Art House Convergence
National Audience Study 2013

Conceived and Presented in Consultation with
Bryn Mawr Film Institute

Avenue ISR • www.avenueisr.com

January 15, 2014
In October, 2013 the Art House Convergence, Bryn Mawr Film Institute and Avenue ISR partnered to conduct a first ever National Audience Study to develop a deep understanding of patron profiles, attitudes and beliefs.

More than 18,000 art house attendees from across the United States participated in this landmark study.
29 Participating Theaters

**The State Theatre (MI)**
**The Michigan Theater (MI)**

SIFF Cinema (WA)

Camera Cinemas (CA)

Rialto Cinemas (CA) – Cerrito, Elmwood, Sebastopol

Cinemapolis (NY)

Jacob Burns Film Center (NY)

The Coolidge Corner Theatre (MA)
Martha’s Vineyard Film Center (MA)
The Nantucket Dreamland (MA)

Jane Pickens Theater (RI)

The Ambler Theater (PA)
Bryn Mawr Film Institute (PA)
The Colonial Theatre (PA)
The County Theater (PA)
The Hiway Theater (PA)

Nickelodeon Theatre (SC)

Maiden Alley Cinema (KY)

The Belcourt Theatre (TN)

The Loft Cinema (AZ)

The Salt Lake Film Society (UT)

Mesilla Valley Film Society (NM)

Capri Theatre (AL)

Robinson Film Center (LA)

The Oklahoma City Museum of Art (OK)

Enzian Theater (FL)
O Cinema (FL)
Campaign Details

- Online Survey initiated by email invitations sent by participating theaters

- As far as we know, the largest survey ever of art house movie attendees
Who is the art house attendee?
The art house attendee sees many more movies in a given year than the average U.S. citizen.

Art house attendees go to the movies about 6 times more often than the norm.

**Art House Attendee: 25.7 movie theater trips per year**

*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?*

**U.S. Admissions Per Capita: 4.1 movie theater trips per year**

(Source for Comparison: Theatrical Market Statistics 2012, Motion Picture Association of America Inc.)
The Art House Audience (Age)

- About 57% of respondents are 55 or older
- 67% (two-thirds) of those who frequently attend a preferred art house (i.e. once a month or more) are 55+

![Bar chart showing the percentage of Art House Attendees and Frequent Moviegoers by age group.](chart.png)
The typical owner is male, affluent, well-educated, marred or living with a partner and 45-64 years old.

For the motion picture industry in general, younger viewers are the frequent attendees who tend to drive ticket sales; for art houses older viewers purchase a higher share of tickets.

Percentage 25 Years Old and Younger

Age and Frequency of Attending

However, the younger viewers who do attend art houses go to movies with quite a bit of regularity

Movies per Year

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?

- Overall: 25.7
- Age: Under 25: 26.9
- Age: 25 to 44: 23.8
- Age: 45 to 64: 25.1
- Age: 65 Plus: 28.1
The Art House Audience (Income and Education)

- Compared to US averages, the art house audience has a very high income and high degree of education
- Many corporate sponsors and others wishing to reach this audience would find them a very attractive consumer segment

**Income**

- Less than $25,000: 11.5% (US), 10.5% (Art House)
- $25,000-$49,999: 17% (US), 15.5% (Art House)
- $50,000-$74,999: 20.1% (US), 18.5% (Art House)
- $75,000-$99,999: 18.8% (US), 17% (Art House)
- $100,000-$149,999: 12% (US), 11.5% (Art House)
- $150,000-$199,999: 12% (US), 11.5% (Art House)
- $200,000 or more: 11.5% (US), 11% (Art House)

**Education**

- Some high school: 24% (US), 18% (Art House)
- High school degree or GED: 20% (US), 18% (Art House)
- Some college: 10% (US), 8% (Art House)
- Associates or other two-year degree: 9% (US), 7% (Art House)
- Bachelors degree: 36% (US), 30% (Art House)
- Graduate or professional degree: 46% (US), 40% (Art House)

Sources for Comparisons: 2012 American Community Survey, United States Census Bureau
Frequent Moviegoers

- The 31% of respondents who attend movies at art houses once a month or more account for more than two thirds of ticket sales

*How often do you typically see movies at SPONSORING THEATER?*

![Pie chart]

- **% of Total**
  - Frequent Moviegoer: 31%
  - Infrequent Moviegoer: 69%

- **Total Tickets Sold**
  - Frequent Moviegoer: 72%
  - Infrequent Moviegoer: 28%
How, when, what and where do they prefer to watch?
Movie Formats

- 48% of all movies that art house attendees watch are in movie theaters
- Frequent Attendees are even less likely to watch movies on television, computers, handheld devices and other formats

*Think about all of the movies you have seen in the past year. What percentage of these have you seen in the following formats and settings?*

### All Attendees
- In movie theater(s): 48%
- On TV: 38%
- On computer, handheld or other: 14%

### Frequent Attendees
- In movie theater(s): 61%
- On TV: 29%
- On computer, handheld or other: 10%
Think about all of the movies you have seen in the past year. What percentage of these have you seen in the following formats and settings?

- **Movie Theaters**
- **TV**
- **Computer, handheld or other**

### Younger moviegoers are more apt to watch movies on computers and handheld devices

**Overall**
- Movie Theaters: 48%
- TV: 38%
- Computer, handheld or other: 14%

**Under 25**
- Movie Theaters: 34%
- TV: 25%
- Computer, handheld or other: 41%

**Age: 25 to 44**
- Movie Theaters: 37%
- TV: 40%
- Computer, handheld or other: 23%

**Age: 45 to 64**
- Movie Theaters: 48%
- TV: 41%
- Computer, handheld or other: 11%

**Age: 65 plus**
- Movie Theaters: 58%
- TV: 34%
- Computer, handheld or other: 8%
What is the greatest distance that you are willing to travel from your home to see a movie in a movie theater?

- The majority of patrons are willing to travel 15 miles to attend a movie theater.
- Just over a third are willing to travel 20 miles.

- 10 miles: 84.6%
- 15 miles: 55.9%
- 20 miles: 34.4%
- More than 20 miles: 17.1%
Frequency of Attending

- Just over half of all movies seen are at a favorite art house.
- By implication, art houses could theoretically nearly double tickets sold by meeting more of the needs of existing audiences (i.e. more of the titles that people want to see).

*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?*

![Bar chart showing the frequency of attending movies by age group and theater type.](chart)

<table>
<thead>
<tr>
<th>Age Group</th>
<th>At Sponsoring Theater</th>
<th>At All Other Theaters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>13.0</td>
<td>12.7</td>
</tr>
<tr>
<td>Age: Under 25</td>
<td>12.3</td>
<td>14.6</td>
</tr>
<tr>
<td>Age: 25 to 44</td>
<td>10.0</td>
<td>13.8</td>
</tr>
<tr>
<td>Age: 45 to 64</td>
<td>12.8</td>
<td>12.3</td>
</tr>
<tr>
<td>Age: 65 Plus</td>
<td>15.5</td>
<td>12.6</td>
</tr>
</tbody>
</table>
Preferred Film Genres

- The art house audience has a wide-reaching array of movie tastes
- Even less-favored genres such as Horror, Westerns and War movies have significant numbers of fans among the art house audience

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

- Drama: 86.9%
- Independent: 80.2%
- Comedy: 78.9%
- Foreign (subtitled): 73.0%
- Documentaries: Social/Cultural: 66.2%
- The Classics: 61.3%
- Action & Adventure: 54.3%
- Foreign (English language): 49.0%
- Romance: 47.2%
- Docs.: Environment/Nature: 45.3%
- Docs.: Political/War: 42.6%
- Thrillers: 41.2%
- Music & Musicals: 40.6%
- Sci-Fi & Fantasy: 34.9%
- Crime & Gangster: 33.0%
- Children & Family: 21.1%
- War: 17.5%
- Westerns: 15.7%
- Horror: 14.2%
Preferred Film Genres (Younger Audiences)

- Younger viewers have somewhat different preferences by genre
- Time slots catering to these viewers should tend more to these genres

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

- Drama
- Independent
- Comedy
- Foreign (subtitled)
- Documentaries: Social/Cultural
- The Classics
- Action & Adventure
- Foreign (English language)
- Romance
- Docs.: Environment/Nature
- Docs.: Political/War
- Thrillers
- Music & Musicals
- Sci-Fi & Fantasy
- Crime & Gangster
- Children & Family
- War
- Westerns
- Horror

Overall
Under 25

- Docs.: Environment/Nature: Overall 44%, Under 25 40%
- Romance: Overall 49%, Under 25 47%
- Foreign (English language): Overall 46%, Under 25 45%
- Foreign (subtitled): Overall 69%, Under 25 66%
- Documentaries: Social/Cultural: Overall 66%, Under 25 66%
- The Classics: Overall 73%, Under 25 73%
- Action & Adventure: Overall 71%, Under 25 71%
- Docs.: Environmental: Overall 87%, Under 25 85%
- Music & Musicals: Overall 41%, Under 25 41%
- Sci-Fi & Fantasy: Overall 35%, Under 25 35%
- Crime & Gangster: Overall 33%, Under 25 41%
- Children & Family: Overall 21%, Under 25 36%
- War: Overall 18%, Under 25 28%
- Westerns: Overall 16%, Under 25 22%
- Horror: Overall 14%, Under 25 38%
Although going to art houses is typically a shared experience, 42% of respondents will at least occasionally go to the movies alone. More common, however, is attending with others, especially spouses, partners or significant others.

When you go to SPONSORING THEATER, do you go by yourself or with other people?

- By myself: 6%
- Some of both: 36%
- With other people: 58%

With whom, if anyone, do you most often go to SPONSORING THEATER? (of those who go to SPONSORING THEATER with other people)

- With spouse, partner, girlfriend/boyfriend or significant other: 58.5%
- With friends: 28.1%
- By myself: 7.3%
- With a larger family group (e.g., children, grandchildren, etc.): 3.4%
- Other: 2.8%
Preferred Movie Times

- Although a significant minority (43%) would prefer to attend movies in the afternoon or earlier, the majority (57%) prefer to attend in the evening.
- 7:00 PM is the most widely preferred start time among evening moviegoers.

What is your favorite time to go to a movie?

- Evening: 57%
- Afternoon: 33%
- Midday or before noon: 10%

What is your favorite time to go to an evening movie?

- 6:00 PM: 5.7%
- 6:30 PM: 6.4%
- 7:00 PM: 36.7%
- 7:30 PM: 23.1%
- 8:00 PM: 17.6%
- 8:30 PM: 3.4%
- 9:00 PM: 4.7%
- 9:30 PM: 1.2%
- 10:00 PM: 0.5%
- After 10 PM: 0.7%
Afternoon Attendees

- Those who would prefer to attend movies in the afternoon tend to be older.

What is your favorite time to go to a movie?

- Afternoon: 33%
- Midday or before noon: 10%
- Evening: 57%

Age distribution for All Attendees and Afternoon Attendees:

- Under 25: 2% and 3%
- 25-34: 5% and 11%
- 35-44: 7% and 11%
- 45-54: 14% and 18%
- 55-64: 27% and 28%
- 65-74: 22% and 31%
- 75-84: 7% and 11%
- 85 or over: 1% and 1%

All Attendees vs. Afternoon Attendees comparison.
What role do art houses play in the lives of their audiences?
The art house experience is almost never boring or ordinary.
On the contrary, it is typically interesting, captivating and uplifting.

In the last 12 months, how often would you say your experience of watching movies at SPONSORING THEATER matches the following terms? (Top 2 Box – Always or Usually)

- Interesting: 86.7%
- Captivating: 62.8%
- Uplifting: 51.7%
- Life changing: 12.6%
- Ordinary: 1.9%
- Boring: 0.8%
Benefits (Knowledge)

- Art houses provide significant benefits to the people who attend them and to their communities
- As the bars highlighted in red show, art houses teach, inform and broaden knowledge

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

<table>
<thead>
<tr>
<th>Statement</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Makes life enjoyable</td>
<td>92.0%</td>
</tr>
<tr>
<td>Sparks my curiosity</td>
<td>85.7%</td>
</tr>
<tr>
<td>Provides me with more to talk about with friends or loved ones</td>
<td>85.2%</td>
</tr>
<tr>
<td>Provides me with opportunities to think and learn</td>
<td>84.9%</td>
</tr>
<tr>
<td>Helps me be a more knowledgeable film viewer</td>
<td>82.9%</td>
</tr>
<tr>
<td>Allows me to make the most of my (leisure) time</td>
<td>81.9%</td>
</tr>
<tr>
<td>Serves as an anchor in my community</td>
<td>80.6%</td>
</tr>
<tr>
<td>Opens up new worlds</td>
<td>78.4%</td>
</tr>
<tr>
<td>Makes me a more well-rounded person</td>
<td>75.4%</td>
</tr>
<tr>
<td>Fills gaps in my knowledge</td>
<td>73.3%</td>
</tr>
<tr>
<td>Teaches me about film appreciation or history</td>
<td>72.4%</td>
</tr>
<tr>
<td>Changes my life for the better</td>
<td>72.1%</td>
</tr>
<tr>
<td>Allows me to gain the excitement of learning</td>
<td>70.7%</td>
</tr>
<tr>
<td>Makes me more tolerant of other points of view</td>
<td>61.1%</td>
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Benefits (Community)

- Art houses anchor communities

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

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Benefits (Quality of Life)

- Art houses add to the quality of life of their audiences

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

- Makes life enjoyable: 92.0%
- Sparks my curiosity: 85.7%
- Provides me with more to talk about with friends or loved ones: 85.2%
- Provides me with opportunities to think and learn: 84.9%
- Helps me be a more knowledgeable film viewer: 82.9%
- Allows me to make the most of my (leisure) time: 81.9%
- Serves as an anchor in my community: 80.6%
- Opens up new worlds: 78.4%
- Makes me a more well-rounded person: 75.4%
- Fills gaps in my knowledge: 73.3%
- Teaches me about film appreciation or history: 72.4%
- Changes my life for the better: 72.1%
- Allows me to gain the excitement of learning: 70.7%
- Makes me more tolerant of other points of view: 61.1%
The theaters participating in this study are Very Valuable or Extremely Valuable to the overall quality of life of more than 60% of respondents. Only 4.4% would say the theaters are Not Very Valuable or Not At All Valuable.

How valuable is SPONSORING THEATER to your overall quality of life?

- Extremely valuable: 22.9%
- Very valuable: 37.3%
- Somewhat valuable: 34.1%
- Not very valuable: 3.6%
- Not at all valuable: 0.8%
- Other, please explain: 1.4%
How do these moviegoers make decisions and where do they gather information?
Attendees typically decide on a specific movie they want to see; then figure out where and when they will see it.

*When you go to the movies in a movie theater, which is most often true about how you decide what to see?*

- 50.3%: I decide on the specific movie I want to see, then find out where and when it is showing.
- 22.1%: I decide "I want to see a movie," then look at local listings to find out what is playing and when.
- 23.4%: I decide to go to a favored theater, then find out what is playing there.
- 4.1%: Other.

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Decision Process
Decision Process (cont.)

- Most often within 1-3 days of when they see the movie, they make the decision to attend
- This has implications against limiting options through long-term scheduling

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

- The day I go to the movie: 13.7%
- Within 2-3 days of when I go to the movie: 41.3%
- Within a week: 30.7%
- Within 2 weeks: 8.0%
- Within a month: 4.1%
- A month or more before I go to the movie: 2.2%
Choosing Films to Watch

- Movie trailers or previews are the most important means by which attendees learn about movies they want to see.
- Advice from friends, direct communications from theaters and printed publications also have significant influence.

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: 57.1%
- My friends: 47.8%
- Emails or newsletters from theaters: 42.4%
- Printed newspapers or magazines: 41.5%
- Television ads or previews showing movie clips/scenes: 34.1%
- Online movie reviews and websites: 33.7%
- Theater websites: 30.8%
- Internet browsing in general: 26.7%
- Newspaper/Magazine ads: 22.3%
- My family: 18.4%
- Posters or schedules from theaters: 18.0%
- Social media (e.g. Facebook, Twitter) posts from theaters: 15.6%
- Online movie ticketing sites: 7.2%
- Billboards: 1.9%
- Other: 6.8%
Although attendees may learn about movies from a wide variety of media and information sources, they are likely to rely on electronic media for screening info.

Local newspapers and publications are still used by about a third of respondents.

Finding Screening Times

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

- Movie theater web sites: 62.7%
- Local newspapers or publications: 32.7%
- Smartphone (or other handheld) apps (e.g. Fandango): 25.5%
- Movie listing web sites (e.g. mrmovietimes.com): 23.6%
- General internet searches (e.g. Google): 22.4%
- Movie ticketing web sites: 16.8%
- Looking at the movie theater's marquee or sign: 9.3%
- Calling a movie theater on the phone: 6.7%
- Local news web sites: 4.1%
- Other: 3.7%
76.2% of respondents have subscribed to one or more social media sites. Most popular among these is Facebook, although there are a number of subscribers to many other social media sites.
How can art houses engage and expand their audiences?
Preferred Film Genres

Among the top 6 genres favored by art house attendees, the ones that respondents would like to see more are Independent and Foreign (subtitled) films.

Which of the following movie types or genres, if any, do you enjoy? (select all that apply) AND Of these types or genres, which would you like to see more often at SPONSORING THEATER?
Performance Ratings (Programming & Screening)

- There is a great deal of variety in how theaters were rated by respondents.
- In the area of programming and screening, the most widespread concern is in the length of movie runs.

*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>Quality of movies offered</td>
<td>88.8%</td>
</tr>
<tr>
<td>2</td>
<td>Picture quality</td>
<td>85.2%</td>
</tr>
<tr>
<td>3</td>
<td>Sound quality</td>
<td>79.7%</td>
</tr>
<tr>
<td>4</td>
<td>Sound volume</td>
<td>78.8%</td>
</tr>
<tr>
<td>5</td>
<td>Variety of movies offered</td>
<td>76.6%</td>
</tr>
<tr>
<td>6</td>
<td>Affordability of tickets</td>
<td>76.3%</td>
</tr>
<tr>
<td>7</td>
<td>Screening times</td>
<td>68.4%</td>
</tr>
<tr>
<td>8</td>
<td>Length of movie runs</td>
<td>61.9%</td>
</tr>
</tbody>
</table>
Performance Ratings (Staff & Amenities)

- Generally staff and volunteers are rated relatively highly by all attendees.
- Nearby dining options and availability of parking are both areas of common dissatisfaction.

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>Customer service of staff/volunteers</td>
<td>86.2%</td>
</tr>
<tr>
<td>2</td>
<td>Knowledge of staff/volunteers</td>
<td>85.0%</td>
</tr>
<tr>
<td>3</td>
<td>Appearance of staff/volunteers</td>
<td>81.6%</td>
</tr>
<tr>
<td>4</td>
<td>Nearby dining options</td>
<td>74.3%</td>
</tr>
<tr>
<td>5</td>
<td>Availability of parking</td>
<td>46.9%</td>
</tr>
</tbody>
</table>
Performance Ratings (Facilities & Concessions)

- Theater cleanliness is generally rated highly
- Variety and affordability of concessions is a bigger area of concern

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>Cleanliness of the theater overall</td>
<td>83.9%</td>
</tr>
<tr>
<td>2</td>
<td>Cleanliness of lobby</td>
<td>83.9%</td>
</tr>
<tr>
<td>3</td>
<td>Cleanliness of bathrooms</td>
<td>78.3%</td>
</tr>
<tr>
<td>4</td>
<td>Temperature of the theater</td>
<td>73.2%</td>
</tr>
<tr>
<td>5</td>
<td>Variety of concessions options</td>
<td>69.5%</td>
</tr>
<tr>
<td>6</td>
<td>Affordability of concessions</td>
<td>62.4%</td>
</tr>
</tbody>
</table>
Alcoholic Beverages and Art Houses

- The 46% 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 and do not want alcohol

**Does SPONSORING THEATER serve alcoholic beverages?**

- No, and I'm glad they don't: 36.8%
- No, but I wish they would: 16.9%
- Yes, but I wish they didn't: 2.0%
- Yes, and I'm glad they do: 44.3%
Educational Content

- 59% of respondents attend theaters which offer some form of educational content, though a surprising 37% aren’t sure whether or not this content is offered.
- Film introductions and commentaries are the most widely attended forms of educational content.

Does SPONSORING THEATER offer year-round educational content such as film introductions/commentaries, classes or panel discussions?

How often do you attend each of the following at SPONSORING THEATER? (of those answering “Yes” to the prior question)

- Film introductions or commentaries
- Question and answer sessions
- Panel discussions
- Classes or seminars
Respondents indicated that enhanced member benefits and more matinee screenings constitute the two changes/additions that are most likely to cause them to attend more often.

35mm and 3D screenings or availability of meals are relatively less likely to increase attendance of these attendees.

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

- New/enhanced membership program with member benefits
- (more) Matinee screenings
- (more) Live performances
- Overall changes to screening times
- New/enhanced educational content
- New/better concessions options
- (more) 35mm screenings
- Availability of meals
- (more) 3D screenings

The chart shows the percentage of respondents who indicated they would attend more often, with options ranging from 0% to 75%.
Increasing Frequency – Verbatim Comments

Please complete the following sentence: “I would attend movies at SPONSORING THEASTER more often if…”

- Exclusivity/Loyalty
  - “…there were new/enhanced ticket buying loyalty programs.”
  - “…I like the idea of a frequent buyer program where you get free movies or concessions based on number of visits or a point system.”
  - “…collaborated with local restaurants for special dinner & movie discounts.”

- More frequent/noticeable communications
  - “…I received email notifications about what is playing currently and what is coming soon.”
  - “…I was exposed to more reminders / teasers of current films.”
  - “…I knew more readily what’s playing on a given evening, since I often forget and miss opportunities I’d learned of the previous weekend.”

- Improved film quality/variety
  - “…there were more quality movies to choose from.”
  - “…it showed more high quality comedies.”
  - “…they had better movies and faster service.”
Please complete the following sentence: “I would attend movies at SPONSORING THEASTER more often if…”

- **Online ticket purchasing and/or reserved seating**
  - “…if there was a simple way to buy online (i.e. Paypal).”
  - “…I could purchase tickets online and not stand in the ticket line.”
  - “…I could reserve my seats when I buy my tix and be assured of a good viewing spot.”

- **Enhanced programming**
  - “…Q and A with film makers, or something different that sets it off from other theaters.”
  - “…if there were programs following the movies that facilitated discussions. I go by myself frequently and it would be nice to use my love of movies to meet new friends.”
  - “…they offered film courses or series on a particular topic of interest (e.g. noir series).”

- **Miscellaneous**
  - “…I wish some of the movies, especially the older movies being screened, were more affordable. It is difficult to justify spending the full price on a movie ticket to go to see a movie I could easily watch on my TV at home.”
  - “…they played more classic films or presented more films in 35mm or 70mm.”
  - “…people could vote what new films to show.”
  - “…if the food/drink offerings were healthier.”
How can art houses expand their bases of financial support?
More than half of respondents provide financial support to the theaters they attend, beyond purchasing tickets to see movies. This is an engaged, committed population.

Do you provide financial support to SPONSORING THEATER, aside from purchasing tickets to see movies there? (e.g. give donations, purchase memberships)

- Yes: 57.2%
- No: 42.8%
Value and Financial Support

- The decision to support an art house theater financially is related to the overall value that the theater brings to a person’s life.

How valuable is SPONSORING THEATER to your overall quality of life?

<table>
<thead>
<tr>
<th>Value Level</th>
<th>Overall</th>
<th>Financial Supporters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extremely valuable</td>
<td>22.9%</td>
<td>26.9%</td>
</tr>
<tr>
<td>Very valuable</td>
<td>37.3%</td>
<td>41.1%</td>
</tr>
<tr>
<td>Somewhat valuable</td>
<td>26.3%</td>
<td>34.1%</td>
</tr>
<tr>
<td>Not very valuable</td>
<td>3.6%</td>
<td>1.8%</td>
</tr>
<tr>
<td>Not at all valuable</td>
<td>0.8%</td>
<td>0.6%</td>
</tr>
<tr>
<td>Other, please explain</td>
<td>1.4%</td>
<td>0.9%</td>
</tr>
</tbody>
</table>
Drivers of Engagement

- The following table shows the correlation between good performance on service metrics and the overall value that the theater brings to the quality of life of audience members.
- To deliver more value to patrons, theaters must pay particular attention to these attributes.

**Correlation between: Please rate SPONSORING THEATER on the following criteria (Top 2 Box – Excellent or Very Good; Overall Results plus High and Low) AND How valuable is SPONSORING THEATER to your overall quality of life? (Top 6 responses ranked by correlation coefficient)**

<table>
<thead>
<tr>
<th>Rank</th>
<th>Site</th>
<th>Correlation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Quality of movies offered</td>
<td>0.321</td>
</tr>
<tr>
<td>2</td>
<td>Variety of movies offered</td>
<td>0.314</td>
</tr>
<tr>
<td>3</td>
<td>Affordability of tickets</td>
<td>0.279</td>
</tr>
<tr>
<td>4</td>
<td>Picture quality</td>
<td>0.249</td>
</tr>
<tr>
<td>5</td>
<td>Customer service of staff/volunteers</td>
<td>0.228</td>
</tr>
<tr>
<td>6</td>
<td>Cleanliness of lobby</td>
<td>0.226</td>
</tr>
<tr>
<td>7</td>
<td>Screening times</td>
<td>0.225</td>
</tr>
<tr>
<td>8</td>
<td>Affordability of concessions</td>
<td>0.223</td>
</tr>
</tbody>
</table>
Key Takeaways

1. Art house attendees represent a vitally important portion of the film-going public.
2. They are more affluent and better educated than the U.S. norm.
3. Art house movie theaters provide tremendous benefits and quality of life to attendees.
4. A typical art house has about half of the total moviegoing “wallet share” of attendees; i.e. there is an opportunity to increase business just by meeting more of the needs of current attendees.
5. The best way to both increase attendance and donor support is to provide better or more great titles.
6. Beyond this, art houses should address any operational shortcomings and should focus on communications and attendee loyalty initiatives.
About Avenue ISR

Since 2006, Avenue ISR has conducted more than 100 marketing strategy engagements for organizations with well-established and emerging brands.

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.