

The logo for ArtHouse Convergence features the word "ARTHOUSE" in a large, orange, sans-serif font. The letter "O" is replaced by a cluster of small, colored dots in shades of orange, yellow, and black. Below "ARTHOUSE", the word "CONVERGENCE" is written in a smaller, black, sans-serif font.

# ARTHOUSE CONVERGENCE

## National Data Surveys

AHC 2018 National Audience Study

January 22, 2019

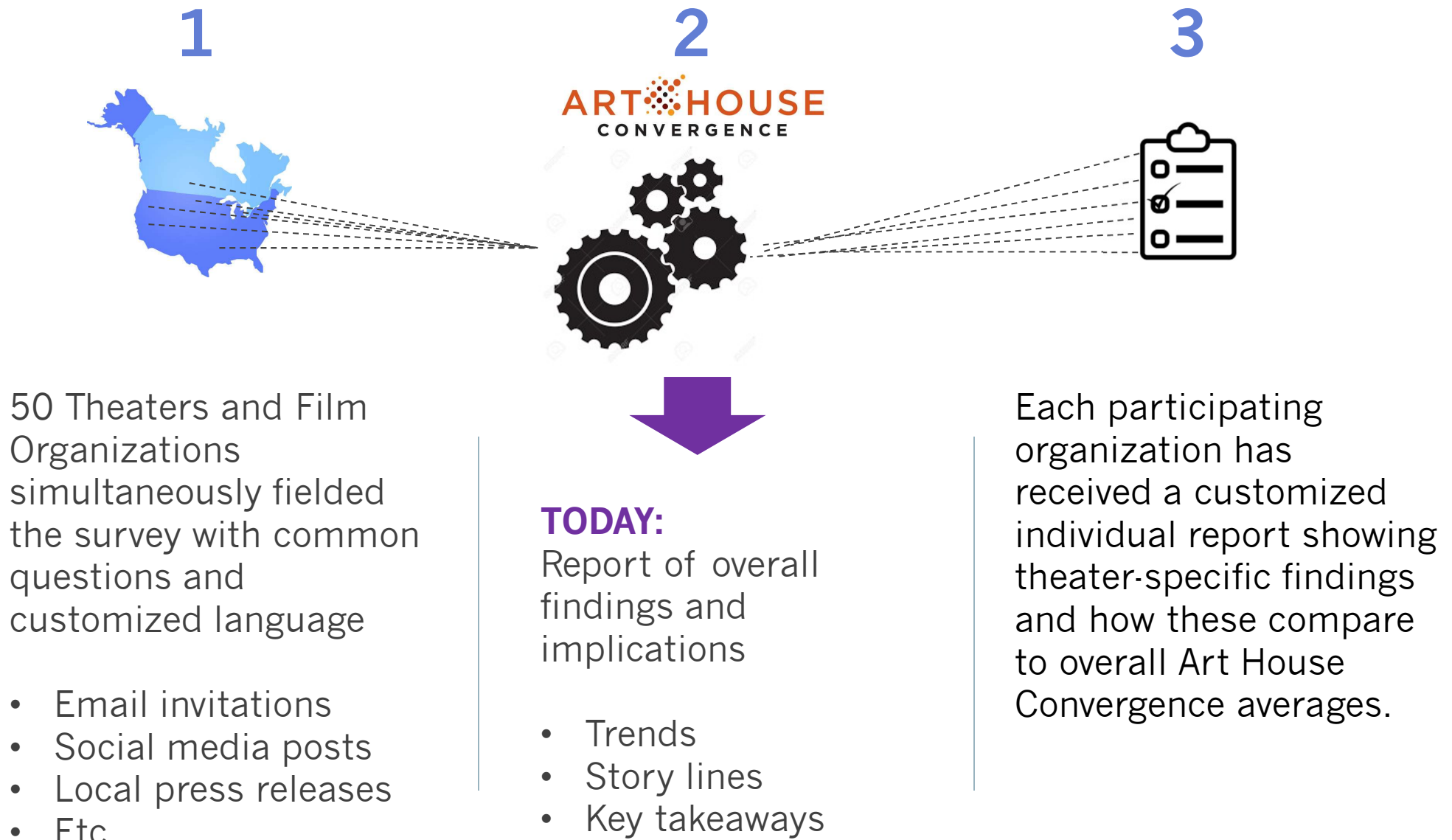
**6<sup>th</sup>** Year of the National Audience Study

**50** Theaters and Film Organizations

**22,500** Theater Patrons

Representing **43** States and Provinces

# Sources and Methods



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## **I. Art Houses Have Tremendous Impact**

## **II. Competing and Collaborating**

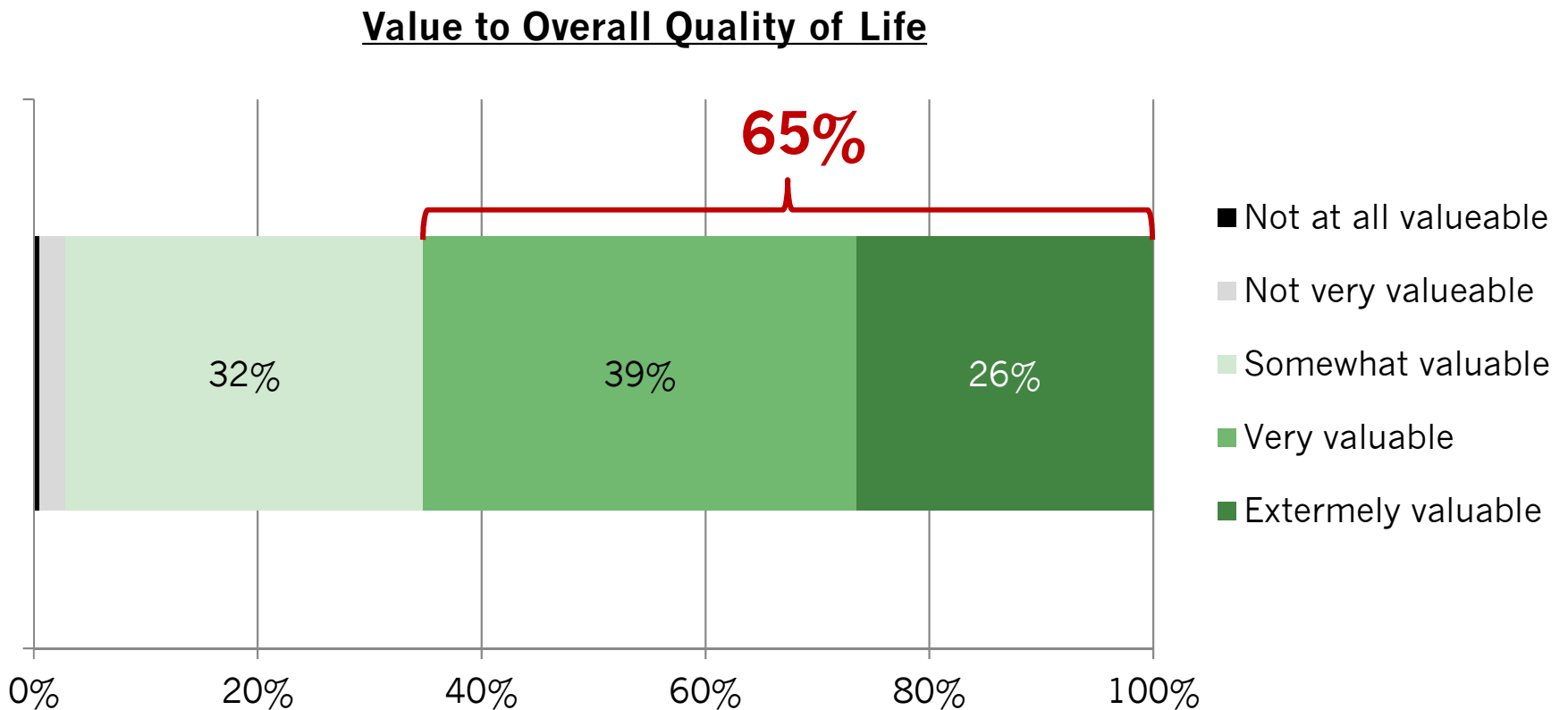
## **III. Opportunities to Engage**

## **IV. Art Houses Thrive When They...**

## **V. APPENDIX**

# Art houses are tremendously valuable to the quality of life of their patrons.

- 65% of patrons report that their Art House theater is “extremely” or “very” valuable to their overall quality of life



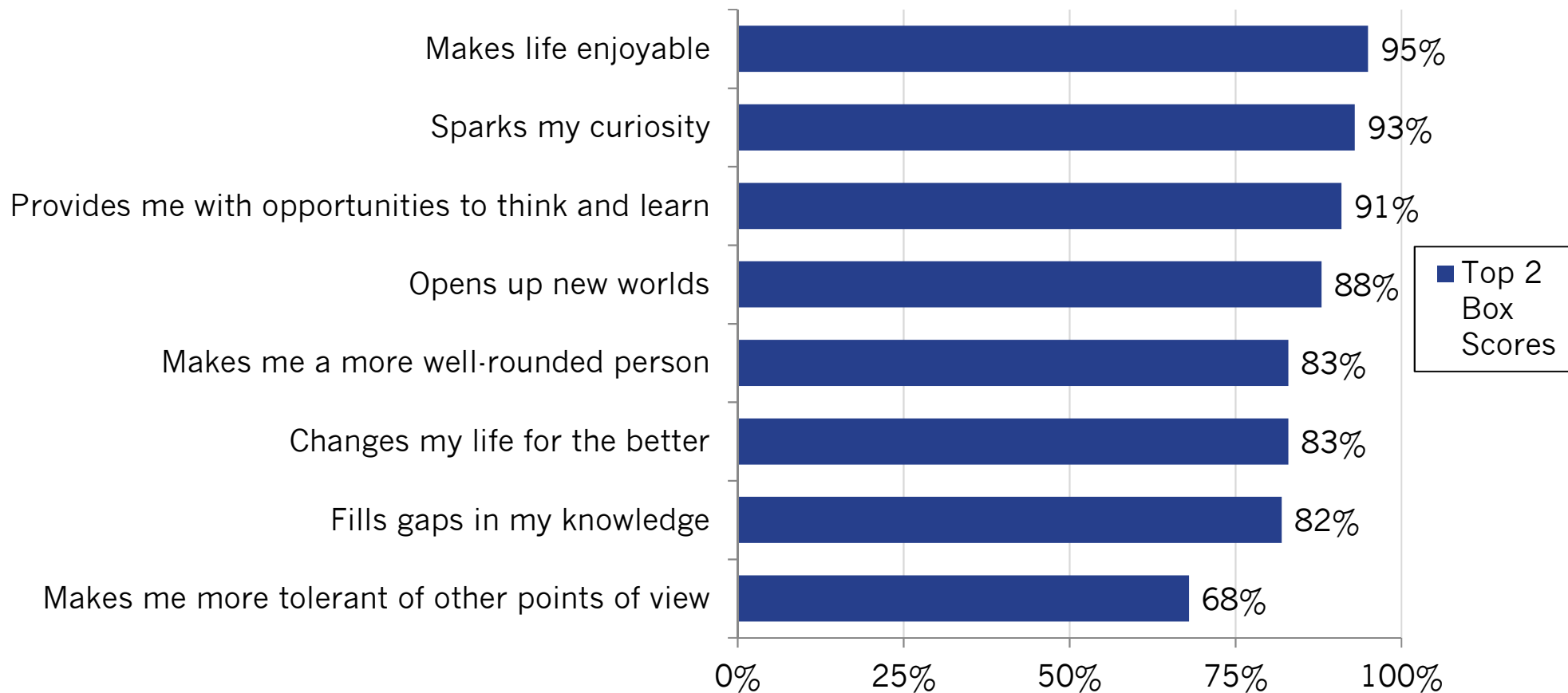
**Question:** How valuable is [SPONSORING ORGANIZATION] to your overall quality of life?

n=18,450

# On a personal level, patrons gain joy, curiosity, knowledge and tolerance from art houses.

- Any one of these attributes is a tremendous personal benefit that can be celebrated in internal and external communications

## **Personal Impacts: Top 2 Box (Strongly or Somewhat Agree)**



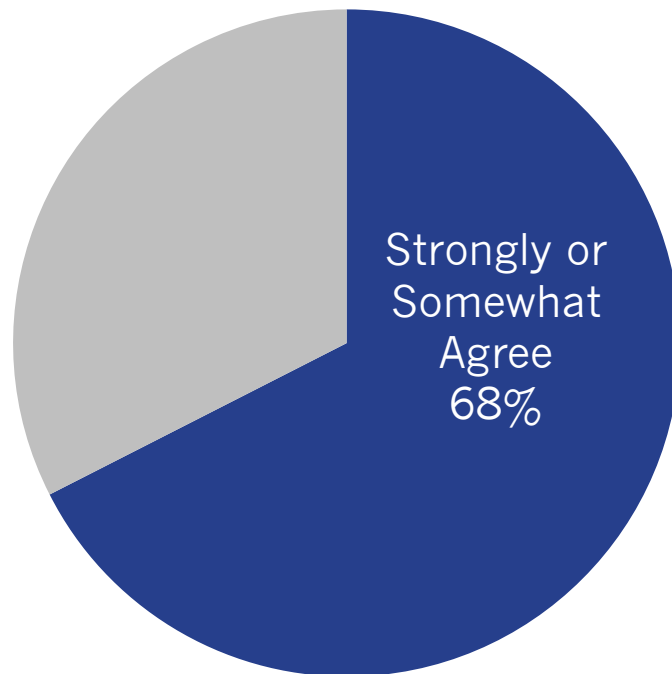
**Question:** To what extent do you agree with the following statements about [SPONSORING ORGANIZATION]?

n=18,446

# Pulling out one personal benefit, art houses help to advance mutual understanding.

- And this is just one of many personal benefits that patrons gain from art houses

## **Personal Impact - Makes Me More Tolerant of Other Points of View: Top 2 Box (Strongly or Somewhat Agree)**



*“The movies shown by The Belcourt immerse you in the minds of people who have a wide variety of backgrounds. I believe showing people different walks of life increases tolerance and appreciation for others.”*

*“The Nick [Nickelodeon] plays a critical role in the midlands area of South Carolina of highlighting the beauty of diversity and equality and bringing global perspectives.”*

*“We believe the Rafael offers so much to our community especially during these challenging times- we are thrilled to support!”*

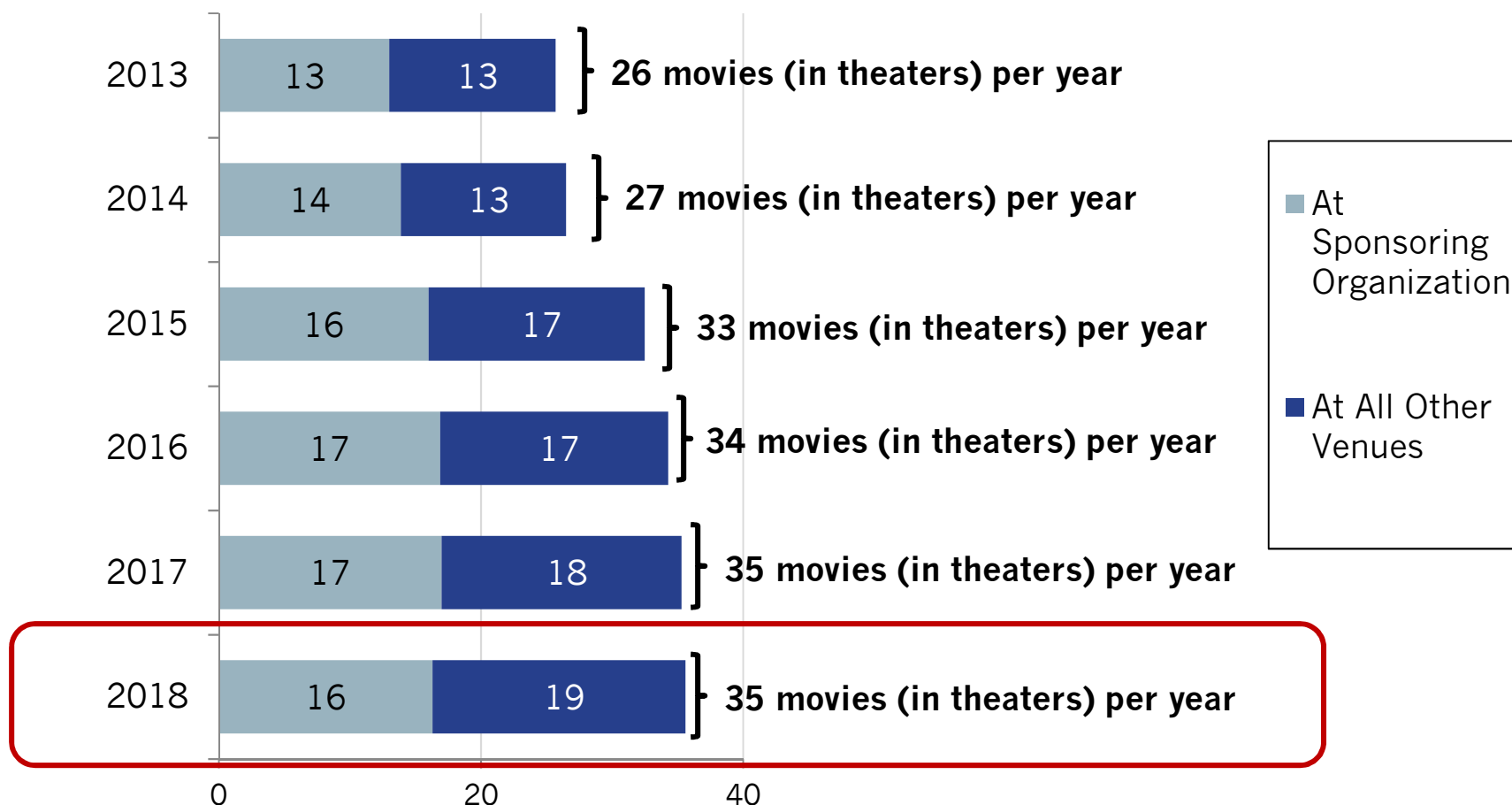
**Question:** To what extent do you agree with the following statements about [SPONSORING ORGANIZATION]?

n=18,446

## Theater moviegoing continues to hold strong.

- Since 2013, average movies seen per year has trended upward and then held steady

**Average Movies In Theaters Per Year**



**Question:** : How often do you typically see full length feature movies at [SPONSORING ORGANIZATION] compared to other places and formats?

n=21,653



# THE TOP 5 FILMS THAT MADE PATRONS APPRECIATE THEIR ART HOUSE THEATER

5...

# THREE IDENTICAL STRANGERS



4...



# BLACKKKLANSMAN



3...



# FREE SOLO



2...



# WON'T YOU BE MY NEIGHBOR?



# 1

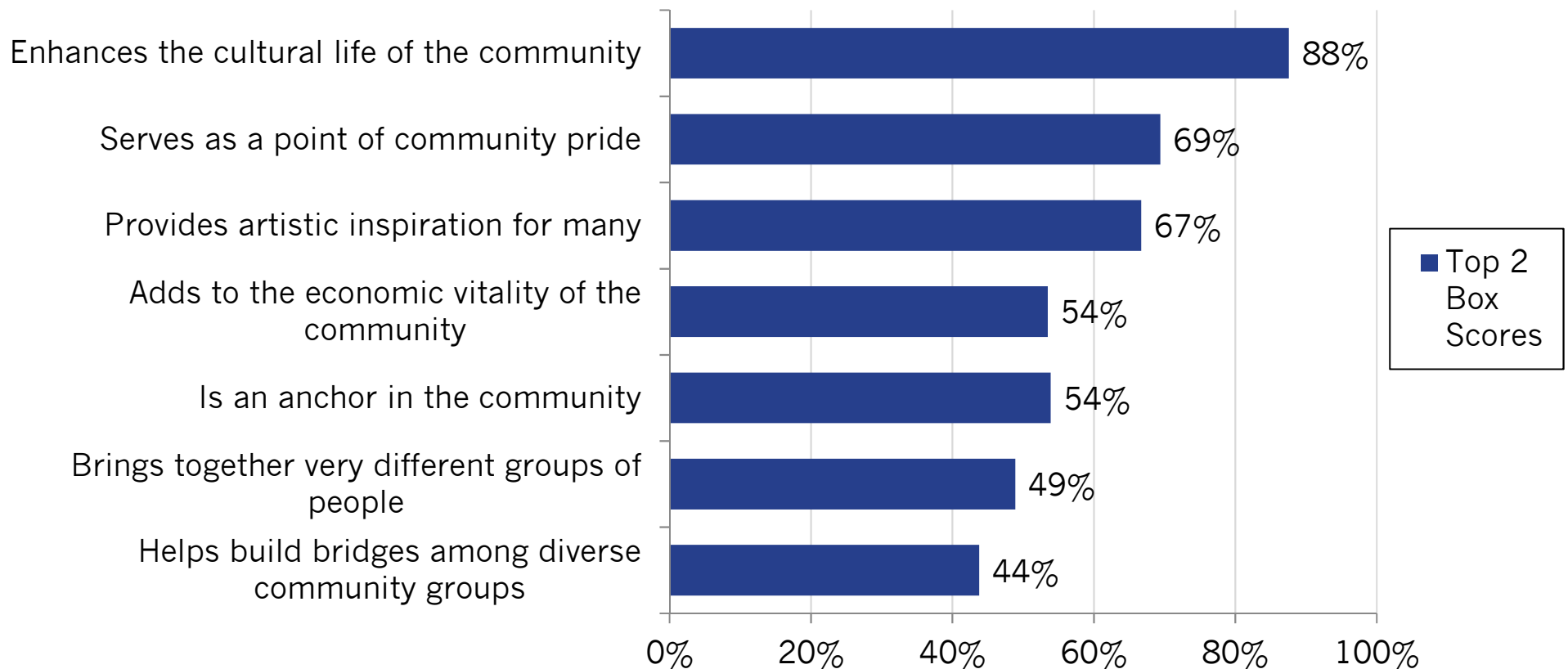
# RBG



# Communities benefit from art houses by gaining an enhanced cultural life, economic vitality and community bridge-building.

- Again, any one of these is a tremendous benefit for communities, but art houses deliver on many fronts

## **Role of Art Houses in Their Communities (Select All That Apply)**



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

n=18,910



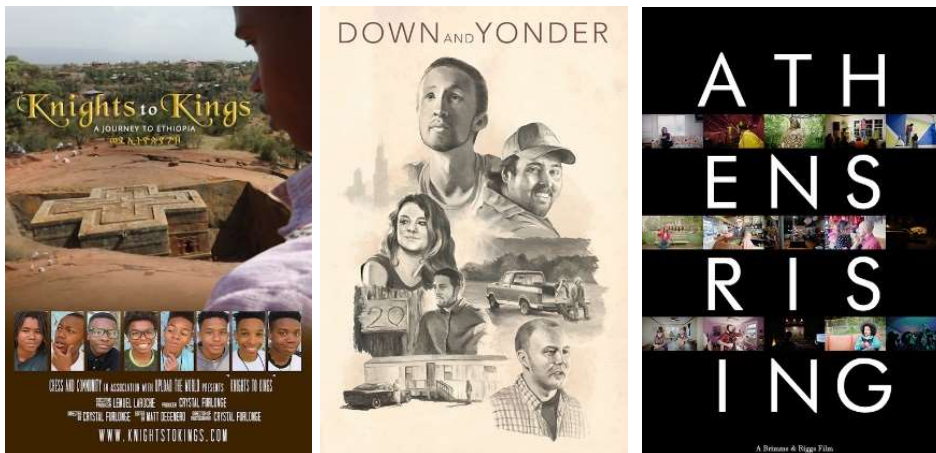
Pulling out one of many community benefits, art houses provide artistic inspiration throughout their communities.

**67%** of patrons indicate their favored art house “provides artistic inspiration for many.”

*“I fully believe [Athens] Ciné is an essential addition to the arts in Athens. I'm so proud of all it has become thanks to great leadership!”*

*“I do believe that the Loft is a part of our Tucson community. I love when you have events all over town on films with meaningful messages. I attended many free films at other locations over the summer when the Loft was under renovations. It is that level of commitment to the community that is special about the Loft.”*

### AthFest Weekend of Locally Produced Films



*Images: Athens Ciné*

### Outdoor Screenings in The Loft Parking Lot



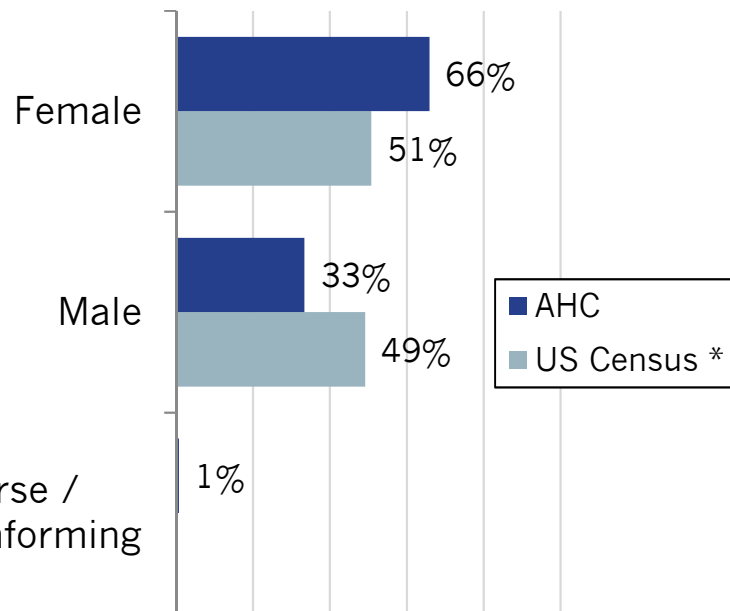
*Photo: The Loft Cinema*

# Those who are responsible for selling sponsorships and advertising generally have a great story to tell.

- Art house patrons are well-educated, high-income with a large percentage of women (who still tend to make many household purchase decisions)

## Gender Identity

**66% Identify as Female**



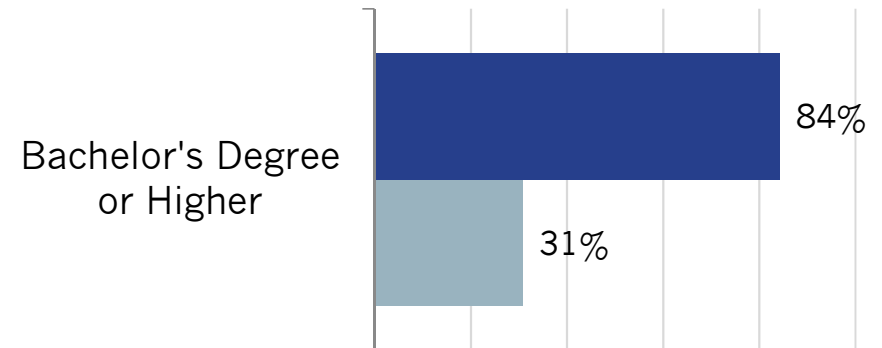
Gender Diverse /  
Gender Non-conforming

0.8% of Art House Patrons are Transgender or Nonbinary

*\* U.S. Census Bureau, Population Estimates Program (PEP) – Updated July 1, 2017*

## College Degree (or higher)

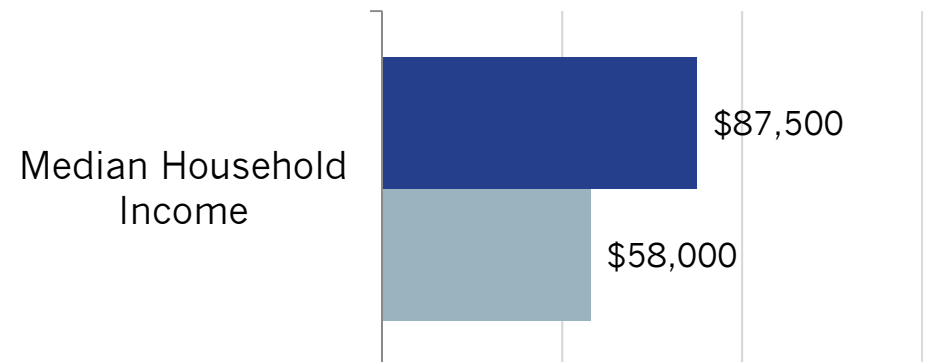
**84% Have a College Degree**



Bachelor's Degree  
or Higher

## Median Income

**Household Income 51% Higher Than U.S. Median**



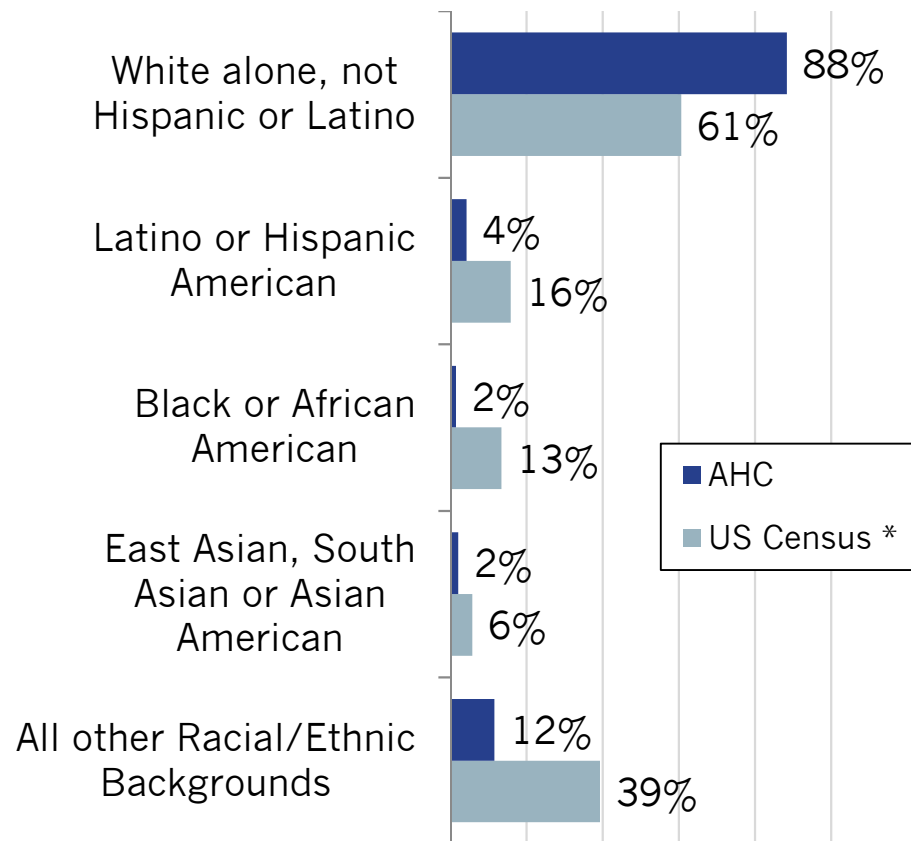
Median Household  
Income

# The Art House patron population tends to be relatively older and relatively less diverse, compared to the country as a whole.

- There is considerable variability for each organization – the white percentage of patrons is as low as 53% for at least one theater

## Racial or Ethnic Background

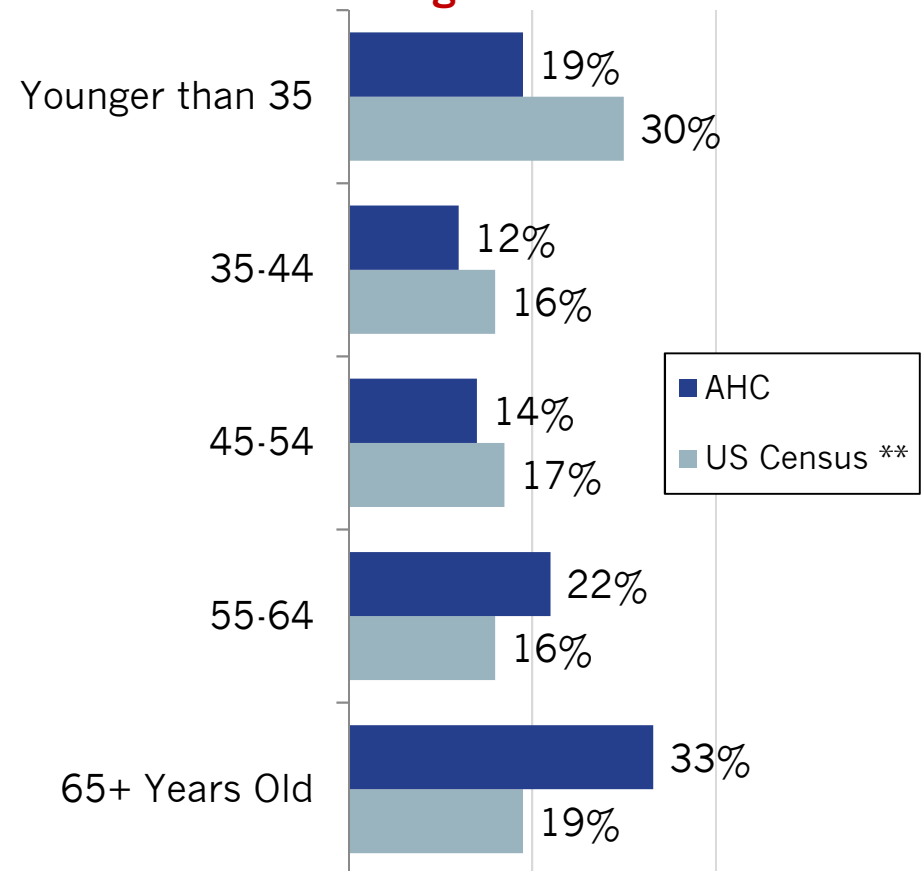
### Less Diverse Than U.S. Population



\* U.S. Census Bureau, Population Estimates Program (PEP) – Updated July 1, 2017

## Age (Adult Population)

### Mean Age is 54

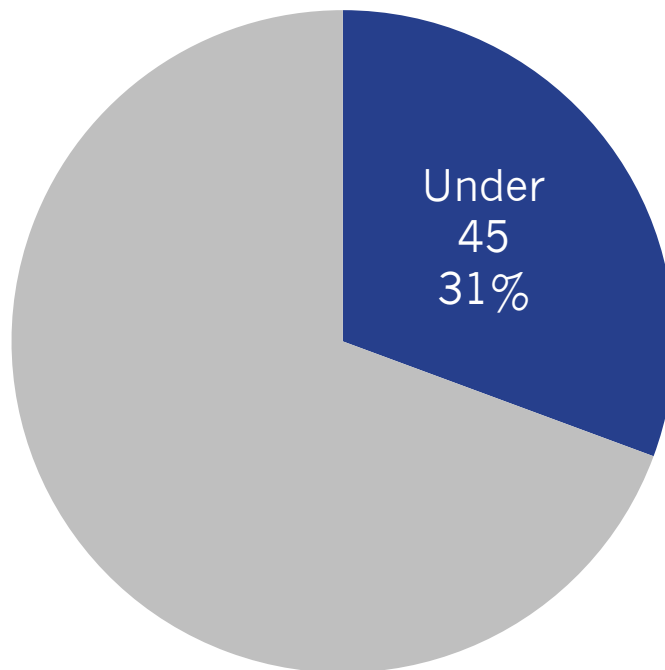


\*\* U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates (

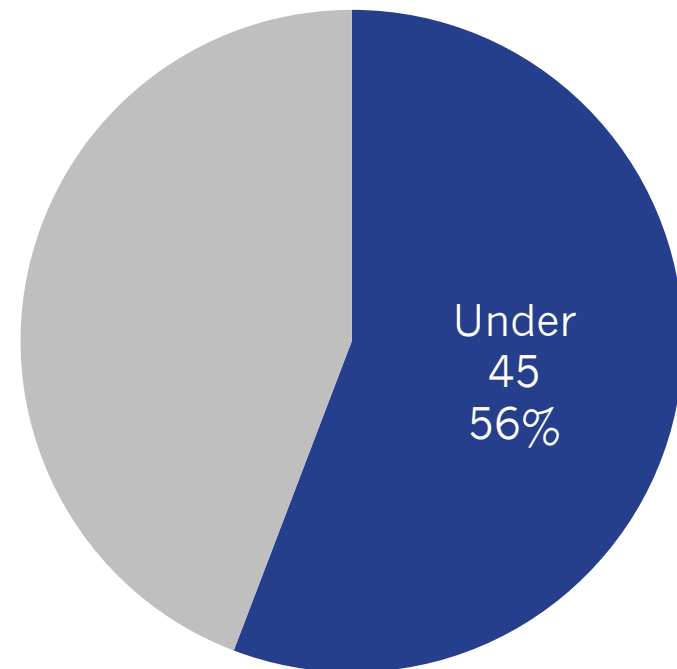
## Newer audiences continue to skew younger.

- The art house community appears to be effective at winning over younger audiences
- These results are even more dramatic this year than in years prior

% of Overall Audience Under 45



% of Recent Attendees (3 yrs or less) Under 45



**Question:** *How long have you been attending movies at [SPONSORING ORGANIZATION]?*  
n=22,258



# The Big Takeaways: Art Houses Have Tremendous Impact

- Art Houses remain incredibly important in the lives of their patrons and their communities
- Patrons appreciate not just the great movies they get to see but also the role these organization play in supporting vibrant and open communities
- Art houses are doing a very good job in general of reaching out to younger audiences
- Across the art house world, attendance is holding steady



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**II. Competing and Collaborating**

**III. Opportunities to Engage**

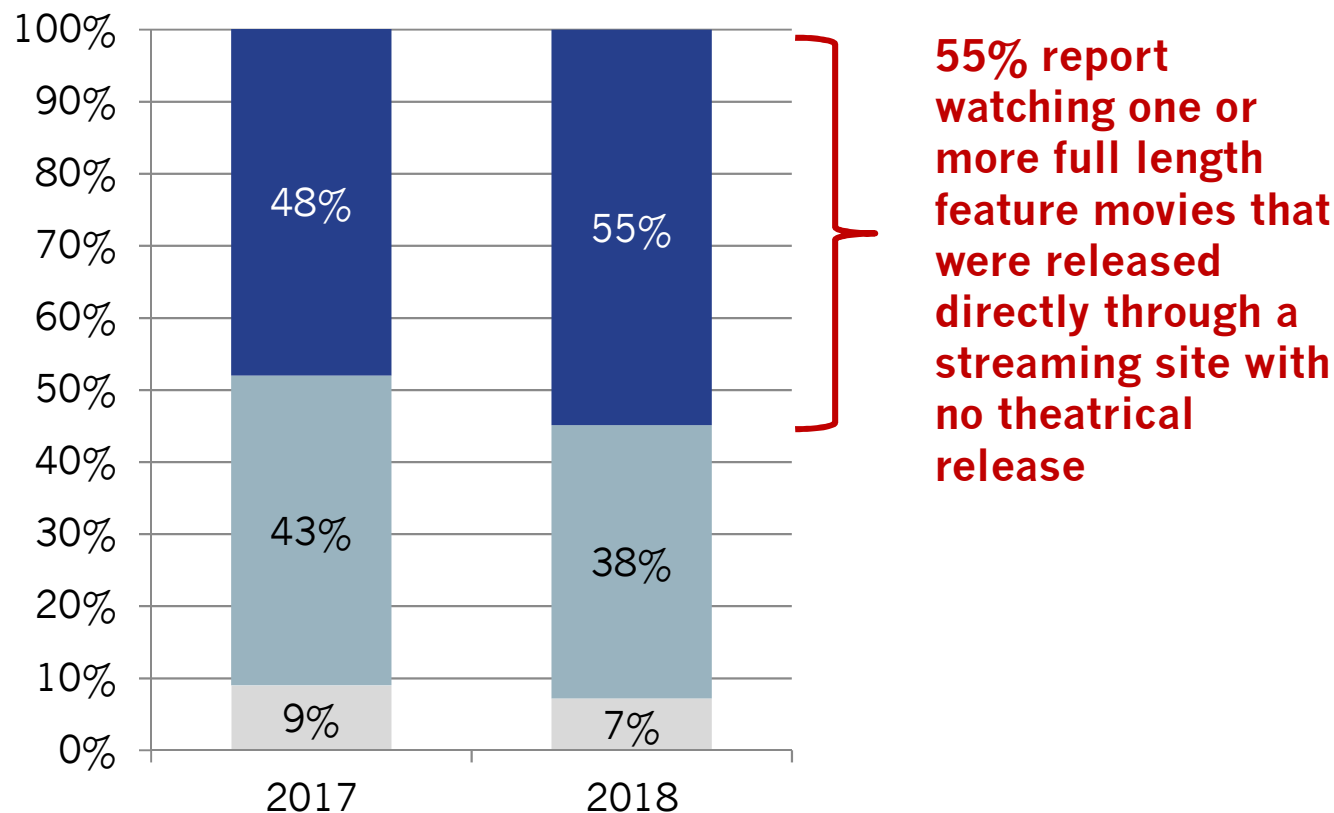
**IV. Art Houses Thrive When They...**

**V. APPENDIX**

# An increasing number of art house patrons are watching new releases that are only released through streaming services.

- The proportion of respondents who have watched movies released directly through streaming sites has increased by 7 percentage points since 2017

## % Who Watched Full Length Feature Movies With No Theatrical Release – Last 3 Months

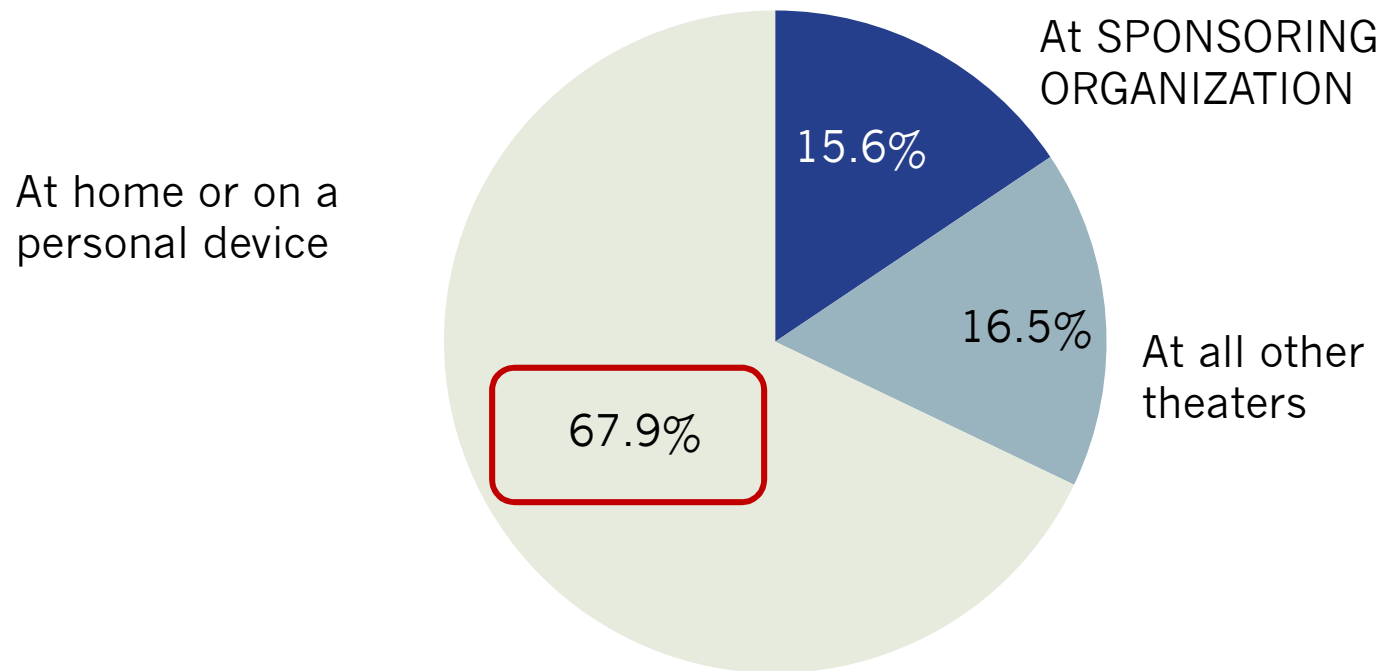


**Question:** In the past 3 months have you watched one or more full length feature movies that were released directly through a streaming site (e.g. Netflix) with no theatrical release?  
n=21,692

## Most movies that patrons see are at home.

- Just about one out of every six movies that art house patrons see is at their primary art house
- 64.5% of movies they see are at home or on a personal device

**Annual Movie Viewership, By Location/Format**

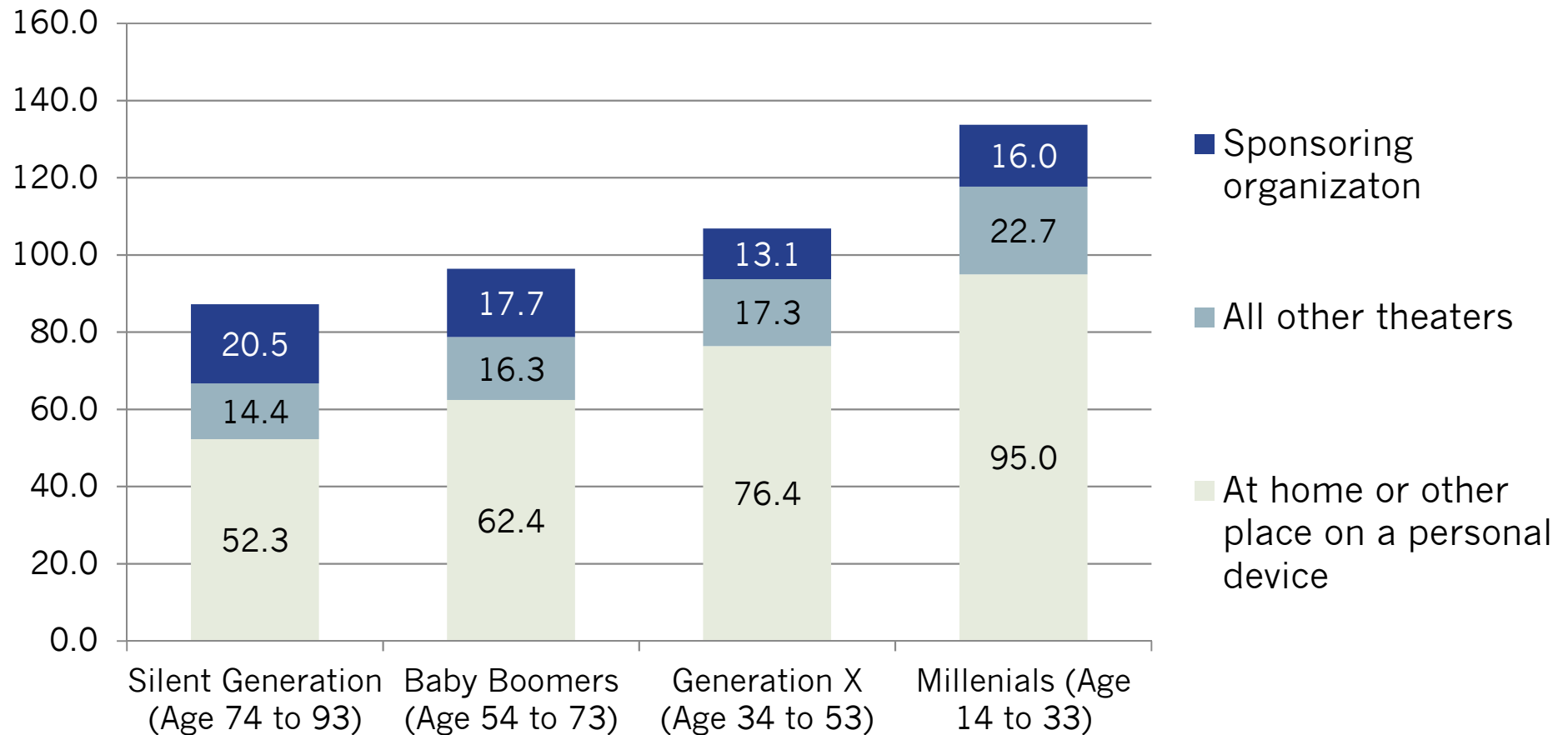


**Question:** How often do you typically see full length feature movies at [SPONSORING ORGANIZATION] compared to other places and formats?  
n=21,653

Although all generations are attending a relatively similar number of movies at art houses, the ‘wallet share’ is lower among younger generations.

- Patrons of all ages watch more movies at home than in theaters

### Frequency of Movie Watching by Location

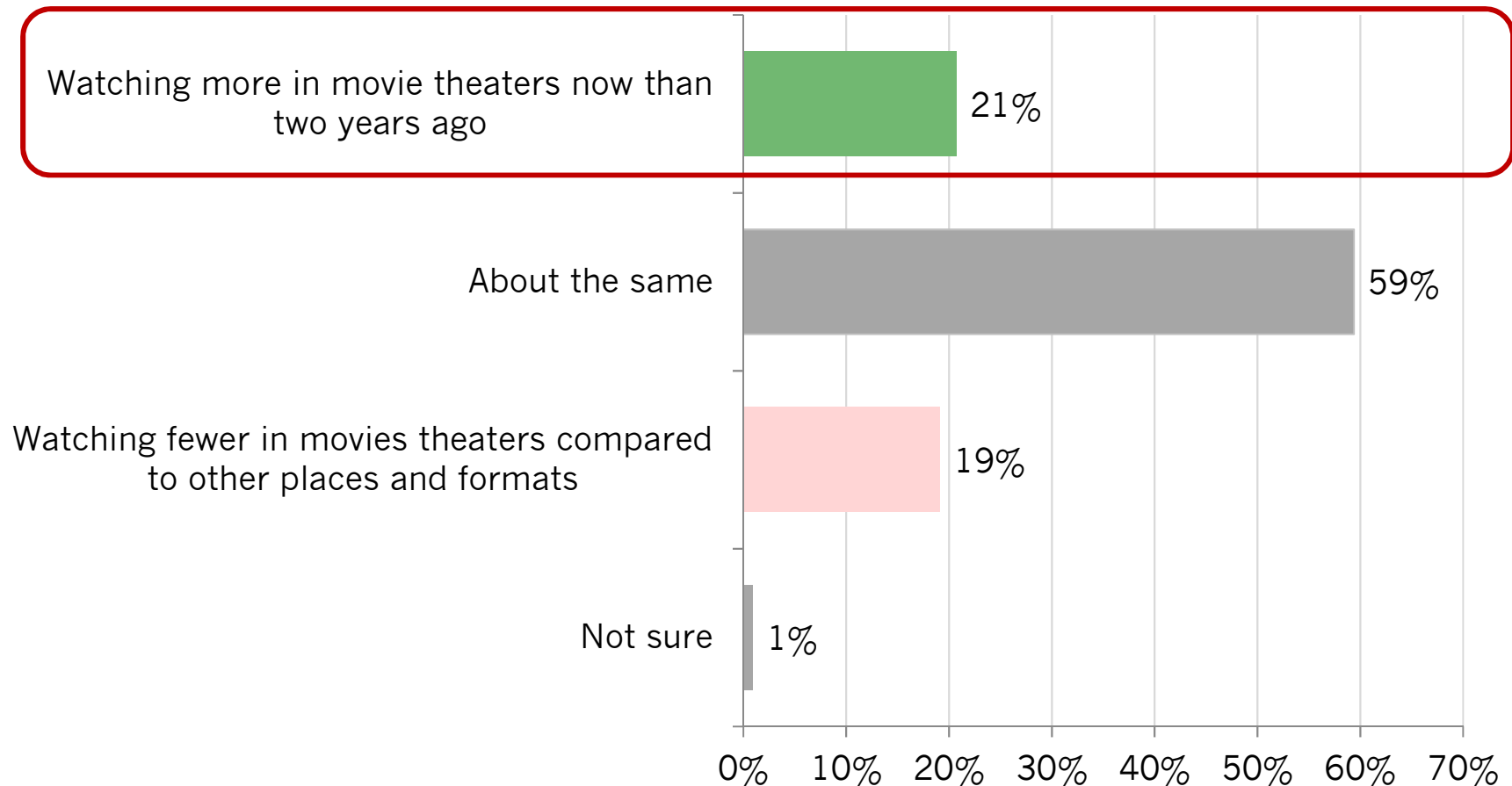


**Question:** How often do you typically see movies at [SPONSORING ORGANIZATION]? How often do you typically see movies at each of the following locations?  
n=21,653 (2018)

21% of patrons indicate they are watching more movies in theaters than 2 years ago; 19% report watching fewer movies.

- This tends to reinforce the finding of a relatively stable theater going population

### Theater Movie Watching Compared to 2 Years Prior

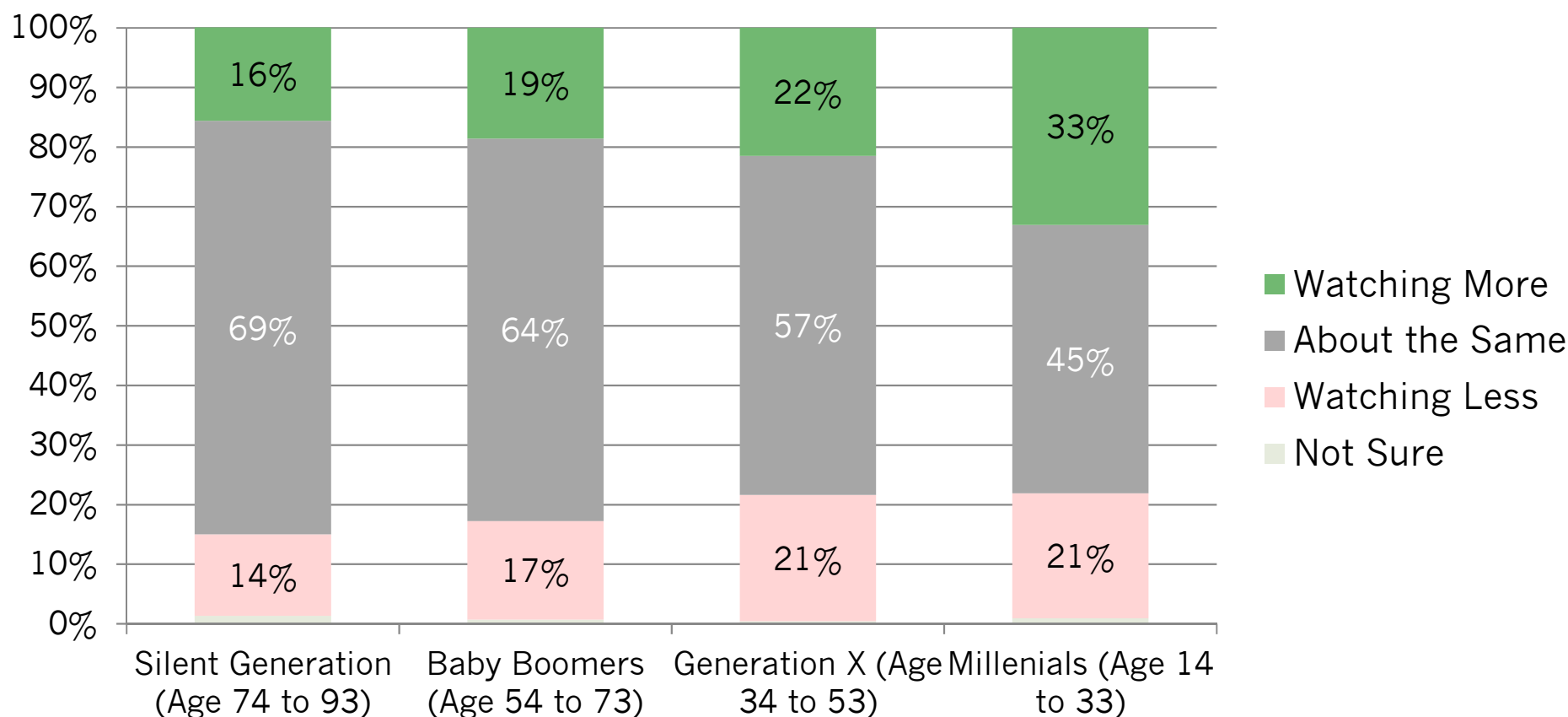


**Question:** Compared to two years ago, would you say you are watching more movies in movie theaters compared to other formats in venues?  
n=21,608

# Millennials are the most likely to report watching more movies in movie theaters than 2 years prior.

- One third (33%) report watching more movies in recent years

## Movie Watching Compared to 2 Years Prior: Generational Breakdown

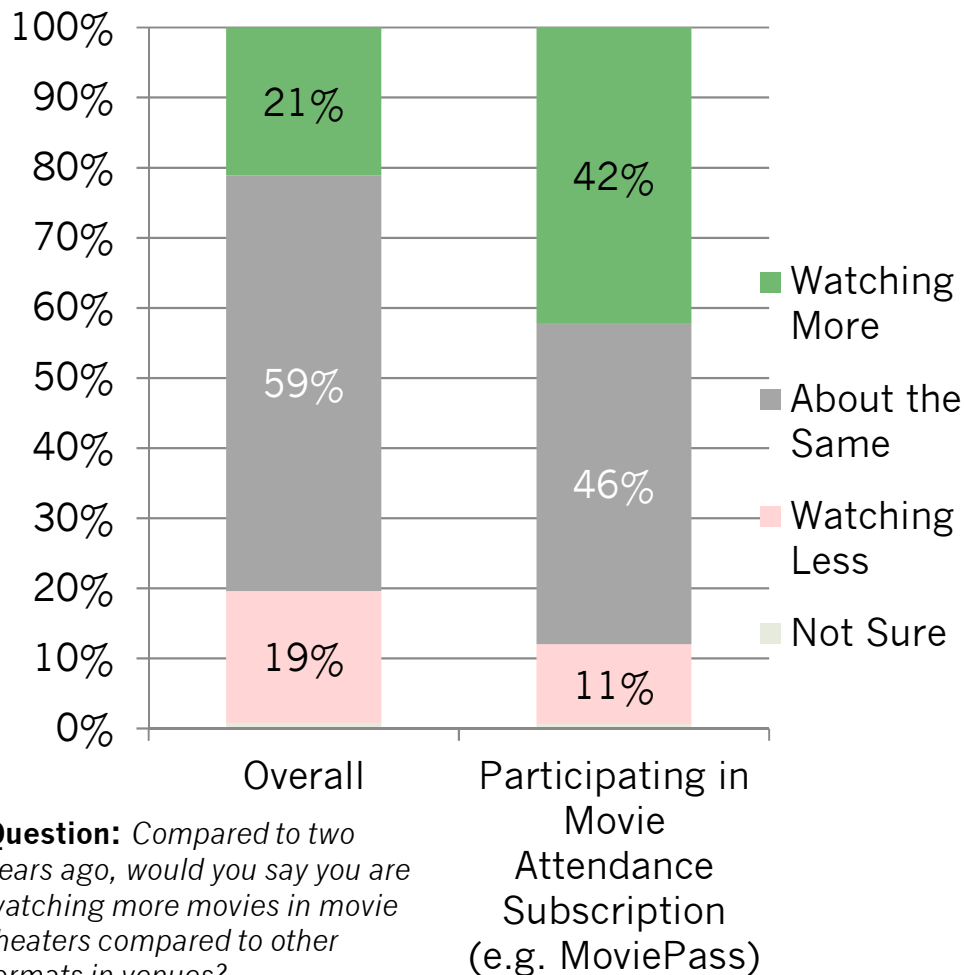


**Question:** Compared to two years ago, would you say you are watching more movies in movie theaters compared to other formats and venues?  
n=21,608

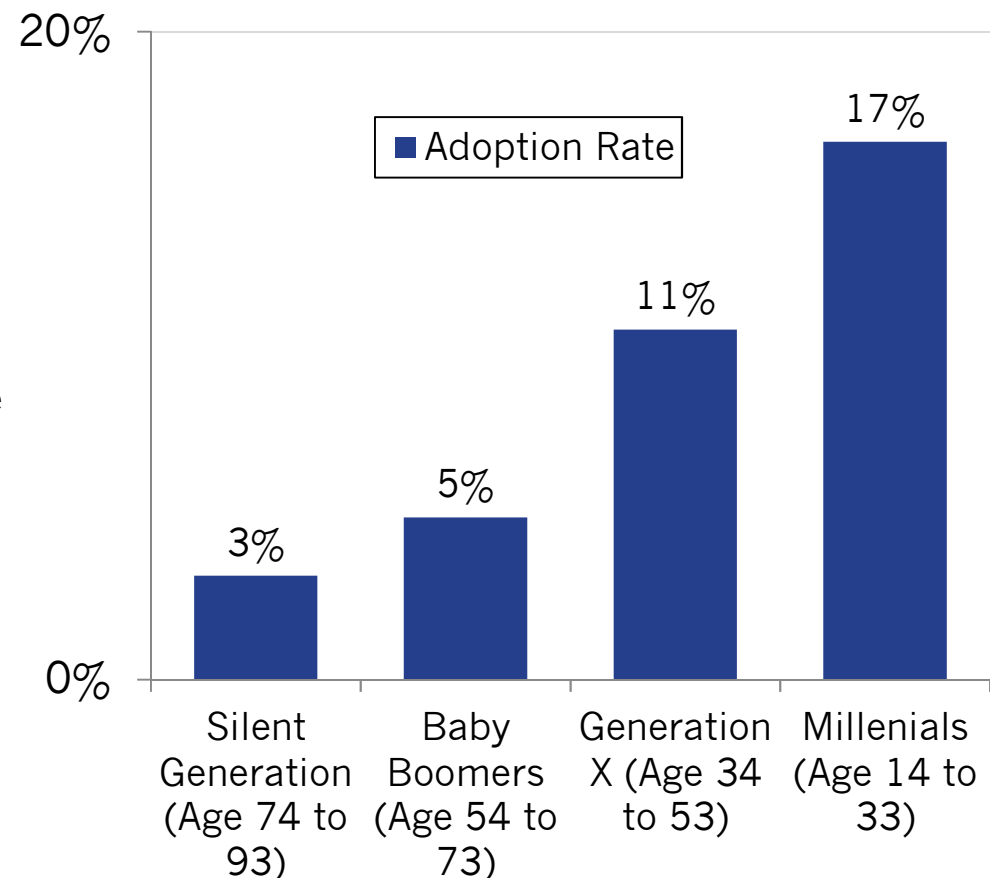
Movie attendance subscription services such as MoviePass may be at least partially responsible for groups with increased attendance from 2017 to 2018.

- Using a subscription service is correlated with increased attendance, and adoption of subscription services is most common among younger generations

**Likely Impact of Movie Attendance Subscription Services**



**Participation in Movie Admission Subscription Services by Generation**



**Question:** Are you currently participating in any third party programs (e.g. MoviePass) that offer a monthly movie admission subscription service charged to a dedicated debit card?  
n=18,311



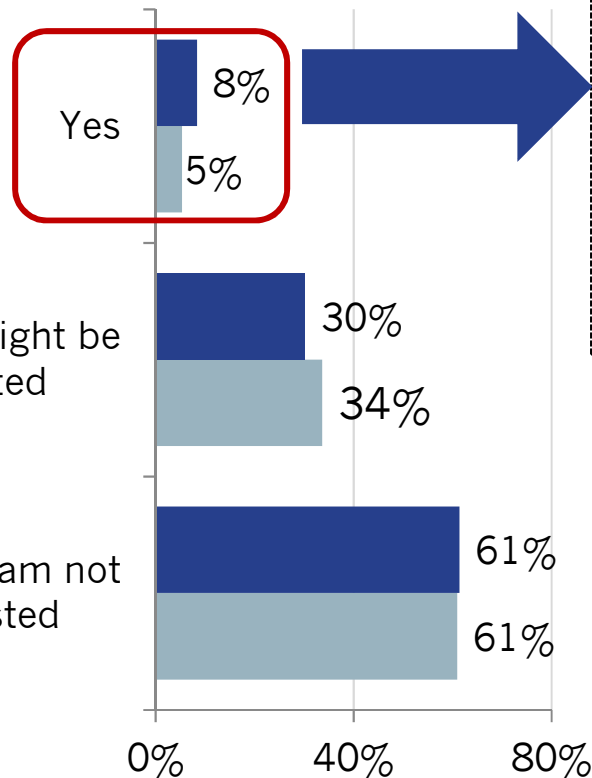
# Participating in movie admissions subscription programs has increased, but satisfaction has declined from 89% positive to 56% positive.

- Much of this decline in ratings is caused by MoviePass (from verbatims)
- Many patrons are moving into other subscription programs

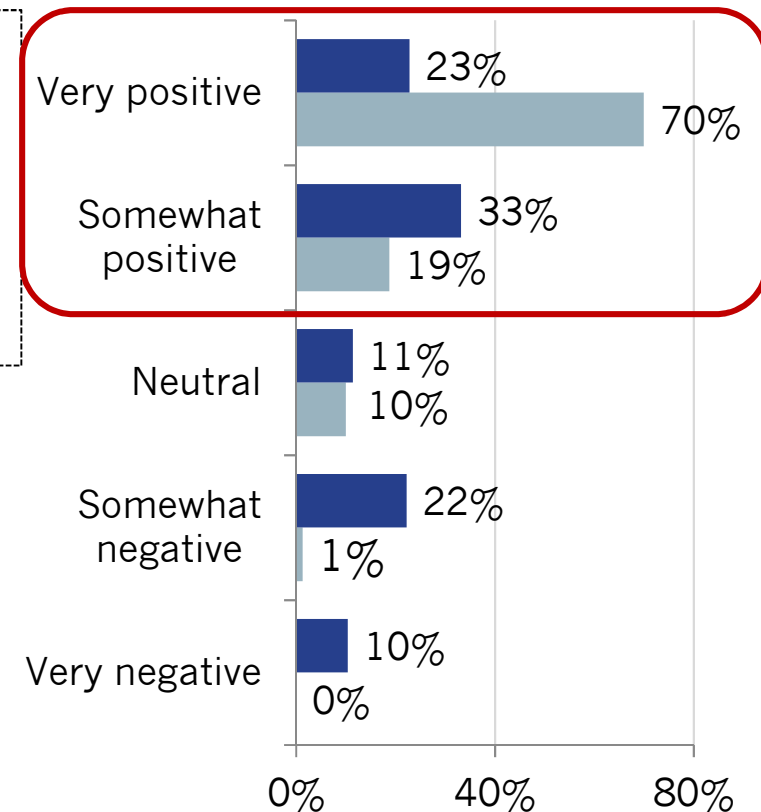
## Patron Participation in 3<sup>rd</sup> Party Programs Like MoviePass

## Program Mentions

## Patron Rating of Program



- **MoviePass** - 1,019
- **AMC Stubs A List** - 220
- **Sinemia** - 57
- **Cinemark Movie Club / Connections** - 50
- **Regal Club** - 13
- **Fandango** - 7
- **Alamo Season Pass** - 6



**Question:** Are you currently participating in any third party programs (e.g. MoviePass) that offer a monthly movie admission subscription service charged to a dedicated debit card?  
n=18,311 (2018)

**Question:** How has the experience been?  
n=1,491

# The Big Takeaways: Competing and Collaborating

- Most art house patrons see many more movies at home than they do in theaters (art house or other)
- The percentage who are seeing new releases that go directly through streaming sites is on the rise
- A large proportion of patrons, particularly younger ones, are increasing the number of movies they are seeing in theaters
- 3<sup>rd</sup> party movie admission subscription services may be playing a role...and may hold promise



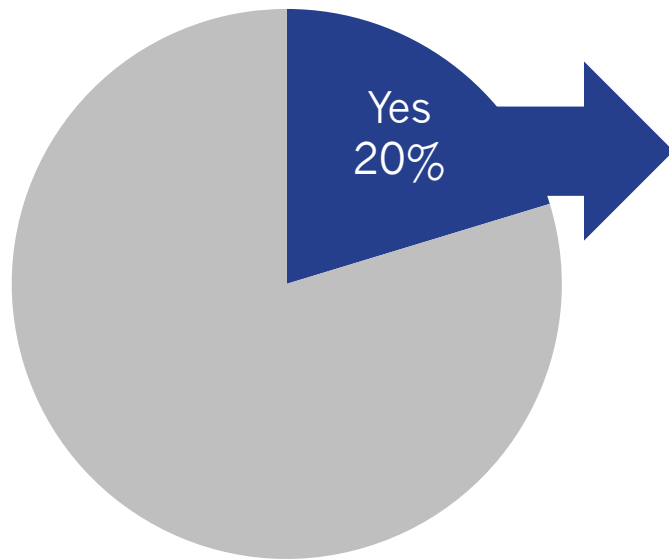
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# Attracting new audiences is most often driven by screening movies that people want to see.

- But of course they need to know about the movie and that it is showing at the art house to come in, so where do they find out about movies?

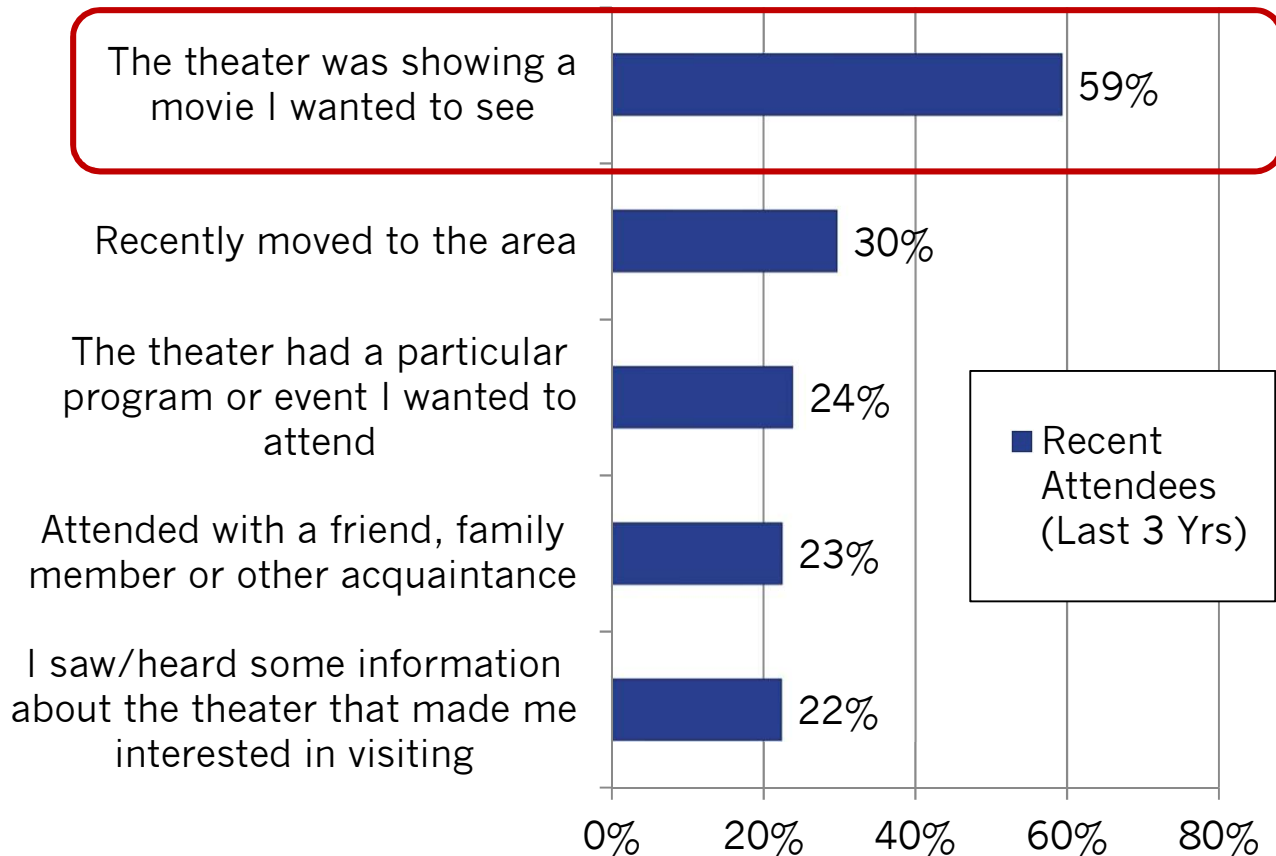
## Recent Attendee: 3 Years of Less Seeing Movies at SPONSORING ORGANIZATION



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

n=22,258

## Reasons to Begin Attending SPONSORING ORGANIZATION



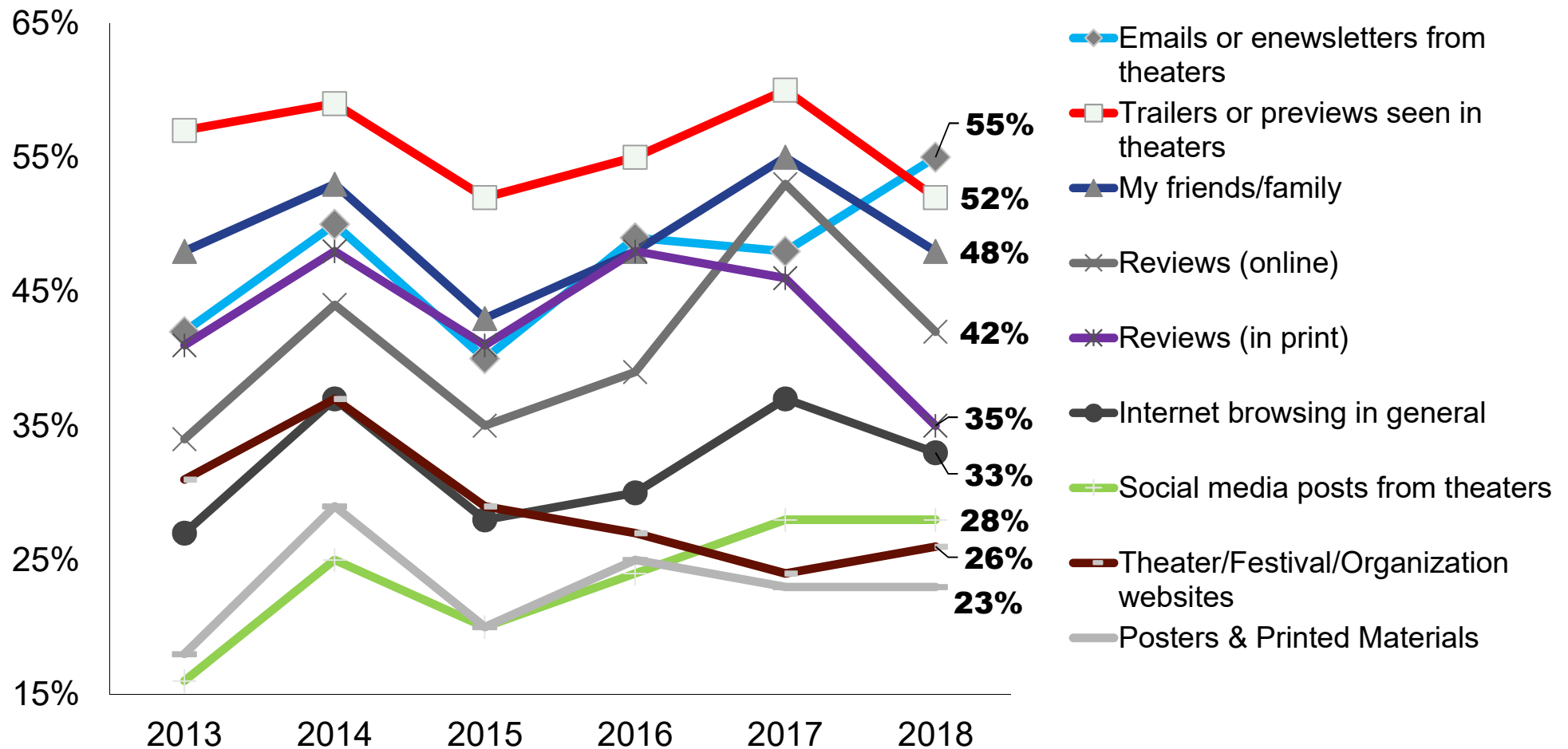
**Question:** What caused you to first attend a movie at [SPONSORING ORGANIZATION]? (select all that apply)

n=3,956

# Patrons continue to rely on a large number of information sources to learn about movies.

- These range from print to digital to word of mouth

## Top 9 (Out of 17) Means of Learning About Movies

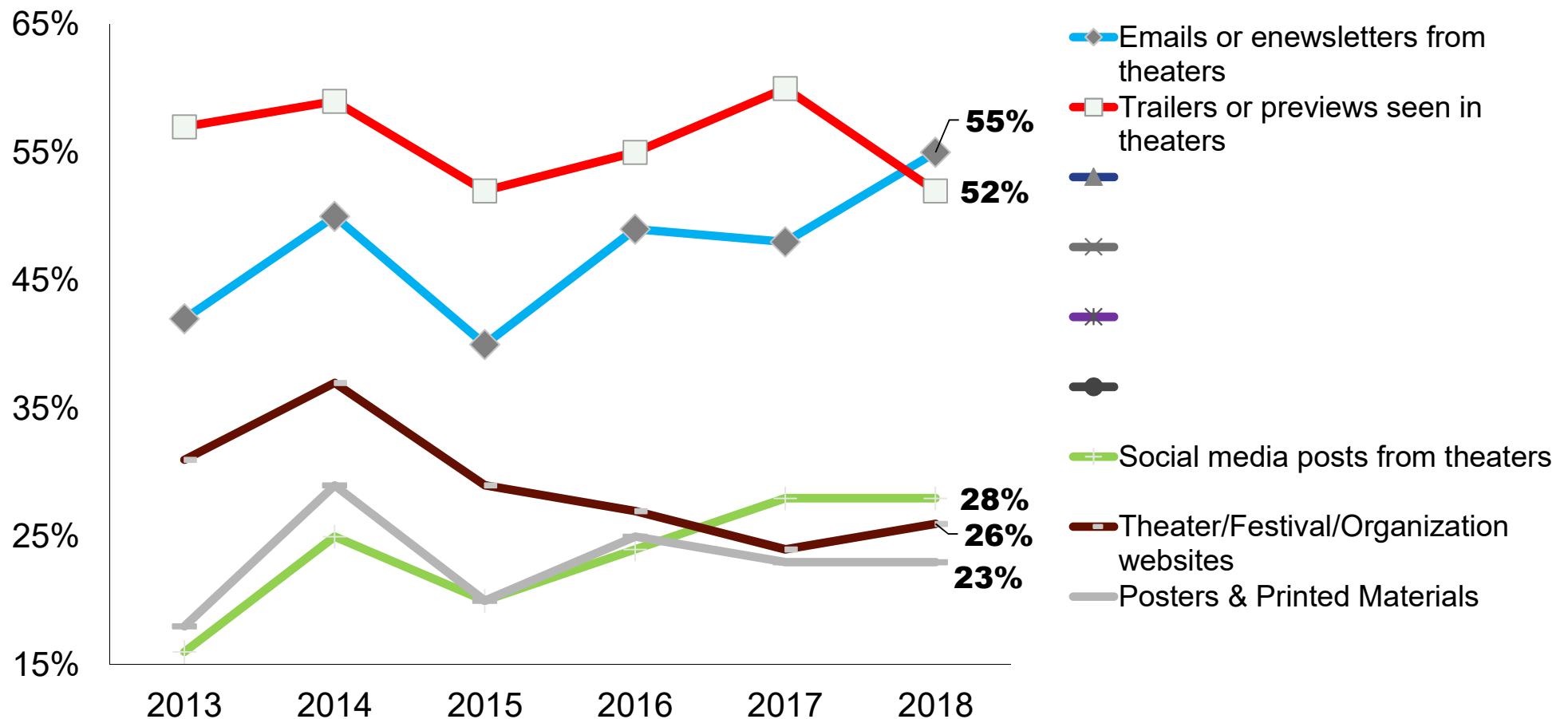


**Question:** How do you typically learn about which movies you might be interested in seeing away from home (in theaters, at festivals, etc.)? (select all that apply)  
n=19,675 (2018)

Many of these information sources remain in the direct control of art houses and other film organizations.

- The importance of emails and e-newsletters and social media is growing
- The role of traditional websites and printed materials may be in decline

**Top 9 (Out of 17) Means of Learning About Movies**

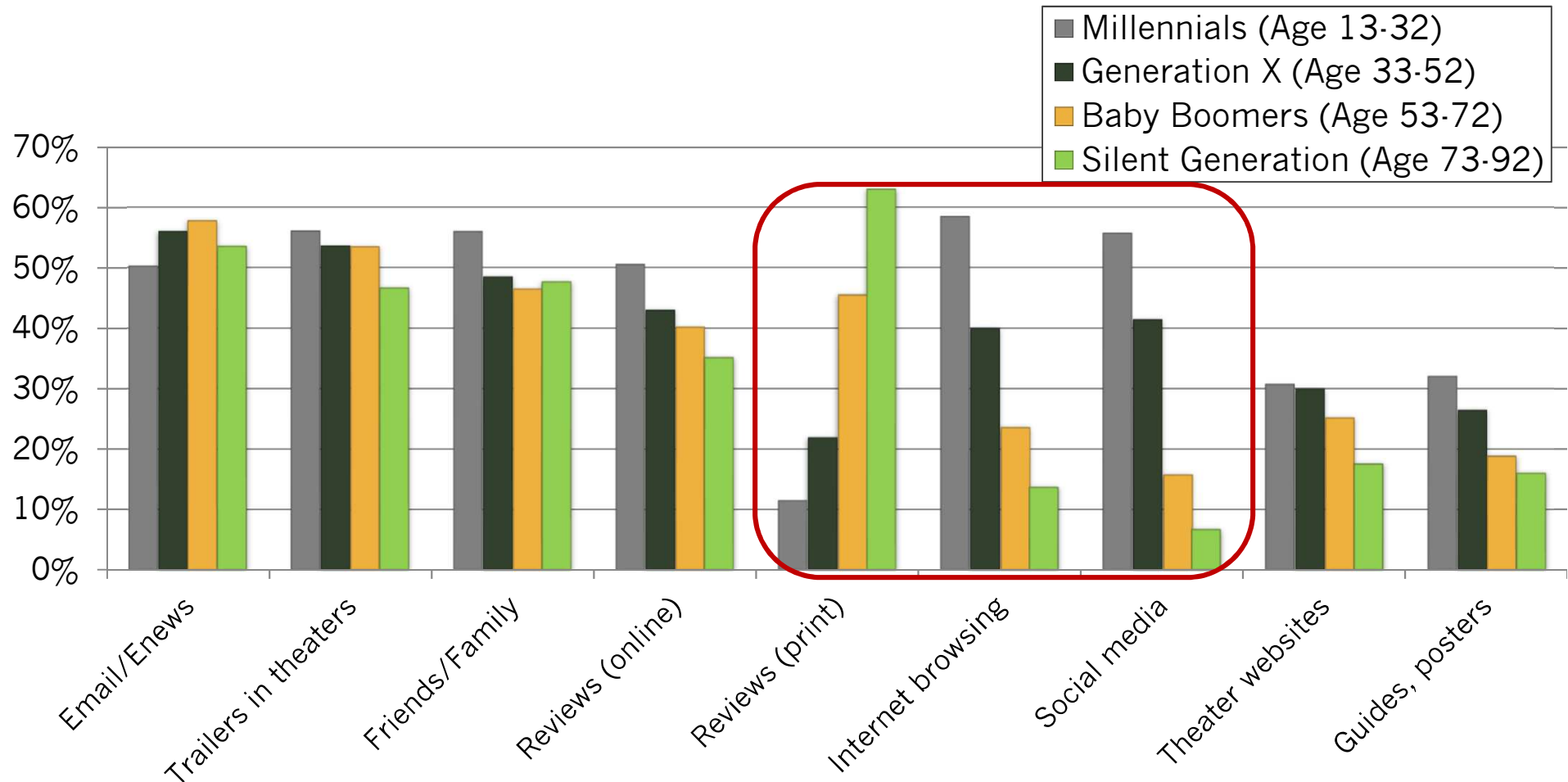


**Question:** How do you typically learn about which movies you might be interested in seeing away from home (in theaters, at festivals, etc.)? (select all that apply)  
n=19,675 (2018)

Although many communications media can reach all generations, some are more specific to particular age groups.

- Printed reviews are predominantly read by older generations; internet browsing and social media are more used by younger generations

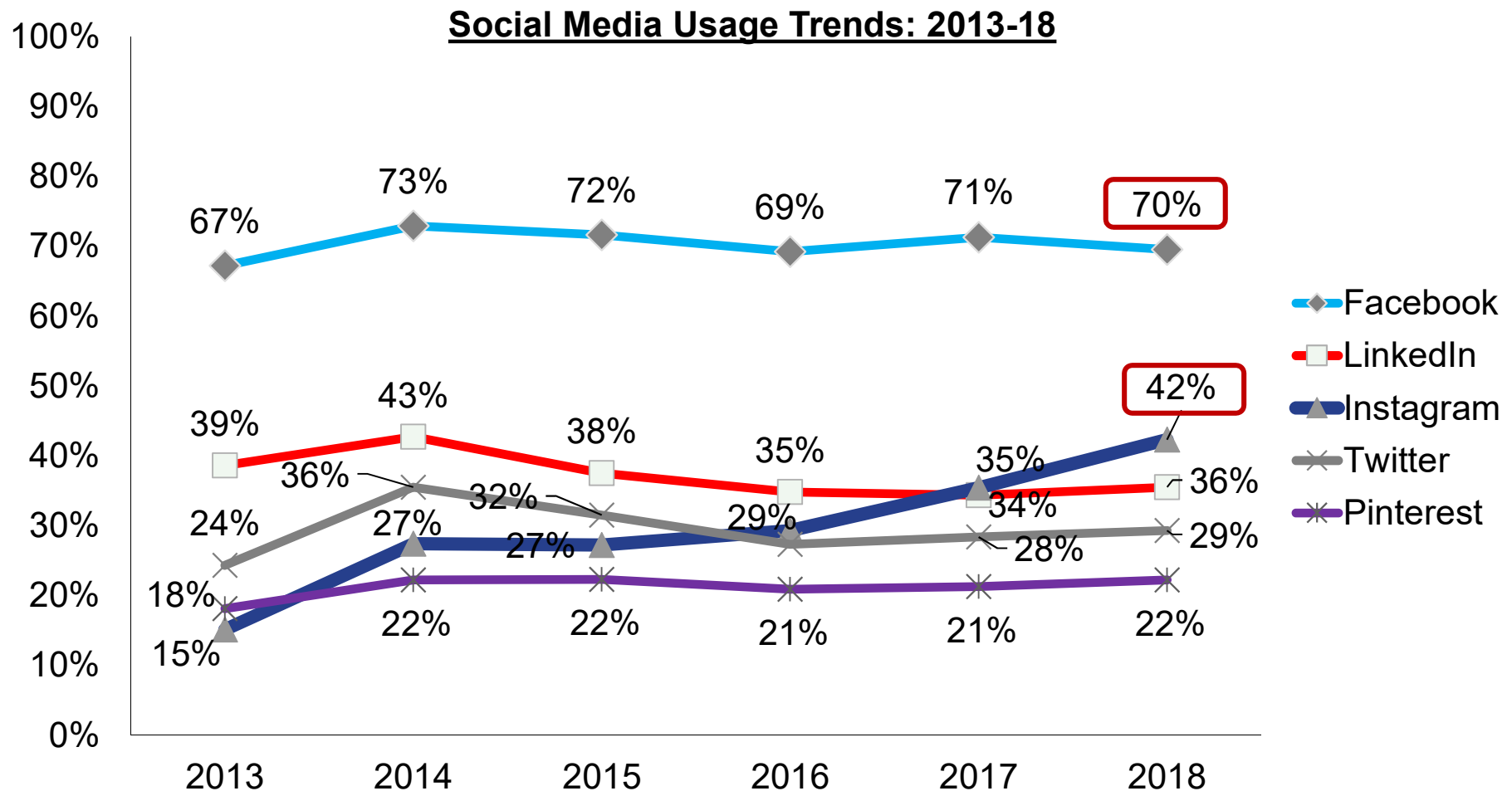
**Ways of Learning About Movies 2018 (by Generation)**



**Question:** 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)  
n=19,675

## Participation in Instagram continues to climb.

- Facebook remains the most widely used social media at 70%
- Instagram usage has risen from seven percentage points in the last year



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

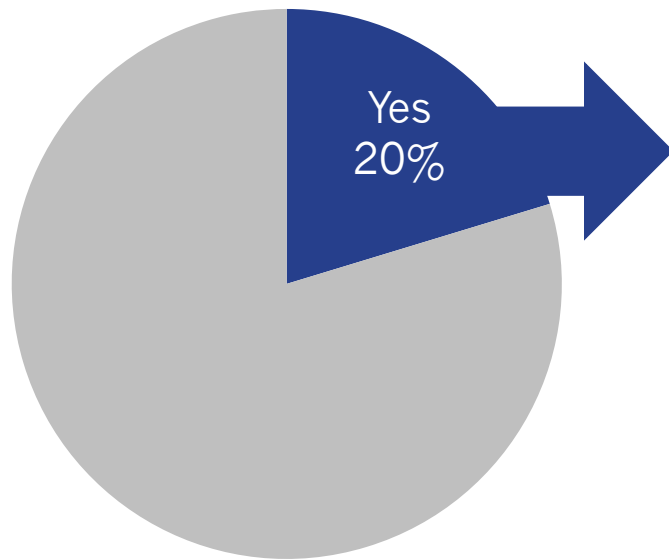
n=19,218



A large number of new audience members also come for particular programs and events.

- These programs and events can take many forms

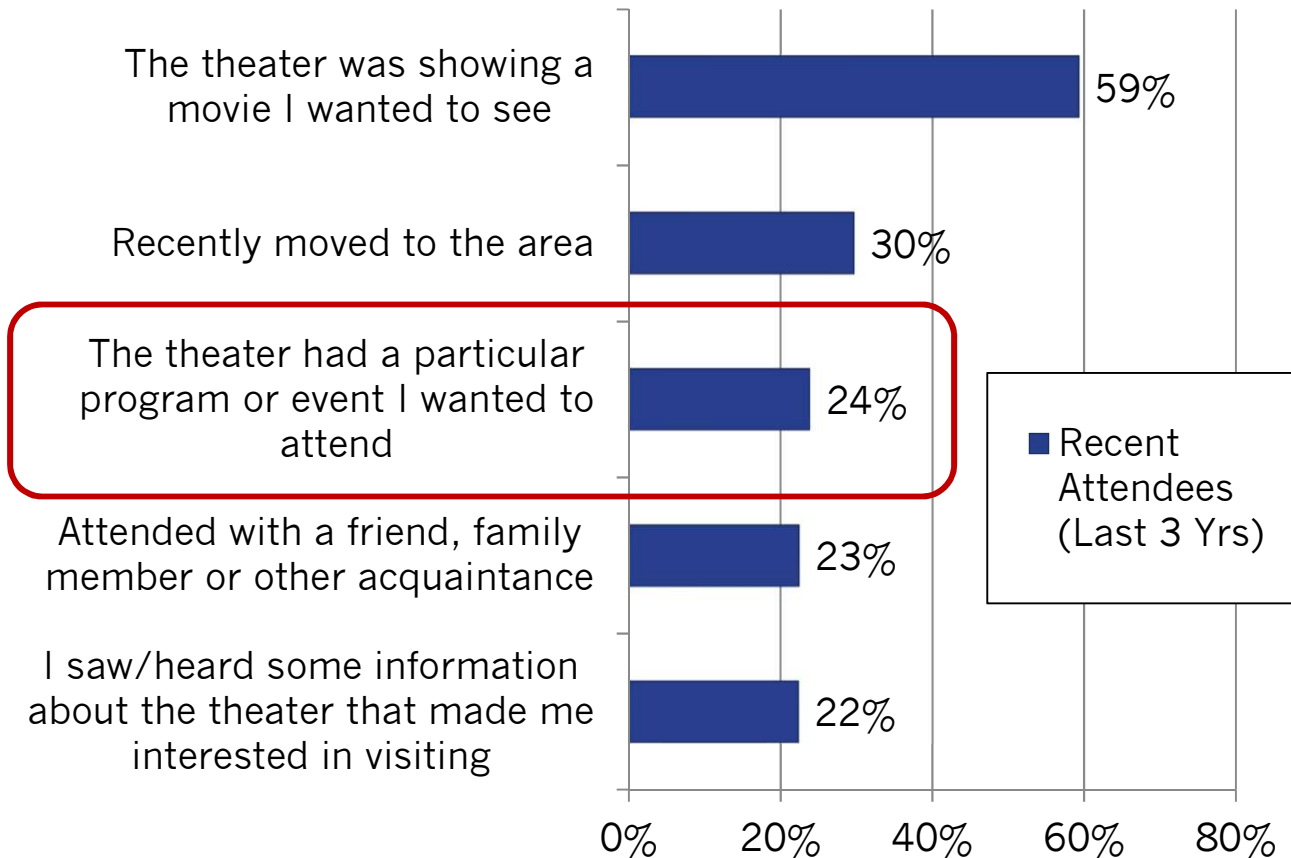
**Recent Attendee: 3 Years of  
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**Question:** How long have you been attending movies at [SPONSORING ORGANIZATION]?

n=22,258

**Reasons to Begin Attending SPONSORING  
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**Question:** What caused you to first attend a movie at [SPONSORING ORGANIZATION]? (select all that apply)

n=3,956

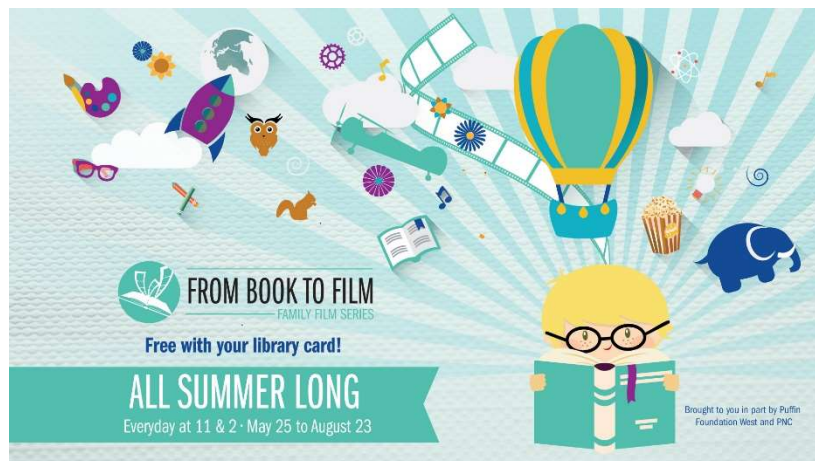
# Attracting New Audiences: Community Outreach and Partnerships

- When thinking of what first brought them into their art house theater, many respondents pointed to events involving other community organizations



[www.gablescinema.com](http://www.gablescinema.com)

- The **Coral Gables Art Cinema** (Coral Gables, FL) partners with Books & Books and the Coral Gables Museum to put on **Family Day on Aragon** the second Saturday of every month.
- This event brings together families for a day of discounted movies, free story time/entertainment and free museum admission.



[www.gatewayfilmcenter.org](http://www.gatewayfilmcenter.org)

- **Gateway Film Center** (Columbus, OH) and the Columbus Metropolitan Library join forces to deliver **From Book to Film** – a summer family film series that offers free admission with a library card.
- From May until August they offer daily showings of a movie inspired by a great book, and rotate films weekly.

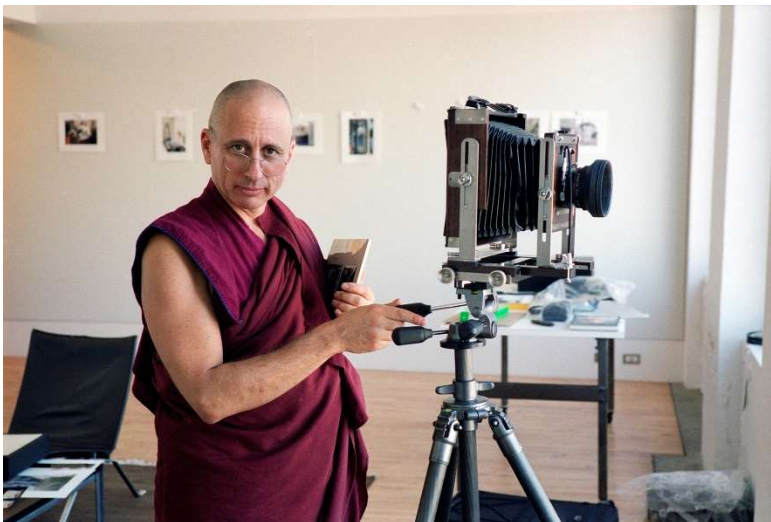
# Attracting New Audiences: Leading Community Conversations

- Community discussions can give art houses visibility and help win new audiences



*Silence* (2016)

- The Music Box Theatre** (Chicago, IL) hosted a screening of *Silence* on behalf of the Archdiocese of Chicago's Department of Parish Vitality and Mission.
- Post-screening, a cardinal from the archdiocese hosted a conversation and reflection from the audience, creating a unique cultural opportunity for people of all backgrounds and religions.

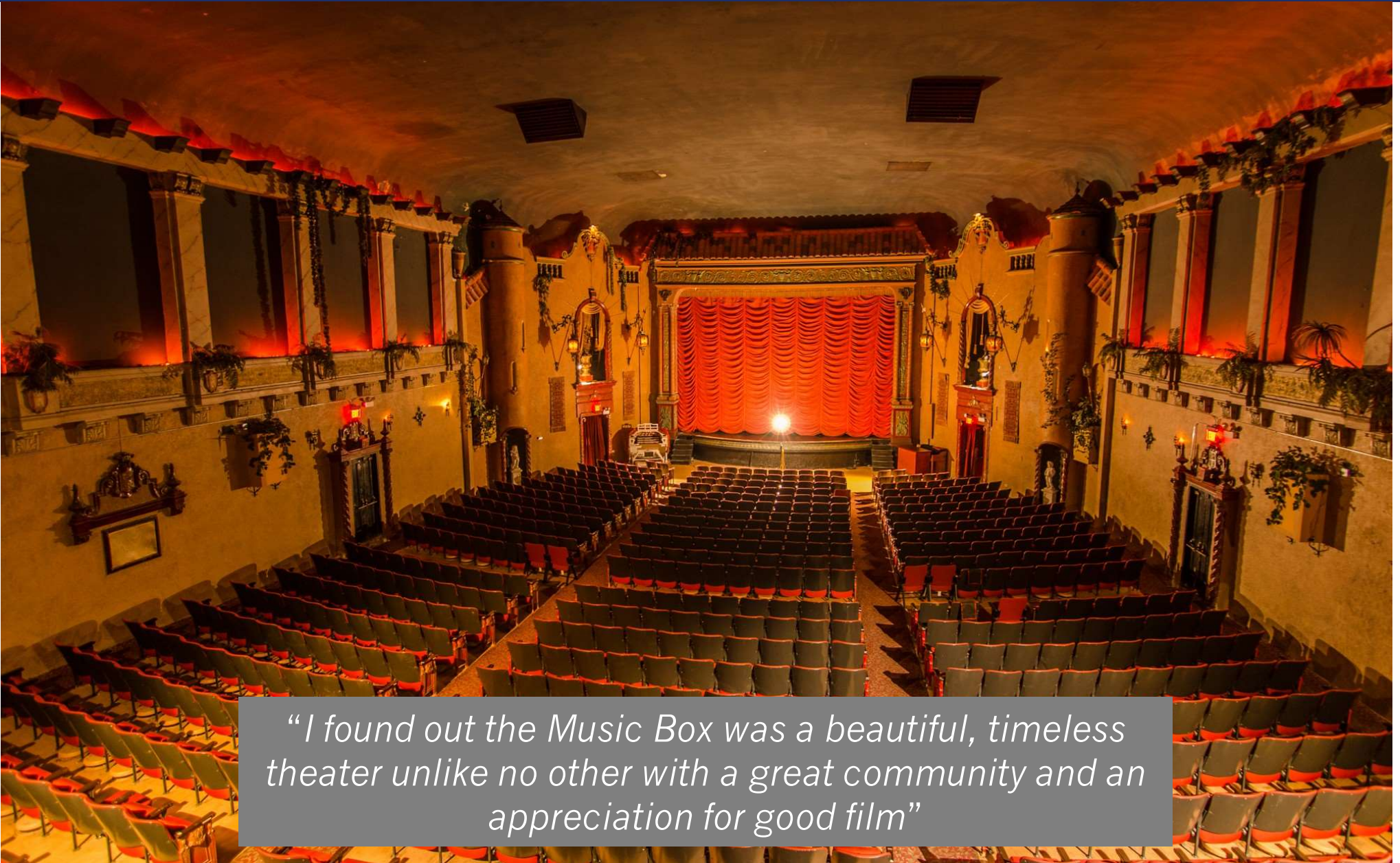


*Monk With A Camera* (2013)

- Seasonal programming at **Robinson Film Center** (Shreveport, LA) includes **Faith on Film**, bringing together area clergy members from different religions and denominations to have a conversation on faith as seen through the lens of film.



It is still true that a great experience will keep them coming back: *“A beautiful, timeless theater unlike no other with a great community and an appreciation for good film”*



*“I found out the Music Box was a beautiful, timeless theater unlike no other with a great community and an appreciation for good film”*

Although it is difficult to offer more of every kind of programming, there are a number of changes that organizations can offer to increase attendance.

- Restored classics and matinees have widespread appeal
- Other changes appeal differently to different age groups

### Changes Patrons Report Would Make Them Attend More Often

VARIABLE	ALL	Silent Generation	Baby Boomers	Gen X	Millenials
New/enhanced ticket buying loyalty program (e.g. buy 5 tickets and get the 6th free)	●		●	●	●
New/expanded screenings of Restored classic films	●	●	●	●	●
New/expanded screening of Newly Remastered classic films	●	●	●	●	●
New/expanded matinee screenings	●	●	●	●	●
Filmmaker appearances	●		●	●	●
New/enhanced membership program with member benefits	●		●	●	●
Films by local filmmakers or featuring local topics/settings				●	●
New/expanded simulcasts (live opera or theater performances shown on screen)		●			
New/expanded 70mm screenings					●
New/expanded 35mm screenings					●

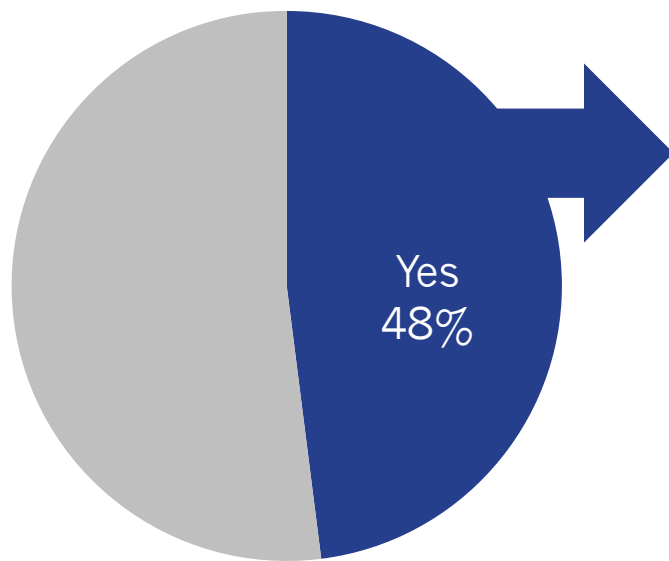
● = 50%+ indicate they would attend more often if this changes was made

**Question:** *Would any of the following changes cause you to attend [SPONSORING ORGANIZATION] more often?*  
n=18,266

For the nearly half of these patrons who have made the membership decision, the decision is often associated with discounts and access.

- Though a desire to support a valued organization is top of the list, availability of ticket discounts is important to the majority

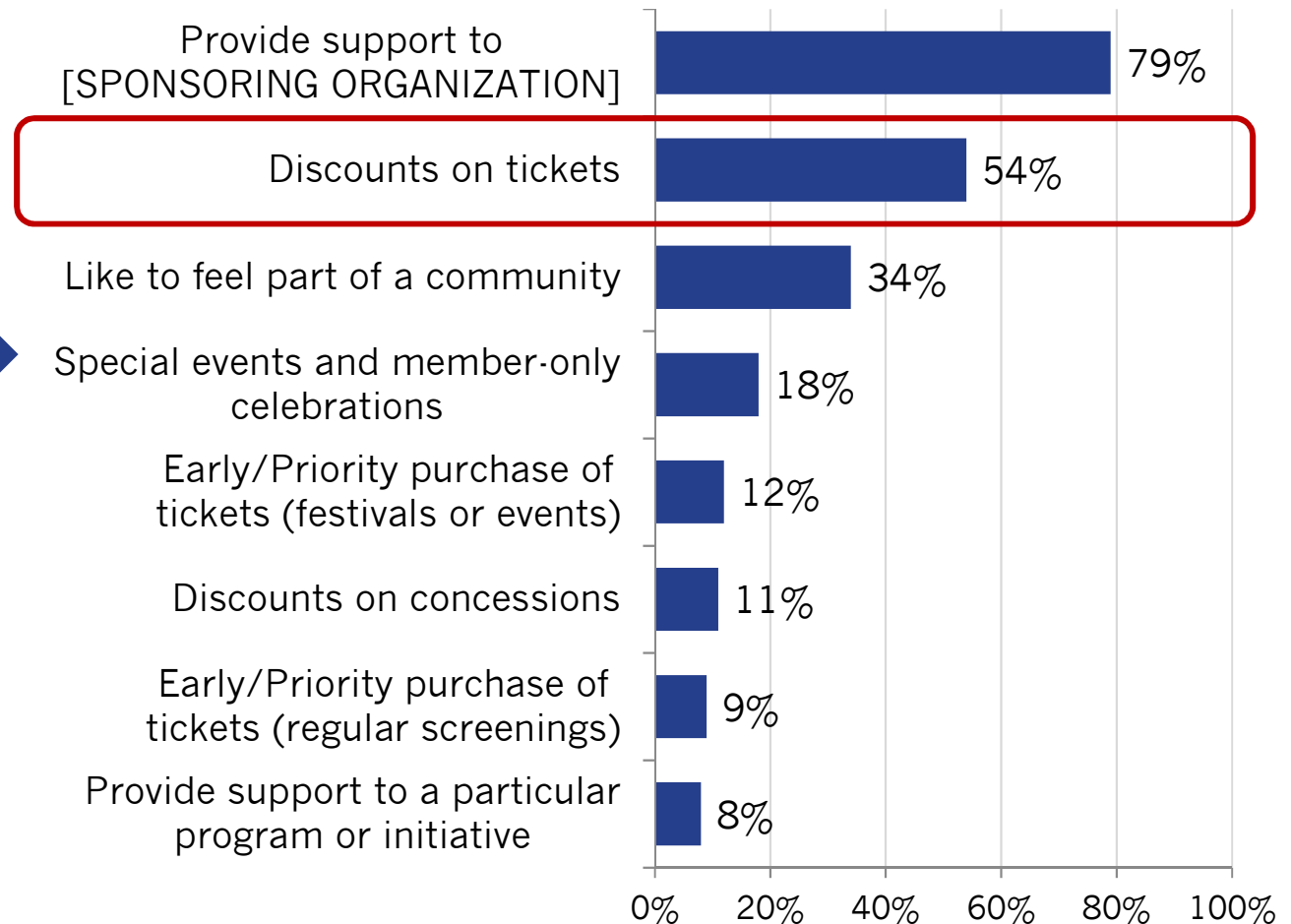
**Currently a Member of  
SPONSORING  
ORGANIZATION?**



**Question:** Are you currently a “member” of [SPONSORING ORGANIZATION]

n=18,303

**Reasons For Membership (Top 8 Results)**



**Question:** What are the most important reasons you are a member of [SPONSORING ORGANIZATION] (select no more than 3)  
n=8,753



# The Big Takeaways: Opportunities to Engage

- Showing great films is essential to building audience, but so too is engaging potential attendees through the media they use when researching films
- Strength in a variety of communications media is necessary to connect with individuals across the span of generations
- Social media continues to grow in importance with Instagram the rising star
- Programs and events (community partnerships, unique celebrations) add an additional means to reach new patrons
- Enhancing frequency of attending may rely on both programming and a thoughtful approach to discount and prepay programs



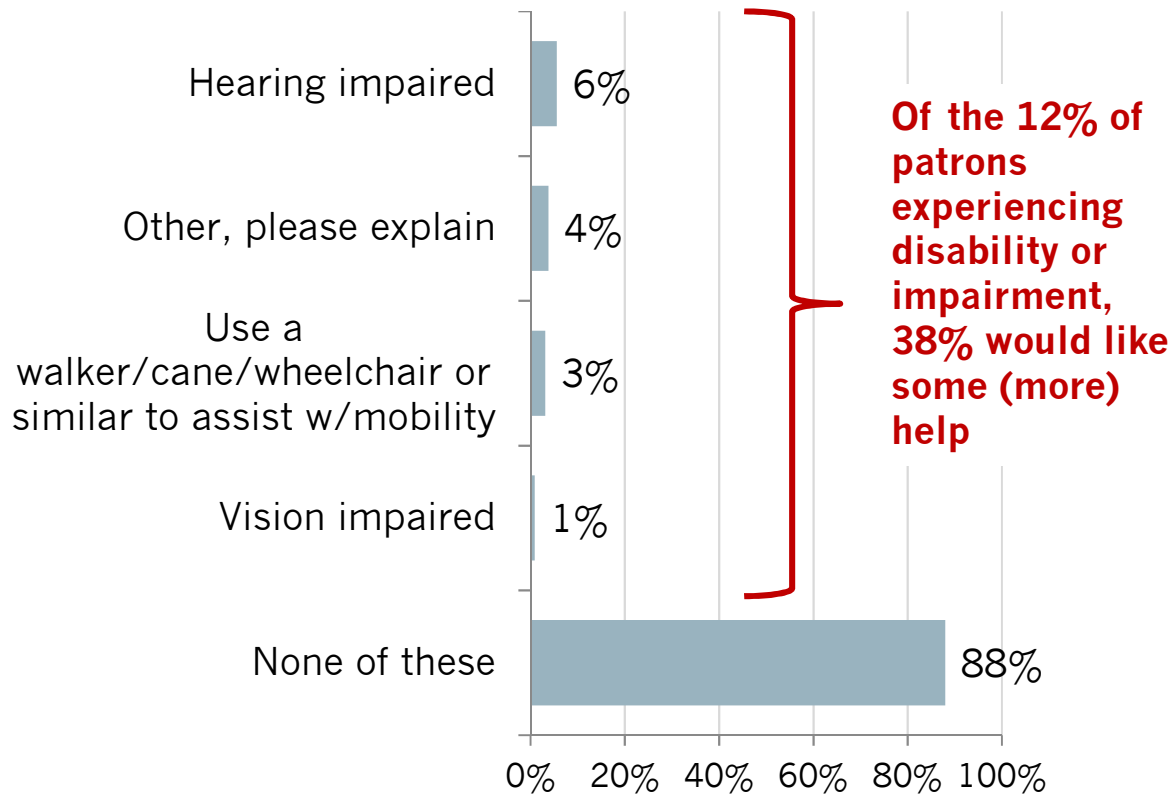
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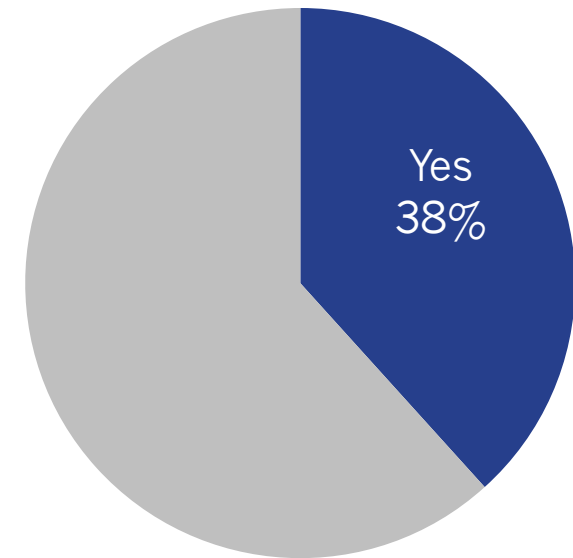


...take care of the needs of patrons with disabilities and impairment.

**Patron Disability or Impairment Impacting Movie Going Experiences**



**Would Like Additional Accommodation From SPONSORING ORGANIZATION**

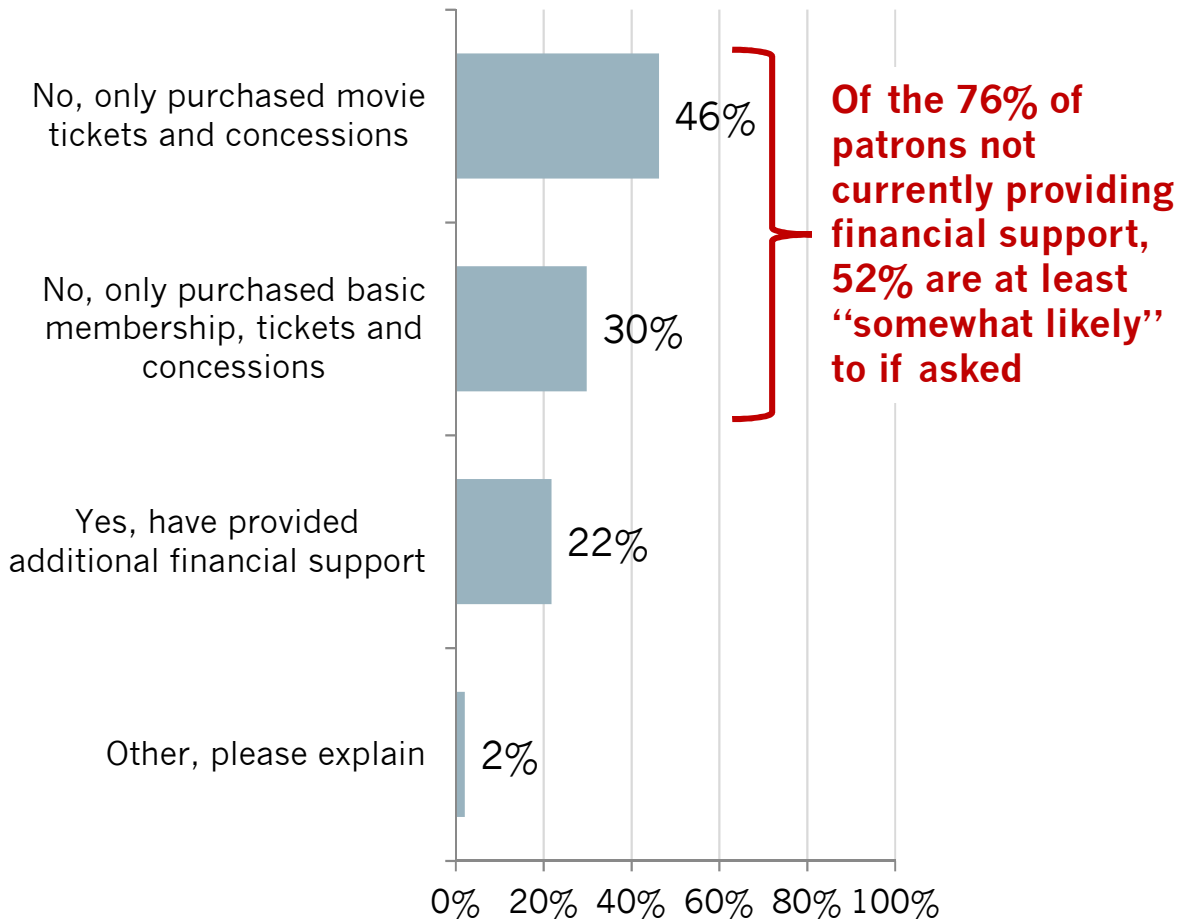


**Question:** Do you have any physical disabilities or differences that impact your experience of watching a movie in a movie theater?  
n=18,155

**Question:** Is there anything [SPONSORING THEATER] could do or provide to better accommodate your needs?  
n=1,073

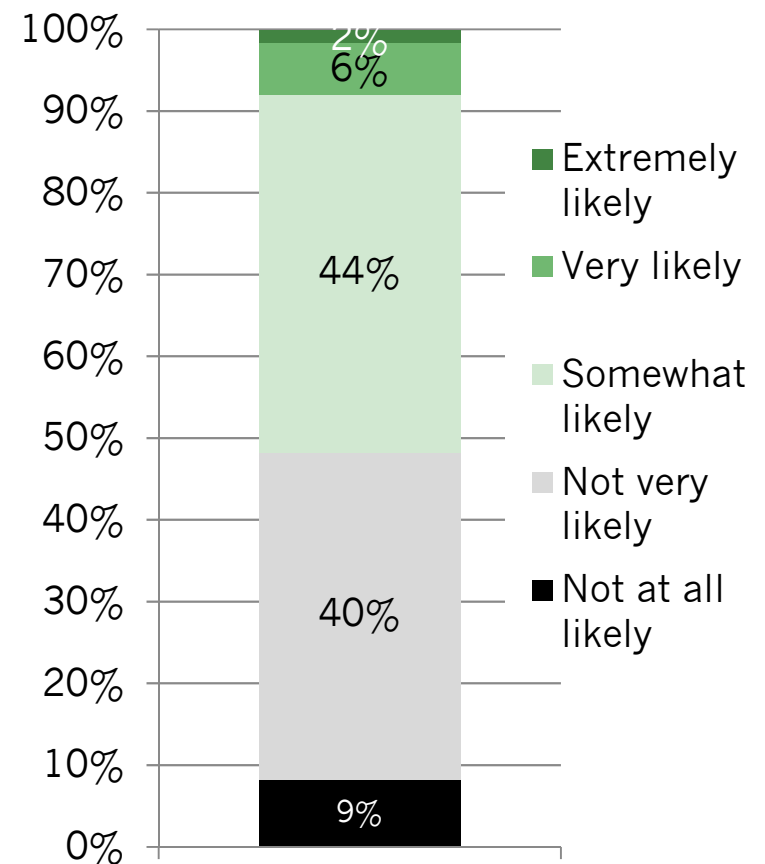
...find opportunities to ask for support in support of the mission.

### Current Financial Contributions



**Question:** In the past two years, have you provided financial support to [SPONSORING ORGANIZATION], aside from purchasing tickets to see movies there or purchasing a basic level of membership?  
n=18,263

### Potential Financial Contributions



**Question:** How likely would you be to make a financial contribution, if asked?  
n=14,025

...take care of the little things.

*“Y'all need to learn how to make better popcorn!”*



... and keep it up. You have some allies out there.

*“I love having an art house theatre in my town.”*

*“I can’t imagine living here without you.”*

*“Provides richness and diversity to the community.”*

*“Essential to maintaining our culture.”*

*“I believe in independent theaters.”*

*“You are amazing!”*

# Table of Contents

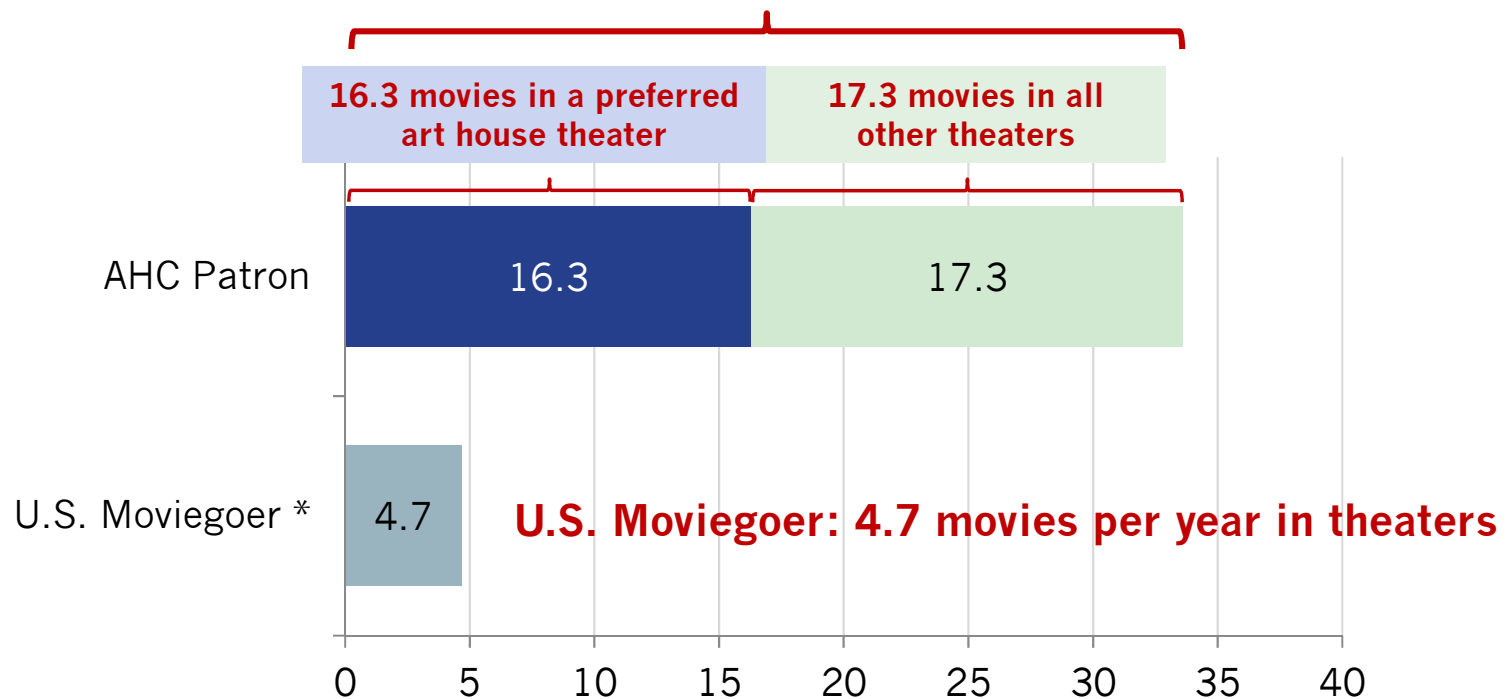
- I. Art Houses Have Tremendous Impact**
- II. Competing and Collaborating**
- III. Opportunities to Engage**
- IV. Art Houses Thrive When They...**
- V. APPENDIX**

# Art House Theaters patrons attend 7 times as many movies per year as the typical U.S. moviegoer.

- In the AHC National Audience study, patrons reported attending more than 33 movies in theaters per year; in MPAA's 2017 THEME study, patrons reported attending 4.7 movies per year

## Average Movies In Theaters Per Year – Art House Patron vs. U.S. Moviegoers\*

**Art House Patron: 33.6 movies per year in theaters**



\* Motion Picture Association of American 2017 THEME (Theatrical and Home Entertainment Market Environment) Report

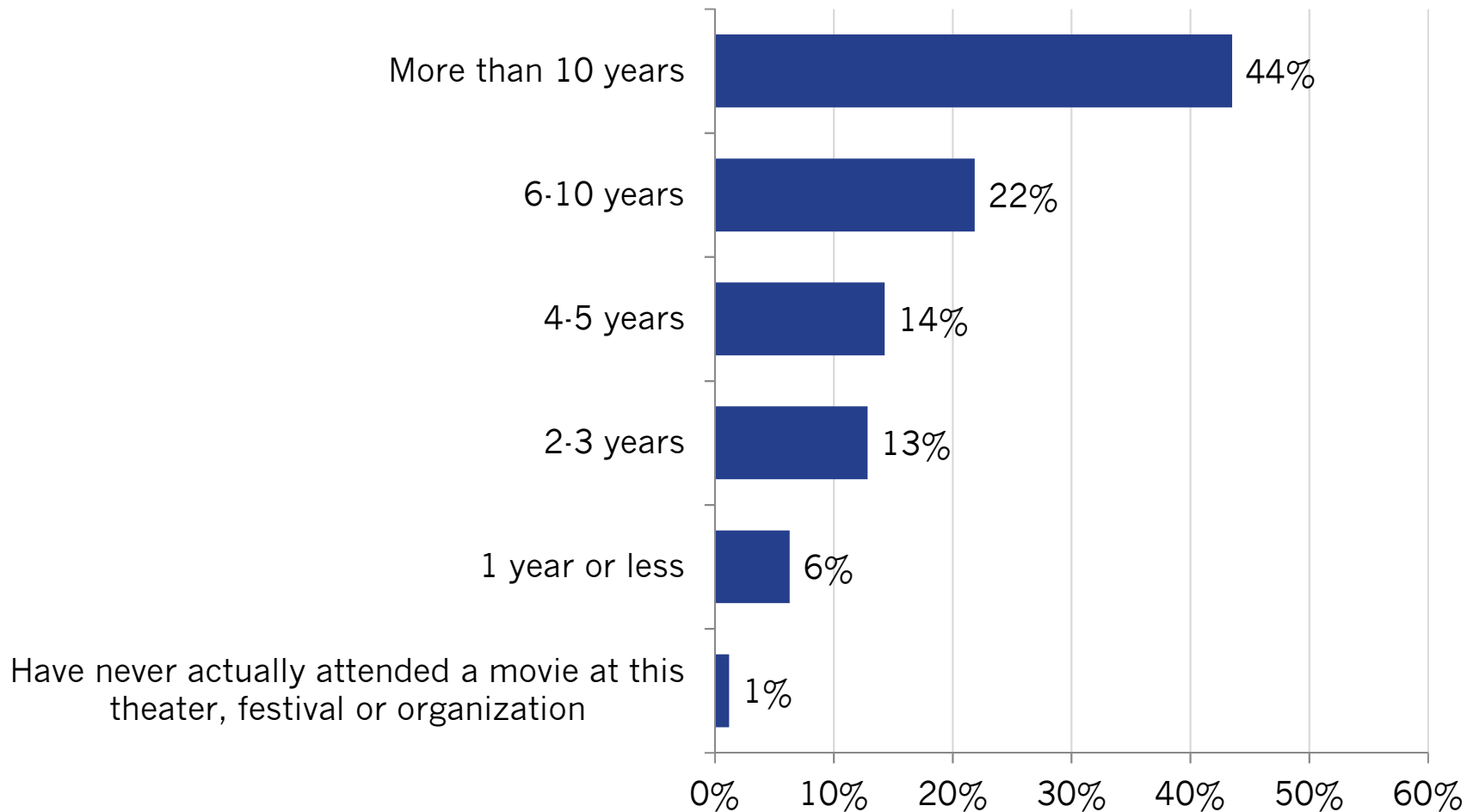
**Question:** : How often do you typically see full length feature movies at [SPONSORING ORGANIZATION] compared to other places and formats?

n=21,653

# Tenure of Audiences

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

## **Years Attending [SPONSORING ORGANIZATION]**

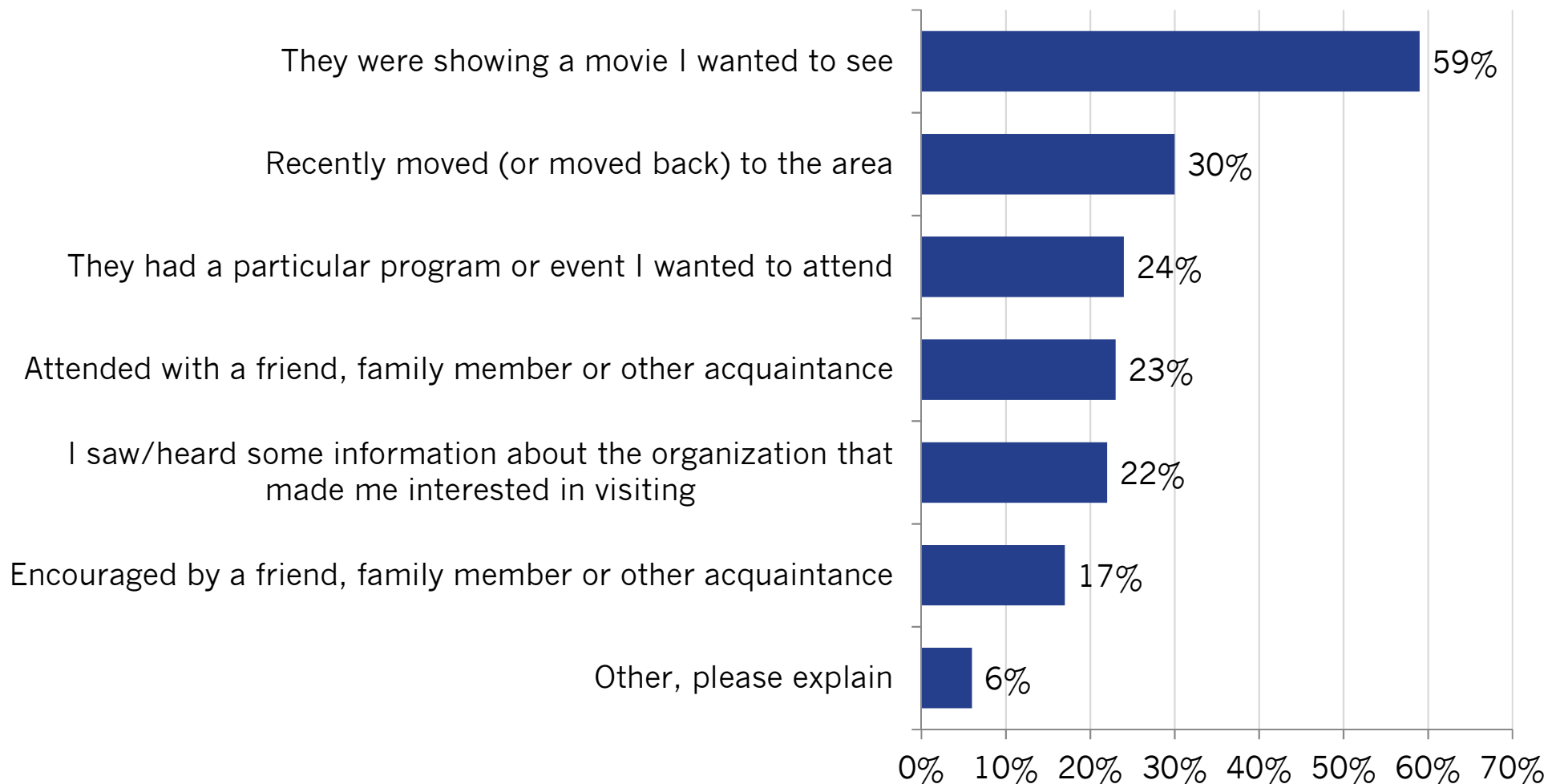




# Attracting New Audiences

**Question:** What caused you to first attend a movie or program at [SPONSORING ORGANIZATION] (select all that apply)

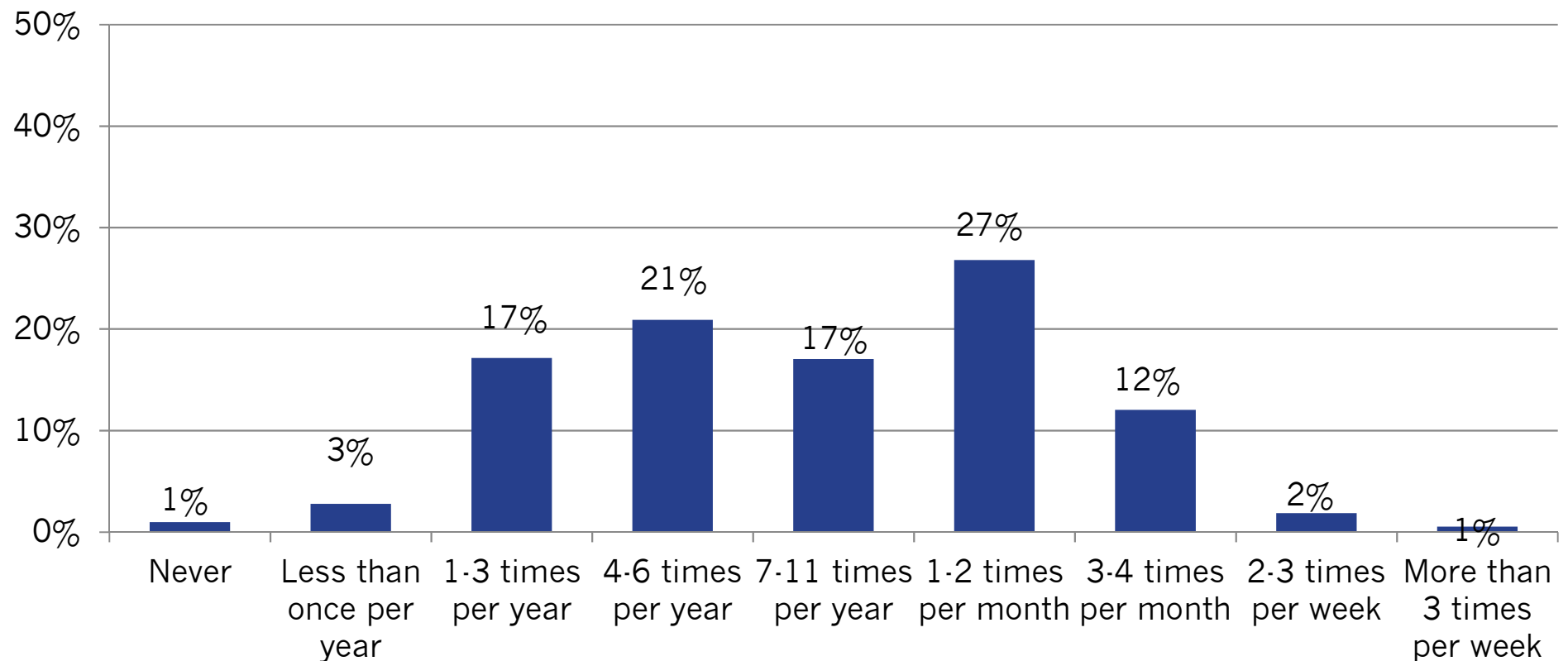
## Reasons For First Attending



# Frequency of Attending Preferred Art House Theater (Sponsoring Organization)

**Question:** How often do you typically see movies at [SPONSORING ORGANIZATION]? (Note: if primarily answering for a film festival or seasonal venue, answer for how often you attend during the time when you do attend) How often do you typically see movies at each of the following locations?

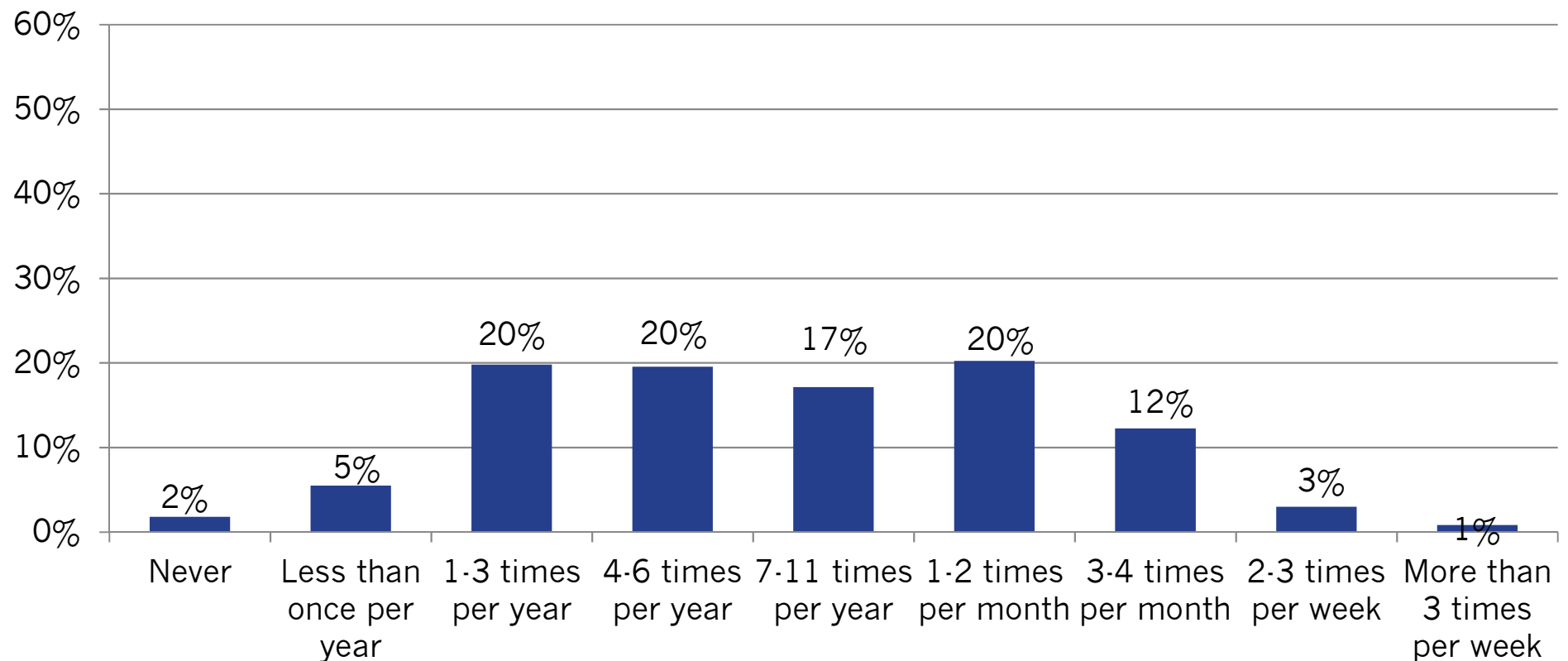
## Frequency of Attending Sponsoring Theater



# Frequency of Attending at Other Venues (Not Sponsoring Organization)

**Question:** How often do you typically see movies at all other movie venues put together? (Note: if primarily answering for a film festival or seasonal venue, answer for how often you attend during the time when you do attend) How often do you typically see movies at each of the following locations?

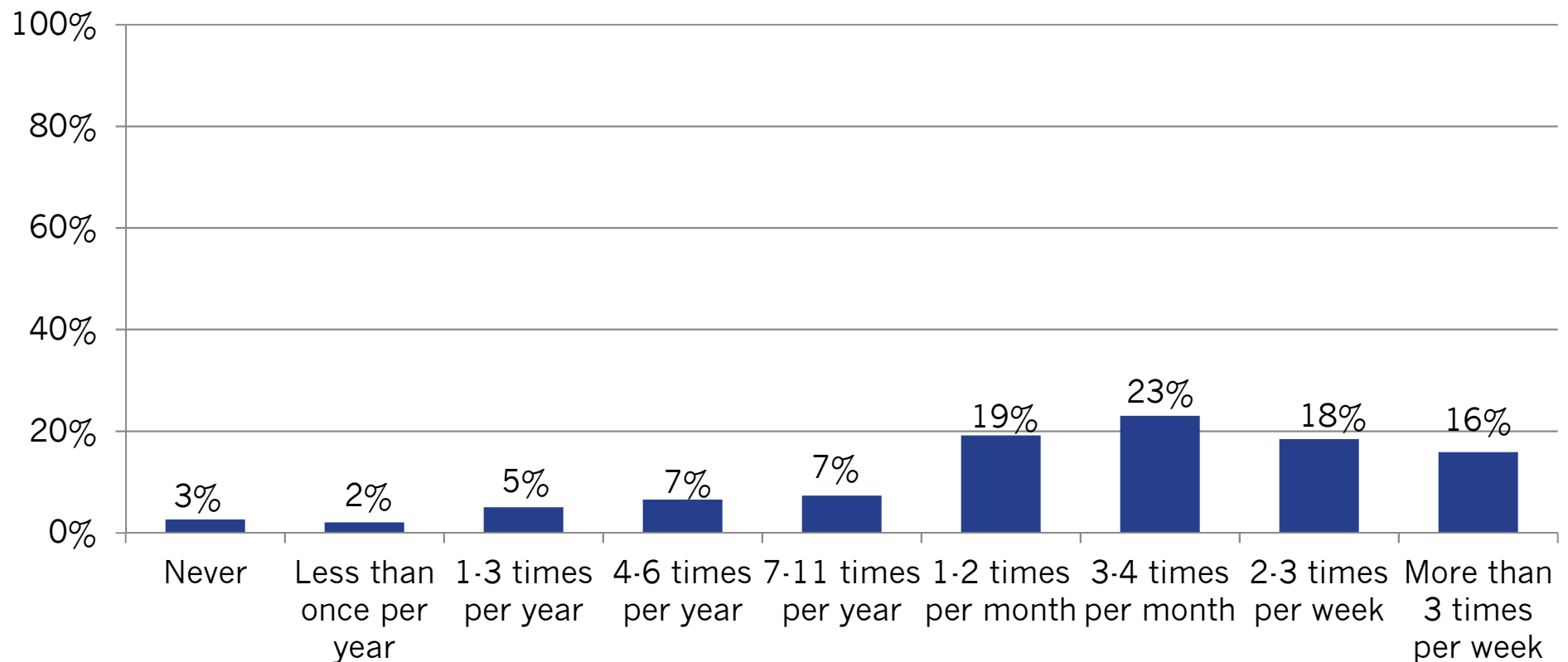
## Frequency of Attending “Other” Theaters



# Frequency of Watching Movies At Home & On Devices

**Question:** How often do you typically see movies at at home or other place on a TV, computer or other personal electronic device? (Note: if primarily answering for a film festival or seasonal venue, answer for how often you attend during the time when you do attend) How often do you typically see movies at each of the following locations?

## Frequency of Watching Movies at Home/Devices



# Sources of Information: Movie Screening and Show Times

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

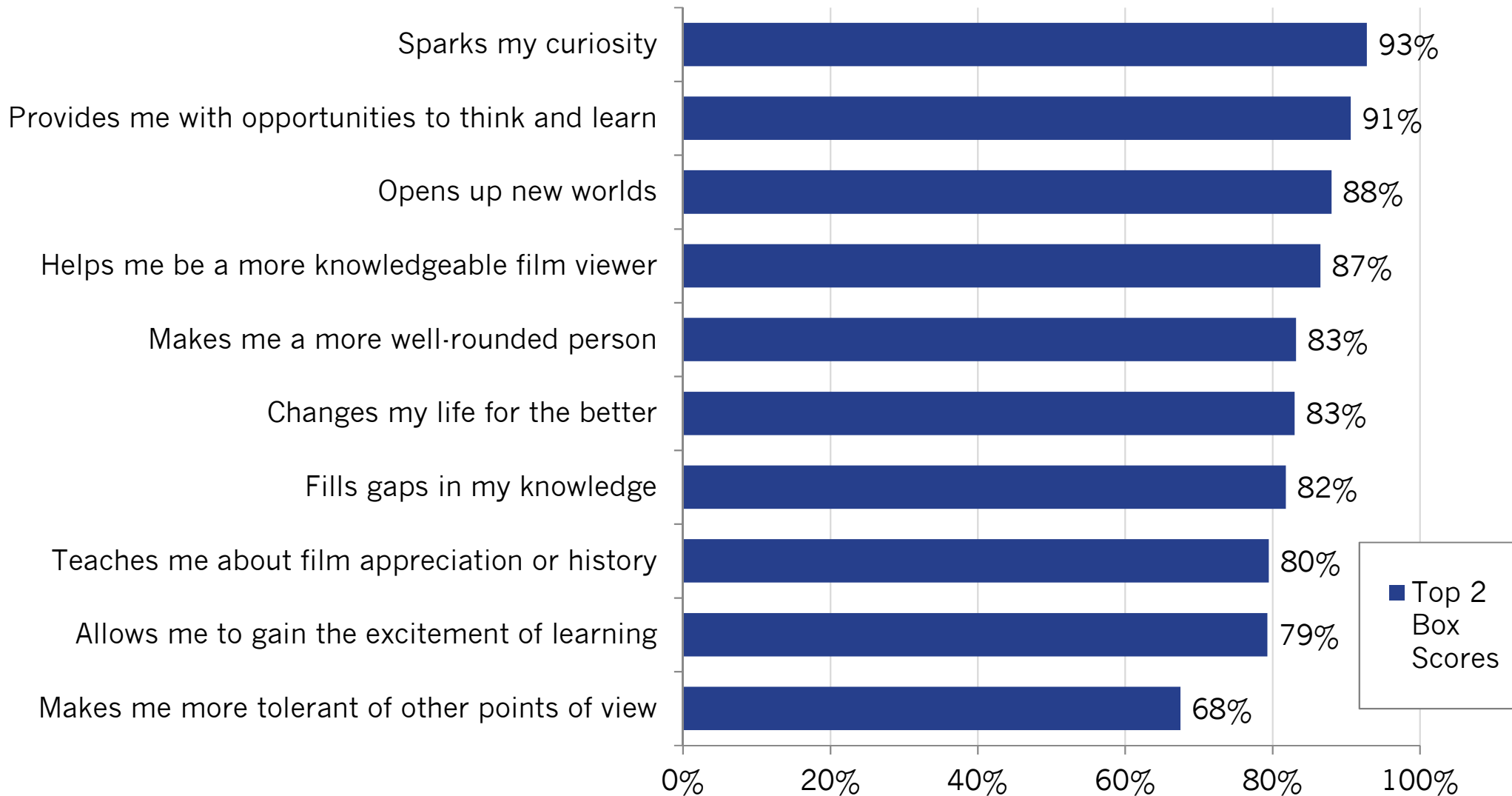
## Movie Time Information Sources



# Personal Significance of the Art House

**Question:** *To what extent do you agree with the following statements about [SPONSORING ORGANIZATION]?*

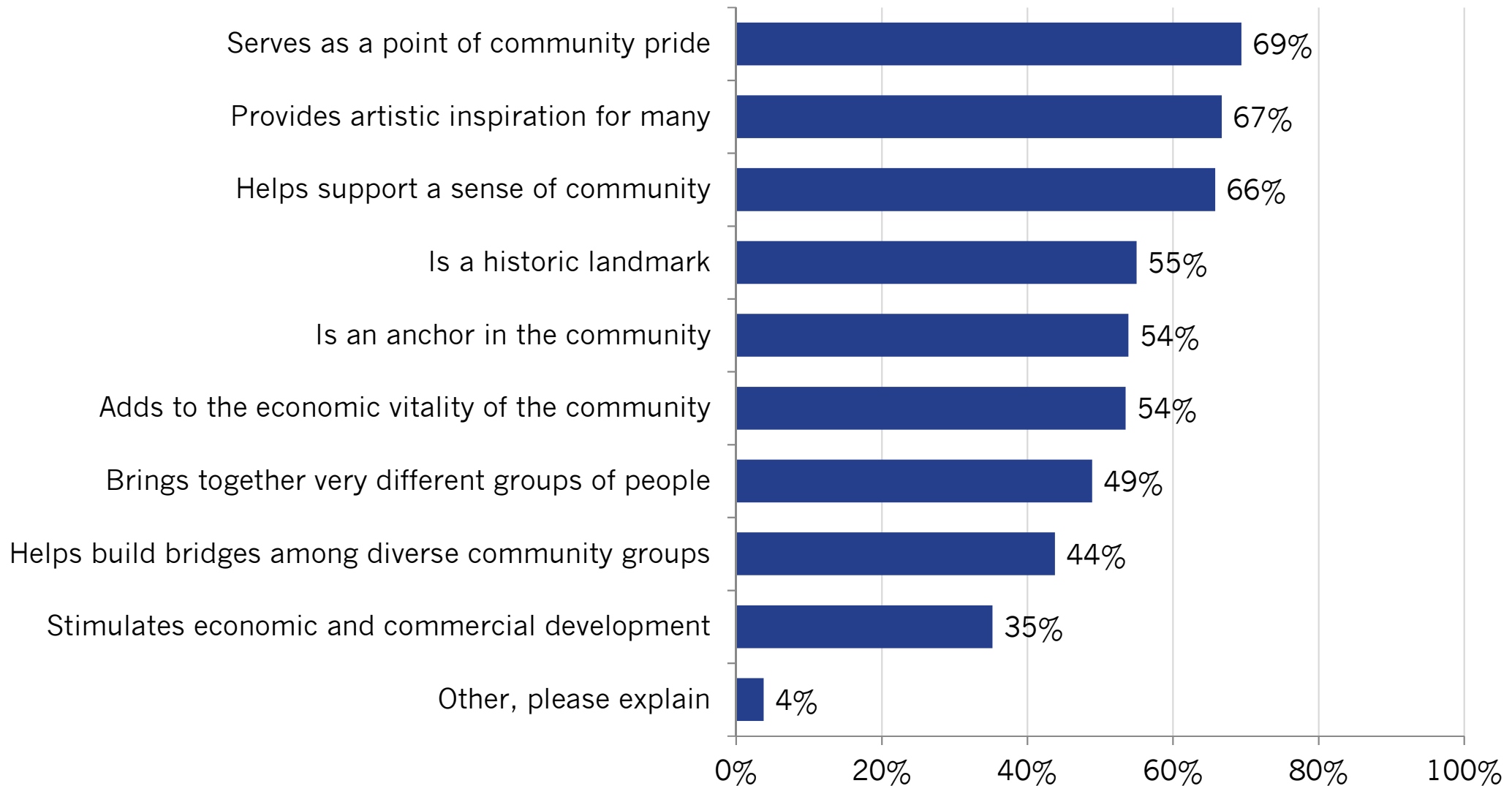
## **Role Art House Plays in Respondent's Life - Top 2 Box: Strongly or Somewhat Agree**



# Community Significance of the Art House

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

## Role Art House Plays in Community

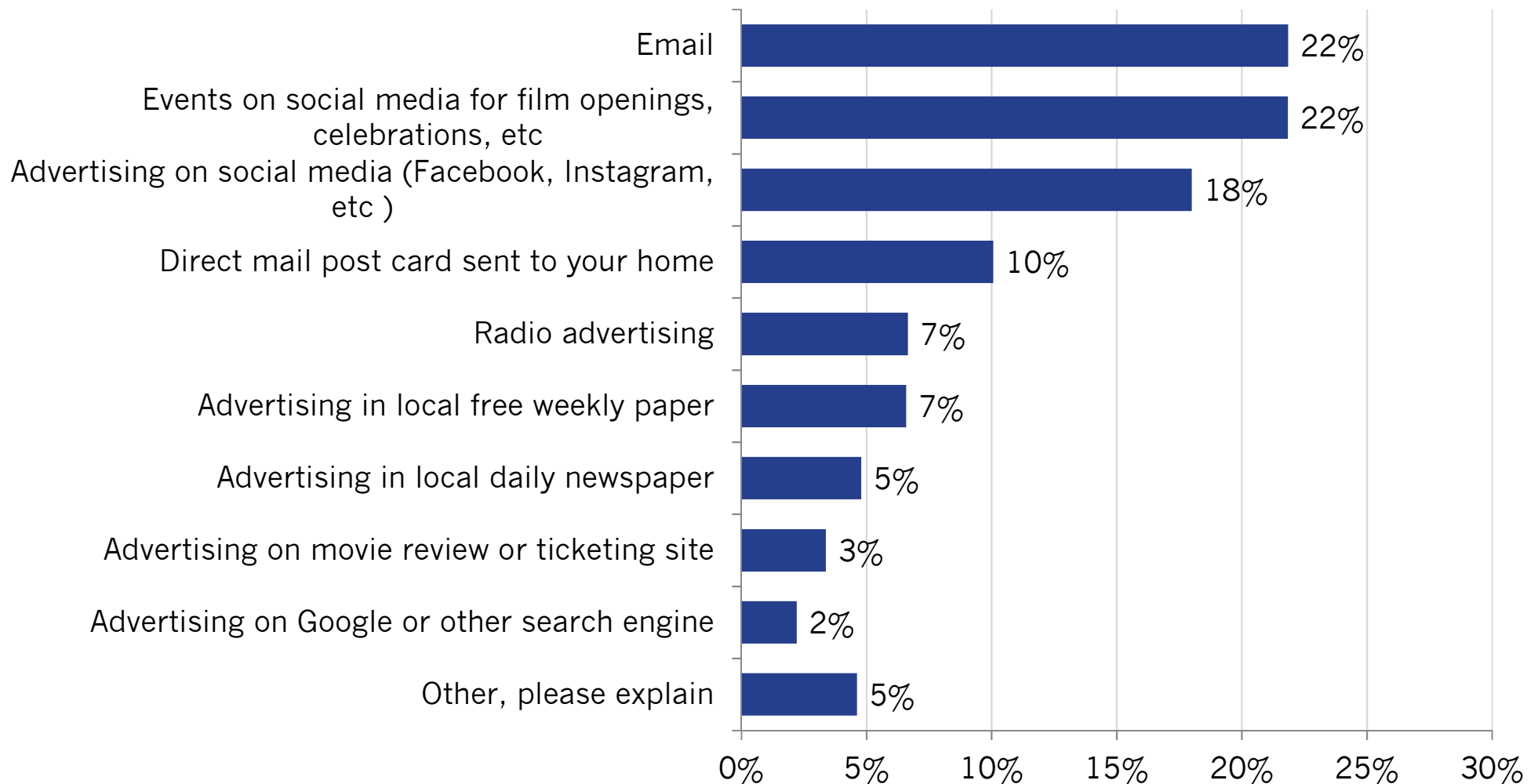




# Reaching New Audiences: Communications Vehicles/Media

**Question:** Suppose [SPONSORING ORGANIZATION] wished to reach out to more people in the community who share your values and interests. Which of these might be most effective to reach these new people who are somewhat like you? (select one only)

## Reaching New Audiences



# Reasons for Membership

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

## Reasons For Membership

