Art House Convergence 2013
A National Survey
Conducted and Presented by
BRYN MAWR FILM INSTITUTE
Introduction

- Fourth annual online survey, conducted October-November 2012

- 138 began survey
- 83 completed (60%)
- 34 states plus Canada represented
- 23 theaters (28% of completes) also participated in 2011 survey
Who are we?

• 90% independent
  - 10% in chain/group consisting of 4 theaters on average

• 78% nonprofit (vs. 71% in last year’s survey)

• About half (48%) own their theater buildings

• As in previous surveys, most are located in metropolitan, relatively affluent areas
  - This year’s sample is more urban, less rural, vs. 2011
  - Also, somewhat more theaters in high-income areas

• Audiences are primarily adults (including many seniors)
Location of respondents’ theaters

Q37: Which of the following BEST describes the area where your theater is located?

- Urban: 60%
- Suburban: 19%
- Exurban: 6%
- Rural: 15%

n=84
Socioeconomic demographics of responding theaters’ locations

Q39: How would you describe the socioeconomic level of the area where your theater is located?

n=81

Percent of theaters

- High income: 30%
- Middle income: 64%
- Low income: 6%
76% of theaters have a college or university nearby.

Educational demographics of responding theaters’ locations

Q38/Q40: Is there a college or university near your theater? How would you describe the educational level of the area where your theater is located?

n=84/82

Percent of theaters

- Above average: 72%
- Average: 26%
- Below average: 2%

76% of theaters have a college or university nearby.
Q41: Please estimate the percent of your attendees who fall into each category.

n=83
*High school or college

Percent of attendees

- Non-student adults under 65: 52%
- Seniors 65+: 35%
- Children and other full-time students*: 13%
What kinds of programs do we offer?

- Over three-fourths characterize their theaters as art-house cinemas (vs. just over half in 2011; fewer arts centers and film festivals this year)

- About 66,000 in total attendance per theater*

- Generated, in 2011

- Regular feature films accounted for about ¾ of attendance; special programming for ¼ (less than in 2011)

- Regular features were more art-house, less commercial than last year

- Considerably more theaters than in 2011 offer “educational” programs

*On average
Q3: Which of the following BEST describes your theater?.
n=127

- Art house: 81%
- 1st-run commercial: 6%
- 2nd or subrun commercial: 2%
- Arts center: 4%
- Film society: 2%
- Museum: 3%
- Other: 2%
Q4: How many screens does your theater have?  
n=121

Mean number of screens = 2

Number of screens

Percent of theaters

- 1 screen: 48%
- 2 screens: 22%
- 3 screens: 14%
- 4 or more screens: 16%

Mean number of screens = 2
Mean seats per screen = 230
(median 178)

Mean TOTAL seats per theater = 410
(median 286)

Q5: How many seats for each screen?
n=121
Total attendance in 2011 for all screenings and other programs

Mean attendance in 2011 = 65,703
Median = 36,000

Q6: Please estimate your total attendance in 2011.
n=95
Types of programming offered in 2011

Percent of total 2011 attendance

Regular feature films (main attractions) 74%

Special programs* 26%

One-tenth of special programs were LIVE performances

Q7/Q9: Of your total 2011 attendance, estimate the percent that was in each category. Of all special programs in 2011, what percent were live performances?

n=95/89

*E.g., short runs, “one-night stands,” live performances, etc.
Types of regular feature films (main attractions) shown in 2011

Percent of regular feature films (main attractions)

Q8: Of all your regular feature films in 2011, what percent were in each category?

n=92
Q10: Which of the following kinds of SCREENED special programs does your theater offer?

n=88
Q10: Which of the following kinds of SCREENED special programs does your theater offer?

- Opera: 33%
- Theater: 31%
- Popular music: 31%
- Dance: 31%
- Films with meal tie-ins: 30%
- Current affairs: 24%
- Sports: 17%
- Classical music: 14%

Others (open-ended):
- Locally produced films
- Films with live musical accompaniment
- Films with tie-ins to other arts groups/nonprofits
- Outdoor free screenings

n=88
Q11: Which of the following does your theater offer?
n=100
Other types of educational programs*

- Film classes for elementary, middle-school or high-school students
  - Film literacy
  - Classic films
- Special screenings for area schools (sometimes with filmmakers or other speakers)
- Film-making workshops/summer camps
- “Young film critics” programs
- Filmmaker visits to classrooms

*Open-ended
How much do we make?

$838,725 mean total income/theater*

51% from box office*

Generated, in 2011

Box office about $428 K/theater or $214 K/screen*

*On average

About $73,000,000 grand total income for 87 responding theaters
Total gross income in 2011

Mean gross income in 2011 = $838,725
Median = $500,000

Q13: Please estimate your total gross income in 2011.
n=87
Where do we make money?

- 51% box office
  - Mean adult (non-senior) evening admission = $9.00 (range $5 to $14)

- 16% concessions
  - Mean per-capita concessions = $2.82 (range less than $1 to $7)

- 14% development and fundraising
  - About half of donations come from individuals

- Most theaters do not have an endowment or a planned giving program
Sources of income in 2011

Percent of total 2011 income

Q14/Q15: What percent of all 2011 income came from each source? What percent of 2011 BOX OFFICE income came from each source?

n=86

*Adult (non-senior) evening general admission
Gross income in 2011: **Box office ONLY**

- By Number of Screens -

Q13: Please estimate your total gross income in 2011.
Q14: What percent of all 2011 income came from each source?

<table>
<thead>
<tr>
<th>Number of Screens</th>
<th>Mean Box Office Income</th>
<th>Sample Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 screen</td>
<td>$225,256</td>
<td>(43)</td>
</tr>
<tr>
<td>2 screens</td>
<td>$339,205</td>
<td>(21)</td>
</tr>
<tr>
<td>3 screens</td>
<td>$886,064</td>
<td>(10)</td>
</tr>
<tr>
<td>4 or more screens</td>
<td>$989,990</td>
<td>(8)</td>
</tr>
</tbody>
</table>
Q13/Q14: Please estimate your total gross income in 2011. What percent of all 2011 income came from box office?

*Percent difference with additional screen.*
Total number of seats (across all screens)
- By Number of Screens -

Mean total # of seats

<table>
<thead>
<tr>
<th>Screens</th>
<th>Mean Total # of Seats</th>
<th>(n)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 screen</td>
<td>304</td>
<td>(58)</td>
</tr>
<tr>
<td>2 screens</td>
<td>327</td>
<td>(27)</td>
</tr>
<tr>
<td>3 screens</td>
<td>530</td>
<td>(17)</td>
</tr>
<tr>
<td>4 or more</td>
<td>743</td>
<td>(19)</td>
</tr>
</tbody>
</table>

*Percent difference with additional screen.
Q5: How many seats for each screen? (TOTAL for all screens)
**Total 2011 attendance**

- **By Number of Screens** -

<table>
<thead>
<tr>
<th>Screens</th>
<th>Mean Attendance</th>
<th>Actual Change</th>
<th>Percent Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 screen</td>
<td>30,341</td>
<td>+17,386</td>
<td>+57%</td>
</tr>
<tr>
<td>2 screens</td>
<td>47,727</td>
<td>+80,496</td>
<td>+169%</td>
</tr>
<tr>
<td>3 screens</td>
<td>128,223</td>
<td>+44,200</td>
<td>+34%</td>
</tr>
<tr>
<td>4 or more screens</td>
<td>172,423</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Percent difference with additional screen.

Q6: Please estimate your total attendance in 2011.
Screens, capacity, attendance, income - 2008-2011 (theaters that participated in all four surveys) -

Q6: Please estimate your total attendance in 2011.
Q13: Please estimate your total gross income in 2011.
Q14: What percent of all 2011 income came from each source?
n=8
Q6: Please estimate your total attendance in 2011.
Q13: Please estimate your total gross income in 2011.
Q14: What percent of all 2011 income came from each source?
Q23: Does your theater offer each of the following?

n=93

Currently offer | Plan to offer
--- | ---
Full meals | 10% | 7%
Alcoholic beverages | 49% | 24% | 73%
Sources of development/fundraising income in 2011

Percent of total 2011 development income

- Individuals: 50%
- Government: 17%
- Foundations: 18%
- Corporations and businesses: 12%
- Other donors: 3%

Q16/17: What percent of all 2011 development and fundraising income came from each source? What percent of government income came from each source?

n=61/41
Endowments and planned giving
- Percent of theaters -

Mean value = $396 K

Endowment Plan

Have endowment 13%
Intend to create 35%
No plans 52%

Planned giving program

Have program 19%
Intend to create 40%
No plans 41%

Q18/19: Do you have an endowment? What is its approximate value?
n=91/10
Q20: Do you have a planned giving program?
n=90
How do we track donations?

- Theaters use a wide variety of software for tracking donations and membership dues
  - Specific donor programs
  - General database programs
- But one-fourth of theaters do not track this information at all
Use of software for tracking donations and membership dues

<table>
<thead>
<tr>
<th>Specific donor programs</th>
<th>% of theaters</th>
</tr>
</thead>
<tbody>
<tr>
<td>DonorPerfect</td>
<td>11</td>
</tr>
<tr>
<td>GiftWorks</td>
<td>11</td>
</tr>
<tr>
<td>Agile</td>
<td>8</td>
</tr>
<tr>
<td>Raiser’s Edge</td>
<td>8</td>
</tr>
<tr>
<td>Proprietary software</td>
<td>7</td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>General database programs</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Excel</td>
<td>29</td>
</tr>
<tr>
<td>FileMaker</td>
<td>11</td>
</tr>
<tr>
<td>Access</td>
<td>7</td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
</tbody>
</table>

| NO tracking software         | 24            |

Q35: What type of software do you use to track donations (including membership dues)?

n=72
How do we spend money?

• Mean total operating expenses in 2011 = $765,093
  - Salaries/benefits and film rentals together account for over half
  - Another 13% goes to occupancy costs (rent or mortgage, utilities, maintenance, etc.)

• Average net profit in 2011 was 4%
  - Two-thirds of responding theaters showed a profit, while one-fourth ran a deficit
Operating expenses in 2011

Total mean expenses = $765,093
Median = $460,000

Mean # of employees: 5 full-time 10 part-time

Q25/Q26: What percent of all 2011 operating expenses went toward each? How many paid employees do you currently have?

n=72/80
Net profit or deficit in 2011

Percent of theaters

- >10% profit: 34%
- 1 to 10% profit: 33%
- Broke even: 8%
- Ran deficit: 25%

Mean profit = 4%
Median = 5%

Q13/Q24: Please estimate your total gross income in 2011.
Please estimate your total operating expenses in 2011.

n=73
### Theater characteristics by 2011 profitability

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>&gt;10% profit in 2011</th>
<th>Broke even in 2011</th>
<th>Ran deficit in 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>For-profit organization</td>
<td>32%</td>
<td>0</td>
<td>22%</td>
</tr>
<tr>
<td>2011 gross income</td>
<td>$758 K</td>
<td>$602 K</td>
<td>$698 K</td>
</tr>
<tr>
<td>2011 total expenses</td>
<td>$551 K</td>
<td>$602 K</td>
<td>$777 K</td>
</tr>
<tr>
<td>Mean profit margin in 2011</td>
<td>+26%</td>
<td>0</td>
<td>-28%</td>
</tr>
<tr>
<td>Percent of expenses that went to salaries/benefits</td>
<td>28%</td>
<td>25%</td>
<td>34%</td>
</tr>
<tr>
<td>Per-capita concessions sales</td>
<td>$2.93</td>
<td>$2.42</td>
<td>$2.46</td>
</tr>
<tr>
<td>Have endowment</td>
<td>16%</td>
<td>33%</td>
<td>6%</td>
</tr>
<tr>
<td>Value of endowment</td>
<td>$495 K</td>
<td>$58 K</td>
<td>$125 K</td>
</tr>
<tr>
<td>Have converted at least one screen to digital as of 2012</td>
<td>40%</td>
<td>17%</td>
<td>28%</td>
</tr>
</tbody>
</table>
Theaters in less densely populated areas tend to be more profitable (less competition?)

Q13/Q24: Please estimate your total gross income and operating expenses in 2011. Which best describes your location?
Profile of theaters that showed >10% profit in 2011

• More varied programming
  - Show more commercial films (though still mainly art house)
  - Greater range of special screened programming
  - More film festivals and filmmaker appearances

• More varied sources of income
  - Less dependent on operating income than unprofitable theaters
  - More income from space rentals and business sponsors/advertising
  - While only one-sixth have an endowment, value is sizable for those who do

• Nearly half have converted at least some screens to digital
  - Funds for conversion mainly from targeted capital campaigns
Profile of theaters that broke even in 2011

- Less varied special screened programming than profitable theaters
- Less income from box office and concessions (and lower per-cap concessions $$)
  - More dependent on development/donations than profitable theaters
  - And get much less in *individual* donations (more reliant on foundations)
  - One-third have an endowment, but average value is small
- Only half have online ticketing
- Only one-sixth have converted any screens to digital
  - Funds for conversion mainly from targeted capital campaigns and annual appeals
- In general, seem to feel more challenged than other theaters by issues covered in this survey
Profile of theaters that ran a deficit in 2011

- Located in somewhat less affluent areas
- Less varied special screened programming than profitable theaters, and fewer commercial films
- Total income was 8% less than that of most profitable theaters, but expenses were 41% higher
  - Spent much more on salaries/benefits, despite having fewer employees (and relying more on volunteers)
  - Very few have an endowment
- About one-fourth have converted any screens to digital
  - Funds for conversion mainly from targeted capital campaigns and operating income
- Feel more challenged by competition from nearby theaters
How do we show films?

<table>
<thead>
<tr>
<th>Projection capabilities</th>
<th>3D and digital</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Most common:</td>
<td>• 12% of theaters currently offer 3D and another 24% plan to do so in future</td>
</tr>
<tr>
<td>- Professional-quality non-DCI video</td>
<td>• Only about one-third have converted any screens to digital – but nearly all are raising funds for this purpose</td>
</tr>
<tr>
<td>- 35mm (platter or reel-to-reel)</td>
<td></td>
</tr>
<tr>
<td>- Power-_Point-type consumer-quality video</td>
<td></td>
</tr>
</tbody>
</table>
Q29/Q33: Which of the following projection equipment/capabilities do you have in house?

What is your status regarding 3D programming?

n=83

12% of theaters currently offer 3D
Another 24% plan to do so
Q31: Which best describes your theater’s status regarding DCI conversion?
n=84
Use of specific types of DCI-compliant projector

- Christie only: 47%
- Barco only: 20%
- NEC only: 18%
- SONY only: 3%
- Use >1 type: 12%

Percent of theaters that have a DCI-compliant projector

Q30: For how many screens do you use each type of DCI-compliant projector?

n=34
Q32: How are you handling/planning to handle fundraising/financing for DCI conversion?

n=81
## Other aspects of our operations

<table>
<thead>
<tr>
<th>How do we sell tickets?</th>
<th>How do we use volunteers?</th>
</tr>
</thead>
<tbody>
<tr>
<td>• 74% of theaters use online ticketing</td>
<td>• 83% of theaters have volunteers</td>
</tr>
<tr>
<td>- This is significantly higher than the 2011 survey’s 58%</td>
<td>• Mean # of active volunteers = 46</td>
</tr>
<tr>
<td></td>
<td>• Most commonly deployed at special events</td>
</tr>
</tbody>
</table>
Q46/Q47: About how many active volunteers do you have? How do you use your volunteers?
n=78/65

Other uses (open-ended):
- Distributing flyers
- Cleaning/maintenance
- Bartending

Mean # of volunteers = 46
Median = 15
<table>
<thead>
<tr>
<th>How do we market ourselves?</th>
<th>How do we keep in touch with patrons?</th>
</tr>
</thead>
<tbody>
<tr>
<td>• For marketing and publicity, theaters rely mainly on weekly email “blasts,” websites, and Facebook</td>
<td>• Email reaches more people than “snail mail” (and is used by more theaters)</td>
</tr>
<tr>
<td>• But media such as Twitter, TV, and printed inserts/tear-outs are considered highly effective by a minority of respondents</td>
<td>• 74% of theaters have conducted surveys with their patrons at some time (e.g., customer satisfaction, demographics, etc.)</td>
</tr>
</tbody>
</table>
Q42: Choose and rank the FIVE media that you have found most effective in publicizing your programs and activities.

n=83
Q42: Choose and rank the FIVE media that you have found most effective in publicizing your programs and activities.

n=83
### Rankings of effectiveness of media

<table>
<thead>
<tr>
<th>Type of media</th>
<th>% including in top 5</th>
<th>Mean ranking (5 = highest)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Twitter</td>
<td>11%</td>
<td>4.3</td>
</tr>
<tr>
<td>TV</td>
<td>7%</td>
<td>4.3</td>
</tr>
<tr>
<td>Newspaper/magazine inserts or tear-outs</td>
<td>5%</td>
<td>4.2</td>
</tr>
<tr>
<td>Facebook</td>
<td>83%</td>
<td>4.0</td>
</tr>
<tr>
<td>Radio</td>
<td>24%</td>
<td>3.7</td>
</tr>
<tr>
<td>Onscreen ads re coming events</td>
<td>35%</td>
<td>3.4</td>
</tr>
<tr>
<td>Print ads</td>
<td>53%</td>
<td>3.3</td>
</tr>
<tr>
<td>Flyers re specific events</td>
<td>25%</td>
<td>3.3</td>
</tr>
<tr>
<td>Emails re specific events</td>
<td>31%</td>
<td>3.0</td>
</tr>
<tr>
<td>Printed film or program guide</td>
<td>48%</td>
<td>2.5</td>
</tr>
<tr>
<td>Weekly email updates</td>
<td>90%</td>
<td>2.2</td>
</tr>
<tr>
<td>Website</td>
<td>88%</td>
<td>2.1</td>
</tr>
</tbody>
</table>

Q42: Choose and rank the FIVE media that you have found most effective. 
n=83
Q43: About how many people do you have on each of the following types of mailing list (your best estimate)?

- Email list: 9,093
- "Snail-mail" list: 7,332
We provide a variety of special offers, usually involving discounts

Q48: Which of the following does your theater offer?  
n=83  
*E.g., Living Social, Groupon, etc.

<table>
<thead>
<tr>
<th>Offer</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership discounts</td>
<td>77%</td>
</tr>
<tr>
<td>Discounts for members of other organizations</td>
<td>47%</td>
</tr>
<tr>
<td>NONmember discounts</td>
<td>25%</td>
</tr>
<tr>
<td>Loyalty/rewards programs</td>
<td>24%</td>
</tr>
<tr>
<td>Online group buying discounts*</td>
<td>23%</td>
</tr>
<tr>
<td>Free-for-all evenings</td>
<td>13%</td>
</tr>
<tr>
<td>Other offers (open-ended):</td>
<td></td>
</tr>
<tr>
<td>• Bargain matinees</td>
<td></td>
</tr>
<tr>
<td>• Free or discounted student screenings</td>
<td></td>
</tr>
<tr>
<td>• Multiple-purchase ticket discounts (e.g., punch cards, ticket coupon books)</td>
<td></td>
</tr>
</tbody>
</table>
Nearly three-fourths of us offer memberships

- Up from 65% in 2011
- Mean number of members = 1,718 (range 80 to 10,000)
- Average annual dues (20-25% higher than last year):
  - Basic individual -- $59 (range $10 to $275)
  - Basic couple/family -- $110 (range $25 to $500)
- 47% of theaters with members offer free memberships to high donors
- Benefits usually include admission discounts and special events just for members
Q53: Which of the following membership benefits do you offer?

n=59

- Discounted admission: 97%
- Member-only special events: 81%
- Discounts at local businesses: 24%
- Discounts on education programs: 24%
- Free gift cards: 14%

71% of theaters offer memberships
Mean # of members = 1,718
Other membership benefits*

- Concessions specials (the most frequently mentioned)
  - Lots of free popcorn!
  - Discounts on other concessions items
- Priority ticketing for some films and events
- Access to library (books, videos)

*Open-ended
What challenges keep us awake at night?

<table>
<thead>
<tr>
<th>Most challenging</th>
<th>Least challenging</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Fundraising (both capital and for operations)</td>
<td>• Maintaining good relationships with film distributors</td>
</tr>
<tr>
<td>• Attracting younger audiences</td>
<td></td>
</tr>
<tr>
<td>• Converting or adapting to digital</td>
<td></td>
</tr>
<tr>
<td>• Marketing and publicizing films</td>
<td></td>
</tr>
</tbody>
</table>
Challenges faced by respondents’ theaters

Q27: Rate how much of a challenge each issue is for your theater.

Mean rating

- Capital fundraising: 4.5
- Operating fundraising: 4.4
- Attracting younger audiences: 4.3
- Converting/adapting to digital: 4.2
- Marketing/publicizing films: 4.2
- Increasing membership: 4.0
- Competition from nearby theaters: 4.0
- Getting films you want: 3.8
- Building/maintenance issues: 3.7
- Community recognition of value: 3.6
- Non-theater tech competition: 3.4
- Good relations with distributors: 2.6

n=84
Other challenges*

- Finding the “right” staff
- Parking!!
- Widening our geographic marketing areas

*Open-ended
1. Expand programming, especially **mid-week**
   *Push distributors’ tolerance since it does not really hurt them anyway.*

2. Control staffing and other expense (natch!)

3. Convert to DCI and use targeted campaign to raise $$

4. Focus on individual donors

5. Analyze donor and survey information for use in programming decisions

6. Raise ticket prices to elastic “limits”

7. Serve alcohol (good luck, PA.)
Additional slides
Notable differences in sample characteristics: 2012 vs. 2011

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not for profit</td>
<td>78%</td>
<td>71%</td>
</tr>
<tr>
<td>Urban/suburban location</td>
<td>79%</td>
<td>68%</td>
</tr>
<tr>
<td>Rural location</td>
<td>15%</td>
<td>24%</td>
</tr>
<tr>
<td>High-income area</td>
<td>30%</td>
<td>24%</td>
</tr>
<tr>
<td>Low-income area</td>
<td>6%</td>
<td>12%</td>
</tr>
<tr>
<td>Art-house cinema</td>
<td>81%</td>
<td>56%</td>
</tr>
<tr>
<td>Arts center</td>
<td>4%</td>
<td>16%</td>
</tr>
<tr>
<td>Film society</td>
<td>2%</td>
<td>7%</td>
</tr>
<tr>
<td>Three or more screens</td>
<td>30%</td>
<td>23%</td>
</tr>
<tr>
<td>Average seats per screen</td>
<td>230</td>
<td>342</td>
</tr>
<tr>
<td>Characteristic</td>
<td>2012</td>
<td>2011</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>------</td>
<td>------</td>
</tr>
<tr>
<td>% of attendance that was for special programs</td>
<td>26%</td>
<td>39%</td>
</tr>
<tr>
<td>% of special programs that were live</td>
<td>11%</td>
<td>21%</td>
</tr>
<tr>
<td>Regular feature films:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>% first-run art-house/specialty</td>
<td>64%</td>
<td>56%</td>
</tr>
<tr>
<td>% commercial</td>
<td>11%</td>
<td>21%</td>
</tr>
<tr>
<td>Classes/seminars</td>
<td>38%</td>
<td>33%</td>
</tr>
<tr>
<td>Film intros/commentaries</td>
<td>86%</td>
<td>68%</td>
</tr>
<tr>
<td>Panel discussions</td>
<td>80%</td>
<td>66%</td>
</tr>
<tr>
<td>Q &amp; As</td>
<td>93%</td>
<td>82%</td>
</tr>
<tr>
<td>Email list</td>
<td>9,903</td>
<td>7,150</td>
</tr>
<tr>
<td>“Snail mail” list</td>
<td>7,332</td>
<td>3,762</td>
</tr>
</tbody>
</table>

**Notable differences: 2012 vs. 2011**
Notable differences: 2012 vs. 2011 (cont’d.)

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>2012</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offer memberships</td>
<td>71%</td>
<td>65%</td>
</tr>
<tr>
<td>Mean individual dues</td>
<td>$59</td>
<td>$49</td>
</tr>
<tr>
<td>Mean couple/family dues</td>
<td>$110</td>
<td>$88</td>
</tr>
</tbody>
</table>