

 **NCM**™ + affinitysolutions

Economic Impact Study: Moviegoing as an Indicator of Spend



Executive Summary

A new Affinity Solutions (AFS) Economic Impact Report commissioned by National CineMedia (NCM) identified an inextricable link between in-theater movie experiences and elevated consumer spend. Affinity worked with NCM's data and technology platform, NCMx, to analyze the purchase behavior of millions of consumers before and after buying movie tickets. Affinity Solutions' consumer purchase data, based on over 100 million cardholders, uncovered that moviegoers drive commerce in specific ways that can be measured. NCM reaches nearly 8 million moviegoers each week through its network of over 21,000 screens across the United States.

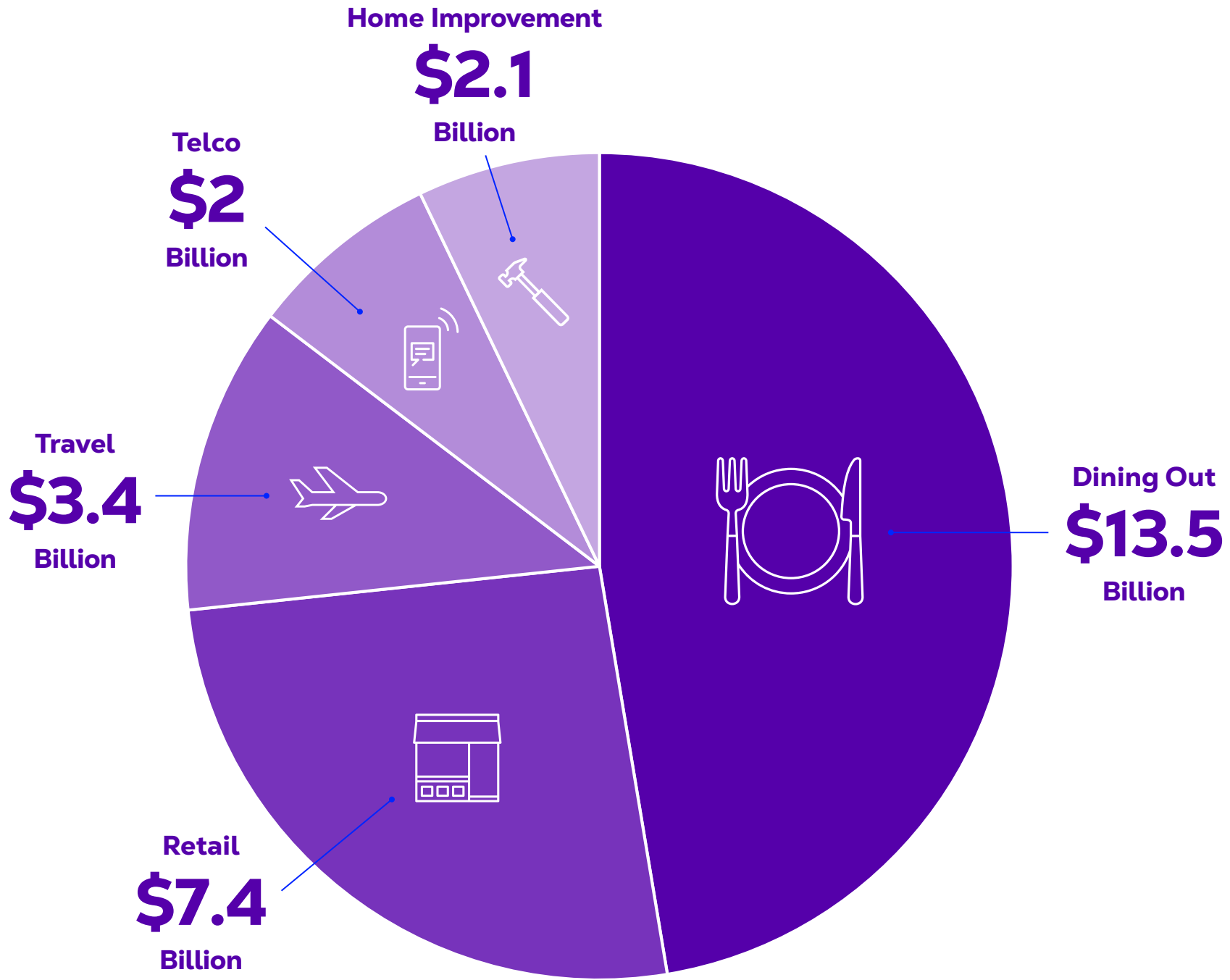
Purchases were broken out by merchant categories and then benchmarked against gen-pop during the same period. For the purposes of the analysis AFS and NCM looked at total spend by category for the March-June 2022 time frame. Additionally, AFS and NCM analyzed movie-night spending patterns based on two of the biggest blockbuster films in 2022, *Top Gun: Maverick* and *Dr. Strange in the Multiverse of Madness*. *Top Gun: Maverick* leaned toward an older Gen X and male audience, while *Dr. Strange in the Multiverse of Madness* attracted a younger Gen Z and Millennial demographic. The study analyzed these moviegoers to ascertain brand affinity, incremental spend and most importantly title and genre spend diversity.

The study was conducted to understand the economic impact of moviegoers on key consumer categories. The insights and findings below demonstrate how going to the movies generates 2X the expenditures of non-moviegoers in same-day retail and restaurant spending. Additionally, the study shows the spending habits of moviegoers change by demo as different titles and genres bring diverse audiences with varied preferred brands and categories of spend.



Moviegoer Spending By Category

US Total / March – June, 2022



Insight

1

They spent a total of \$28 billion dollars across five key categories within four months of the year within the NCM network.

Not surprisingly, the “dinner and a movie” experience proved to be the largest consumer spend area, with \$13.5 billion dollars spent in and around the movie experience. However, people did much more than dine when it came to consumer spend lift around the movie experience. Retail, travel, telco and home improvement totaled close to another \$15 billion in spend in that same time period.

Insight 2

Moviegoers are consummate consumers, with 2X spend and shop rate versus non-moviegoers. Largest spend found with dining, retail and travel activities within hours of the movie experience.



Top Gun: Maverick Moviegoers vs Non-Moviegoers

Spending Index 8hrs After Movie

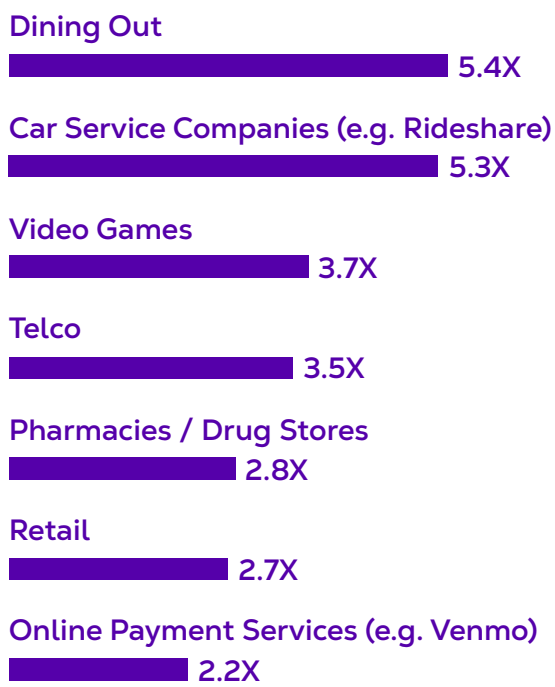
Top Gun audiences drew an older, male crowd. These *Maverick* Dads made going to the movies part of their consumer purchase journey for the night, spending on average 3.5x more across major retail categories compared to non- moviegoers. The top four favorite destinations included retail shopping, stops at the sporting goods, home improvement and pet supply stores.



Doctor Strange in the Multiverse of Madness Moviegoers vs Non-Moviegoers

Spending Index 8hrs After Movie

Young Millennials opted into the movie experience of *Dr. Strange in the Multiverse of Madness* as an opportunity for social spending – with increased spend while dining out at QSRs, using rideshare apps and social payment platforms like Venmo. We saw an average incremental lift of 3.6x across the top categories analyzed.



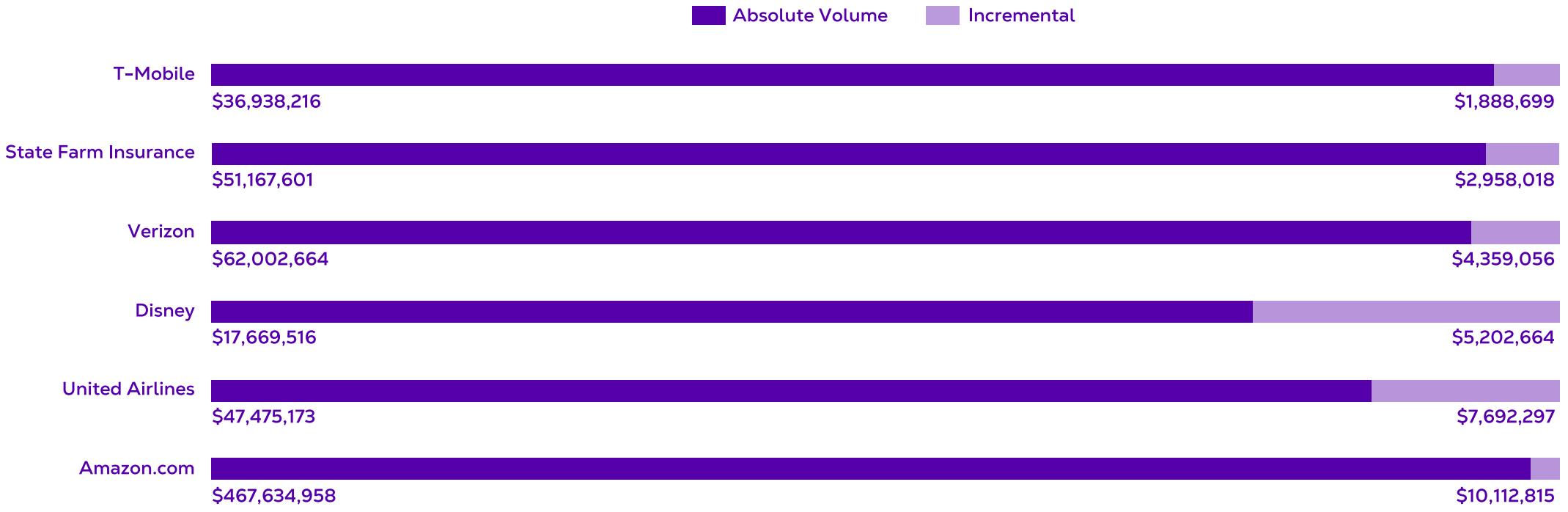
Insight

3

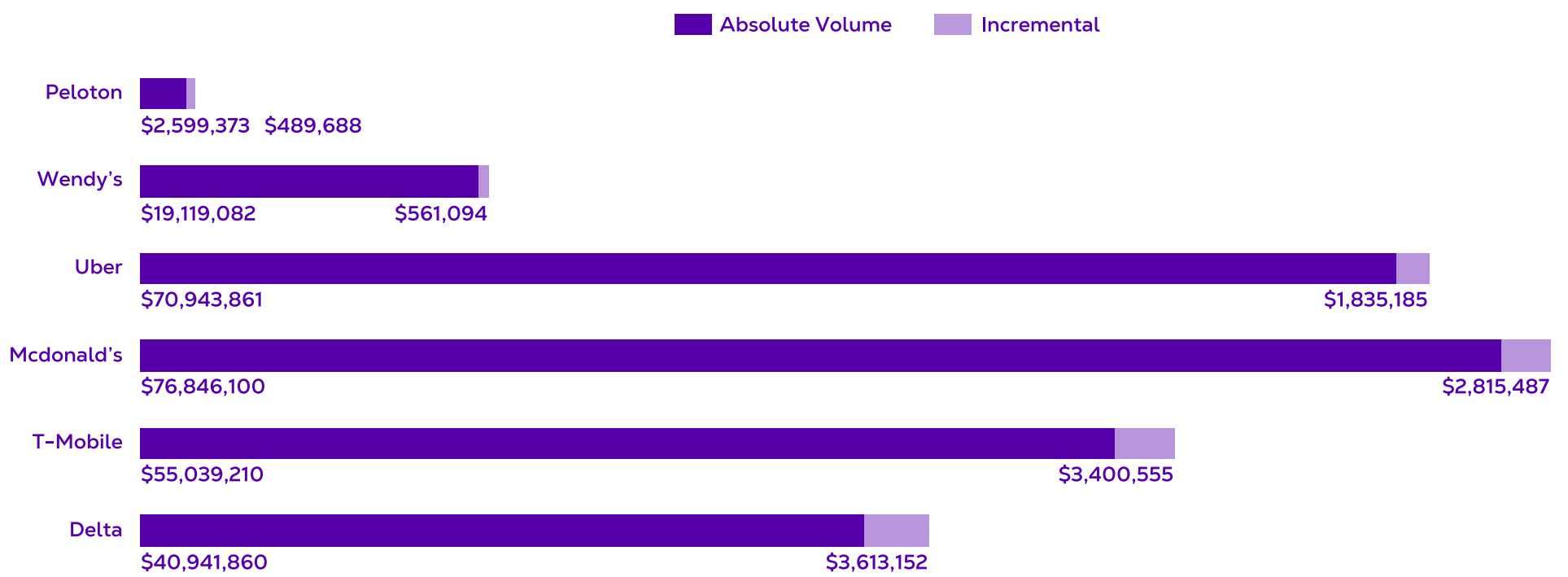
Gen X and young Millennial moviegoers drive significant incremental spend when it comes to their preferred brands.

The value of NCM Moviegoers extends beyond the total spending, they add millions in incremental revenue for their preferred brands in key consumer categories. Delta, T-Mobile and McDonald's led in the travel, telco and QSR categories for the Young Millennial *Doctor Strange in the Multiverse of Madness* demographic. The Gen X *Top Gun: Maverick* crowd preferred online shopping with Amazon, booking flights with United and shopping at the Disney store.

Top Gun: Maverick



Doctor Strange in the Multiverse of Madness



In Conclusion

The study found that the opportunity to drive meaningful, increased consumer outcomes is significant in and around the moviegoing experience.

Marketers can reach relevant buyers and, key to these findings, reach them when they are primed to shop. Moviegoers are 2X higher spenders and are most likely to go on a shopping spree on the day they visit a theater.

PROD.

ROLL

SCENE

DIRECTOR:

CAMERA:

DATE:

*Day.Nig
Filter*

TAKE

*Ext Mos
Syn*

Thank You

**Economic Impact Study:
Moviegoining as an
Indicator of Spend**

