2015 National Audience Study & Theater Operations Survey
In October, 2015 the Art House Convergence partnered with Avenue ISR to conduct the third National Audience Study to develop a deep understanding of art house patron profiles, attitudes and beliefs.

More than 20,000 art house attendees from across the United States and Canada participated in this landmark study.

Special thanks to the Bryn Mawr Film Institute for providing the initial vision and leadership for this work.

Also included here are some findings from a Theater Operations Survey conducted among theater owners and
Thank you to the 33 North American art houses and film societies who participated in the 2015 National Audience Study!

<table>
<thead>
<tr>
<th>Rank</th>
<th>Site</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Amherst Cinema, Amherst, MA</td>
<td>18</td>
</tr>
<tr>
<td>2</td>
<td>a/perture cinema, Winston-Salem, NC</td>
<td>19</td>
</tr>
<tr>
<td>3</td>
<td>Avalon Theatre, Washington, DC</td>
<td>20</td>
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<tr>
<td>4</td>
<td>Belcourt Theatre, Nashville, TN</td>
<td>21</td>
</tr>
<tr>
<td>5</td>
<td>Bloor Hot Docs Cinema, Toronto, ON</td>
<td>22</td>
</tr>
<tr>
<td>6</td>
<td>Cinemapolis, Ithaca, NY</td>
<td>23</td>
</tr>
<tr>
<td>7</td>
<td>The Colonial Theatre, Phoenixville, PA</td>
<td>24</td>
</tr>
<tr>
<td>8</td>
<td>The Coolidge Corner Theatre, Brookline, MA</td>
<td>25</td>
</tr>
<tr>
<td>9</td>
<td>Denver Film Society, Denver, CO</td>
<td>26</td>
</tr>
<tr>
<td>10</td>
<td>The Enzian, Maitland, FL</td>
<td>27</td>
</tr>
<tr>
<td>11</td>
<td>Film Society of Lincoln Center, New York, NY</td>
<td>28</td>
</tr>
<tr>
<td>12</td>
<td>FilmScene, Iowa City, IA</td>
<td>29</td>
</tr>
<tr>
<td>13</td>
<td>Gateway Film Center, Columbus, OH</td>
<td>30</td>
</tr>
<tr>
<td>14</td>
<td>The Grand Cinema, Tacoma, WA</td>
<td>31</td>
</tr>
<tr>
<td>15</td>
<td>IFC Center, New York, NY</td>
<td>32</td>
</tr>
<tr>
<td>16</td>
<td>Images Cinema, Williamstown, MA</td>
<td>33</td>
</tr>
<tr>
<td>17</td>
<td>Indiana University Cinema, Bloomington, IN</td>
<td></td>
</tr>
</tbody>
</table>
Two Sources of Data

- Thank you also to the 62 North American art houses and film societies who participated in the Theater Operations Survey!

<table>
<thead>
<tr>
<th>2015 National Audience Study</th>
<th>2015 Theater Operations Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumer Study of 20,000 art house patrons</td>
<td>Industry Study of 62 art house leaders (owners, managers, etc.)</td>
</tr>
<tr>
<td>Represented throughout with these colors:</td>
<td>Represented throughout with these colors:</td>
</tr>
</tbody>
</table>

![Color representation for 2015 National Audience Study](image1)

![Color representation for 2015 Theater Operations Survey](image2)
The majority of respondents were art house movie theaters (for these purposes, included some venues with a mix of film and live performance).

The mean respondent operates 2 screens with a seating capacity of 440.

Which of the following best describes the organization you represent?

- Art house: 85%
- Conventional movie theater or chain: 5%
- Film society: 3%
- Film festival: 3%
- Other: 3%

How many theaters does your organization operate?

- 1: 55%
- 2: 27%
- 3: 9%
- 4: 9%
- 5: 9%
- More than 5: 0%

How many screens do you have across all theaters?

- 1: 47%
- 2: 15%
- 3: 11%
- 4: 17%
- 5: 6%
- More than 5: 4%

Mean number of screens = 2.3
Mean seats per screen = 188
Mean total seats per theater = 440
Age of Respondents (National Audience Study)

- The mix of theaters (and therefore respondents) changes in each year of the National Audience Study.
- This year’s audience is somewhat older than the 2014 respondent mix and younger than the 2013 respondent group – to bear in mind when viewing trending slides.

### Age of Respondent

<table>
<thead>
<tr>
<th>Age Group</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 35</td>
<td>14%</td>
<td>19%</td>
<td>24%</td>
</tr>
<tr>
<td>35-54</td>
<td>32%</td>
<td>31%</td>
<td>28%</td>
</tr>
<tr>
<td>55-64</td>
<td>26%</td>
<td>22%</td>
<td>25%</td>
</tr>
<tr>
<td>65+</td>
<td>33%</td>
<td>25%</td>
<td>22%</td>
</tr>
</tbody>
</table>
Executive Summary of Findings

1. Even within the art house movie assortment, the movies that entertain are not necessarily the same ones that build lasting impressions and appreciation for individual theaters.

2. A wide range of genres and films are necessary to connect with all segments and groups of the art house audience.

3. Art house movie theaters play a critical role in patron’s lives and their communities, across the spectrum of generations.

4. Although there may be room to grow, art houses appear to be doing a capable job of cultivating younger patrons, at least in part by engaging in a wider range of communications and events.

5. Continuing to reach new audiences (including younger ones) may depend on continuing to offer alternative genres and working with affiliate and community groups.

6. Pinterest and direct mail may be contrarian diamonds in the rough.

7. New patrons are legitimate prospects for membership and fundraising as soon as they walk in the entrance.
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1. Movies That Entertain and Elevate
Key Movies of 2015

“Following are a list of movies released in 2015. Please select the movie that best fits the description.

- Was most entertaining/enjoyable
- Left the greatest lasting impression on you
- Made you appreciate [SPONSORING ORGANIZATION] the most"

This list of 60 films was compiled in late October based on national sales figures, film review sites and input from the Art House Convergence – it does not perfectly replicate the offerings of any one art house theater.
TOP 5 MOST ENTERTAINING/ENJOYABLE FILMS
GRANDMA
3...
FAR FROM THE MADDING CROWD
MAD MAX: FURY ROAD
Most Entertaining/Enjoyable Movie By Age

- Different age groups found different films to be more or less enjoyable
- Mad Max: Fury Road and Inside Out were more popular among younger art house patrons
- Far From the Madding Crowd and Grandma were more popular among older patrons

Which film was most entertaining/enjoyable?

<table>
<thead>
<tr>
<th>Film</th>
<th>Under 35</th>
<th>35-54</th>
<th>55-64</th>
<th>65+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mad Max: Fury Road</td>
<td>1%</td>
<td>6%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>The Martian</td>
<td>1%</td>
<td>7%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>Far From the Madding Crowd</td>
<td>1%</td>
<td>3%</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>Inside Out</td>
<td>3%</td>
<td>5%</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>Grandma</td>
<td>2%</td>
<td>4%</td>
<td>7%</td>
<td>9%</td>
</tr>
</tbody>
</table>
TOP 5 FILMS THAT LEFT THE GREATEST LASTING IMPRESSION ON VIEWERS
5...
LOVE & MERCY
3...
AMY
EX MACHINA
FINALLY, THE TOP 5 FILMS THAT MADE PATRONS APPRECIATE THEIR ART HOUSE THEATER
LOVE & MERCY
CITIZEN KANE
Additional Findings and Implications

1. The movies that were most entertaining (and may have even drawn the largest audiences) are different from the movies that left the greatest lasting impact and those that create audience appreciation of art houses.

2. There were an additional 20 movies that were each chosen by at least 200 patrons (1% of total) either because they left the greatest lasting impression or created appreciation:

   - A Most Violent Year
   - Best of Enemies
   - Clouds of Sils Maria
   - GETT: The Trial of Viviane Amsalem
   - Going Clear: Scientology and the Prison of Belief
   - Grandma
   - Grey Gardens
   - I’ll See You In My Dreams
   - Inside Out
   - Iris
   - It Follows
   - Kurt Cobain: Montage of Heck
   - Phoenix
   - Sicario
   - The Apu Trilogy
   - The End of the Tour
   - The Martian
   - The Salt of the Earth
   - The Tale of Princess Kaguya
   - The Third Man

3. And there were dozens upon dozens of other films selected or written-in that audiences found moving, compelling and memorable.

4. Implication: art house audiences are diverse and a given theater needs to offer a wide range of programming approaches to connect with all segments in a community.
2. The State of the Art House
91 percent of participating theaters are using a DCI compliant digital projector

More than 50 percent are using still some form of 35mm projection equipment

Other types of projection equipment are less widely used

Which of the following projection equipment/capabilities do you have in house? (select all that apply)

- DCI-compliant digital projector: 91%
- 35 mm projector & reel-to-reel system: 36%
- 35 mm projector & platter system: 28%
- Power-Point-type consumer-quality video projector: 28%
- Pro-quality non-DCI digital projector: 26%
- 16 mm projector: 19%
- 70 mm projector: 8%
- Other, please explain: 4%

A total of 53% maintain some form of 35mm capability.
Theater Operations Survey: DCI Conversion, 2010-2014

- DCI Conversion appears to have grown even more widespread

Note: Chart designed by the Bryn Mawr Film Institute

Note: The 2011 to 2014 studies specifically asked respondents to respond re: the prior year; the 2015 study focused on the current year
Although the majority of respondents still plan to keep their 35 mm projection capabilities after DCI conversion, this number has fallen from 2013.

Note: The 2013 study specifically asked respondents to respond re: the prior year; the 2015 study focused on the current year.
Art houses offer a wide variety of special content including live performances, simulcasts, education and a variety of additional programming.

Which of the following special content does your organization currently offer?

- Film series: 84%
- Live performances (music, dance, etc.): 54%
- Sing-alongs: 39%
- Film classes led by an instructor: 38%
- Simulcasts of live performances and events: 32%
- 3D screenings: 27%
- HFR (high frame rate) screenings: 4%
- None of these: 7%
National Audience Survey: 
Frequency of Attending

- The average art house attendee reports seeing 32.5 movies per year, up from 26.5 in 2014 and 25.7 in 2013.
- Any given art house attendee is choosing to see just under half of his or her movies at a favored art house.

How often do you typically see movies at SPONSORING THEATER? AND How often do you typically see movies at all other types of movie theaters put together?

Movies Per Year

- 2015: 16.0 at Sponsoring Theater, 16.5 at All Other Theaters, Total: 32.5 movies per year
- 2014: 13.9 at Sponsoring Theater, 12.6 at All Other Theaters, Total: 26.5 movies per year
- 2013: 13.0 at Sponsoring Theater, 12.7 at All Other Theaters, Total: 25.7 movies per year
Art house audiences have enriching and transformative experiences because of their favored theaters.

To what extent do you agree with the following statements about SPONSORING THEATER?
(Top 2 Box - Strongly Agree or Somewhat Agree)

- Sparks my curiosity: 93%
- Provides me with opportunities to think and learn: 93%
- Makes life enjoyable: 92%
- Provides more to talk about with friends & loved ones: 88%
- Fills gaps in my knowledge: 86%
- Allows me to make the most of my (leisure) time: 86%
- Helps me be a more knowledgeable film viewer: 84%
- Makes me a more well-rounded person: 84%
- Opens up new worlds: 84%
- Teaches me about film appreciation or history: 81%
- Allows me to gain the excitement of learning: 79%
- Changes my life for the better: 77%
- Makes me more tolerant of other points of view: 71%
More than 62% overall would say that the art house they patronize is “Very” or “Extremely” valuable to their overall quality of life. This is generally true across the full spectrum of generations.

How valuable is [SPONSORING THEATER] to your overall quality of life?
In the past 12 months, art houses have been “Interesting,” “Captivating,” “Uplifting” and “Life Changing” in the lives of their patrons...and almost never “Ordinary” or “Boring”
3. Media and Information
Digital media (Facebook, email and websites) are among the most widely used media by art house theaters.

These results are VERY similar to 2014 results.

Please check ALL types of media that your theater currently uses.

- Facebook posts: 97%
- Email notices: 97%
- Theater website: 95%
- Printed flyers or posters for specific events: 90%
- Onscreen ads re: coming events: 83%
- Movie listings in local print publications: 79%
- Printed schedules or guides: 79%
- Twitter posts: 79%
- Print ads in local publications: 72%
- Facebook advertising (paid): 66%
- Marquee: 60%
- Instagram posts: 52%
- Other social media: 26%
- Twitter advertising (paid): 7%
- Text messages to subscribers: 5%
- Instagram advertising (paid): 2%
- Other*: trailers, radio: 21%
Theater Operations Survey: The Most Effective Media

- The most effective media are thought to be email notices and websites
- Several widely used communications tend to be seen as less effective, including social media posts and printed flyers or posters

Please check ALL types of media that your theater currently uses. AND Please check the five media you have found the most effective.
In general, the most widely used media are influencing audience decisions of what movie to see.

Patrons: How do you typically learn about which movies you might be interested in seeing in movie theaters? (select all that apply) AND Leaders: Please check ALL types of media that your theater currently uses.

- Trailers or previews seen in theaters: 83% (What You Do), 52% (What They Use)
- Email notices: 97% (What You Do), 40% (What They Use)
- Theater website: 95% (What You Do), 29% (What They Use)
- Printed flyers or posters for specific events: 90% (What You Do), 20% (What They Use)
- Printed schedules or guides: 79% (What You Do), 20% (What They Use)
- Print ads in local publications: 72% (What You Do), 20% (What They Use)
- Social Media: 97% (What You Do), 20% (What They Use)
However, patrons make use of a wide variety of other media and information sources that are out of the control of art house theaters.

**Patrons: How do you typically learn about which movies you might be interested in seeing in movie theaters?** (select all that apply)

- Trailers or previews seen in theaters: 52%
- My friends: 43%
- Reviews (in print): 41%
- Email notices: 40%
- Reviews (online): 35%
- Theater website: 29%
- Internet browsing in general: 28%
- Trailers or previews seen online: 25%
- Television ads or trailers: 21%
- Printed flyers or posters for specific events: 20%
- Printed schedules or guides: 20%
- Print ads in local publications: 20%
- Social Media: 20%
- My family: 14%
Social Media and Art House Movie Theaters

- Although 97% of theaters are using social media to try to communicate with patrons, only 20% of respondents report using social media to decide which movies to attend.

  Patrons: How do you typically learn about which movies you might be interested in seeing in movie theaters? (select all that apply) AND Theater Operations Survey: Please check ALL types of media that your theater currently uses.

<table>
<thead>
<tr>
<th>What You Do</th>
<th>What They Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trailers or previews seen in theaters</td>
<td>83%</td>
</tr>
<tr>
<td>Email notices</td>
<td>97%</td>
</tr>
<tr>
<td>Theater website</td>
<td>95%</td>
</tr>
<tr>
<td>Printed flyers or posters for specific events</td>
<td>90%</td>
</tr>
<tr>
<td>Printed schedules or guides</td>
<td>79%</td>
</tr>
<tr>
<td>Print ads in local publications</td>
<td>72%</td>
</tr>
<tr>
<td>Social Media</td>
<td>97%</td>
</tr>
</tbody>
</table>
Participation in Social Media

- The majority of respondents in all age groups are on Facebook.
- Patrons also subscribe to LinkedIn, Twitter, Instagram, Pinterest (!) and Google+ in large numbers.

*To which, if any, social media sites have you subscribed? (select all that apply)*
Age Differences and Use of Social Media

- Although participation in social media is widespread, younger patrons are much more likely to use social media to make movie choices.
- Older patrons are more likely to use print ads and listings.
- For older patrons, social media may currently be more useful for building engagement in general.

![Use Social Media to Choose Movies](chart)

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Use Social Media to Choose Movies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 35</td>
<td>11%</td>
</tr>
<tr>
<td>35-54</td>
<td>27%</td>
</tr>
</tbody>
</table>

![Use Newspaper/Magazine Ads to Choose Movies](chart)

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Use Newspaper/Magazine Ads to Choose Movies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 35</td>
<td>8%</td>
</tr>
<tr>
<td>35-54</td>
<td>14%</td>
</tr>
<tr>
<td>35-54</td>
<td>23%</td>
</tr>
<tr>
<td>35-54</td>
<td>30%</td>
</tr>
</tbody>
</table>
As indicated by previous slides, many respondents who participate in social media are not yet interacting with art house theaters through these media.

Which, if any, interactions have you had with [SPONSORING THEATER] on social media?

- Read posts made by [SP. THEATER] (40%)
- Friend/Follow/etc. on social media: (35%)
- Mentioned a movie I've seen at [SP. THEATER] in my own posts (29%)
- Liked or responded to posts made by [SP. THEATER] (28%)
- Other, please explain (1%)
- None of these (42%)

Participate in One or More Social Media

Yes 81%
The weekly email continues to be the favored communications medium for most theater news and information.

### Preferred Medium

<table>
<thead>
<tr>
<th>Rank</th>
<th>Email</th>
<th>Web site</th>
<th>Social</th>
<th>Handout</th>
<th>Reg. mail</th>
<th>Signs</th>
</tr>
</thead>
<tbody>
<tr>
<td>News and information about the theater/organization</td>
<td>84%</td>
<td>41%</td>
<td>20%</td>
<td>13%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>New film announcements</td>
<td>87%</td>
<td>39%</td>
<td>21%</td>
<td>13%</td>
<td>10%</td>
<td>16%</td>
</tr>
<tr>
<td>Special events and programs</td>
<td>88%</td>
<td>38%</td>
<td>22%</td>
<td>14%</td>
<td>12%</td>
<td>15%</td>
</tr>
</tbody>
</table>

### Preferred Frequency

<table>
<thead>
<tr>
<th>Rank</th>
<th>Daily</th>
<th>Twice a week</th>
<th>Weekly</th>
<th>Monthly</th>
<th>Quarterly</th>
<th>Yearly</th>
</tr>
</thead>
<tbody>
<tr>
<td>News and information about the theater/organization</td>
<td>1%</td>
<td>4%</td>
<td>37%</td>
<td>36%</td>
<td>18%</td>
<td>5%</td>
</tr>
<tr>
<td>Upcoming show times</td>
<td>2%</td>
<td>7%</td>
<td>73%</td>
<td>15%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>New film announcements</td>
<td>2%</td>
<td>7%</td>
<td>68%</td>
<td>21%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Special events and programs</td>
<td>3%</td>
<td>6%</td>
<td>56%</td>
<td>32%</td>
<td>4%</td>
<td>1%</td>
</tr>
</tbody>
</table>
4. Attracting New Audiences
Although there are several areas that are at least somewhat challenging for art house leaders, engaging younger audiences is seen as “Extremely challenging” or “Very challenging” by the majority.
The Proportion of Newer Audiences

- The next several slides will focus on the 25.4% of patrons who indicate they have been attending movies at a given art house theater for 3 years or less.

**How long have you been attending movies at [SPONSORING THEATER]?

- More than 10 years: 35.2%
- 6-10 years: 20.5%
- 4-5 years: 16.2%
- 2-3 years: 17.7%
- 1 year or less: 7.7%
- Have never actually attended a movie at this theater: 1.6%
Newer Audiences Are Younger

- Newer audiences are skewing younger
- This may indicate that efforts to reach out to younger viewers are working

% of Overall Audience Under 35

% of Recent Attendees (3 yrs or less) Under 35
Attracting New Audiences

- Specific movies are primary in drawing in new audiences
- However, communications, special events and word of mouth referrals play an essential supporting role

What caused you to first attend a movie at [SPONSORING THEATER] (select all that apply)

- The theater was showing a movie I wanted to see: 58%
- I saw/heard some information about the theater that made me interested in visiting: 27%
- The theater had a particular program or event I wanted to attend: 24%
- Attended with a friend, family member or other acquaintance: 23%
- Encouraged by a friend, family member or other acquaintance: 17%
- Other: 7%
Building Audience: Programs/Events

What caused you to first attend a movie at [SPONSORING THEATRE]? 

- The theater had a particular program or event I wanted to attend

- **Niche/Specialty programming**
  - “Italian Splatter Fest” – The Colonial Theater, Phoenixville, PA – all night showing of rare Italian horror films
  - “Curious Minds (Food for Thought series)” – Bloor HotDocs, Toronto, ON – city food writers interview renowned chefs

- **Community partnerships and co-promotions**
  - “Civil Rights Sundays” – The Nickelodeon Theatre, Columbia, SC – partnership with the City of Columbia, the Visitors Bureau, Historic Foundation and the University of SC
  - “Science on Screen” – Coolidge Corner Theater, Brookline, MA - screenings of classic, cult, and documentary films with lively introductions by notable figures from the world of science, technology & medicine

- **Special events for members and community**
  - “Denver Film Society’s Summer Scream.” Reel Social Club members get in FREE.

Denver Film Society’s Summer Scream at Lakeside Amusement Park
Building Audience: Communications

What caused you to first attend a movie at [SPONSORING THEATRE]? 

- **Community mavens/outlets who reach new residents**
  - “Learned about it from my realtor” - The Grand Cinema, Tacoma, WA
  - “The building manager of Capitol Places mentioned The Nick to me” – The Nickelodeon Theatre, Columbia, SC
  - “Local brochures” – Pickford Film Center, Bellingham, WA

- **Promotion of special events and affiliate group communications**
  - “Facebook event” - Texas Theatre, Dallas, TX
  - “Comic-Con 2015 Flyer” – TIFF Bell Lightbox, Toronto, ON
  - “Tour and movie announcement on a group I belong to on meetup.com.” - Tampa Theatre, Tampa, FL

- **Fundraising and crowdfunding campaigns**
  - “Crowdfunding on Indiegogo” – FilmScene, Iowa City, IA
Film Genres for Younger Audiences

- Many of the genres (though not necessarily the titles) that appeal to older art house audiences also appeal to younger viewers.
- However, Action, Thrillers, Sci-Fi & Fantasy, Crime & Gangster and Horror films are of much greater interest to younger audiences.

Which of the following movie types or genres, if any, do you enjoy? (select all that apply)

- Independent: 89% (Under 35), 84% (Overall)
- Drama: 76% (Under 35), 78% (Overall)
- Comedy: 81% (Under 35), 71% (Overall)
- Foreign (subtitled): 69% (Under 35), 70% (Overall)
- Documentaries: Social/Cultural: 69% (Under 35), 68% (Overall)
- The Classics: 65% (Under 35), 58% (Overall)
- Action & Adventure: 47% (Under 35), 62% (Overall)
- Thrillers: 39% (Under 35), 53% (Overall)
- Sci-Fi & Fantasy: 37% (Under 35), 60% (Overall)
- Crime & Gangster: 30% (Under 35), 42% (Overall)
- Horror: 16% (Under 35), 36% (Overall)
Attracting New Audiences in General: Advertising

- In suggesting ways for art houses to reach more people who are similar to their existing audience, respondents suggest direct mail.
- Social media advertising is a close second.

*If [SPONSORING THEATER] did one thing to reach out to someone like you to get them interested in attending a movie, which of these do you think might be most effective? (select one only)*

- Direct mail post card sent to your home: 26%
- Advertising on Facebook: 21%
- Advertising in local free weekly paper: 10%
- Advertising in local daily newspaper: 9%
- Radio advertising: 8%
- Advertising on movie review or ticketing site: 7%
- Advertising on Google or other search engine: 4%
- Other*: 16%

Other: public radio sponsorships, ticket giveaways to affiliate groups, etc.
Accelerating Attendance

- Respondents indicated that a number of changes to programming would cause them to attend more often.
- A new or enhanced ticket loyalty program (for example, buy 10 get one free) tops the list of approaches that would increase attendance.

Would any of the following changes cause you to attend [SPONSORING THEATER] more often?

<table>
<thead>
<tr>
<th>Change</th>
<th>Would attend much more often</th>
<th>Would attend somewhat more often</th>
</tr>
</thead>
<tbody>
<tr>
<td>New/Enhanced ticket buying loyalty program</td>
<td>22%</td>
<td>42%</td>
</tr>
<tr>
<td>(more) Matinee screenings</td>
<td>18%</td>
<td>42%</td>
</tr>
<tr>
<td>Filmmaker appearances</td>
<td>19%</td>
<td>39%</td>
</tr>
<tr>
<td>New/Enhanced membership program/benefits</td>
<td>16%</td>
<td>40%</td>
</tr>
<tr>
<td>Films w/ local filmmakers/topics/settings</td>
<td>9%</td>
<td>38%</td>
</tr>
<tr>
<td>New/Expanded simulcasts</td>
<td>14%</td>
<td>32%</td>
</tr>
<tr>
<td>Overall changes to screening times</td>
<td>10%</td>
<td>33%</td>
</tr>
<tr>
<td>(more) Live performances</td>
<td>11%</td>
<td>32%</td>
</tr>
<tr>
<td>New/Enhanced educational content</td>
<td>7%</td>
<td>32%</td>
</tr>
<tr>
<td>(more) 35mm screenings</td>
<td>11%</td>
<td>28%</td>
</tr>
<tr>
<td>Availability of meals</td>
<td>5%</td>
<td>18%</td>
</tr>
<tr>
<td>New/Better concessions options</td>
<td>5%</td>
<td>18%</td>
</tr>
<tr>
<td>(more) 3D screenings</td>
<td>1%</td>
<td>13%</td>
</tr>
<tr>
<td>New/Expanded children's movies</td>
<td>1%</td>
<td>9%</td>
</tr>
</tbody>
</table>
5. The Path to Engagement
The Path to Engagement

- A traditional view of this journey implies that an organization must first engage a patron as an attendee; then over time convert them to a member and ultimately a contributor.
- Average tenure suggests that there is not much difference between these categories.

<table>
<thead>
<tr>
<th>Attendees</th>
<th>Members</th>
<th>Contributors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Tenure: 8 Years</td>
<td>Average Tenure: 9 Years</td>
<td>Average Tenure: 10 Years</td>
</tr>
</tbody>
</table>
Newer Patrons: Membership and Financial Contributions

- New patrons appear about as willing as long-standing patrons to become members, when membership is available.
- Although a smaller a percentage, a significant number of new patrons become financial contributors within the first 3 years.
Patrons are just as motivated to purchase a membership because it offers a chance to support their art house theater as they are because they gain a tangible benefit (in the form of ticket discounts)

What are the most important reasons you are a member of [SPONSORING THEATER]? (select no more than 3)

- Provide support to my theater: 74%
- Discounts on tickets: 74%
- Special events and member-only celebrations: 18%
- Discounts on concessions: 17%
- Early/Priority purchase of tickets (regular): 14%
- Early/Priority purchase of tickets (festivals or events): 14%
- Provide support to a particular program or initiative: 10%
- Access to parking or parking passes: 7%
- Other, please specify: 3%
- Priority seating: 3%
- Membership was a gift from another person: 3%
- Special “swag” for members (clothing, mugs or other: 1%
- None of these: 1%

Patrons are just as motivated to purchase a membership because it offers a chance to support their art house theater as they are because they gain a tangible benefit (in the form of ticket discounts).
If [PIPED: THE SPONSORING THEATER] offered a membership program by which members of the community could pay $35 per year in exchange for discounts on tickets and invitations to special events and programs, how likely is it you would participate?

- Extremely likely: 23%
- Very likely: 19%
- Somewhat likely: 30%
- Not very likely: 16%
- Not at all likely: 12%

Top 2 Box = 42%

The small number (1.0%) of those who claim their theaters do not offer a membership program are relatively interested in such a program.
In the past 2 years, have you provided financial support to [PIPED: THE SPONSORING THEATER], aside from purchasing tickets to see movies there or purchasing a basic level of membership?

- No, only purchased movie tickets and concessions: 42.1%
- No, only purchased basic membership, tickets and concessions: 34.0%
- Yes, have provided additional financial support: 20.9%
- Other, please explain: 3.0%
### Emotional Drivers for Donors

- Donors, even more than the norm, are likely to see their art houses as critical cultural anchors in their communities that draw in all types of people.

#### What role would you say [SPONSORING THEATER] provides to its community? (select all that apply)

<table>
<thead>
<tr>
<th>Role</th>
<th>Donor (%)</th>
<th>Non-Donor (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enhances the cultural life of the community</td>
<td>86%</td>
<td>83%</td>
</tr>
<tr>
<td>Brings together very different groups of people</td>
<td>71%</td>
<td>68%</td>
</tr>
<tr>
<td>Is an anchor in the community</td>
<td>65%</td>
<td>60%</td>
</tr>
<tr>
<td>Serves as a point of community pride</td>
<td>64%</td>
<td>60%</td>
</tr>
<tr>
<td>Helps support a sense of community</td>
<td>59%</td>
<td>55%</td>
</tr>
<tr>
<td>Provides artistic inspiration for many</td>
<td>55%</td>
<td>57%</td>
</tr>
<tr>
<td>Is an important cultural institution</td>
<td>35%</td>
<td>35%</td>
</tr>
<tr>
<td>Is a historic landmark</td>
<td>34%</td>
<td>40%</td>
</tr>
<tr>
<td>Adds to the economic vitality of the community</td>
<td>27%</td>
<td>31%</td>
</tr>
<tr>
<td>Is a center of economic and commercial development</td>
<td>27%</td>
<td>32%</td>
</tr>
</tbody>
</table>
Audience Experience: Solid Performance

- Of course, keeping and evolving audiences depends on delivering great experiences
- Of 20 metrics related to the audience experience, these top 10 are areas where art houses most meet expectations – including picture and sound quality, cleanliness, staff knowledge and service

Please rate SPONSORING THEATER on the following criteria (Top 2 Box – Excellent or Very Good; Overall Results plus High and Low)

<table>
<thead>
<tr>
<th>Rank</th>
<th>Site</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Picture quality</td>
<td>90.2%</td>
</tr>
<tr>
<td>2</td>
<td>Quality of movies offered</td>
<td>89.6%</td>
</tr>
<tr>
<td>3</td>
<td>Customer service of staff/volunteers</td>
<td>87.5%</td>
</tr>
<tr>
<td>4</td>
<td>Knowledge of staff/volunteers</td>
<td>86.2%</td>
</tr>
<tr>
<td>5</td>
<td>Sound quality</td>
<td>84.8%</td>
</tr>
<tr>
<td>6</td>
<td>Appearance of staff/volunteers</td>
<td>83.5%</td>
</tr>
<tr>
<td>7</td>
<td>Cleanliness of lobby</td>
<td>83.2%</td>
</tr>
<tr>
<td>8</td>
<td>Cleanliness of the theater overall</td>
<td>82.3%</td>
</tr>
<tr>
<td>9</td>
<td>Variety of movies offered</td>
<td>81.7%</td>
</tr>
<tr>
<td>10</td>
<td>Welcoming atmosphere</td>
<td>81.5%</td>
</tr>
</tbody>
</table>
Audience Experience: Areas of Opportunity

- These “bottom 11” are areas where art houses may have opportunities for improvement
- Individual theaters are able to react from specific results

*Please rate SPONSORING THEATER on the following criteria (Top 2 Box – Excellent or Very Good; Overall Results plus High and Low)*

<table>
<thead>
<tr>
<th>Rank</th>
<th>Site</th>
<th>Overall</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>Sound volume</td>
<td>81.4%</td>
</tr>
<tr>
<td>12</td>
<td>Cleanliness of bathrooms</td>
<td>79.3%</td>
</tr>
<tr>
<td>13</td>
<td>Fun atmosphere</td>
<td>75.0%</td>
</tr>
<tr>
<td>14</td>
<td>Affordability of tickets</td>
<td>73.6%</td>
</tr>
<tr>
<td>15</td>
<td>Temperature of the theater</td>
<td>71.4%</td>
</tr>
<tr>
<td>16</td>
<td>Nearby dining options</td>
<td>67.6%</td>
</tr>
<tr>
<td>17</td>
<td>Screening times</td>
<td>67.4%</td>
</tr>
<tr>
<td>18</td>
<td>Variety of concessions options</td>
<td>65.3%</td>
</tr>
<tr>
<td>19</td>
<td>Affordability of concessions</td>
<td>63.4%</td>
</tr>
<tr>
<td>20</td>
<td>Length of movie runs</td>
<td>61.7%</td>
</tr>
<tr>
<td>21</td>
<td>Availability of parking</td>
<td>46.3%</td>
</tr>
</tbody>
</table>
Attracting Sponsors

- Compared to US averages, the art house audience is an attractive group for advertisers and sponsors to try to reach.
- While different theaters have different attendee bases, generally all viewers and donors should attract the interest of sponsors.

**Income**

- US Population: $53,500
- Art House Attendee: $87,500

**Education (Bachelor’s Degree or Higher)**

- US Population: 29%
- Art House Attendee: 84%

Sources for Comparisons: 2013 American Community Survey, United States Census Bureau
Executive Summary of Findings

1. Even within the art house movie assortment, the movies that entertain are not necessarily the same ones that build lasting impressions and appreciation for individual theaters.

2. A wide range of genres and films are necessary to connect with all segments and groups of the art house audience.

3. Art house movie theaters play a critical role in patron’s lives and their communities, across the spectrum of generations.

4. Although there may be room to grow, art houses appear to be doing a capable job of cultivating younger patrons, at least in part by engaging in a wider range of communications and events.

5. Continuing to reach new audiences (including younger ones) may depend on continuing to offer alternative genres and working with affiliate and community groups.

6. Pinterest and direct mail may be contrarian diamonds in the rough.

7. New patrons are legitimate prospects for membership and fundraising as soon as they walk in the entrance.
About Avenue ISR

Since 2006, Avenue ISR has conducted hundreds of marketing strategy engagements for companies and organizations wishing to increase their impact and success.

What does “ISR” stand for? We use customer and market insights to generate actionable strategy that produces measurable business results. Insights are developed using qualitative and quantitative research techniques.

Ultimately, we help our clients answer big questions and make smarter decisions.
APPENDIX
55% of theaters offer alcoholic beverages to their patrons
Few offer full meals and relatively few (8%) plan on doing so in the future

Which of the following projection equipment/capabilities do you have in house? (select all that apply)
The 73% of respondents who attend theaters which serve alcoholic beverages are generally glad to have this option. Most who attend movies at theaters which do not serve alcohol prefer it this way, though there are many others who do want to be able to purchase alcohol.

Does [SPONSORING THEATER] serve alcoholic beverages?

- Yes, and I'm glad they do (54% in 2014, 70% in 2015)
- No, but I wish they would (25% in 2014, 16% in 2015)
- No, and I'm glad they don't (3% in 2014, 3% in 2015)
- Yes, but I wish they didn't (18% in 2014, 12% in 2015)
Requests for Additional Programming

- Patrons would like to see more Independent and Foreign films.
- Although Dramas and Comedies are popular genres, there is a relatively smaller clamor for more of these.

Of these types or genres, which would you like to see more often at [SPONSORING THEATER]?

- Independent: 19.6%
- Foreign (subtitled): 18.4%
- The Classics: 14.5%
- Documentaries: Social/Cultural: 12.9%
- Comedy: 11.6%
- Drama: 10.5%
- Foreign (English language): 7.7%
- Sci-Fi & Fantasy: 7.6%
- Documentaries: Environment/Nature: 6.6%
- Music & Musicals: 5.7%
- Documentaries: Political/War: 5.7%
- Thrillers: 4.8%
- Action & Adventure: 4.5%
- Romance: 4.0%
- Horror: 3.9%
- Children & Family: 2.2%
- Crime & Gangster: 2.2%
- Westerns: 1.6%
- War: 0.8%
- Other, please explain: 3.1%
**Sources of Information: Which Movies to See**

*How do you typically learn about which movies you might be interested in seeing in movie theaters? (select all that apply)*

- Trailers or previews seen in theaters: 51.8%
- My friends: 42.6%
- Reviews (in print): 40.8%
- Emails or newsletters from theaters: 39.8%
- Reviews (online): 35.1%
- Theater websites: 29.4%
- Internet browsing in general: 28.5%
- Trailers or previews seen online: 24.6%
- Television ads or trailers: 21.4%
- Posters/guides or other print materials from theaters: 20.2%
- Newspaper/Magazine ads: 19.8%
- Social media posts from theaters: 19.7%
- My family: 14.0%
- Reviews (on television): 8.5%
- Online movie ticketing sites: 7.0%
- Other, please explain: 6.2%
Sources of Information: Movie Screenings and Show Times

- Movie theater web sites are the top source of movie show times

*How do you typically look for movie screenings and show times? (select all that apply)*

- Movie theater web sites: 59.1%
- Emailed schedules or guides sent by theaters: 28.3%
- Smartphone (or other handheld) apps: 26.6%
- General internet searches (e.g. Google): 24.6%
- Local newspapers or publications: 22.7%
- Movie listing web sites (e.g. mrmovietimes.com): 19.7%
- Movie ticketing web sites: 17.1%
- Printed schedules or guides provided by theaters: 13.5%
- Looking at the movie theater's marquee or sign: 8.5%
- Movie theater Facebook pages: 3.7%
- Calling a movie theater on the phone: 3.4%
- Local news web sites: 2.6%
- Other, please explain: 2.6%
- Telephone movie listing services: 0.9%
Sources of Information: Entertainment and Cultural Events

- Local newspapers or publications top the list of resources for entertainment and cultural events

How do you typically look for entertainment and cultural events in your community? (select all that apply)

- Local newspapers or publications: 54.6%
- My friends: 43.8%
- Emailed guides sent by cities/towns or cultural orgs.: 38.3%
- Local entertainment and cultural web sites: 35.7%
- Social media (e.g. Facebook, Twitter) posts: 33.6%
- General internet searches (e.g. Google): 27.3%
- Printed guides provided by cities/towns or cultural: 25.7%
- Posters, banners, billboards or other displays: 24.0%
- Radio news: 18.3%
- Local news web sites: 16.9%
- My family: 12.4%
- Television news: 9.5%
- Other, please explain: 2.7%
When you go to the movies in a movie theater, which is most often true about how you decide what to see?

- I decide on the specific movie I want to see, then find out where and when it is showing (48.1%)
- I decide "I want to see a movie," then look at local listings to find out what is playing and (24.4%)
- I decide to go to a favored theater, then find out what is playing there (23.7%)
- Other, please explain (3.9%)

How far in advance do you typically decide to see a particular movie in the theater?

- A month or more before I go to the movie (3.2%)
- Within a month (5.9%)
- Within 2 weeks (9.5%)
- Within a week (30.1%)
- Within 2-3 days of when I go to the movie (37.8%)
- The day I go to the movie (13.4%)
- Never (1.2%)