



2016 National Audience Study

Overview

ARTHOUSE CONVERGENCE



In Fall, 2016 the Art House Convergence partnered with Avenue ISR to conduct the fourth National Audience Study to develop a deep understanding of art house patron profiles, attitudes and beliefs.

More than 16,000 art house attendees from across the United States and Canada participated in this landmark study.

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

National Audience Study: Participating Theaters

- Thank you to the 38 North American art houses, film festivals and film societies who participated in the 2016 National Audience Study!

Rank	Site	Rank	Site
1	Amherst Cinema, Amherst, MA	20	Maiden Alley Cinema, Paducah, KY
2	a/perture cinema, Winston-Salem, NC	21	Martha's Vineyard Film Center, Martha's Vineyard, MA
3	Belcourt Theatre, Nashville, TN	22	Michigan Theater, Ann Arbor, MI
4	Bijou by the Bay, Traverse City, MI	23	Moxie Cinema, Springfield, MO
5	Bryn Mawr Film Institute, Bryn Mawr, PA	24	The Nickelodeon, Columbia, SC
6	Capri Theatre, Montgomery, AL	25	Park City Film Series, Park City, UT
7	Christopher B. Smith Rafael Film Center, San Rafael, CA	26	Pickford Film Center, Bellingham, WA
8	Cinema Arts Centre, Huntington, NY	27	Pittsburgh Filmmakers, Pittsburgh, PA
9	Cinema Falls, Sioux Falls, SD	28	Robinson Film Center, Shreveport, LA
10	Cinemapolis, Ithaca, NY	29	Roxie Theater, San Francisco, CA
11	The Colonial Theatre, Phoenixville, PA	30	RPL Film Theatre, Regina, Saskatchewan
12	Coolidge Corner Theatre, Brookline, MA	31	Salt Lake Film Society, Salt Lake City, UT
13	Coral Gables Art Cinema, Coral Gables, FL	32	Sidewalk Film Festival, Birmingham, AL
14	FilmScene, Iowa City, IA	33	The State Theatre, Modesto, CA
15	Gateway Film Center, Columbus, OH	34	The State Theatre, Traverse City, MI
16	Gene Siskel Film Center, Chicago, IL	35	Tampa Theatre, Tampa, FL
17	IFC Center, New York, NY	36	Texas Theatre, Dallas, TX
18	Images Cinema, Williamstown, MA	37	Three Rivers Film Festival, Pittsburgh, PA
19	Jacob Burns Film Center, Pleasantville, NY	38	Wilmette Theatre, Wilmette, IL



Data Composition

- 16,412 U.S. and Canadian attendees of Art House movies (theaters, film festivals, film societies, other venues showing art house content)
- Completed a 3rd party web-based survey
- Responded to invitations issued through email, social media, web site posting, press release, etc.

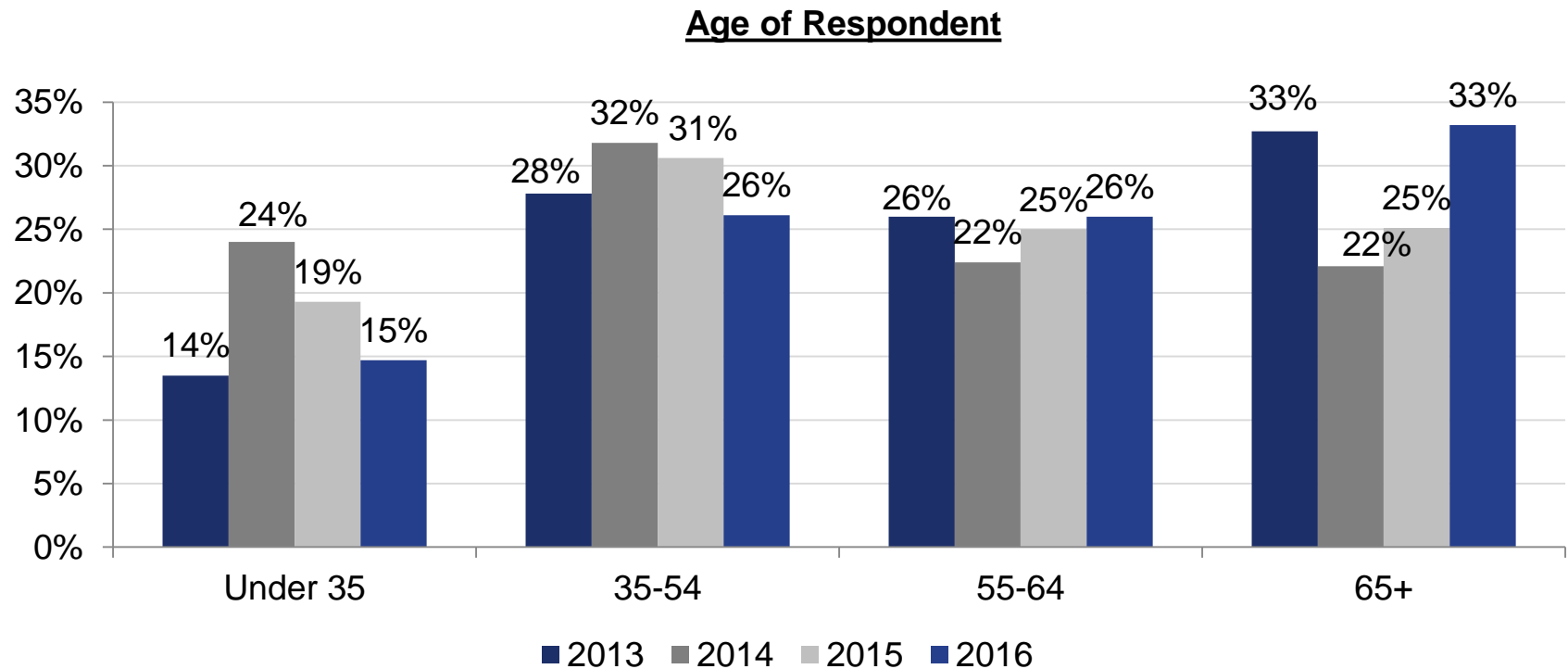
Implications

1. Likely a more actively engaged subset of the entire art house audience
2. General results may not apply to each art house theater or organization because of local community character
3. Because different organizations participate each year, trending results are not perfectly apples to apples
4. Still, a large and diverse group of art house patrons – a meaningful ‘voice of the customer’ to use for decision-making



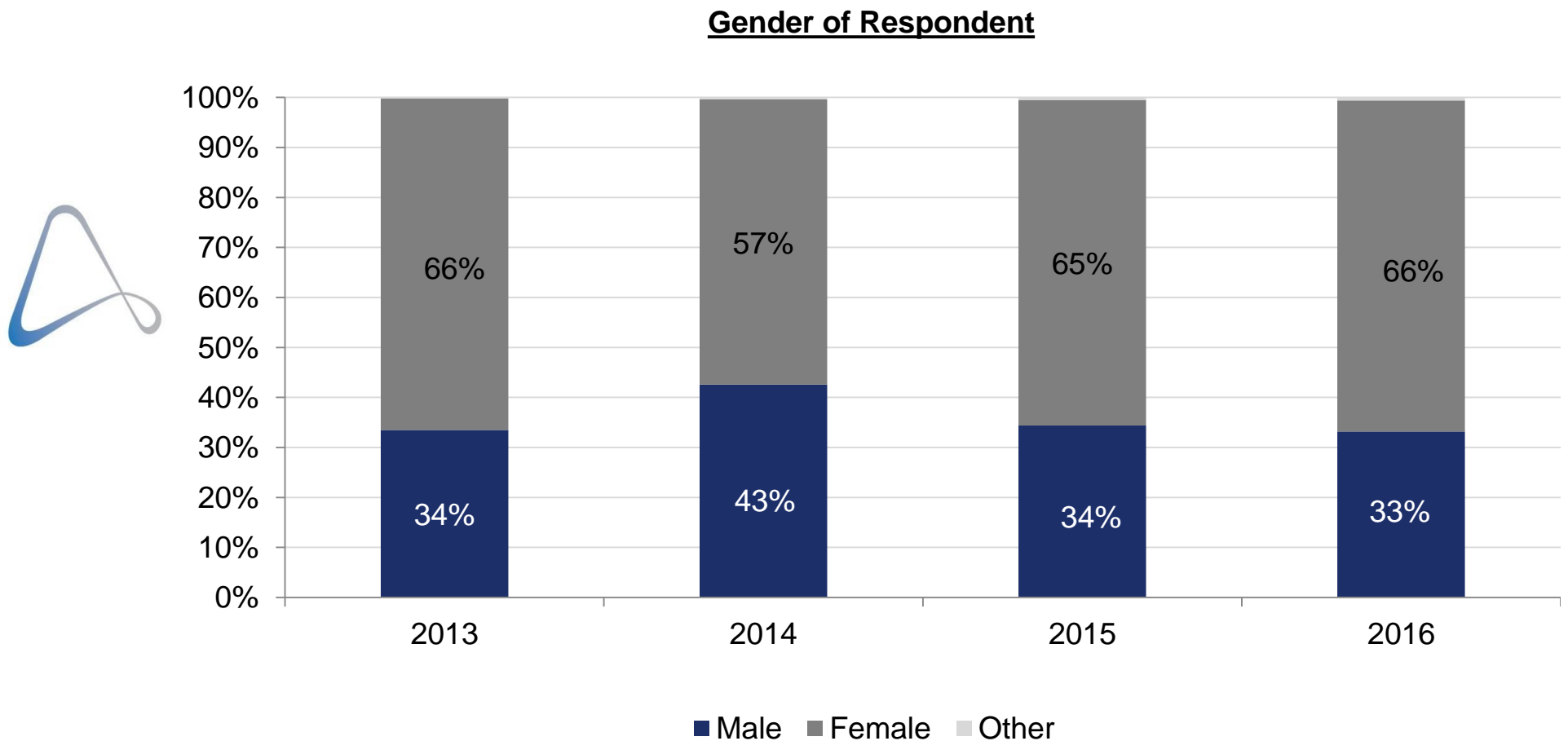
Patron Age

- The mix of theaters (and therefore respondents) changes in each year of the National Audience Study
- This year's audience is very similar in terms of age to that surveyed in 2013
 - o 1/3 of respondents are over the age of 65
 - o About half are between 35 and 64
 - o One in six are younger than 35



Patron Gender

- The National Audience Study has always had a strong female voice
- As in recent years, the percentage of respondents who are female is roughly two-thirds



Frequency of Attending

- The average respondent reports seeing 34 movies per year, up from under 26 per year 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 ORGANIZATION? AND How often do you typically see movies at all other types of movie theaters put together?

Movies Per Year

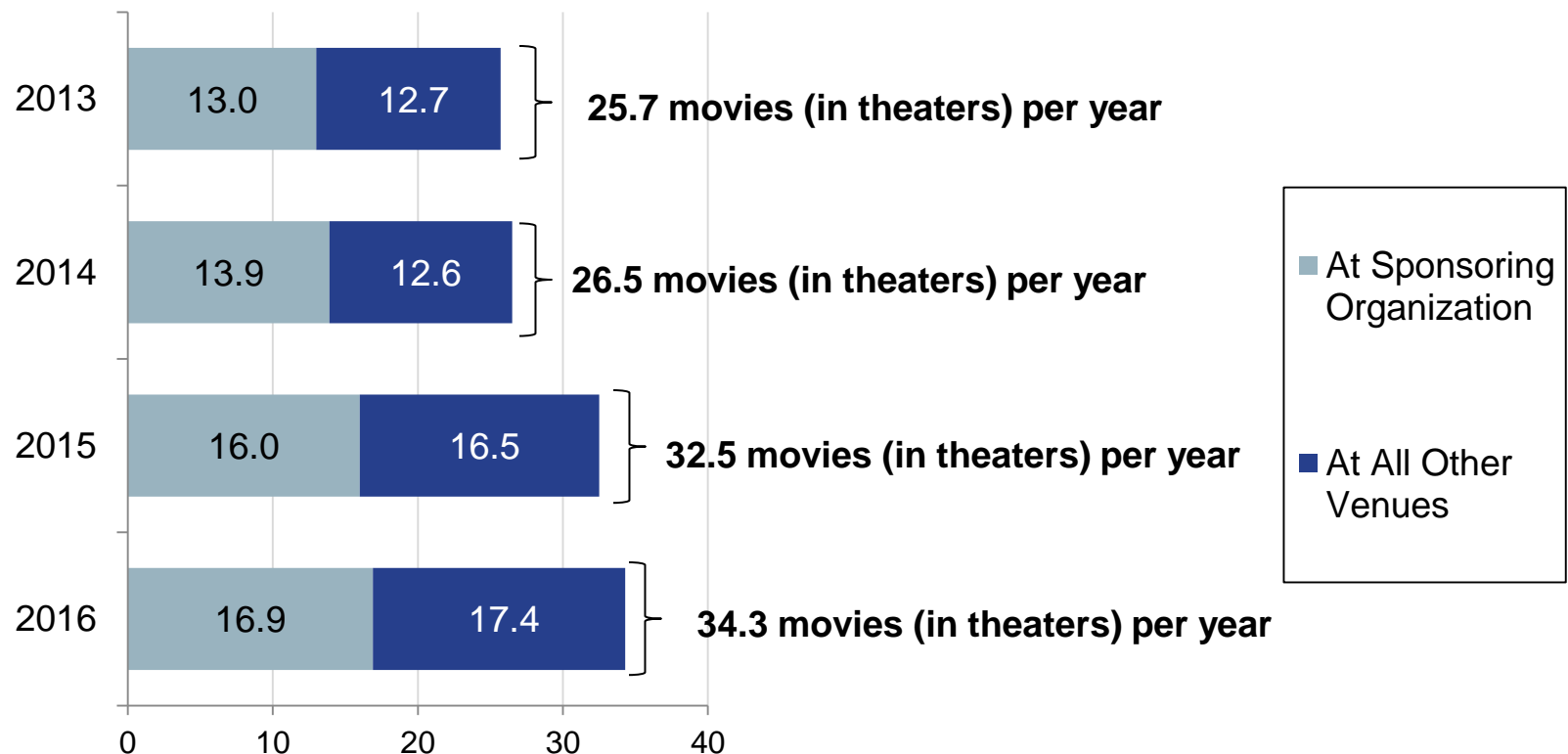


Table of Contents

1. Audience Profiles

2. Content & Format

3. Communications

4. The Path to Engagement

5. Implications

APPENDIX

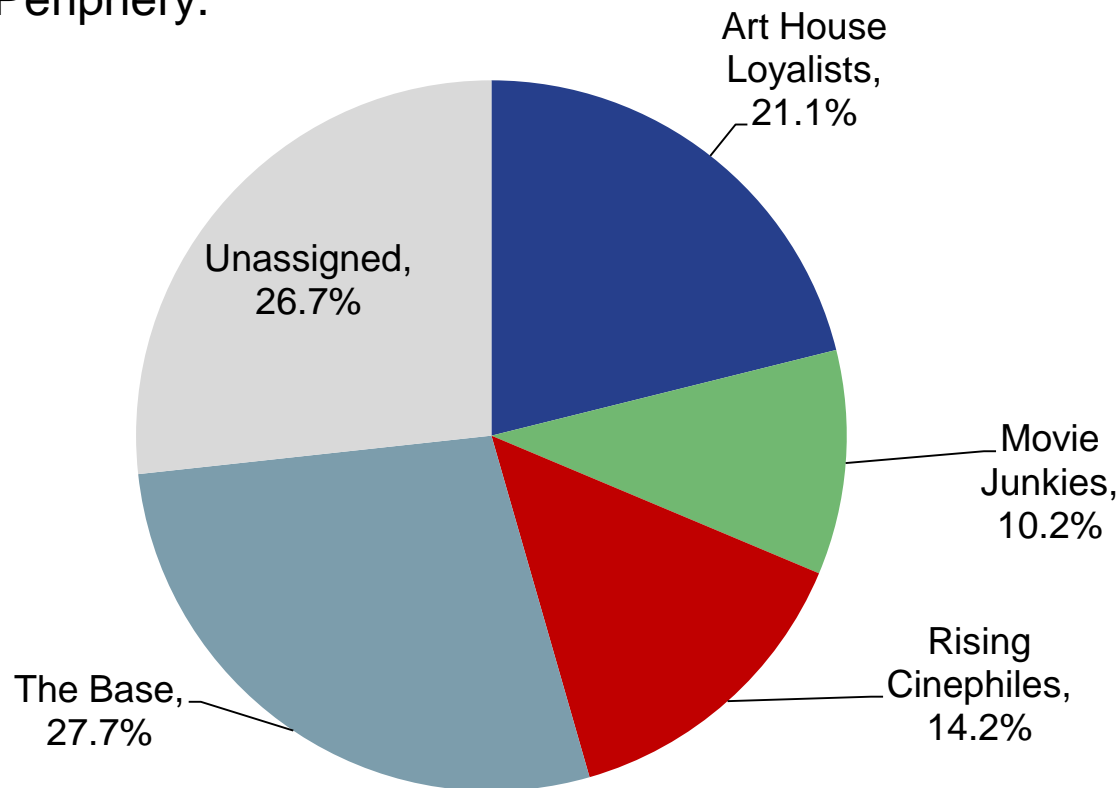


1. Audience Profiles



Cluster Analysis

- A Cluster Analysis separates or partitions respondents based on how they respond to a set of variables
- We used a K-means Cluster Analysis on rating questions such as:
 - *“I seek out movies that push the limits of the cinema art form”*
 - *“I generally stay after the film until the last credits have run”*
 - *“I was part of a film club or society in school”*
- Four interesting groups of art house patrons emerged, covering about 75% of all respondents: Art House Loyalists, Movie Junkies, Rising Cinephiles and the Periphery.



Art House Loyalists are passionate about art house movie theaters and also about movies. They are members, supporters and champions.



Movie Watching Habits

	Number	Compared to Total
Sponsoring Organization	22	28% more
All Others	21	20% more
Total	43	24% more

Demographics

	Number	Compared to Total
Gender	72% Female	66% Female
Avg. Age	58	55
Median Inc.	\$125K	\$87.5K

Attitudes & Behaviors

- Have attended SPONSORING ORGANIZATIONS longer than the norm
- See the art house (or film society, etc.) as extremely valuable to their overall quality of life
- Like variety and some reach beyond the main stream in movies
- More likely than the norm to be a donor
- More likely than the norm to be a member

Movie Junkies are people for whom film is an integral part of life. They are, and always have been, voracious, engaged and ready to grow through the art of film.



Movie Watching Habits

	Number	Compared to Total
Sponsoring Organization	19	13% more
All Others	34	93% more
Total	53	54% more

Demographics

	Number	Compared to Total
Gender	46% F; 53% M	66% Female
Avg. Age	43	55
Median Inc.	\$62.5K	\$87.5K

Attitudes & Behaviors

- They see a movie a week
- 62% studied Film in school (compared to the overall of 12%)
- Very likely to see movies out of the realm of mainstream
- They view cinema as art and actively look for movies that stretch its boundaries
- Were once aspiring writers or directors
- Very knowledgeable about the history of film

Rising Cinephiles are passionate about movies and enjoy exploring new genres and titles, but they are less experienced and engaged than the Movie Junkies.



Movie Watching Habits

	Number	Compared to Total
Sponsoring Organization	14	18% less
All Others	16	10% less
Total	30	14% less

Demographics

	Number	Compared to Total
Gender	58% F; 41% M	66% Female
Avg. Age	50	55
Median Inc.	\$87.5K	\$87.5K

Attitudes & Behaviors

- See fewer movies than the overall norm
- Somewhat likely to see movies out of the mainstream
- Going to the movies is sometimes about seeing films that push the limits of cinema as art
- Were once aspiring actors
- Have a moderate sense of film history
- Are less knowledgeable about the history of film, but willing to learn

The Base are more casual, though still loyal fans. They fill the seats for good movies but are less likely to take chances.



Demographics

	Number	Compared to Total
Gender	69% F; 30% M	66% Female
Avg. Age	57	55
Median Inc.	\$87.5K	\$87.5K

Attitudes & Behaviors

- This is a significant portion of the art house audience
- They are less enthusiastic and engaged than other segments
- They are less likely to seek movies outside of the mainstream
- Not looking to be tastemakers
- No real desire to expand the depth of their current knowledge
- Still actively enjoy and appreciate their art houses, film festivals and other sponsoring organizations

Movie Watching Habits

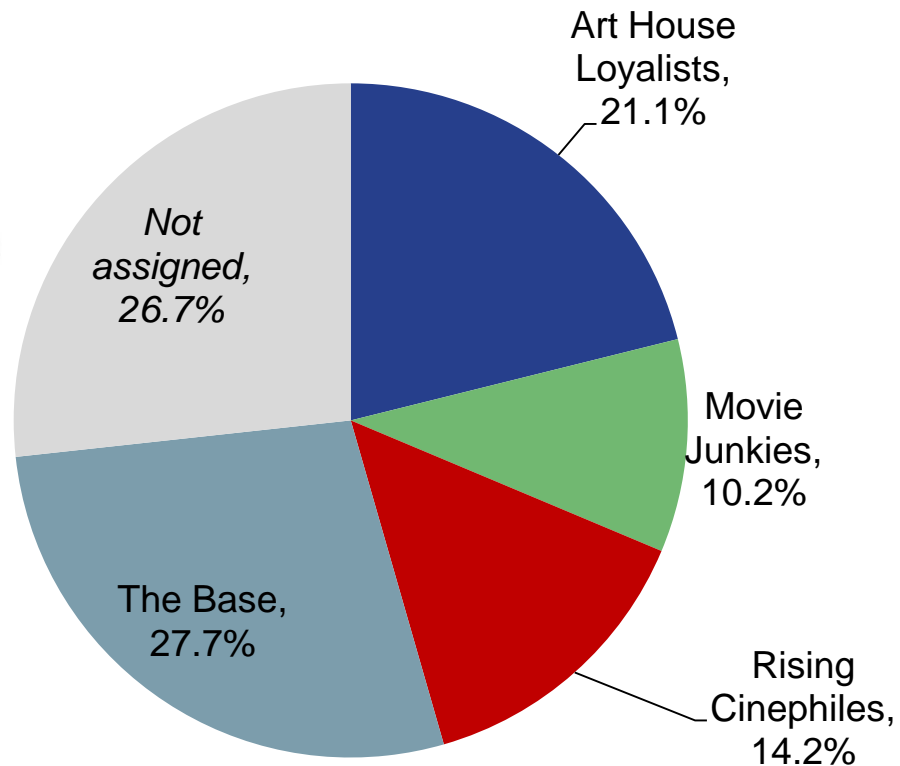
	Number	Compared to Total
Sponsoring Organization	12	27% less
All Others	10	45% less
Total	22	36% less



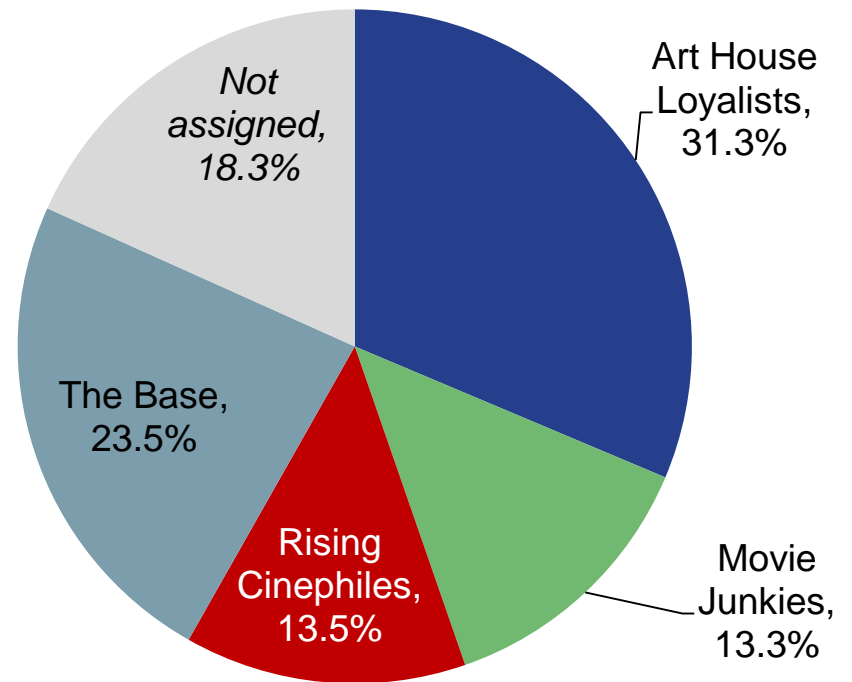
Share of Ticket Purchases

- Although they combine for less than a third of patrons, Art House Loyalists and Movie Junkies combine to purchase nearly 47% of the tickets sold by a given organization

Percentage of Respondents



Percentage of Tickets From SPONSORING ORGANIZATION



Objectives By Audience Profile

- Each organization, market and group of patrons are different, but here are some general strategies implied by the data

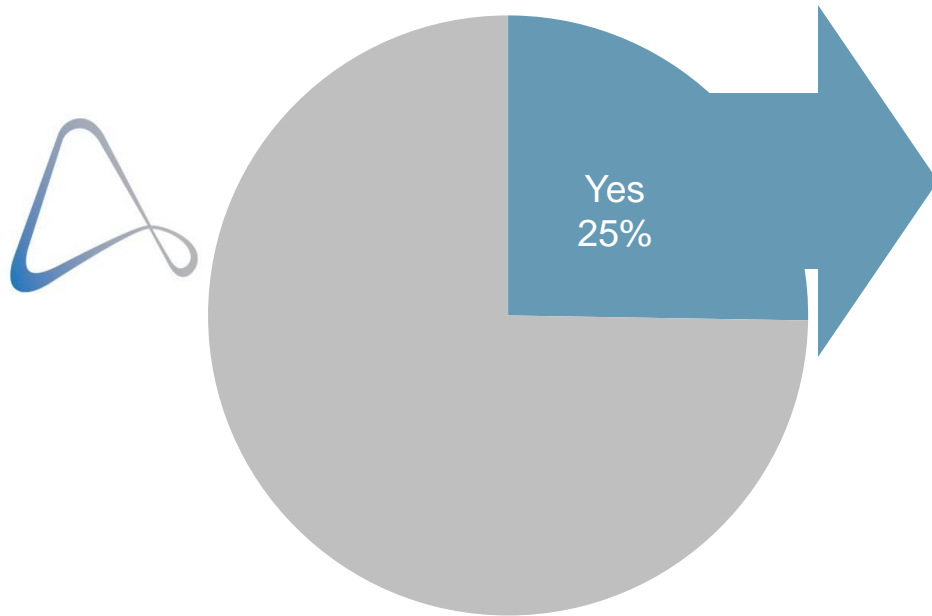
	<u>Key Considerations</u>	<u>Implications</u>
Art House Loyalists	<ul style="list-style-type: none"> Want to see a new movie every 2 weeks Want some programming that pushes the limits Patrons and supporters 	<ul style="list-style-type: none"> Provide variety Enhance content (backstory) Cultivate patronage
Movie Junkies	<ul style="list-style-type: none"> Want to see a new movie every week Want a great variety of genres and limit pushing Seeing a lot of movies away from the art house Local opinion makers 	<ul style="list-style-type: none"> Provide variety of titles and genres Enhance content (history, technical) Win more of their movie watching occasions
Rising Cinephiles	<ul style="list-style-type: none"> Want to learn and grow Tend to follow the lead of others they know 	<ul style="list-style-type: none"> Meet them where they are Move them up the continuum
The Base	<ul style="list-style-type: none"> Just want to see a good movie from time to time 	<ul style="list-style-type: none"> Provide titles that are easy to like; don't overwhelm



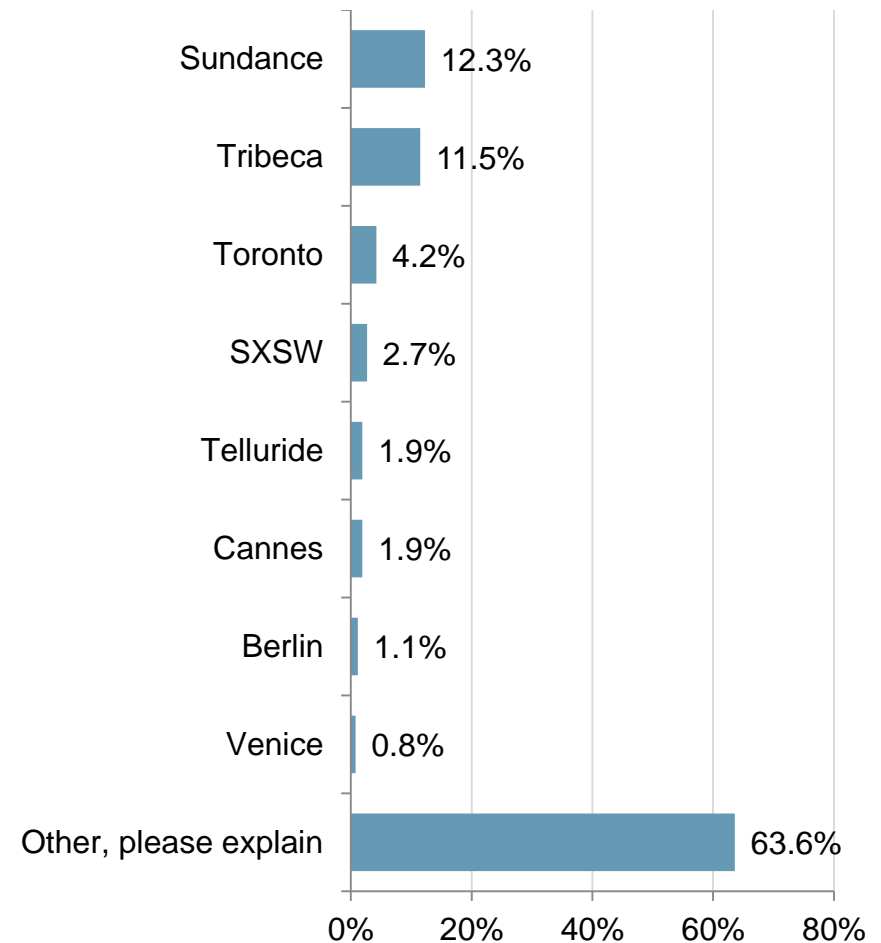
Film Festival Attendance

- About one quarter of respondents have attended a film festival in the past two years; of those who have, Sundance and Tribeca are the most common

Attended ANY Film Festivals in the Last Two Years



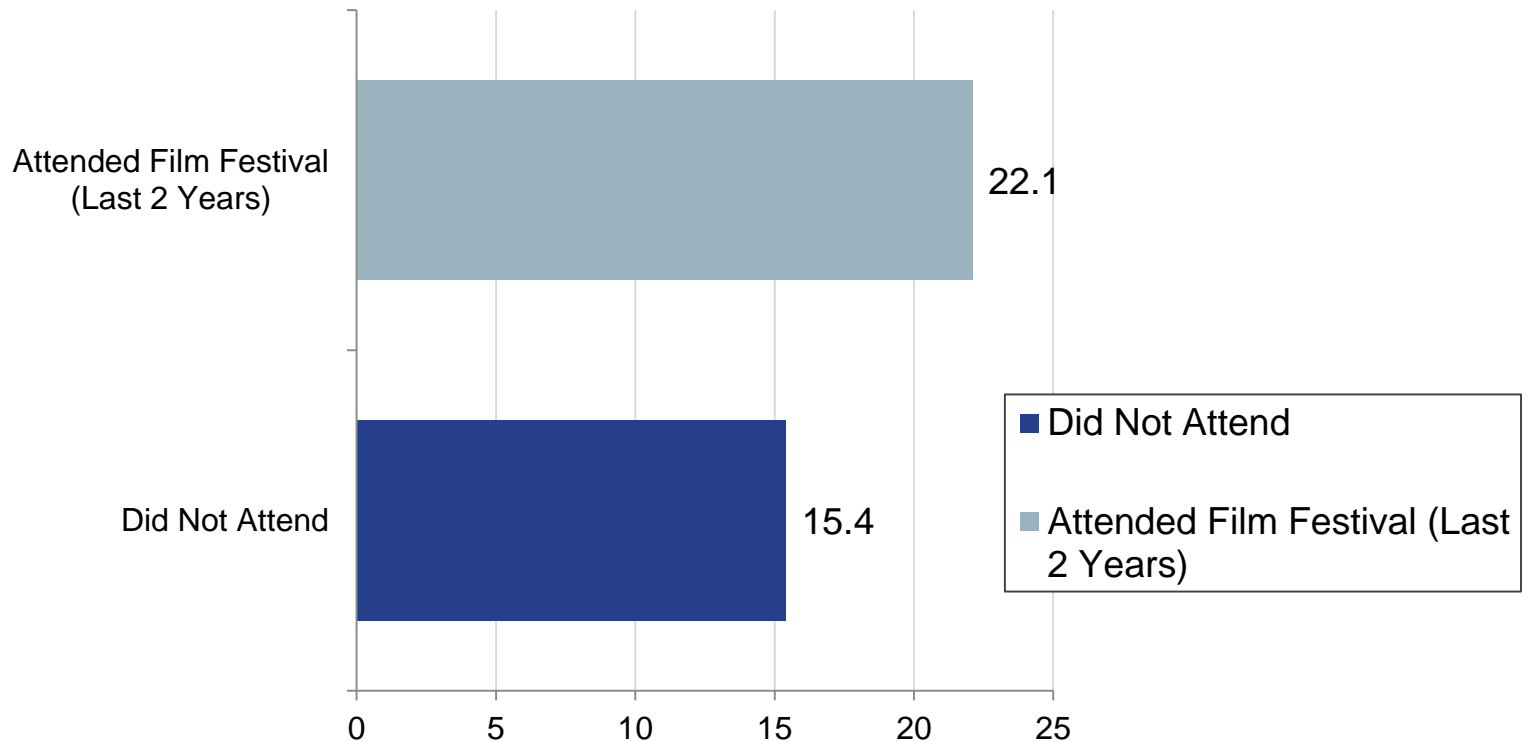
In the past 2 years, which of the following film festivals have you attended? (select all that apply)



Film Festival Attendees and Annual Ticket Purchases

- Those who attend film festivals purchase more tickets to movies – this is true across every profile group (Art House Loyalists, Movie Junkies, etc.
- This is important regardless of which is causing the other result
 - o Promoting, supporting and hosting film festivals may broaden the tastes of audiences
 - o It also may connect with an established core art house audience

Movies Per Year at Sponsoring Organization



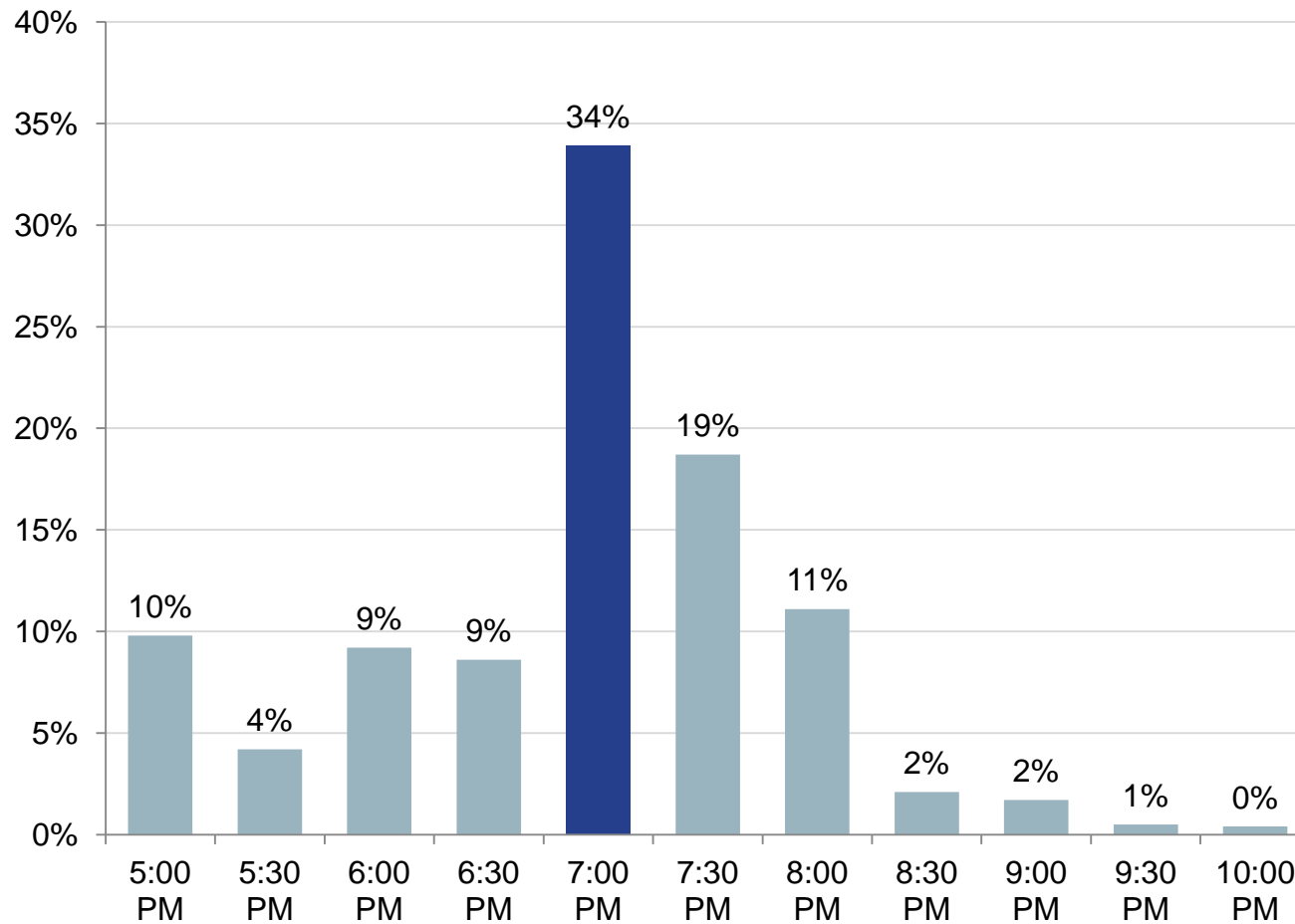
2. Content & Format



Ideal Start Times

- In general, 7:30 is the ideal start time for an evening movie

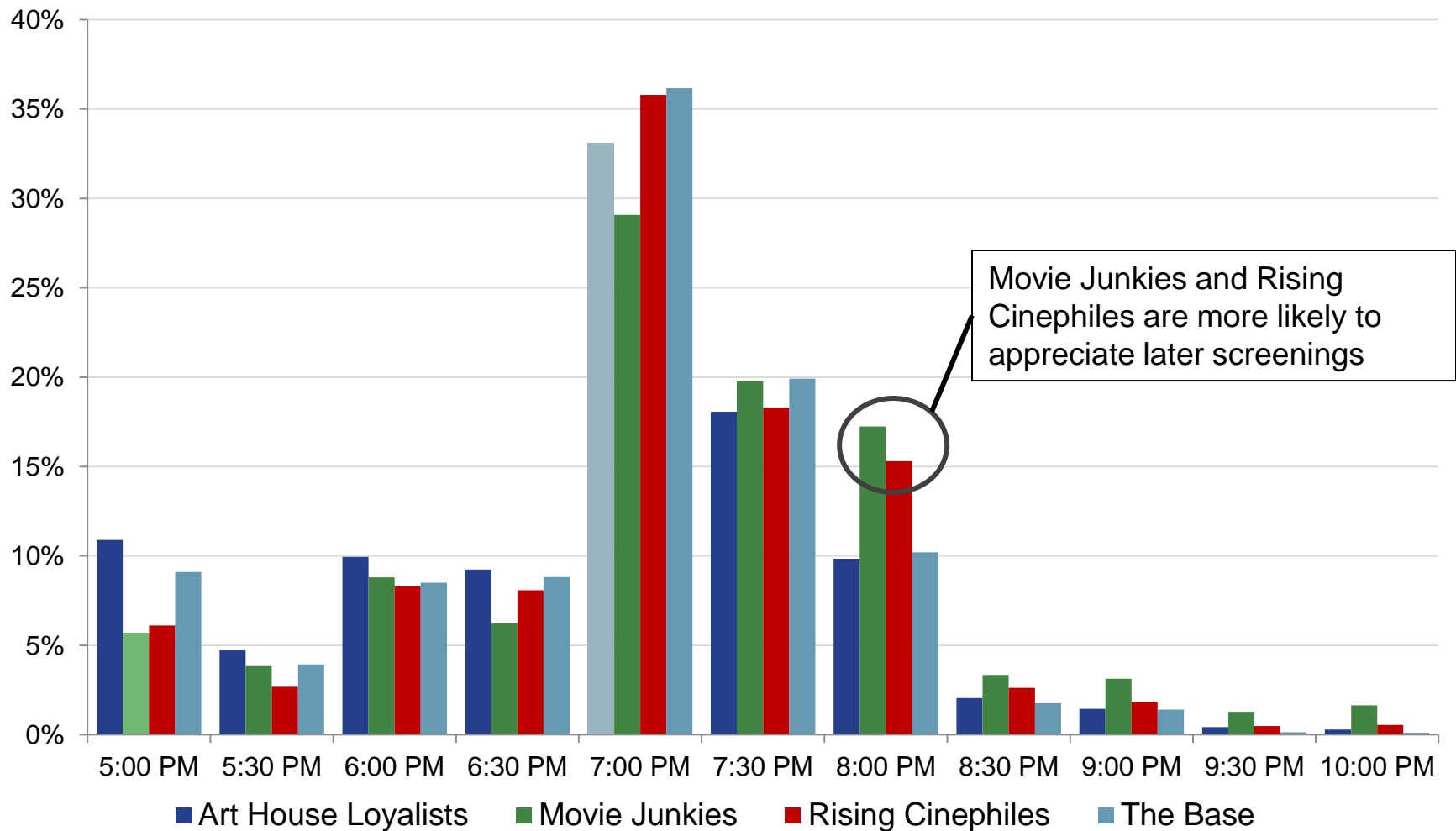
What is your ideal movie start time for an evening movie?



Ideal Start Times, by Audience Profile

- In general, 7:30 is the ideal start time for an evening movie

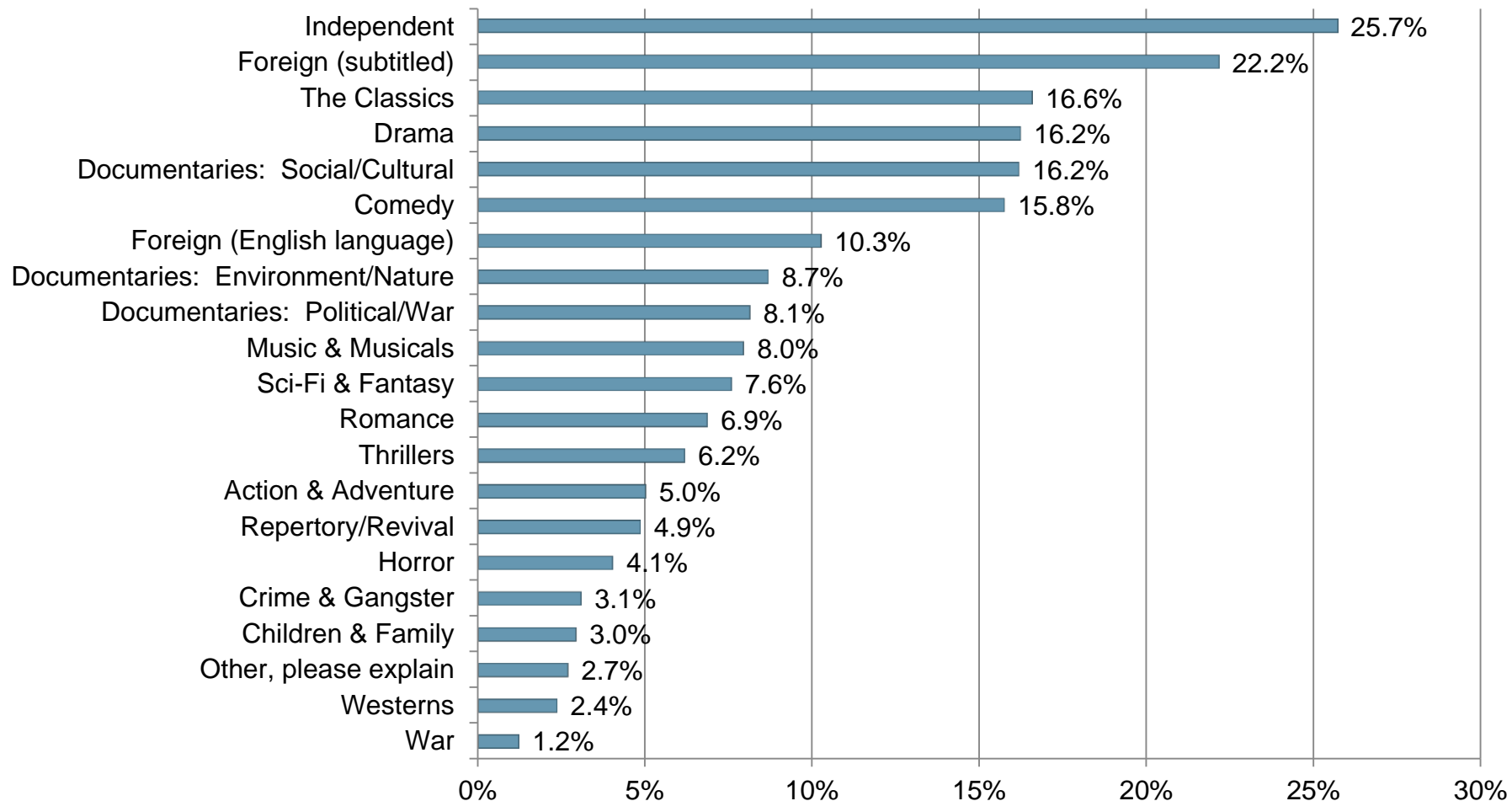
What is your ideal movie start time for an evening movie?



Requests for Additional Programming

- Patrons overall 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

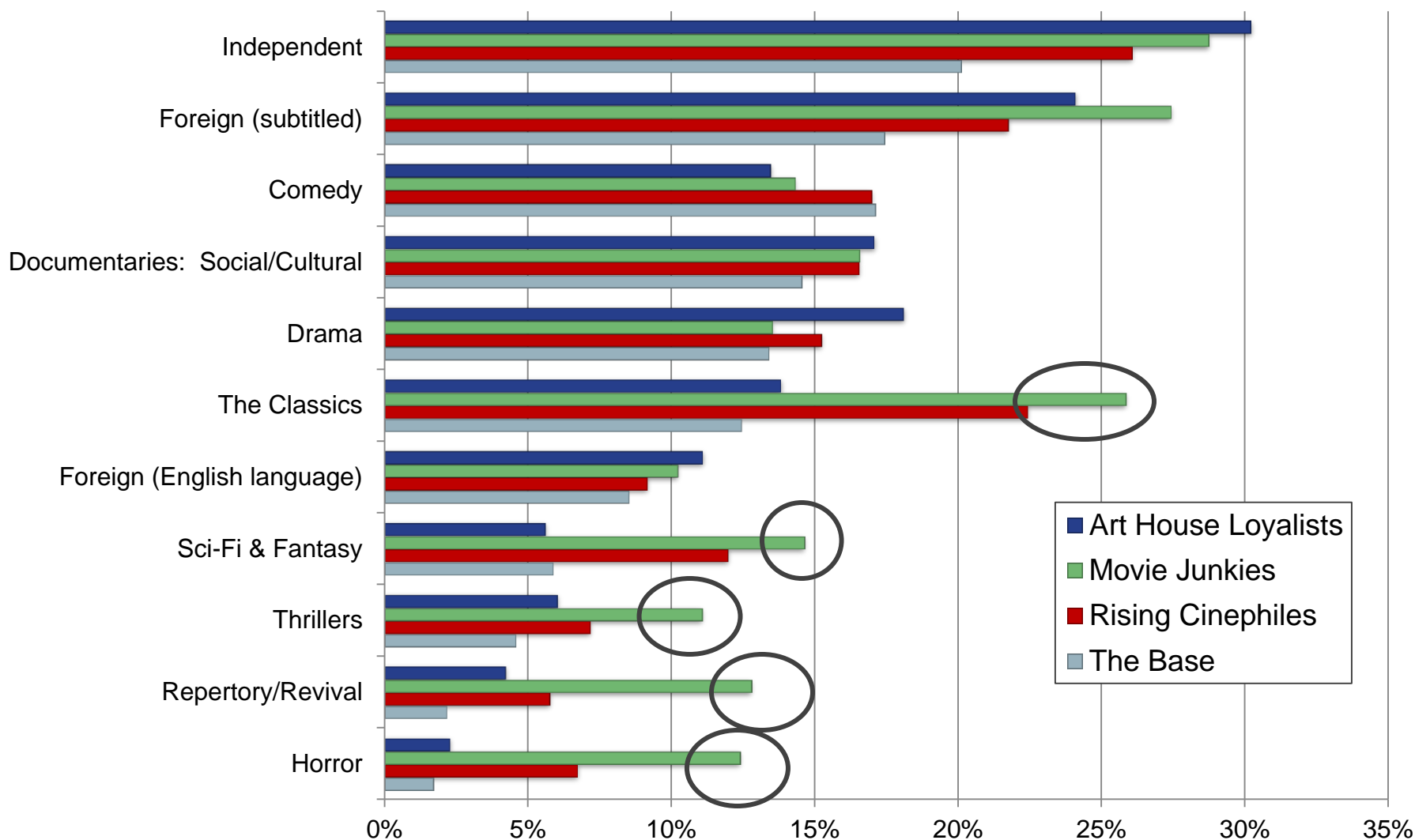
Of these types or genres, which would you like to see more often at [SPONSORING ORGANIZATION]?



Requests for Additional Programming (By Profile)

- Some genres are relatively more in demand by Movie Junkies and rising cinephiles; these include Horror, Thrillers, Sci-Fi, The Classics and Repertory/Revival

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



Key Movies of 2016

“Which movie have you seen at [PIPED: THE SPONSORING ORGANIZATION] in the past year that:

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



These were strictly open-ended questions in which hundreds of responses were written in. These represent merely the “Top 3” in each category.

TOP 3 MOST ENTERTAINING/ENJOYABLE FILMS

3...

CAPTAIN FANTASTIC



2...

A MAN CALLED OVE



1

HUNT FOR THE WILDERPEOPLE



TOP 3 FILMS THAT LEFT THE GREATEST LASTING IMPRESSION ON VIEWERS

3...

THE LOBSTER



2...

DENIAL



1

MOONLIGHT



FINALLY, THE TOP 3 FILMS THAT
MADE PATRONS APPRECIATE
THEIR ART HOUSE THEATER

3...

DENIAL



2...

A MAN CALLED OVE



1

MOONLIGHT



The State of Movie Formats

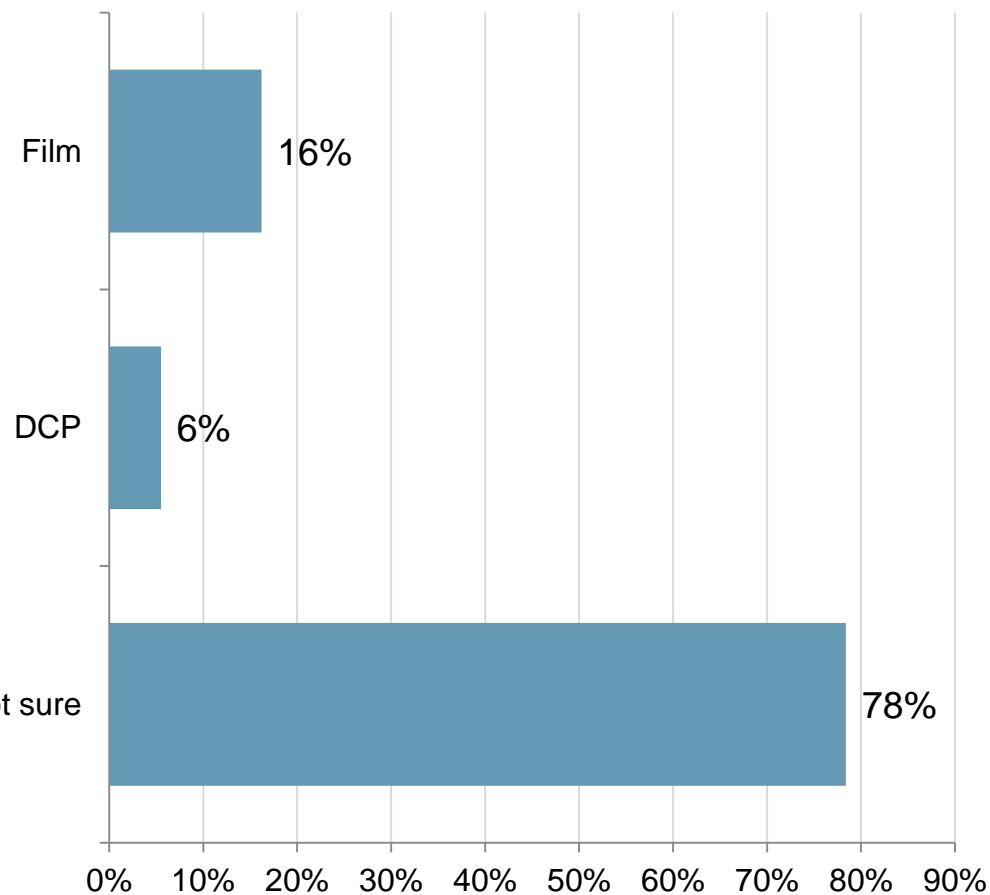
- Patrons were given the following prompt regarding the formats used to screen movies:
 - *Film* – the traditional analogue format, available most commonly in 16 mm, 35 mm or 70 mm format
 - *DCP* – the most common digital format used today



Movie Formatting Preferences

- The majority of respondents have no preference or are unsure of which format they view in a movie theater

In general, do you have a preference for which format you watch in the movie theater?



"Film seems stronger, more genuine -- DCP feels like turning on my TV at home. I don't like it."

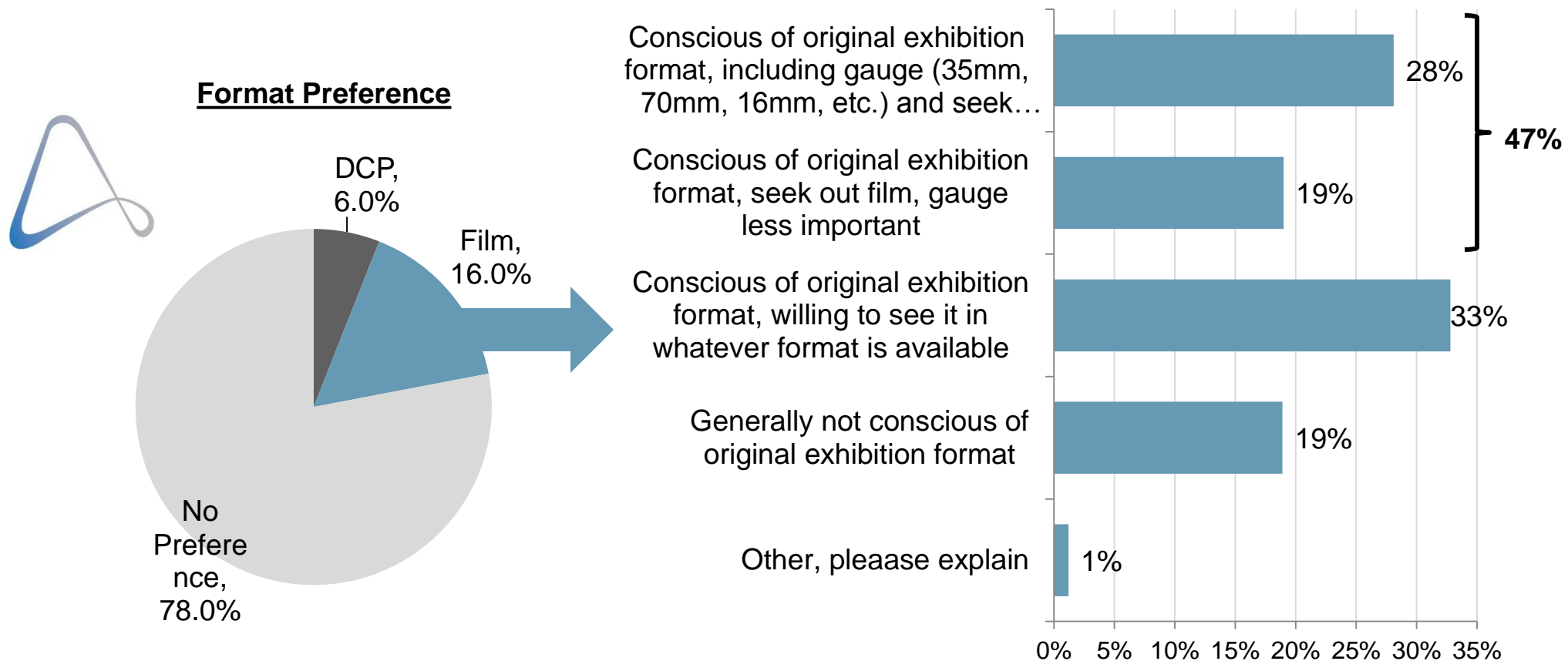
"It is thrilling to see it in the actual film it was intended to be shown with"

"I am generally NOT conscious of a film's original format, but like to see films in their original formats whenever possible -- advertising this is critical"

Movie Formatting Preferences

- Among those who prefer film, about half (47%) seek out screenings in film
- This represents about 8% of the total audience
- In separate analysis, we found that only 1% of those with a preference format would refuse to see films in the less-favored format

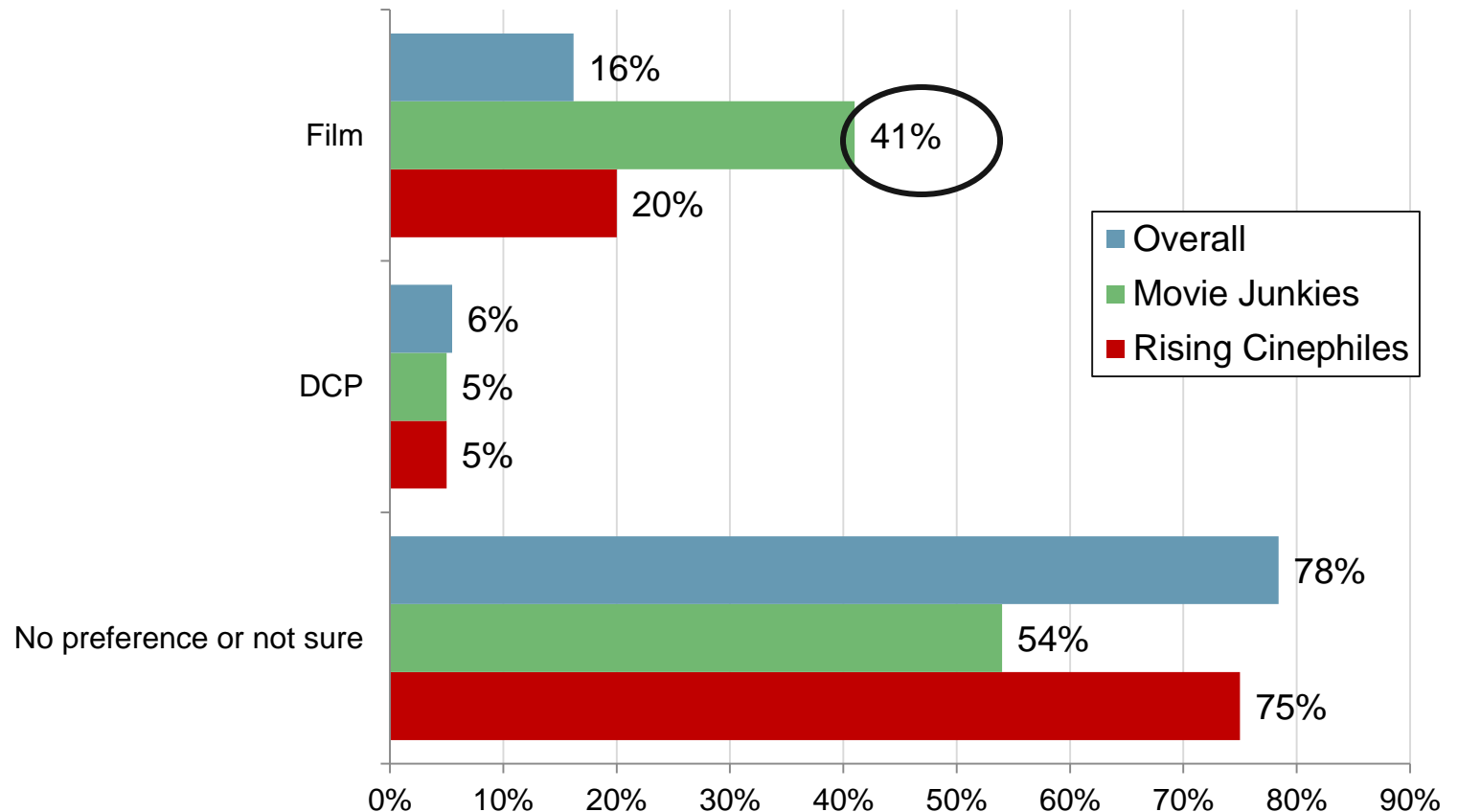
How does the format in which a film was originally shown affect your decision of which screenings to see?



Movie Formatting Preferences

- Movie Junkies (who see the most films and frequent multiple venues) are the most likely to favor film, followed by Rising Cinephiles

In general, do you have a preference for which format you watch in the movie theater?



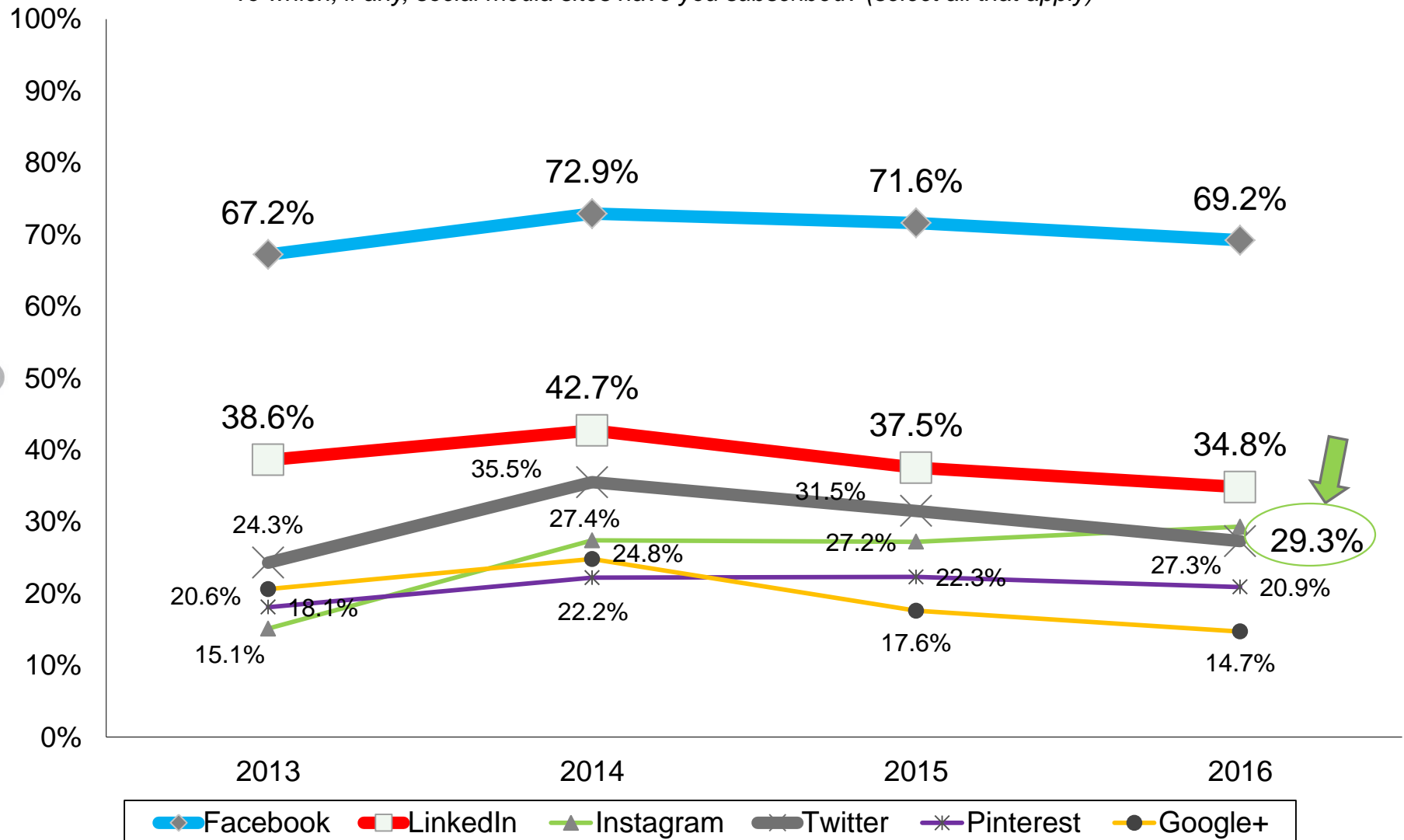
3. *Communications*



Social Media Usage: 2013-2016

- Overall social media participation has remained relatively flat
- Though Facebook and LinkedIn remain the most popular, the percentage of respondents who use Instagram has risen 14% over three years

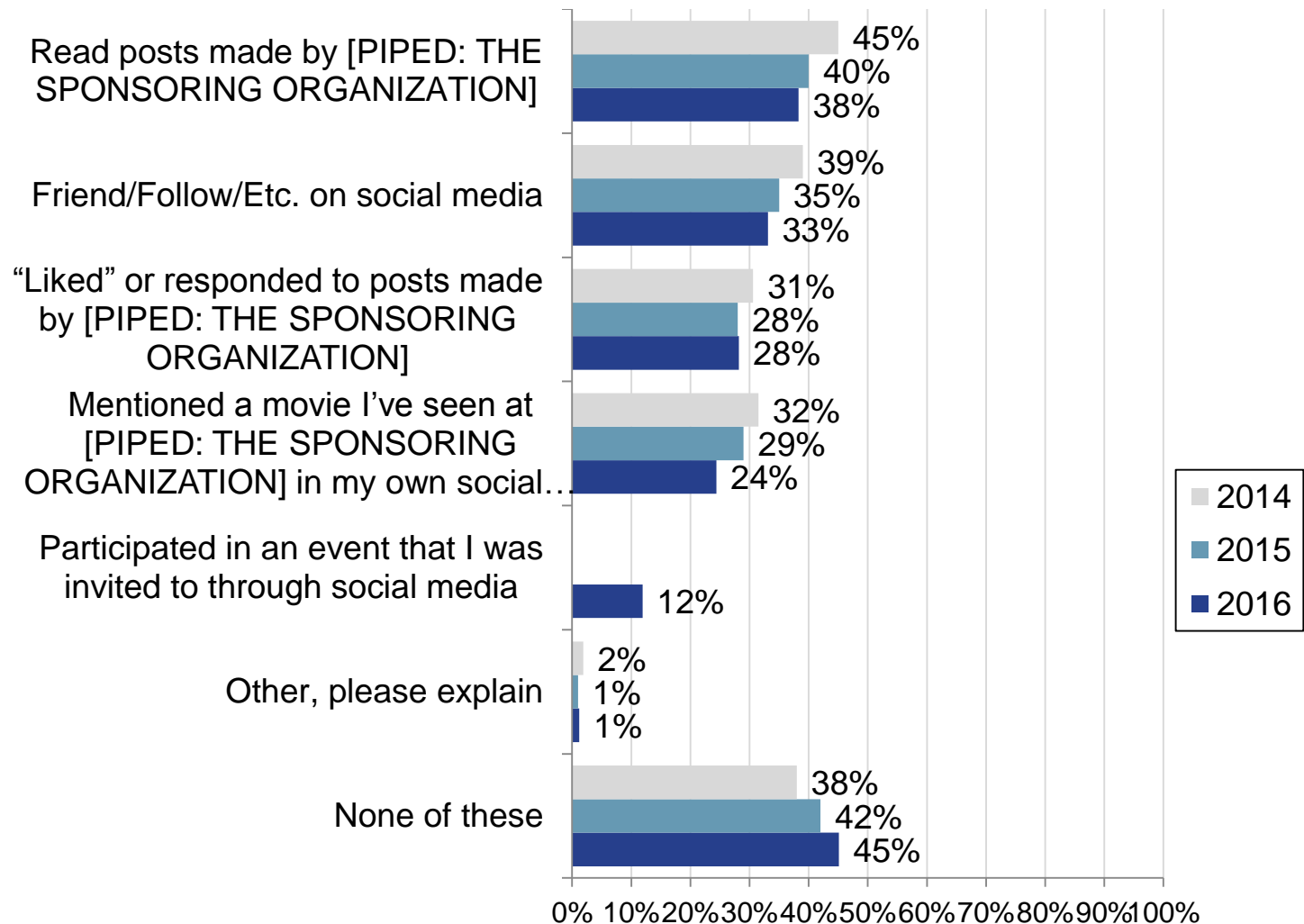
To which, if any, social media sites have you subscribed? (select all that apply)



Social Media in General

- While participation in social media remains strong, art houses (and others) are not seeing an increase in social media engagement in social media
- Most interactions have declined slightly since 2014

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



Learning About New Movies

- Compared to 2014, patrons learn about movies in very similar ways, though there has been a distinct increase in email newsletters and print reviews

How do you typically learn about which movies you might be interested in seeing away from home (in theaters, at festivals, etc.)? (select all that apply)

	2013	Change (3%+)	2016
Trailers or previews seen in theaters	57%	—	55%
Emails or newsletters from theaters, film festivals or film organizations	42%	↑	49%
Reviews (in print)	42%	↑	47%
My friends	48%	—	47%
Reviews (online)*	34%	↑	39%
Internet browsing in general	27%	↑	30%
Theater/Festival/Organization websites	31%	↓	26%

* Rotten Tomatoes, Fandango, IMDB, New York Times, Metacritic, Flixster, YouTube

Learning About New Movies, continued

- A quarter of respondents in 2016 report say they now use printed materials (such as guides), newspaper and magazine ads, and social media posts from theaters to learn about what's coming to town

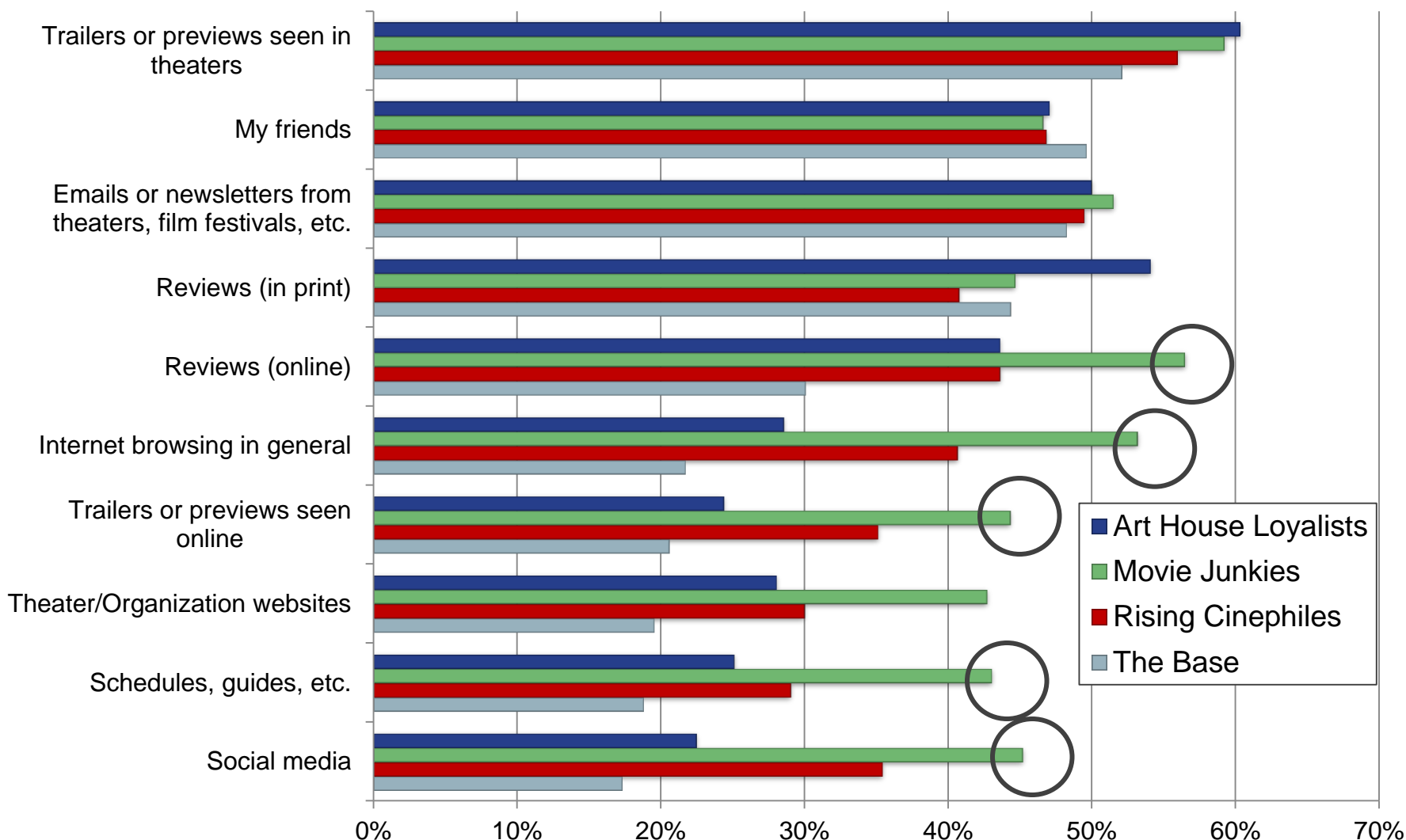
	2013	Change	2016
Trailers or previews seen online	n/a	n/a	26%
Posters, schedules, guides or other printed materials	18%	↑	25%
Newspaper/Magazine ads	22%	↑	25%
Social media posts from theaters, film festivals or film organizations	16%	↑	24%
Television ads or trailers	34%	↓	22%
My family	18%	—	17%
Reviews (on television)	n/a	n/a	11%
Online movie ticketing sites	7%	↑	8%



Requests for Additional Programming (By Profile)

- These are the ten communications vehicles that reach at least 40% of a key profile
- A strong digital presence helps to reach the movie junkies, but so do printed schedules, guides and posters

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



Preferred Forms and Frequency of Communication

- Once again the weekly email is the the favored communications medium for most theater news and information

Preferred Medium

Rank	Email	Web site	Social	Handout	Reg. mail	Signs
News and information about the theater/organization	80%	40%	17%	13%	12%	8%
New film announcements	85%	40%	19%	14%	11%	13%
Special events and programs	87%	39%	19%	15%	13%	12%
Upcoming show times	79%	45%	15%	12%	10%	11%

Preferred Frequency

Rank	Daily	Twice a week	Weekly	Twice a month	Monthly	Quarterly	Yearly
News and information about the theater/organization	2%	4%	42%	12%	29%	10%	2%
New film announcements	2%	6%	62%	13%	15%	1%	1%
Special events and programs	2%	5%	51%	14%	24%	3%	1%
Upcoming show times	2%	7%	67%	11%	11%	1%	1%



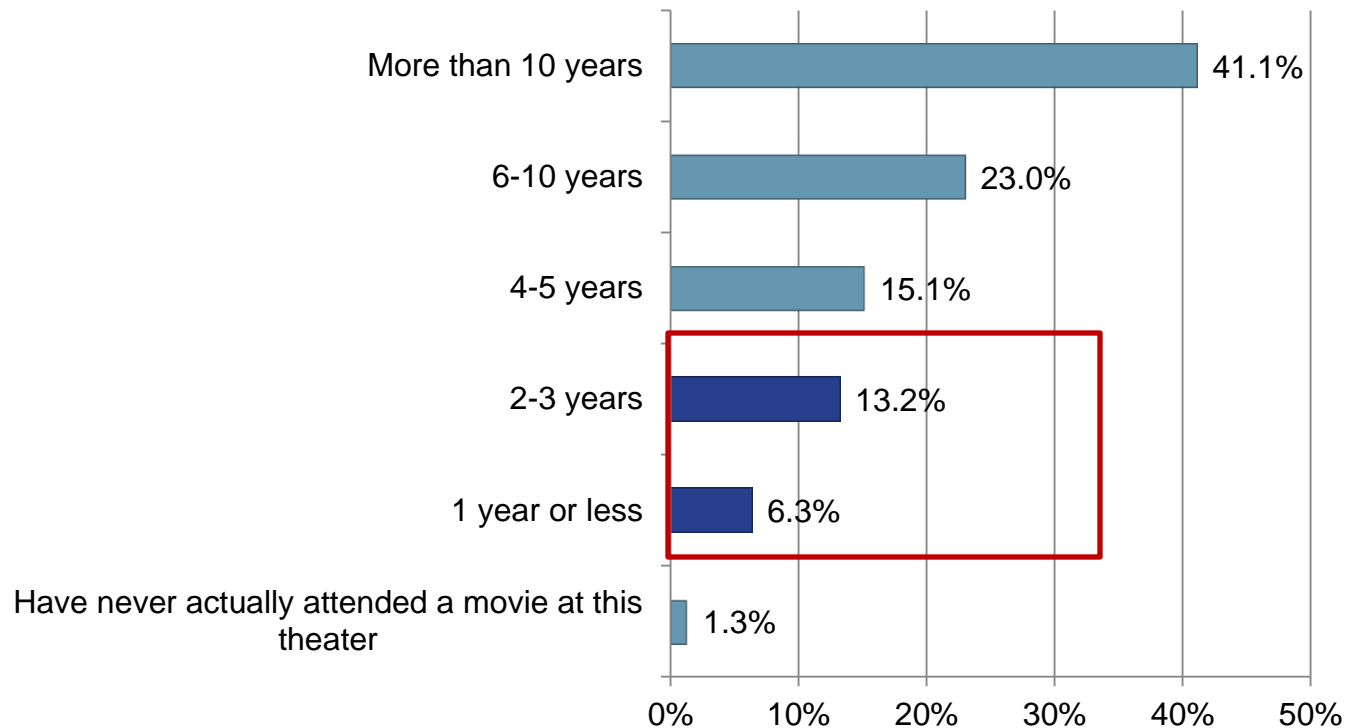
4. The Path to Engagement



The Proportion of Newer Audiences

- Art houses, film festivals and other film organizations continue to attract new audiences
- 19.5% of patrons indicate they have been attending movies at a given organization for 3 years or less

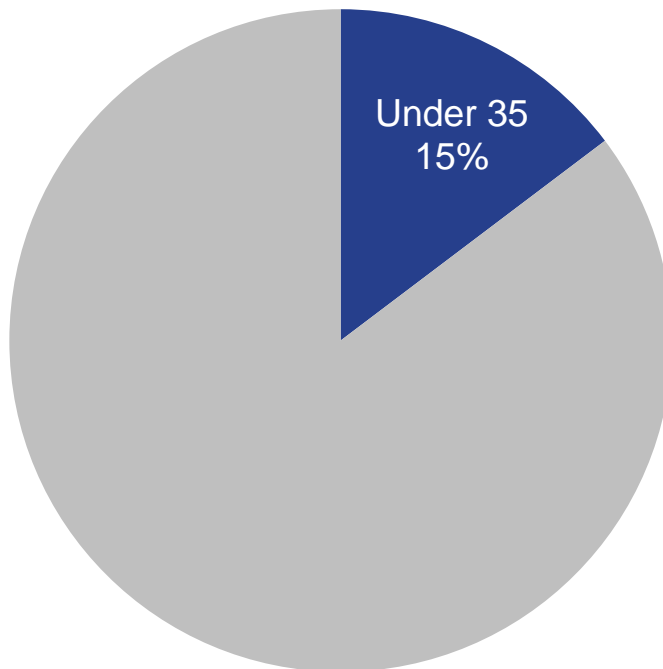
How long have you been attending movies at [SPONSORING ORGANIZATION]?



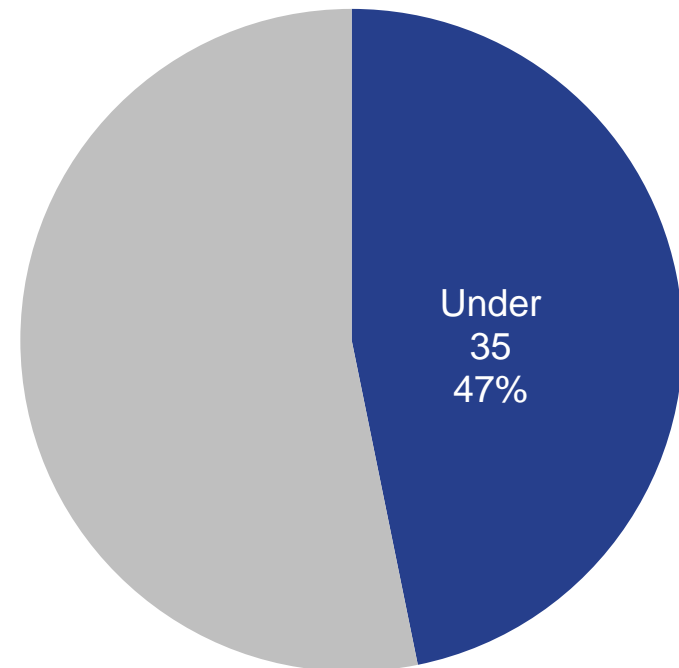
Newer Audiences Are Younger

- Newer audiences are skewing younger
- The art house community appears to be effective at winning over younger audiences

**% of Overall Audience
Under 35**



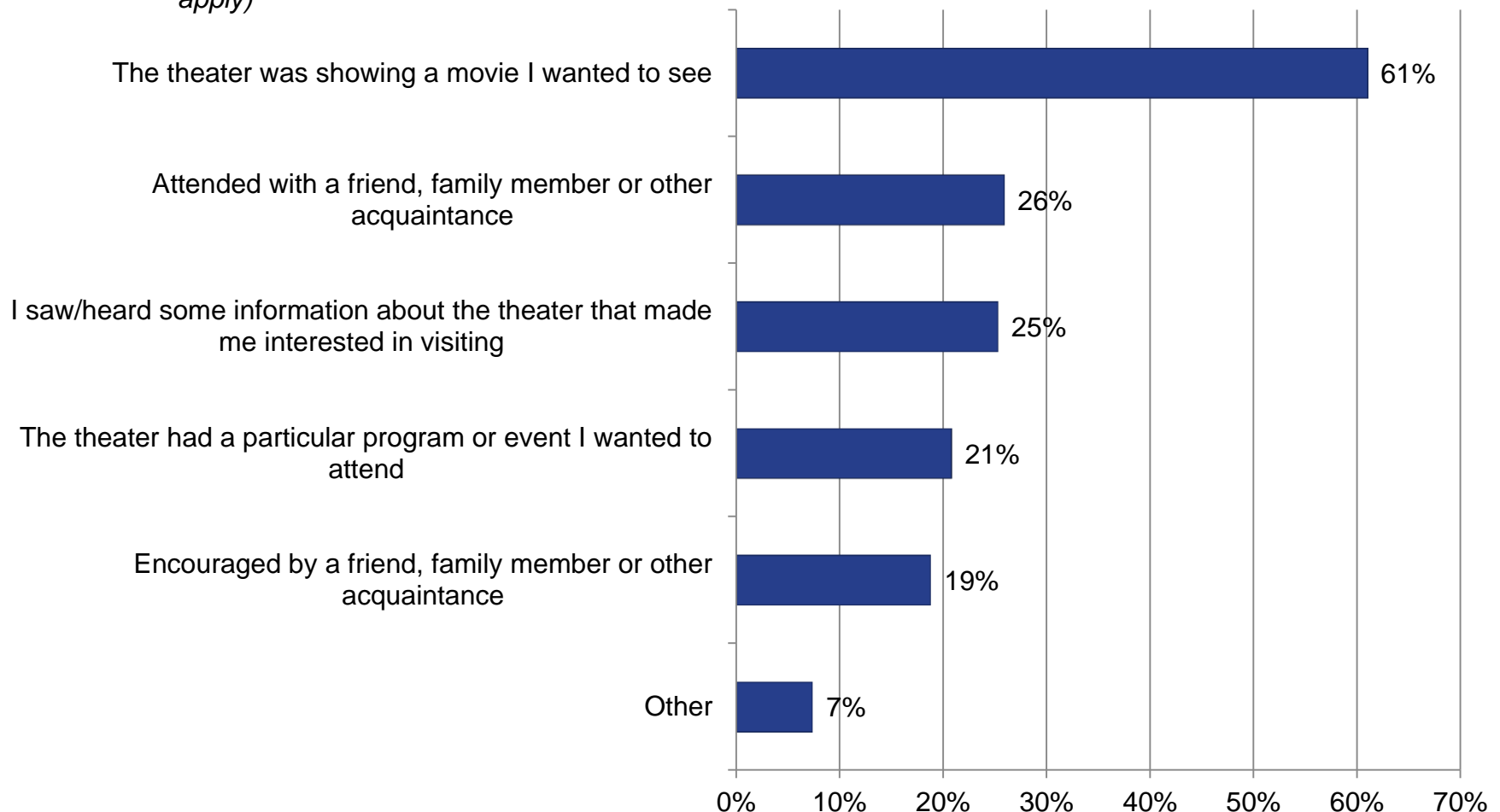
**% of Recent Attendees
(3 yrs or less) Under 35**



Attracting New Audiences

- Specific movies continue to be 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 ORGANIZATION] (select all that apply)



Audience Experience: Solid Performance

- Of 21 metrics related to the audience experience, these top 10 are areas where art houses most meet expectations – including quality of movies offered, picture quality and overall customer service

Please rate SPONSORING ORGANIZATION on the following criteria (Top 2 Box – Excellent or Very Good)

Rank	Site	Overall
1	Quality of movies offered	89.4%
2	Picture quality	85.9%
3	Customer service of staff/volunteers	85.4%
4	Cleanliness of lobby	84.5%
5	Knowledge of staff/volunteers	84.3%
6	Cleanliness of the theater overall	84.1%
7	Welcoming atmosphere	82.5%
8	Variety of movies offered	81.3%
9	Appearance of staff/volunteers	81.0%
10	Sound quality	80.0%



Audience Experience: Areas of Opportunity

- These “bottom 11” are areas where art houses may have opportunities for improvement – availability of parking is one area that slipped significantly
- Individual theaters are able to react from specific results

Please rate SPONSORING ORGANIZATION on the following criteria (Top 2 Box – Excellent or Very Good)

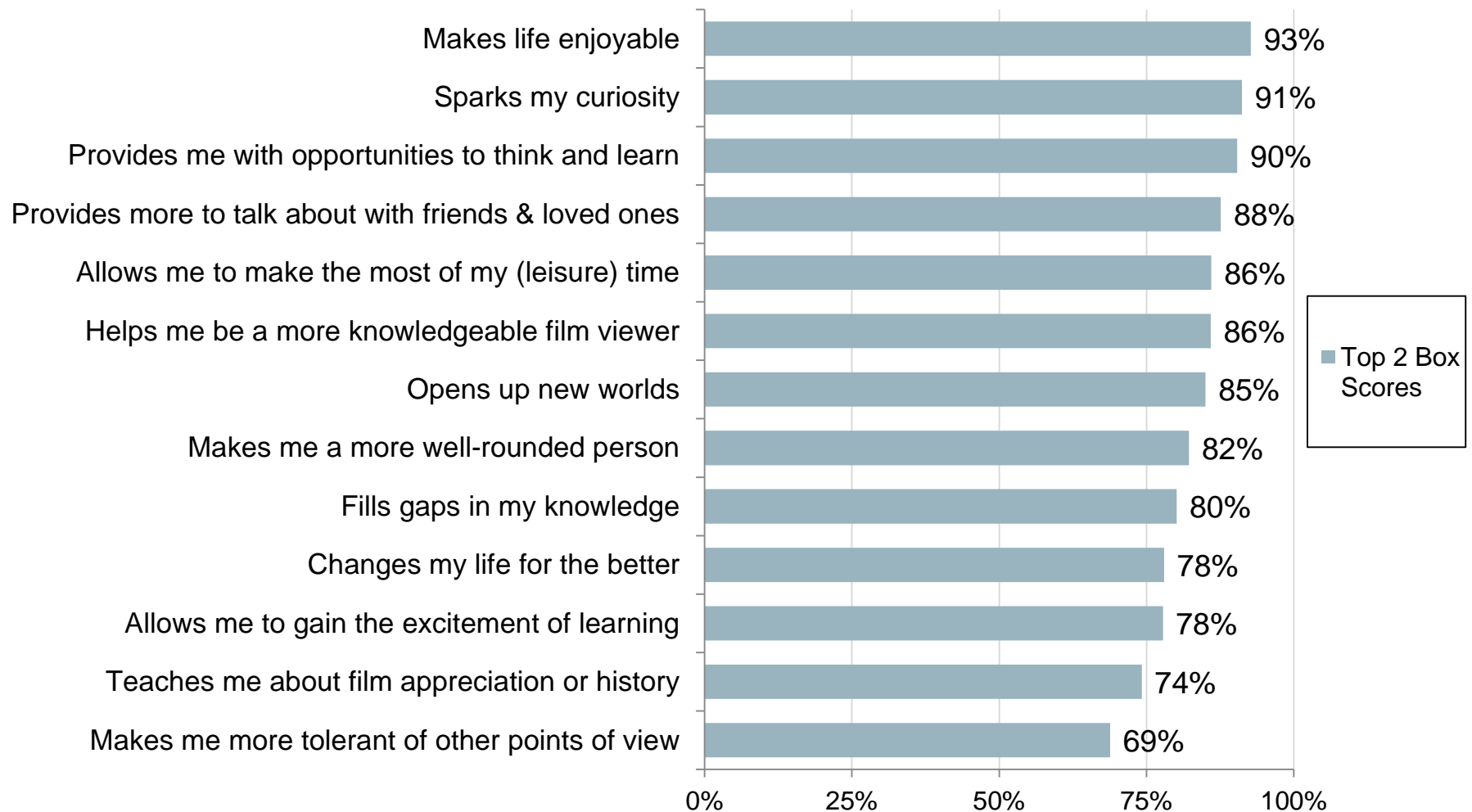
Rank	Site	Overall
11	Cleanliness of bathrooms	79.6%
12	Sound volume	78.1%
13	Fun atmosphere	74.2%
14	Nearby dining options	72.8%
15	Affordability of tickets	72.4%
16	Temperature of the theater	72.3%
17	Screening times	68.7%
18	Variety of concessions options	65.4%
19	Length of movie runs	60.0%
20	Affordability of concessions	59.4%
21	Availability of parking	39.7%



Passion and Engagement

- Art house audiences continue to see their theaters as avenues to fulfillment in many aspects of life

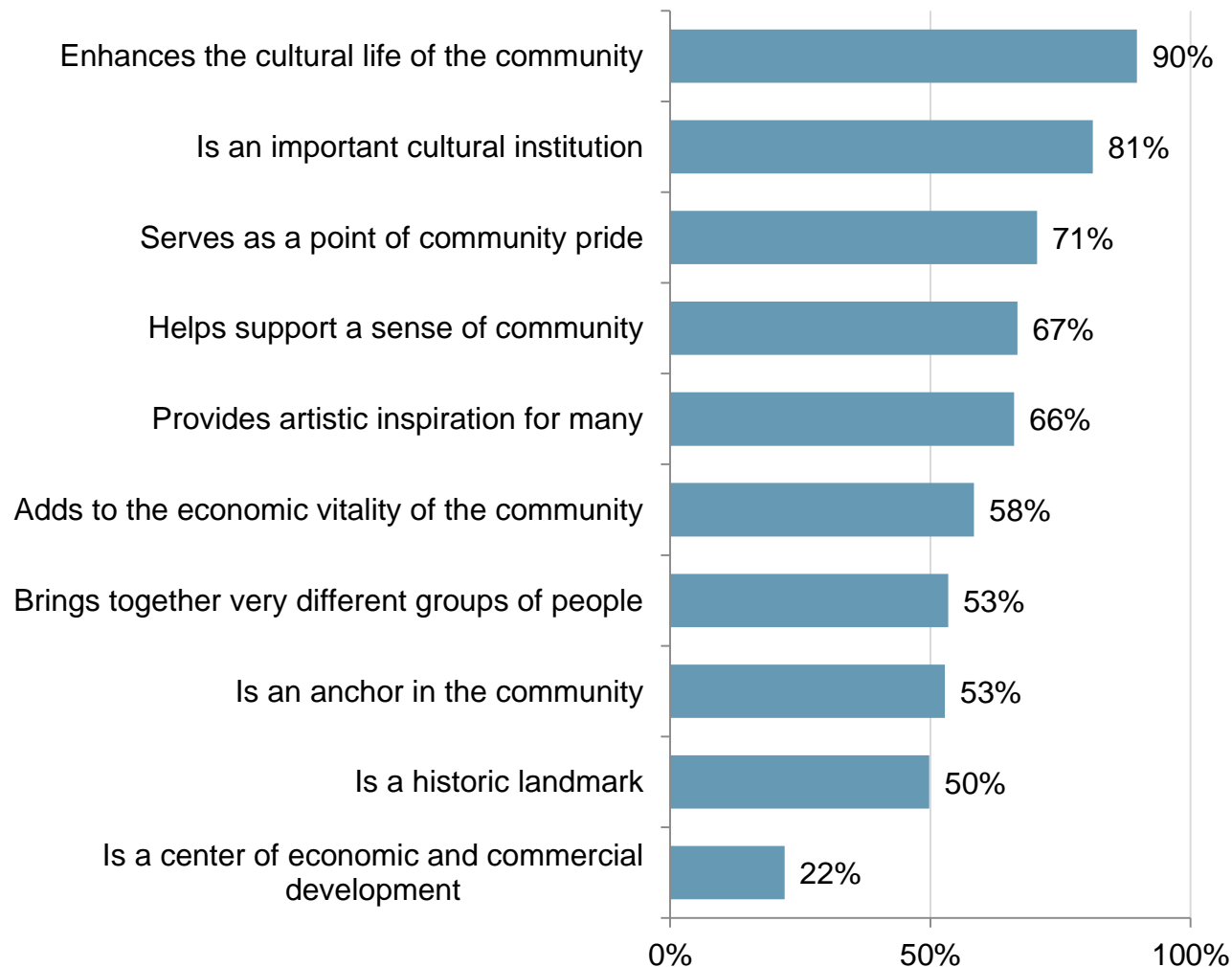
To what extent do you agree with the following statements about SPONSORING ORGANIZATION? (Top 2 Box - Strongly Agree or Somewhat Agree)



Emotional Drivers

- Audiences recognize the cultural importance that art houses have within their communities

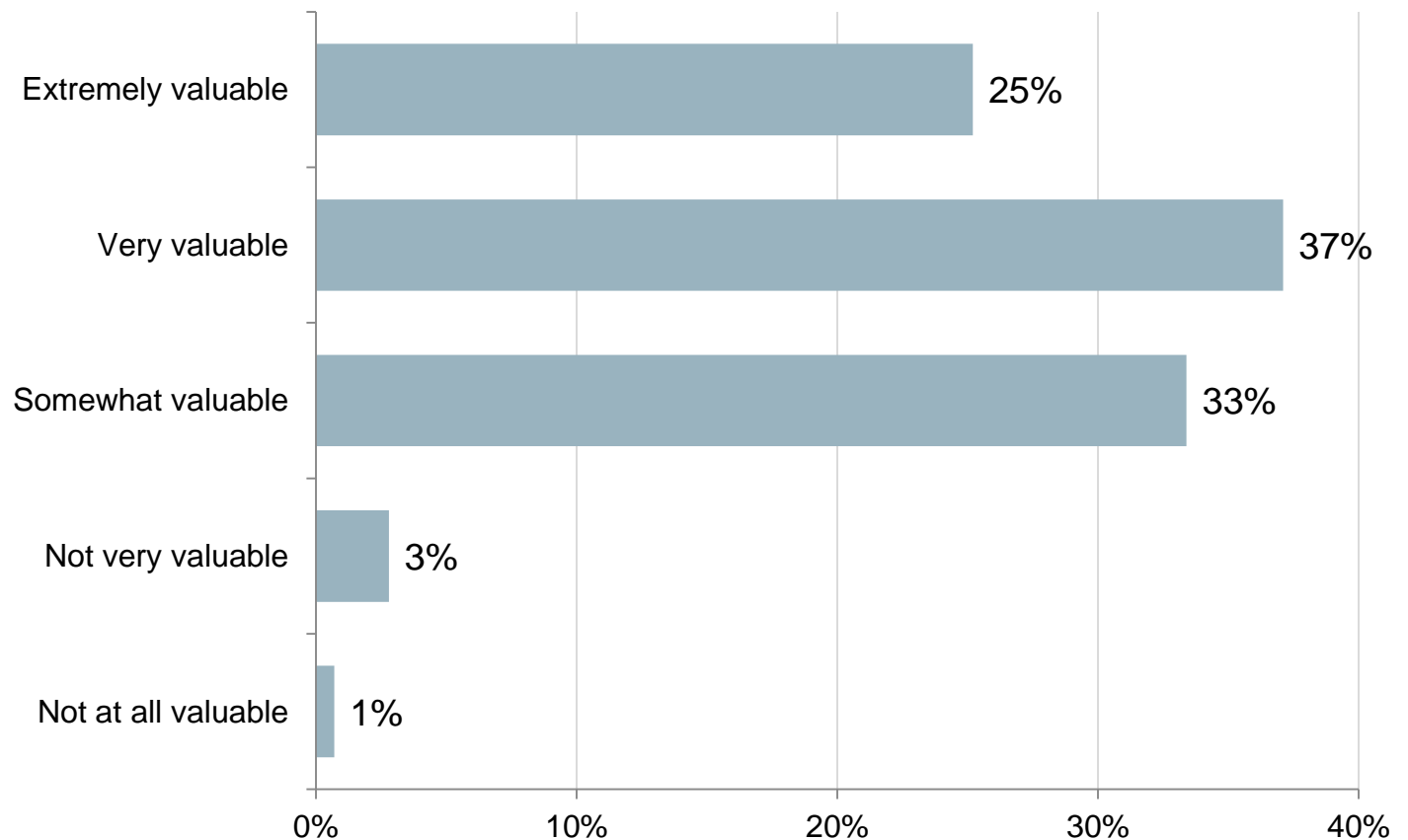
What role would you say [SPONSORING ORGANIZATION] provides to its community? (select all that apply)



Art Houses and Quality of Life

- Over 60% of attendees say their art house theater is “Very” or “Extremely” valuable to their overall quality of life

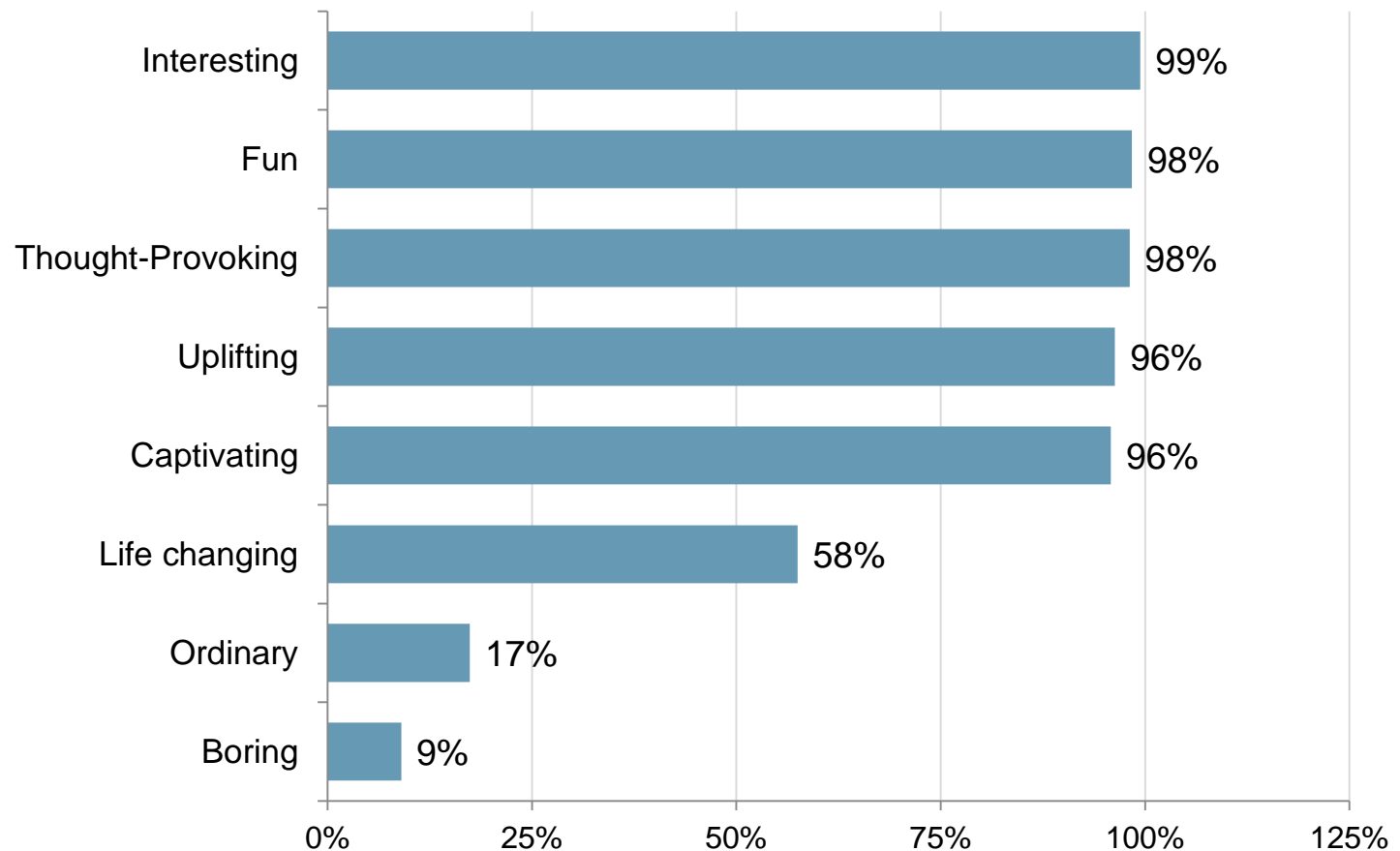
How valuable is [SPONSORING ORGANIZATION] to your overall quality of life?



Personal Impact

- Seeing movies at art houses and other film organizations is typically interesting, thought-provoking and fun
- Since it is almost never ordinary or boring, it is by implication EXTRAORDINARY

In the last 12 months, how often would you say your experience of watching movies at [SPONSORING ORGANIZATION] matches the following terms? (Always, Usually or Sometimes)



Building Audience: Donors with Community in Mind

What caused you to begin providing financial support to this organization? [SPONSORING THEATRE]?

- **Audiences appreciate diverse perspectives**

- *“It shows so many independent, high quality films and represents diverse perspectives. Both are enriching personally and for the community.” – Salt Lake Film Society, Salt Lake City, UT*

- **Patrons understand the impact that art houses have on their communities**

- *“I appreciate having a theatre that provides the high quality of films and special events relatively close to home. I know that I would be missing meaningful experiences if the Cinema Arts Center were to close.” – Cinema Arts Centre, Huntington, NY*
- *“They enrich the community---to read a review in the NYTimes of a movie that’s playing there and be able to go to downtown and see it that same day is a treasure that far too few people here take advantage of...”
FilmScene, Iowa City, IA*

- **It’s more than just a place to see a movie**

- *“I love The Colonial Theatre. I grew up going there. The people are so nice, the theatre looks amazing. It helped Phoenixville rise from the ashes!” – The Colonial Theater, Phoenixville, PA*
- *“It is an essential part of the neighborhood. Brings culture and community and drives economic benefits for local businesses.” – Coolidge Corner Theater, Brookline, MA*



The Colonial Theater, Phoenixville, PA

“Upon deciding whether to move to Bellingham, I searched its proximity to independent movie theaters and that helped me decide this was the type of town I’d want to move to.” – Pickford Film Center, Bellingham, WA



5. Implications




Executive Summary of Findings

1. The Art House movie community is strong. Organizations continue to do a good job of cultivating new audiences and delivering excellent, transcendent experiences.
2. There are a number of profiles among the art house audience:
 - a) Art House Loyalists are passionate supporters of the institution
 - b) Movie Junkies are former film students and aspiring directors who care about the cinema art
 - c) Rising Cinephiles care about film but they are less knowledgeable than the Movie Junkies; they seek to broaden their horizons
 - d) The Base are loyal to the art house but are less likely to be frequent moviegoers; they seek a nice time
3. Content primarily drives the decision to attend and return
4. Different films can play different roles for the organization
 - a) Some broaden the audience to reach The Base and beyond
 - b) Some keep the avid moviegoer and patron engaged, and they are critical
5. Film Festivals are related to accelerated film viewership
6. Although screening in digital will not necessarily drive people away, screening in film is a draw to some of the most important audiences
7. Although a variety of print, digital and other communications are necessary to reach all audiences, the weekly email is still primary



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.



Robert Wood Johnson Foundation

Traverse City Film Festival 2016

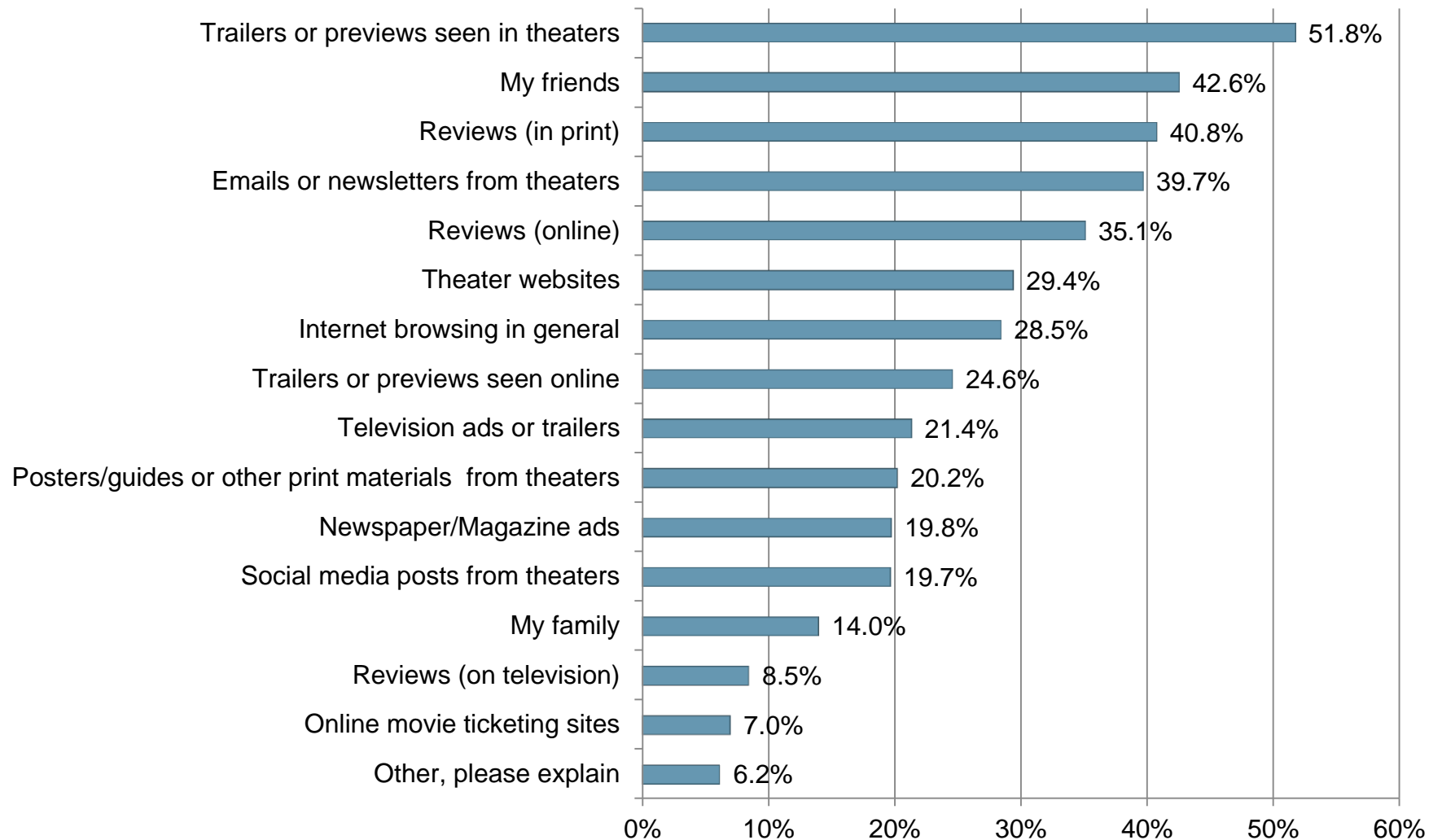


APPENDIX



Sources of Information: Which Movies to See

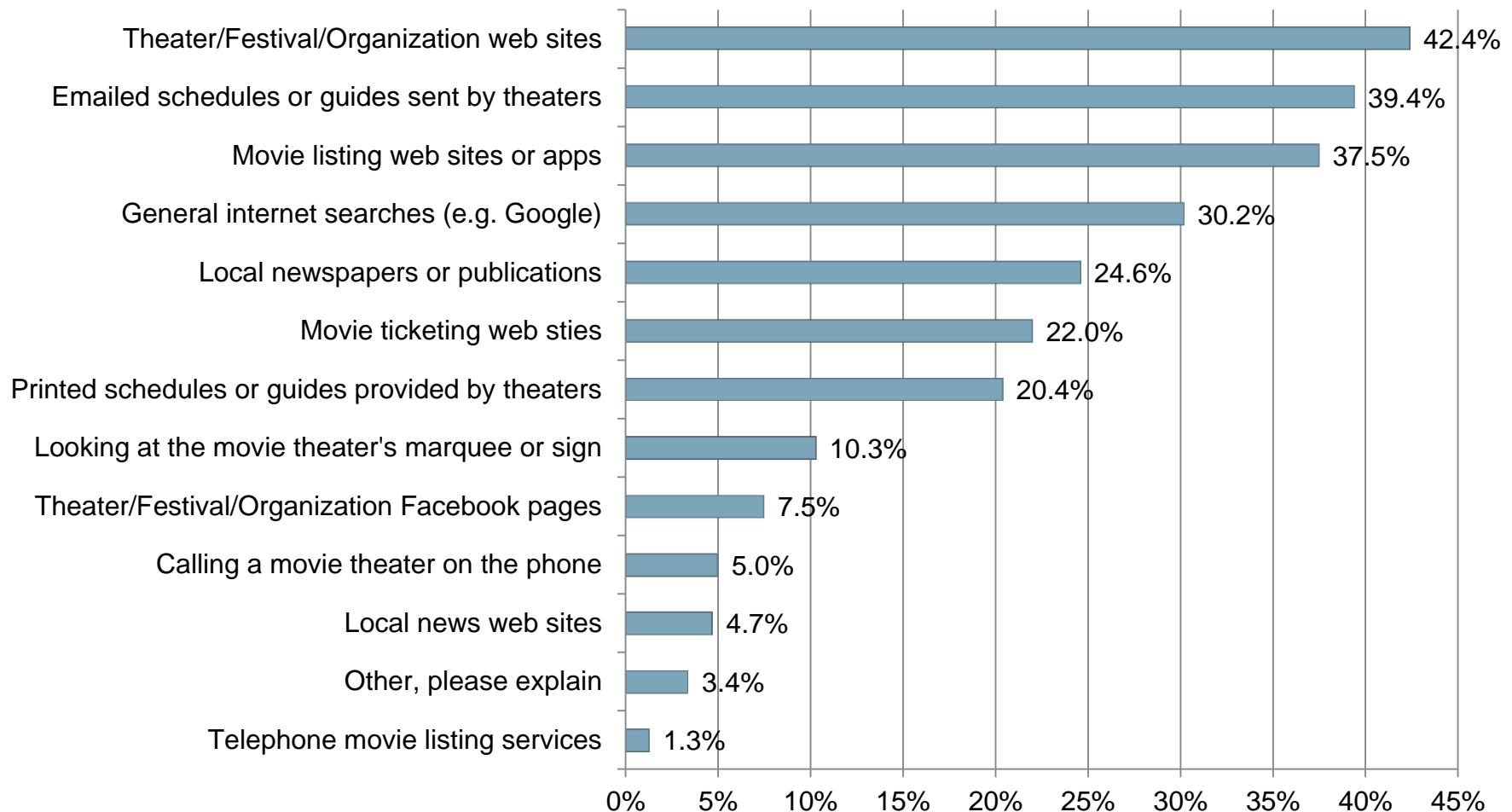
How do you typically learn about which movies you might be interested in seeing in movie theaters? (select all that apply)



Sources of Information: Movie Screenings and Show Times

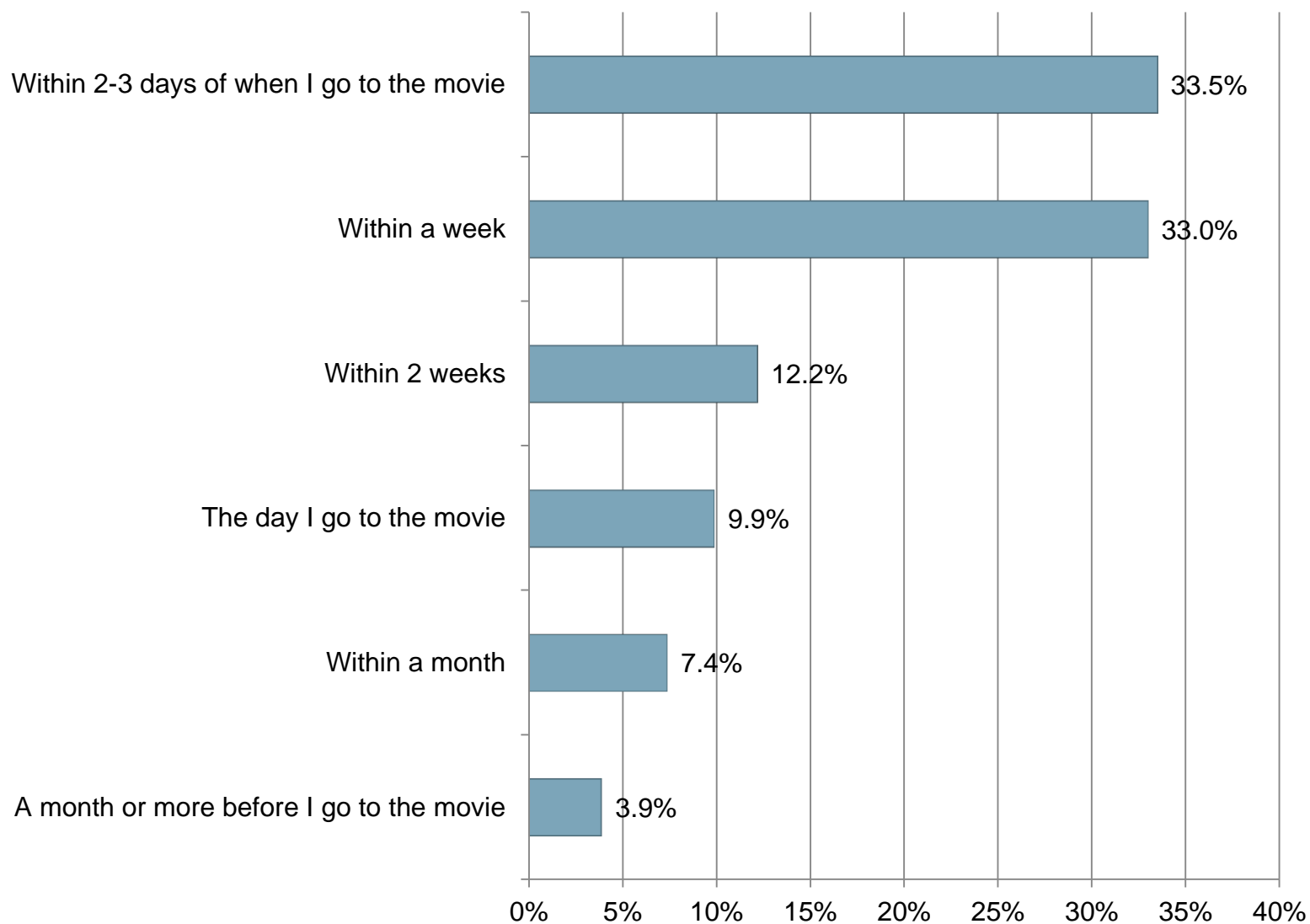
- Theater/Festival/Organization web sites are the top source of movie show times

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



Decision Process

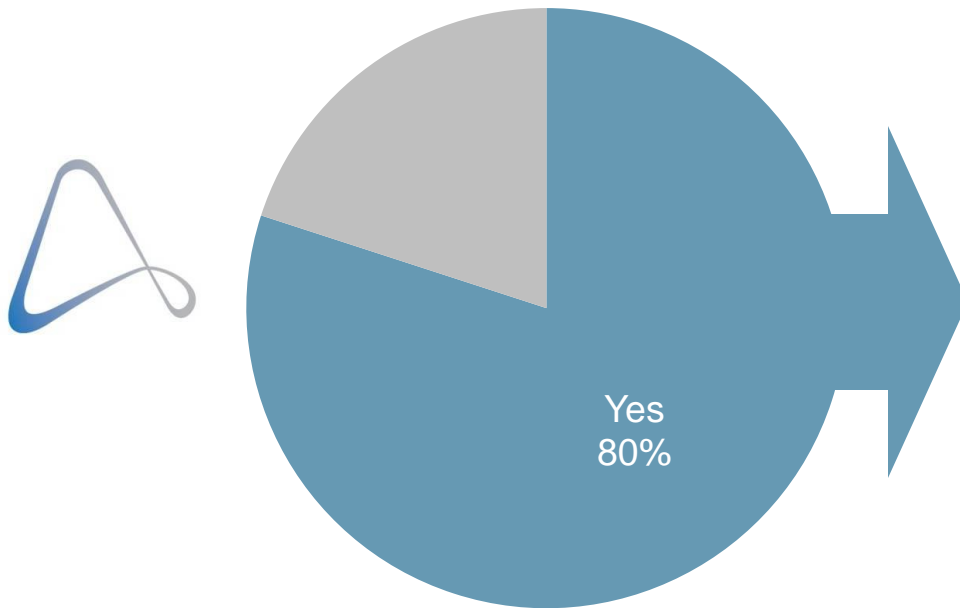
How far in advance do you typically decide to see a particular movie in the theater?



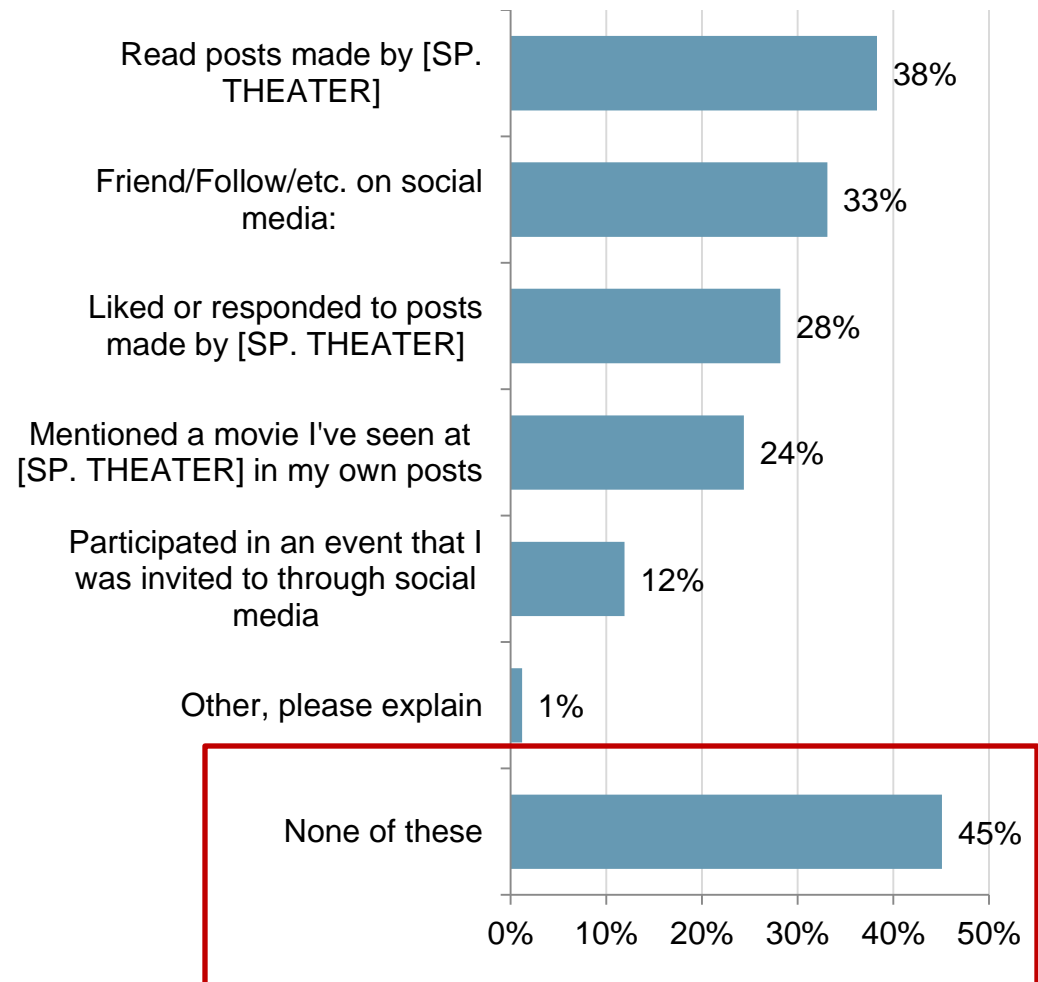
Use of Social Media in General

- Similar to 2015's results, many respondents who participate in social media are not yet interacting with art house theaters through these media

Participate in One or More Social Media



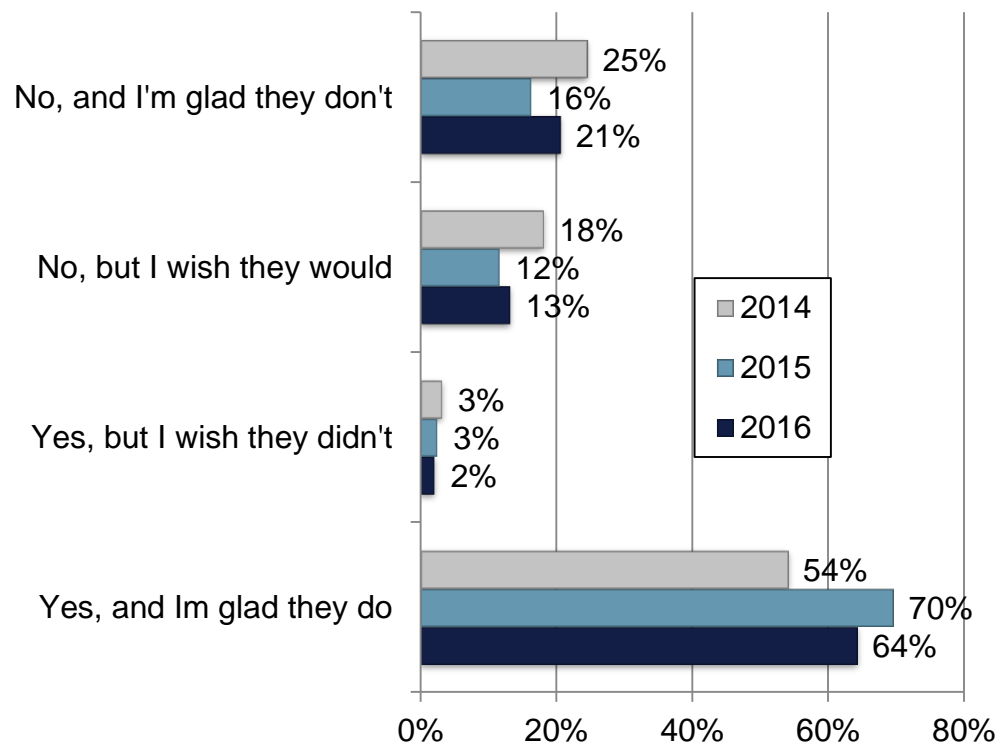
Which, if any, interactions have you had with [SPONSORING ORGANIZATION] on social media?



Alcoholic Beverages

- The attitude towards alcohol in art house theaters has not changed much over the last three years
- Mostly, people are satisfied with their theater's current approach toward this type of offering

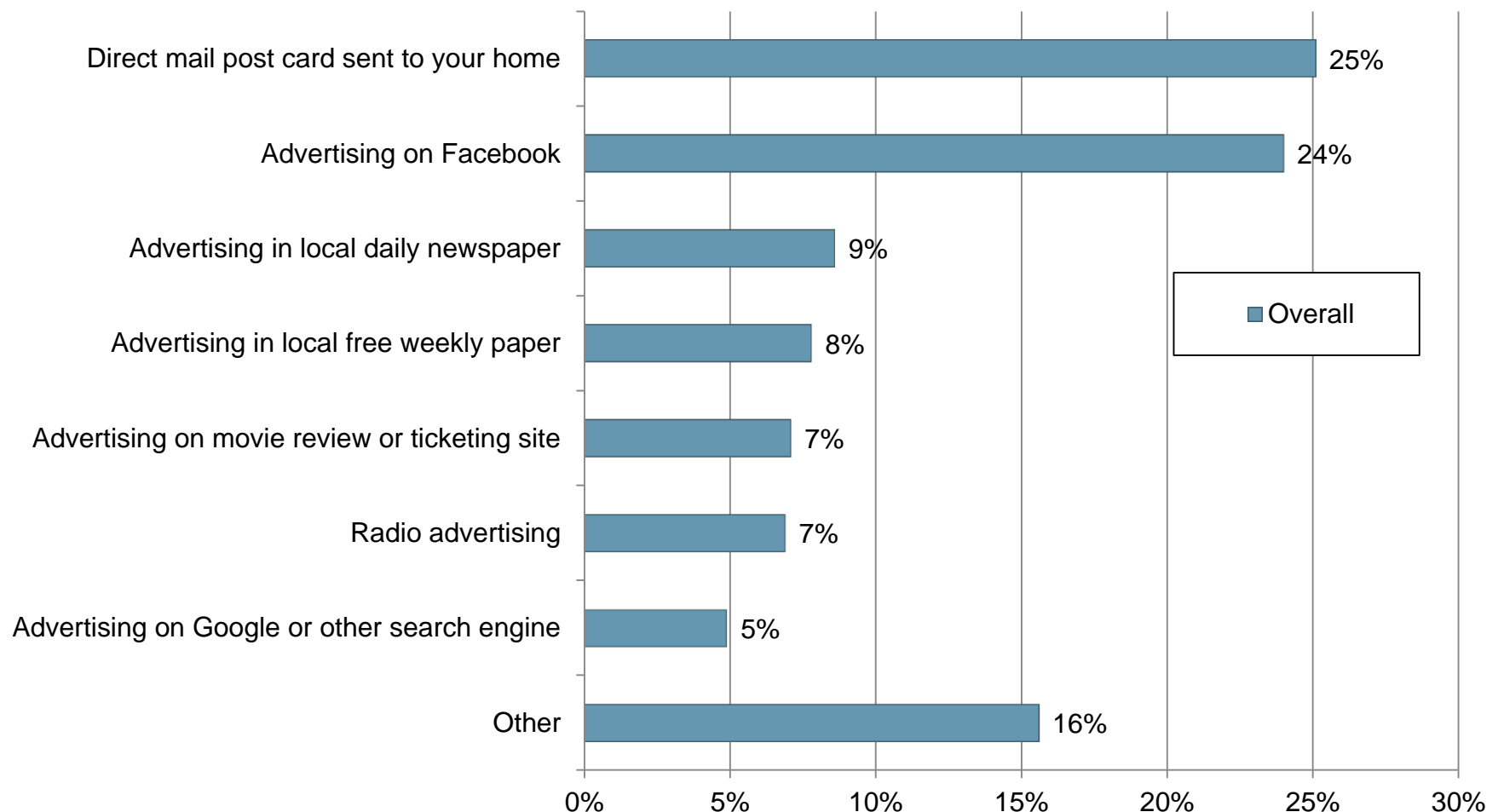
Does [SPONSORING ORGANIZATION] serve alcoholic beverages?



Attracting New Audiences in General: Advertising

- Direct mail continues to be seen as the most effective form of garnering interest from potential new patrons
- Advertising on Facebook is a close second

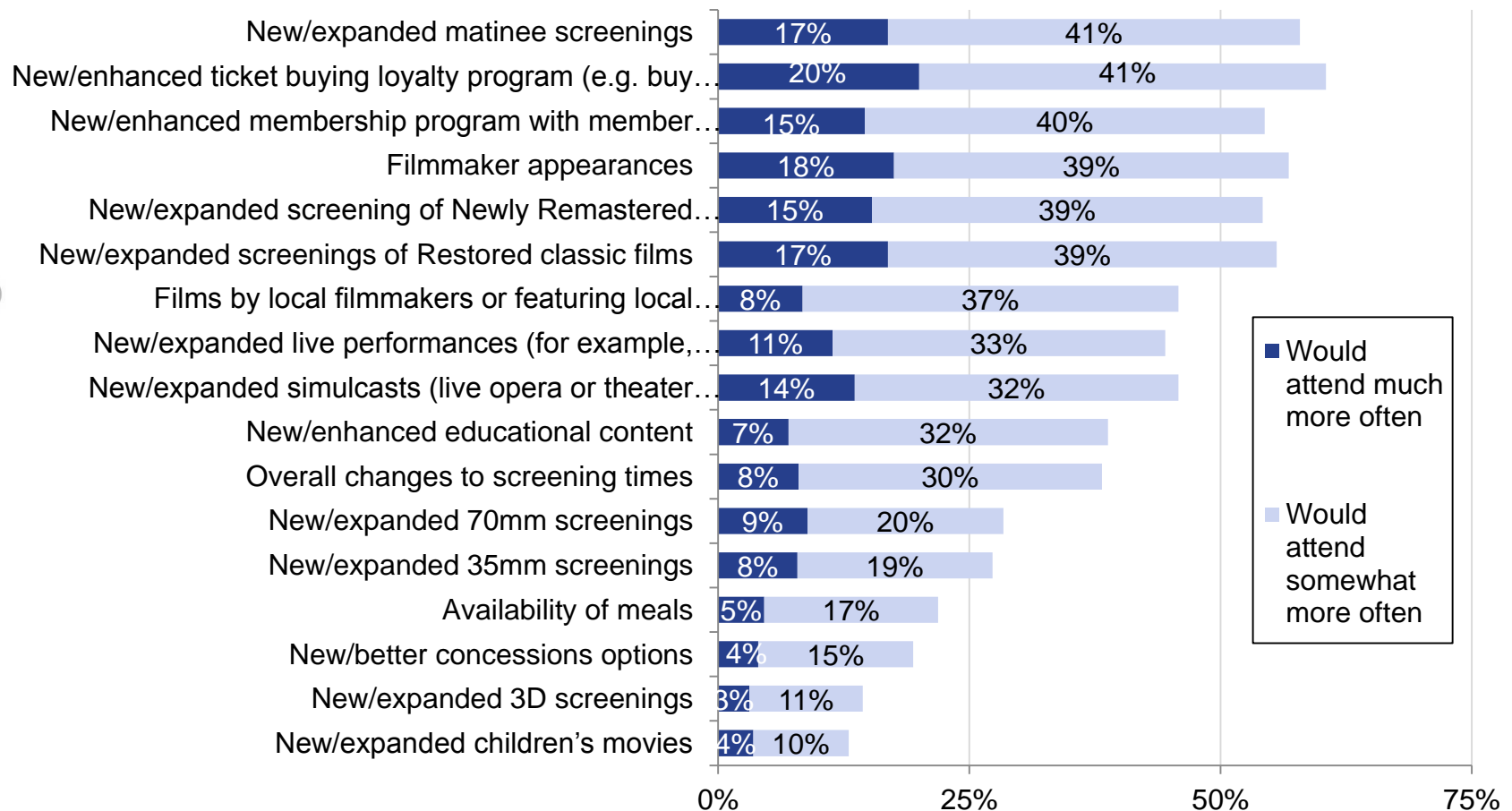
If [SPONSORING ORGANIZATION] did one thing to reach out to someone like you to get them interested in attending a movie, which of these do you think might be most effective? (select one only)



Accelerating Attendance

- Respondents indicated that new/expanded matinee screenings and enhanced incentives for ticket buying loyalty and/or membership programs would cause them to see more movies

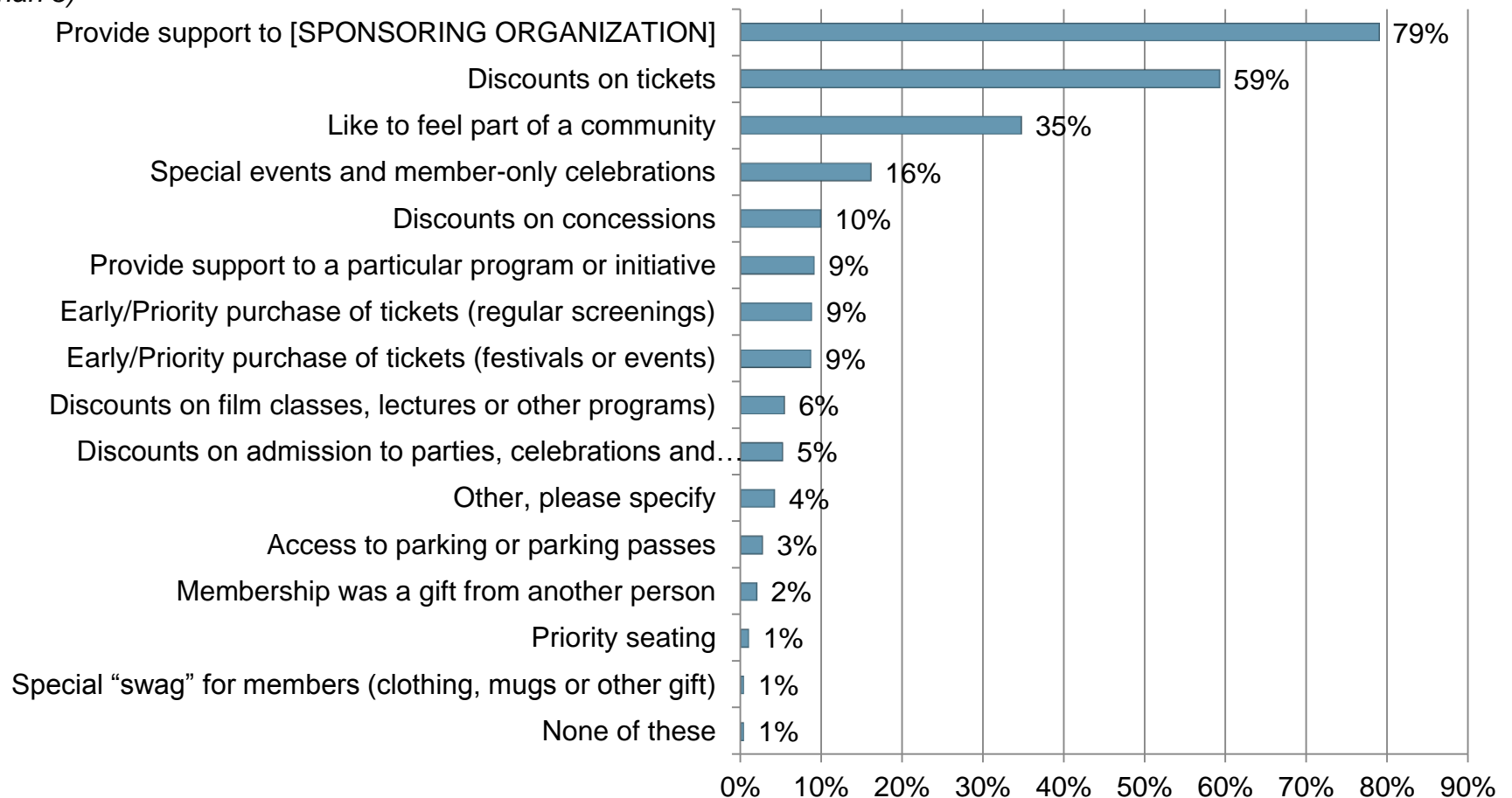
Would any of the following changes cause you to attend [SPONSORING ORGANIZATION] more often?



Top Reasons to be a Member...for the 53% of Respondents Who Are

- Patrons become members, first and foremost, to provide general support to their art house theater

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



Philanthropic Support

- About one in four patrons provides additional financial support to their art house theater

In the past 2 years, have you provided financial support to [PIPED: THE SPONSORING ORGANIZATION], aside from purchasing tickets to see movies there or purchasing a basic level of membership?

