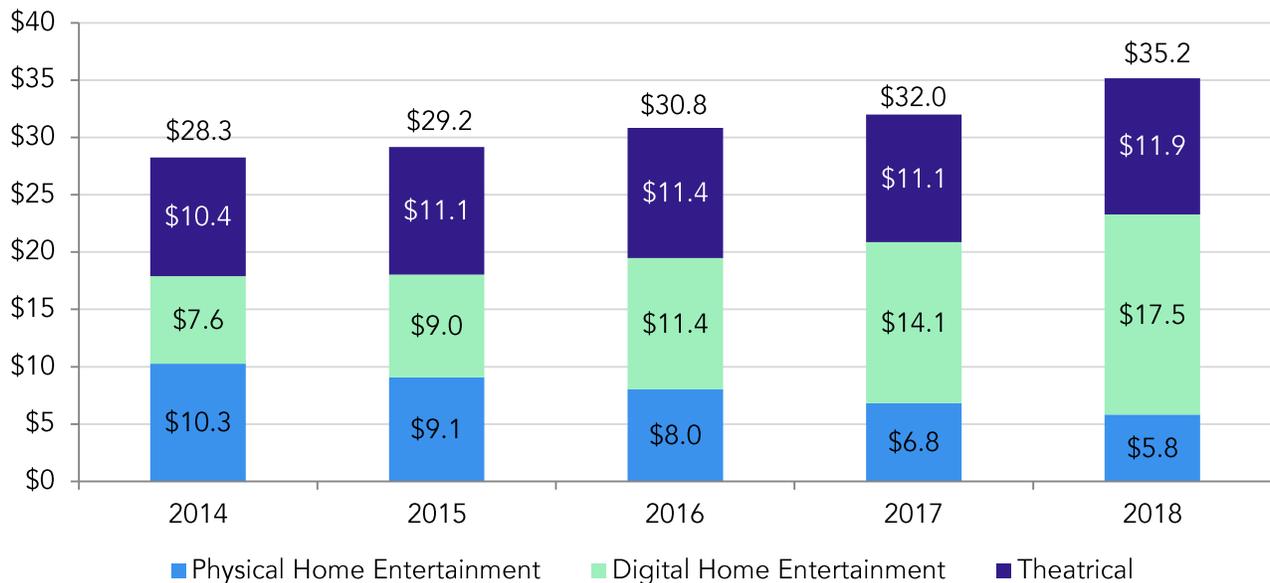


<sup>45</sup> Digital and Physical Home Entertainment comes from IHS Markit. Physical includes rental and retail consumer spending. Digital includes Electronic Sell-Through (EST), video-on-demand (VOD), and subscription streaming (paid subscribers only). Spending only includes revenue from movies and TV and excludes sport.

In 2018, combined theatrical and home entertainment consumer spending in the United States reached \$35.2 billion, a 10 percent increase compared to 2017 and a 24 percent increase compared to 2014. Since 2014, U.S. theatrical consumer spending (box office) has increased 15 percent, while home entertainment spending has increased 30 percent, due to an increase in digital home entertainment.

### U.S. Theatrical & Home Entertainment Consumer Spending (US\$ Billions)

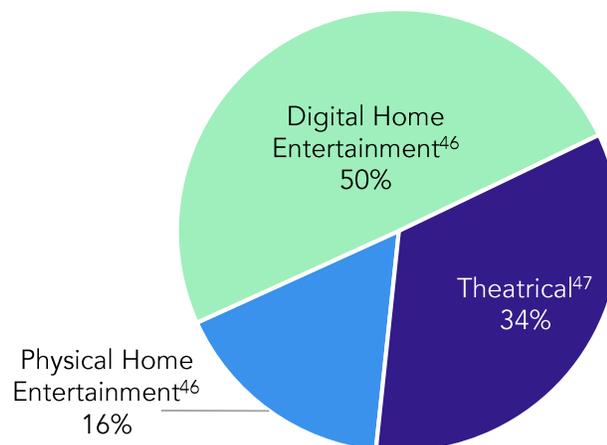
Source: Comscore – Box Office Essentials (Theatrical), Digital Entertainment Group (Home Entertainment)



In 2018, digital home entertainment accounted for 50 percent of combined theatrical and home entertainment consumer spending, followed by theatrical (34%) and physical home entertainment (16%).

### 2018 U.S. Theatrical & Home Entertainment Consumer Spending (US\$ Share)

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



<sup>46</sup> Digital and Physical Home Entertainment comes from DEG. Physical includes Sell-Thru Packaged Goods All, Brick & Mortar, Subscription (Physical Only), and Kiosk. Digital includes EST, VOD and Subscription Streaming (SVOD).

<sup>47</sup> Theatrical comes from Comscore and includes both U.S. and Canada.



**APPENDIX**

## **Demographic Survey Methodology**

### **Survey research**

MCAA commissioned Engine (formerly ORC International) to study motion picture cinema attendance in the United States. A survey was conducted among a representative sample of 8,034 adults (4,016 men and 4,018 women 18 years of age and older living in the United States). Interviewing was conducted beginning January 3, 2019, and ending January 30, 2019, via eight consecutive waves of CARAVAN®, Engine's twice-weekly 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 second 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 last year, and the differing demographic profiles of online versus telephone respondents, only comparisons to 2017 have been made in this report.

### **Movie attendance**

The survey collects data on the frequency of adult motion picture attendance in the prior calendar year (January – December 2018). The following questions are asked:

- *“Think back to January 2018—about a year ago. During the 12-month period from January through December 2018, about how many times did you go to the movies at theaters?”*
- *(IF 1 OR MORE): “And, of those [INSERT RESPONSE] movies that you saw in theaters, how many did you see in 3D or in a large screen format such as IMAX?”*

Also, where the respondent indicates the presence of a child or children in the household ages 2-17, the respondent is asked to provide estimates of the frequency of each child's motion picture attendance, as well as the child's age and gender. Following are the questions used, which are 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 2018, 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 2018?”*
- *(IF 1 OR MORE): “And, of those [INSERT RESPONSE] movies, how many did that child see in 3D or in a large screen format such as IMAX?”*

In order to analyze the data for attendance levels for the entire population two years old or 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 2019. 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 this 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 MPAA. 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 MPAA 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 this year to collect 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 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 that is not an official website and doesn't show regular video ads during the show

### Demographics

Note that 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 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                           | +/- 2.0 percentage points |
| Ages 12-17                          | +/- 2.8 percentage points |
| Ages 18-24                          | +/- 3.7 percentage points |
| Ages 25-39                          | +/- 2.2 percentage points |
| Ages 40-49                          | +/- 3.0 percentage points |
| Ages 50-59                          | +/- 2.9 percentage points |
| Ages 60+                            | +/- 2.5 percentage points |
| White, non-Hispanic                 | +/- 1.2 percentage points |
| Black, non-Hispanic                 | +/- 3.1 percentage points |
| Asian/Other, non-Hispanic           | +/- 3.4 percentage points |
| Hispanic (any race)                 | +/- 2.7 percentage points |
| Asian, non-Hispanic                 | +/- 4.6 percentage points |
| Other, non-Hispanic excluding Asian | +/- 5.0 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                                | +/- 1.4 percentage points |
| Female                              | +/- 1.4 percentage points |

\*Adjusted for weighting design effect

## **Top Films Demographic Methodology**

### **Survey Research**

Comscore/Screen Engine'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*

*Other<sup>48</sup>*

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.

<sup>48</sup> "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.

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 (nonvoice): ages 18+; includes all time spent with nonvoice 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

# 2018

## THEME REPORT

### Photo Credits

First Man Courtesy: Universal Pictures. Photo Credit: Daniel McFadden  
Ocean's 8. Courtesy: Warner Bros. Pictures. Photo by: Barry Wetcher  
Marvel Studios' Black Panther. Ph: Film Frame. ©Marvel Studios 2018  
Mary Poppins Returns. Courtesy: Walt Disney Studios  
Photo of Charles H. Rivkin. Credit: Eli Meir Kaplan  
Roma. Courtesy: Netflix Inc. Photo by Carlos Somonte  
Bumblebee. Courtesy: Paramount Pictures © 2018 Paramount Pictures.  
BlacKkKlansman. Credit: David Lee / Focus Features  
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