

Art House Convergence National Audience Study 2013

*Conceived and Presented in Consultation with
Bryn Mawr Film Institute*

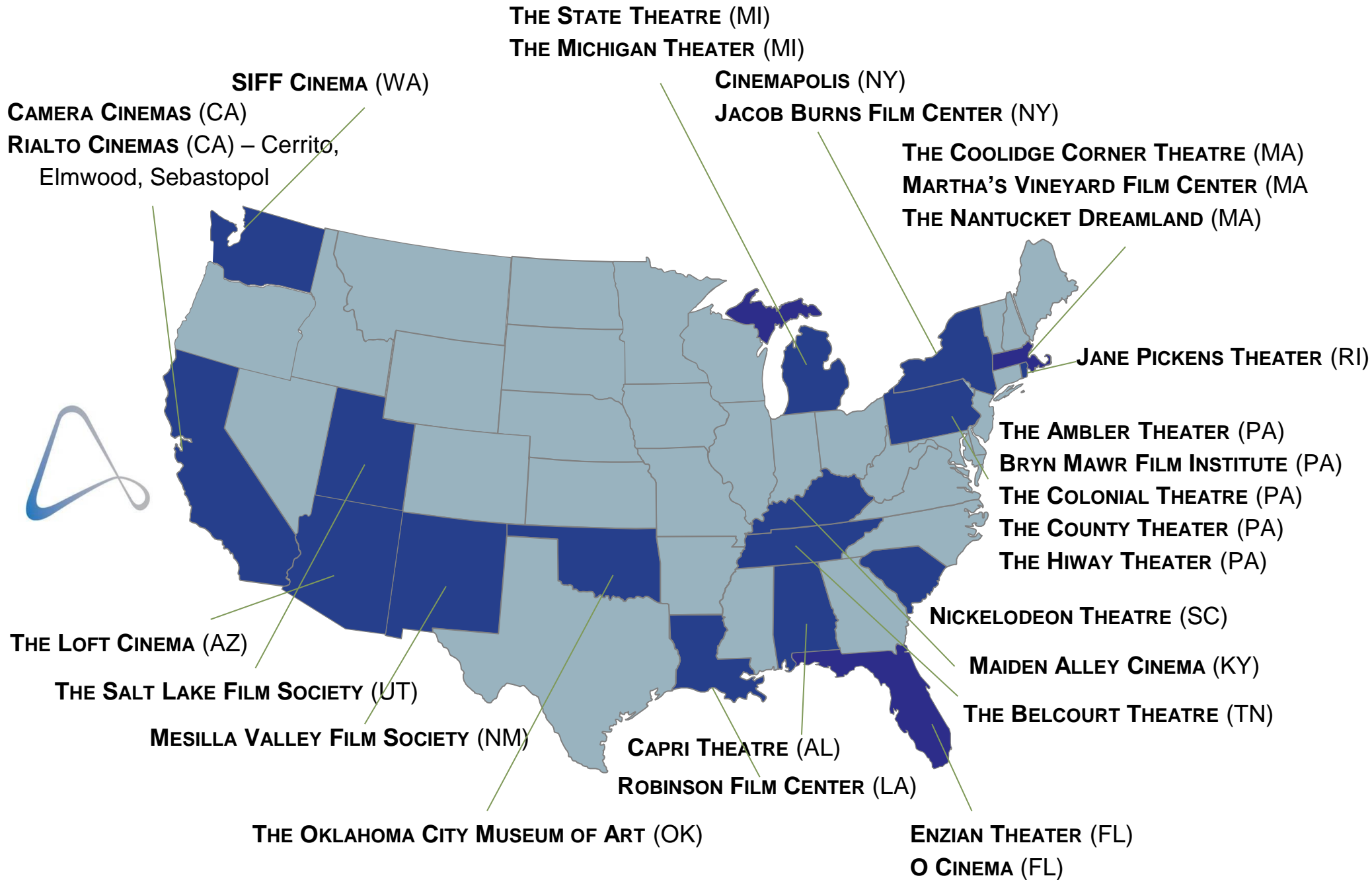
Overview



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.

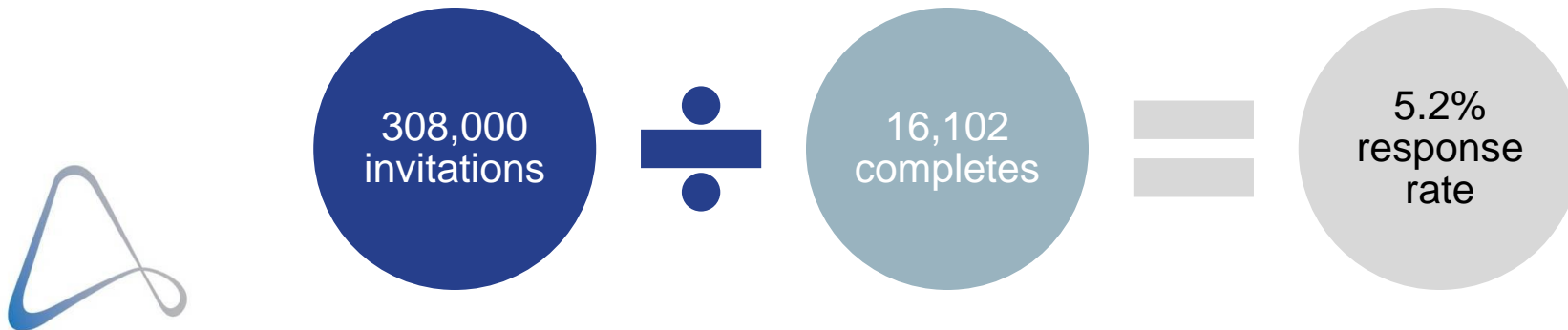
More than 18,000 art house attendees from across the United States participated in this landmark study.

29 Participating Theaters

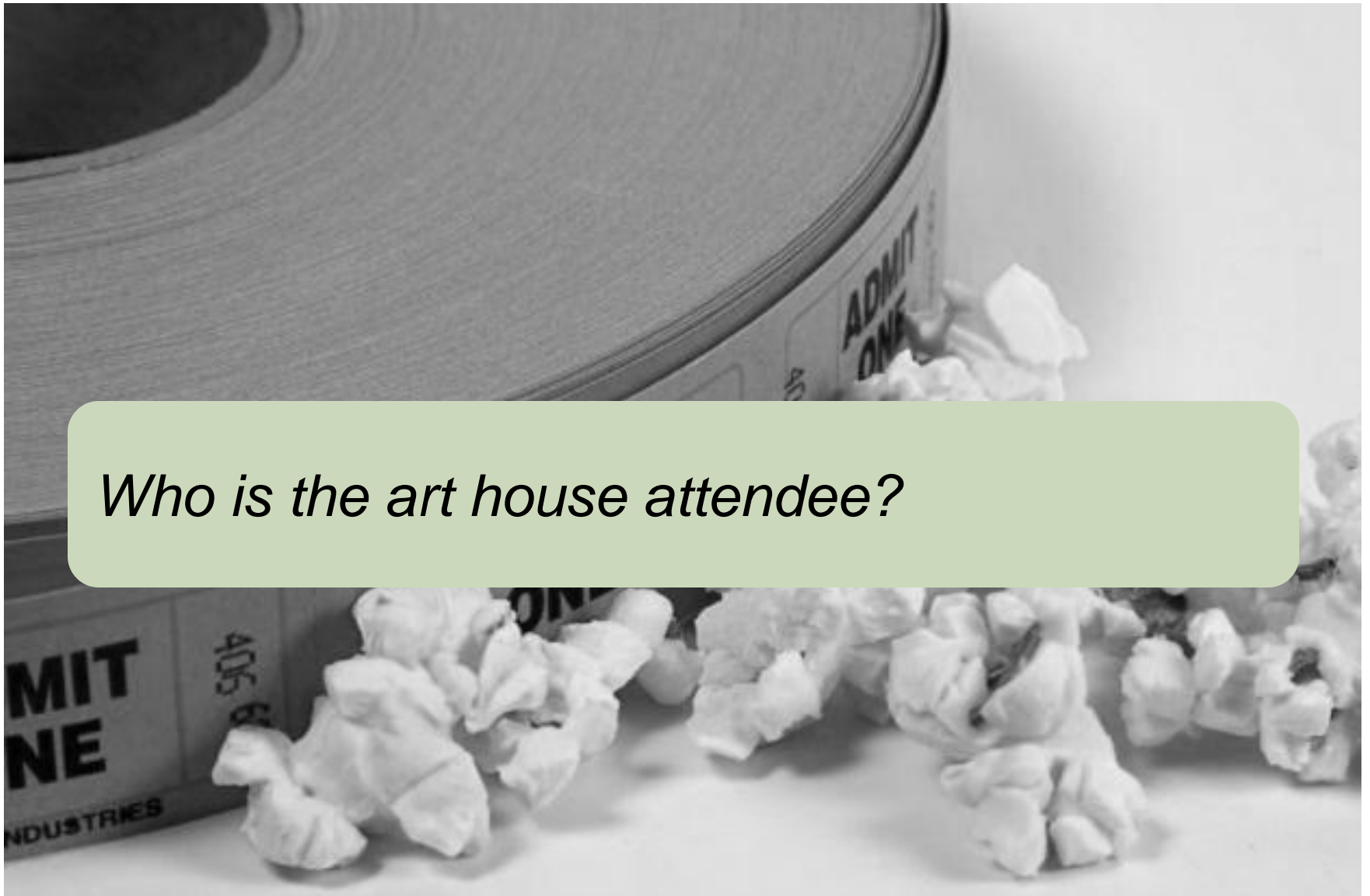


Campaign Details

- Online Survey initiated by email invitations sent by participating theaters



- As far as we know, the largest survey ever of art house movie attendees



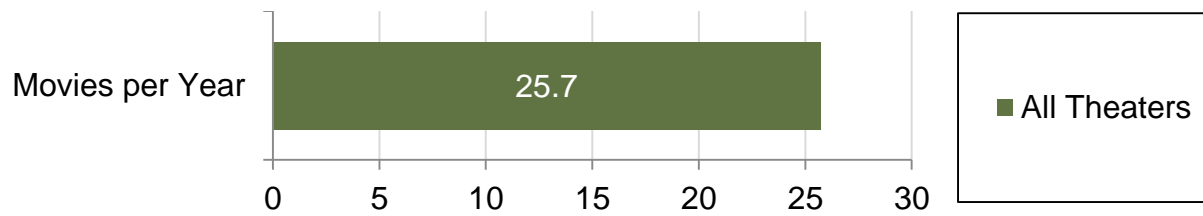
Who is the art house attendee?

Frequency of Attending

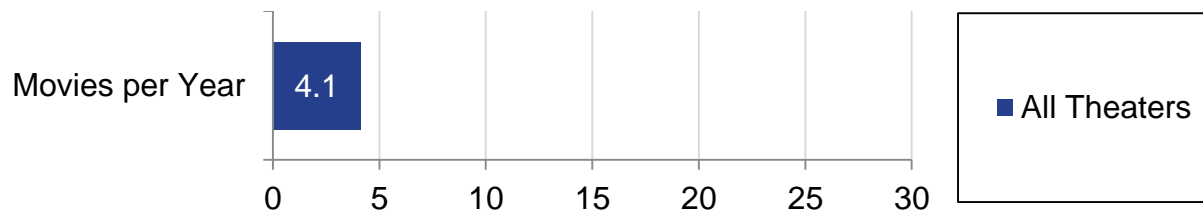
- The art house attendee sees many more movies in a given year than the average U.S. citizen
- Art house attendees go to the movies about 6 times more often than the norm

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?



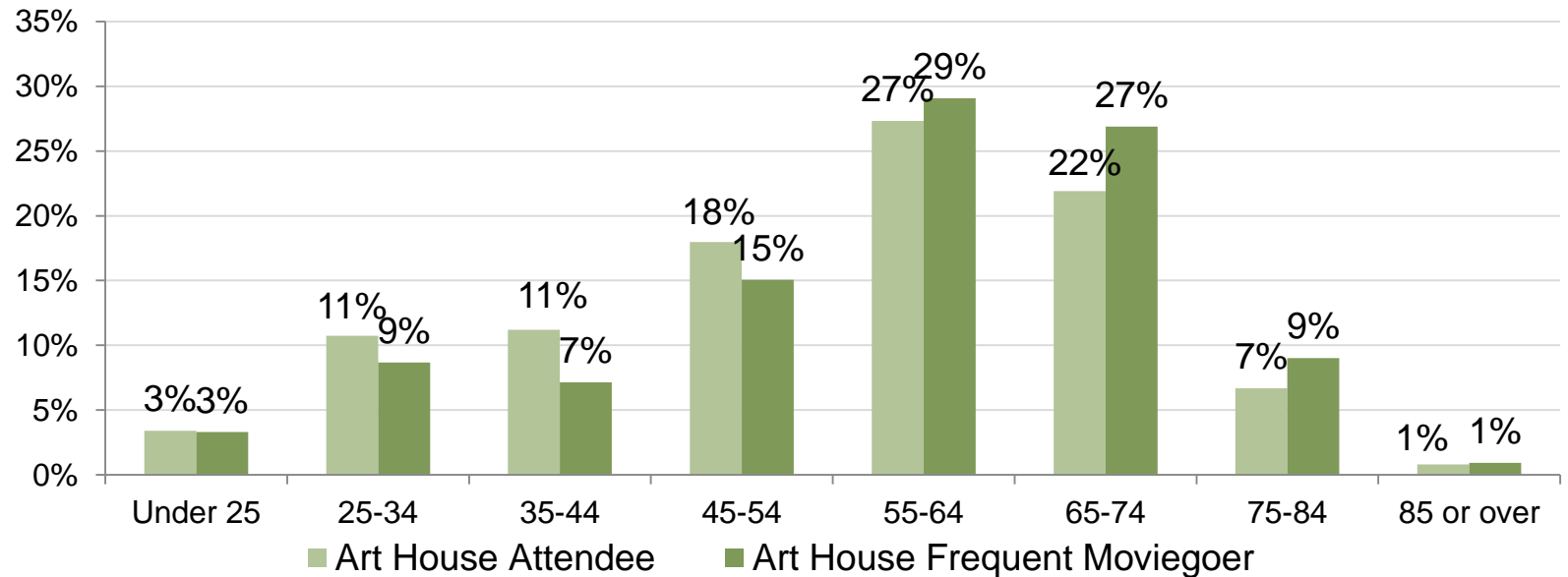
U.S. Admissions Per Capita: 4.1 movie theater trips per year



Source for Comparison: *Theatrical Market Statistics 2012, Motion Picture Association of America Inc.*

The Art House Audience (Age)

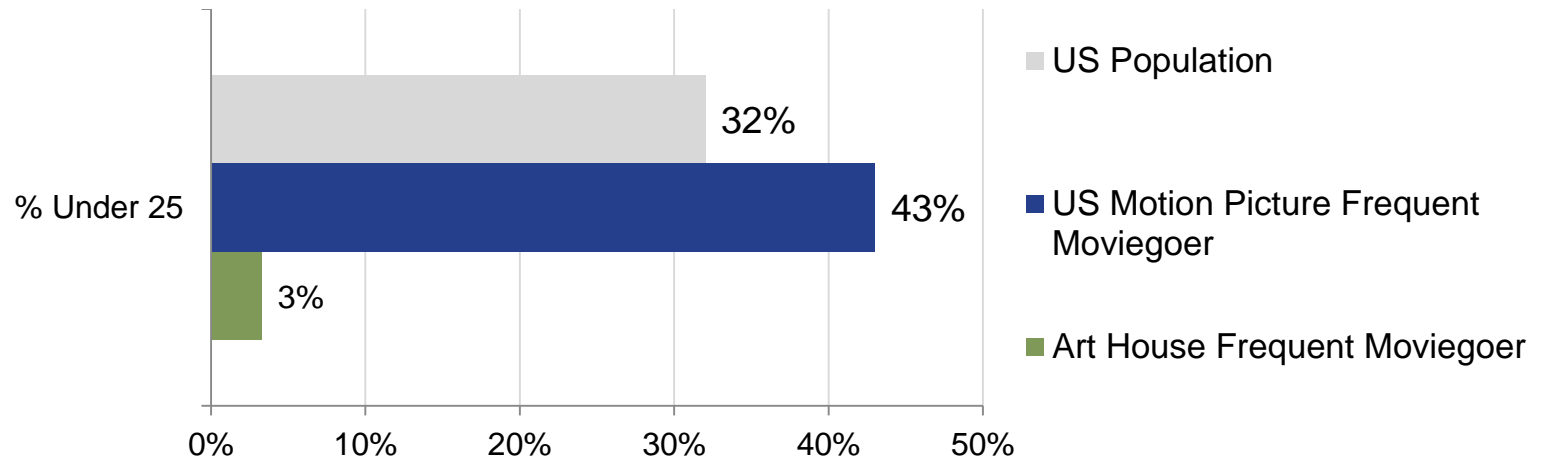
- About 57% of respondents are 55 or older
- 67% (two-thirds) of those who frequently attend a preferred art house (i.e. once a month or more) are 55+



The Art House Audience (Age), Cont.

- 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



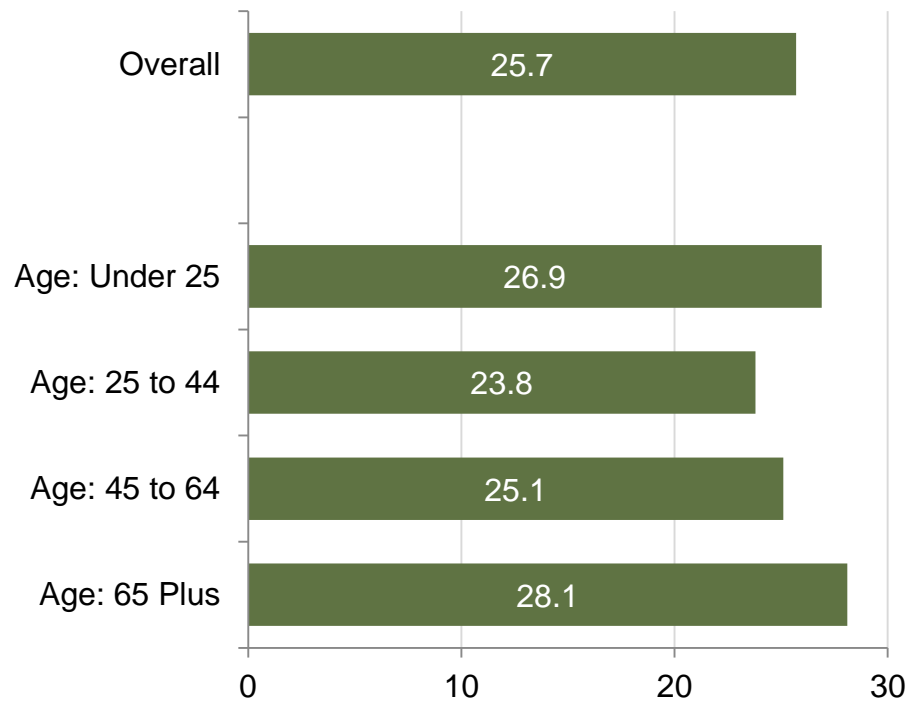
Sources for Comparisons: *Theatrical Market Statistics 2012*, Motion Picture Association of America Inc.; *2012 American Community Survey*, United States Census Bureau

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

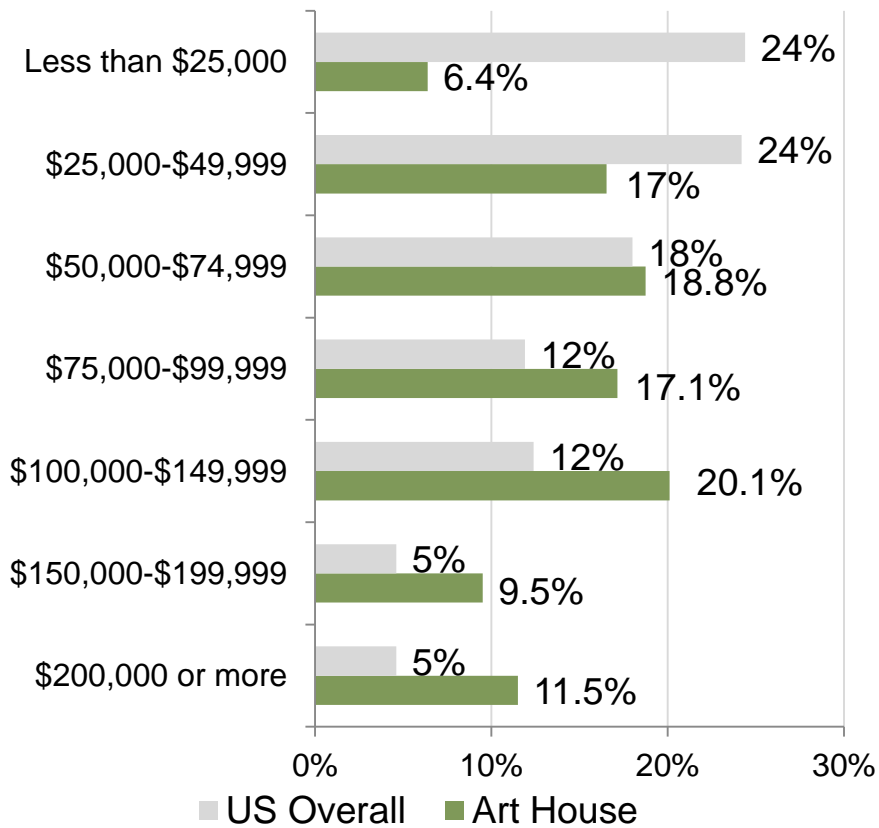
How often do you typically see movies at SPONSORING THEATER? AND How often do you typically see movies at all other types of movie theaters put together?



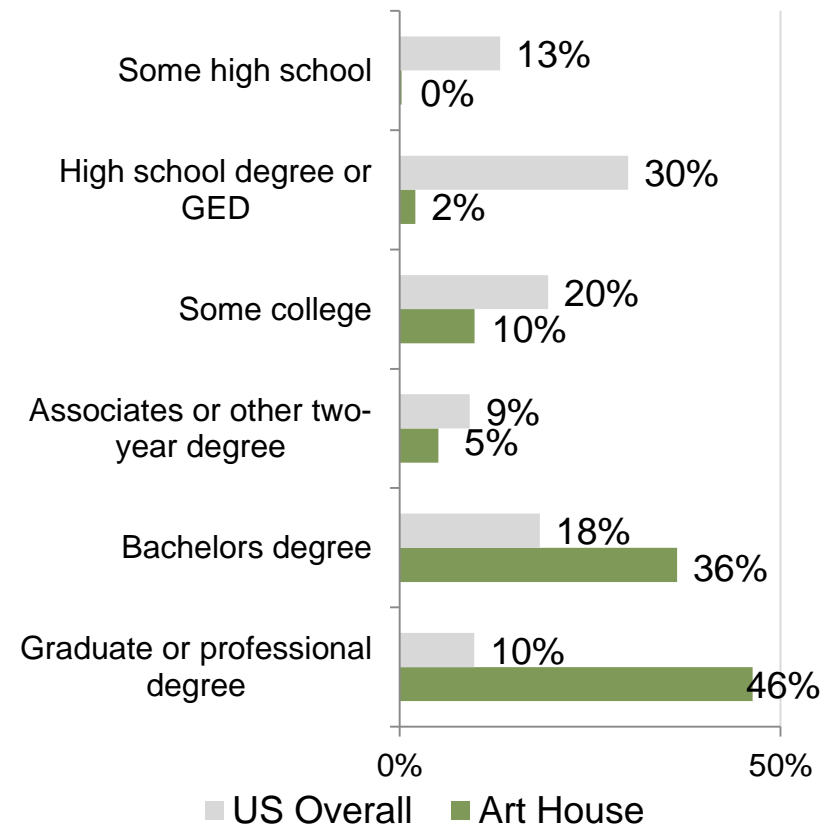
The Art House Audience (Income and Education)

- 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



Education



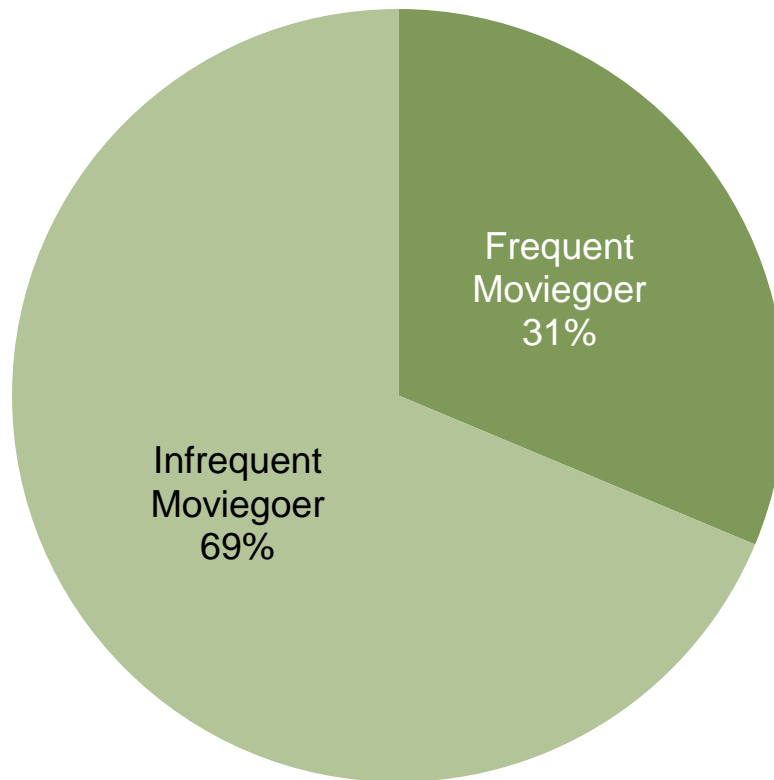
Sources for Comparisons: 2012 American Community Survey, United States Census Bureau

Frequent Moviegoers

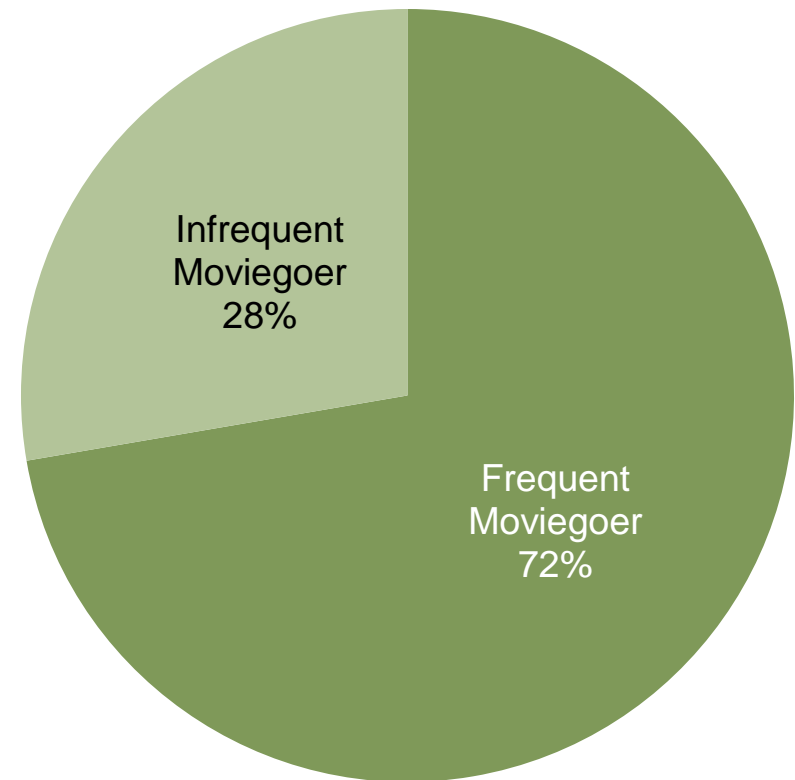
- The 31% of respondents who attend movies at art houses once a month or more account for more than two thirds of ticket sales

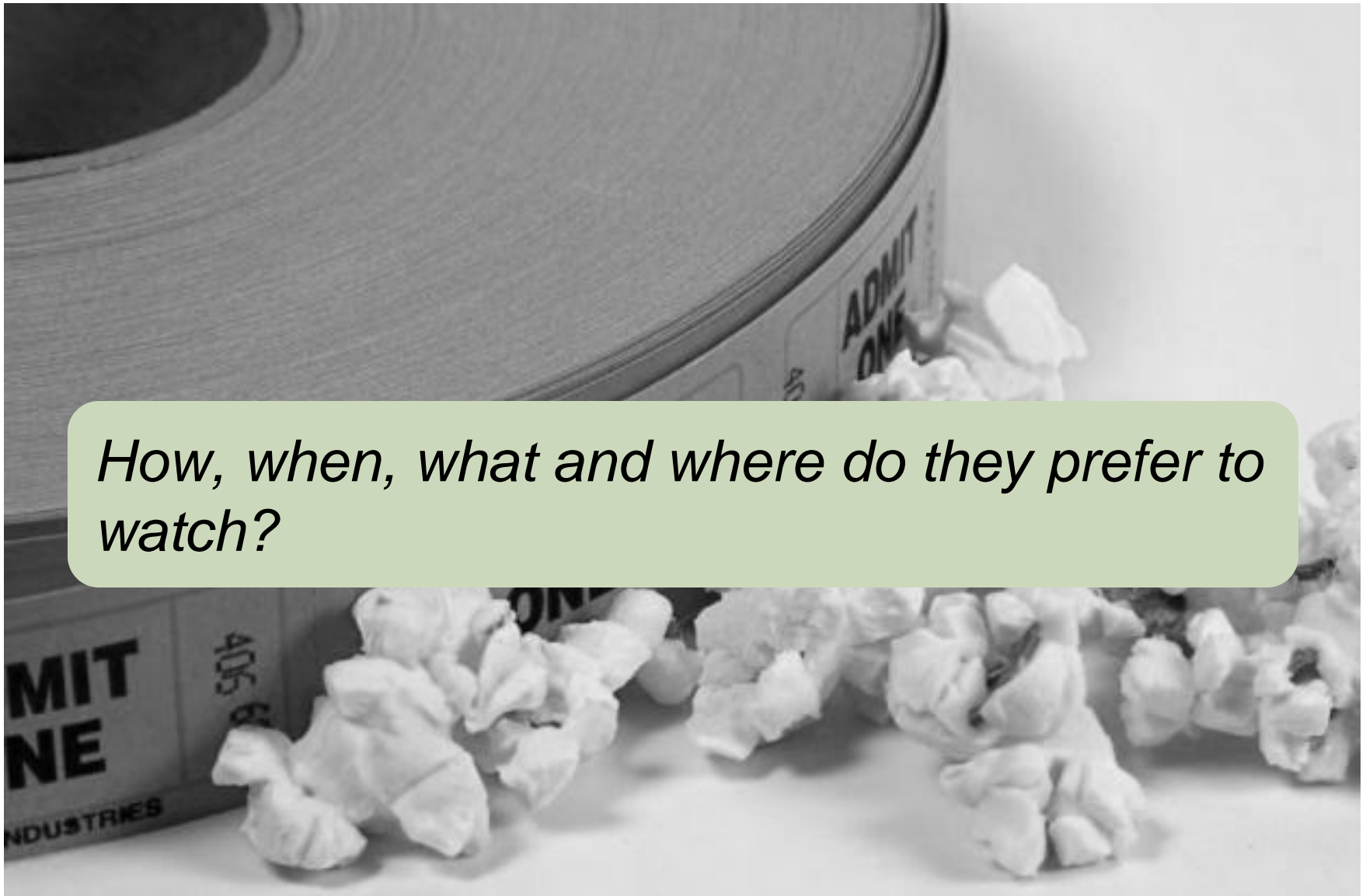
How often do you typically see movies at SPONSORING THEATER?

% of Total



Total Tickets Sold



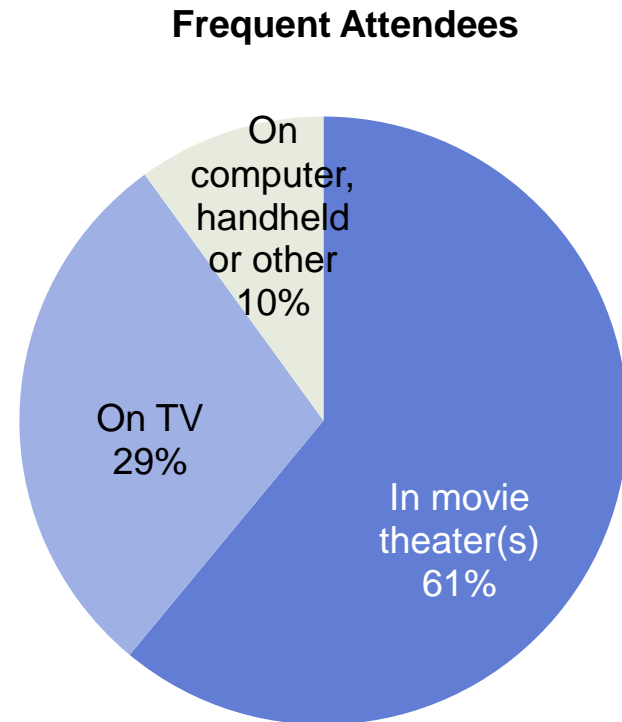
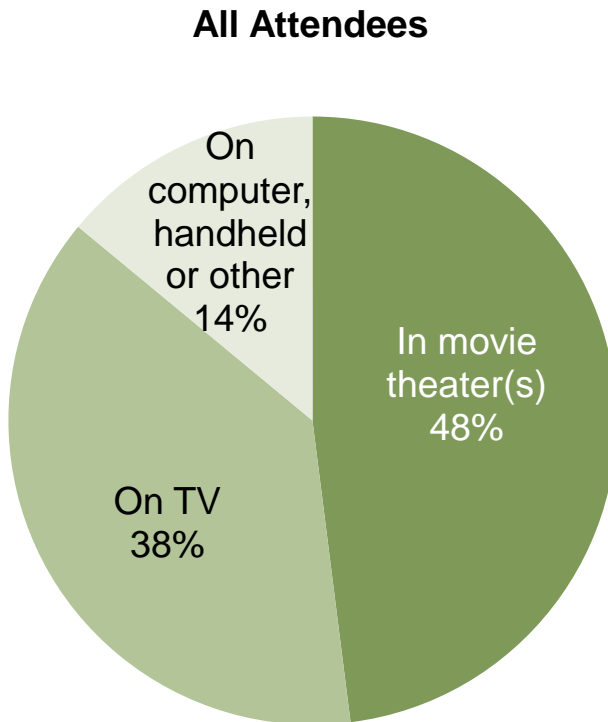


How, when, what and where do they prefer to watch?

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

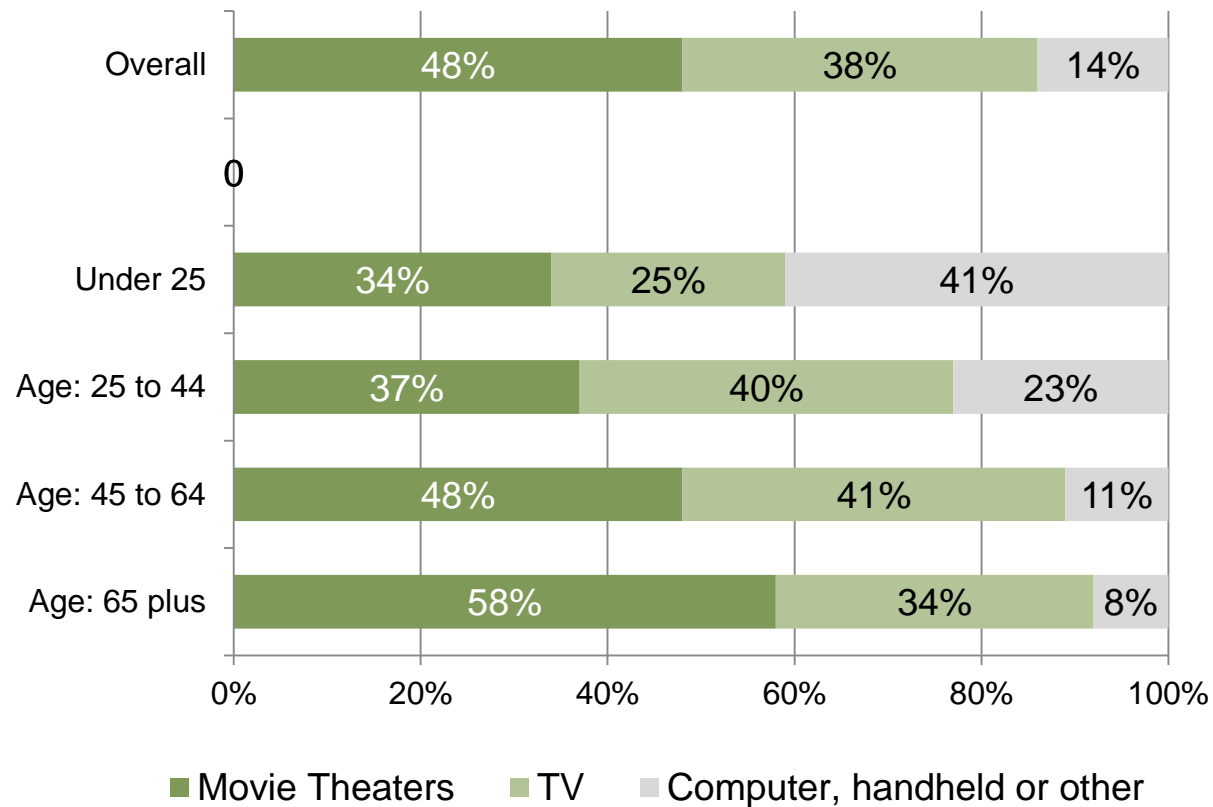
Think about all of the movies you have seen in the past year. What percentage of these have you seen in the following formats and settings?



Movie Formats (by Age)

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

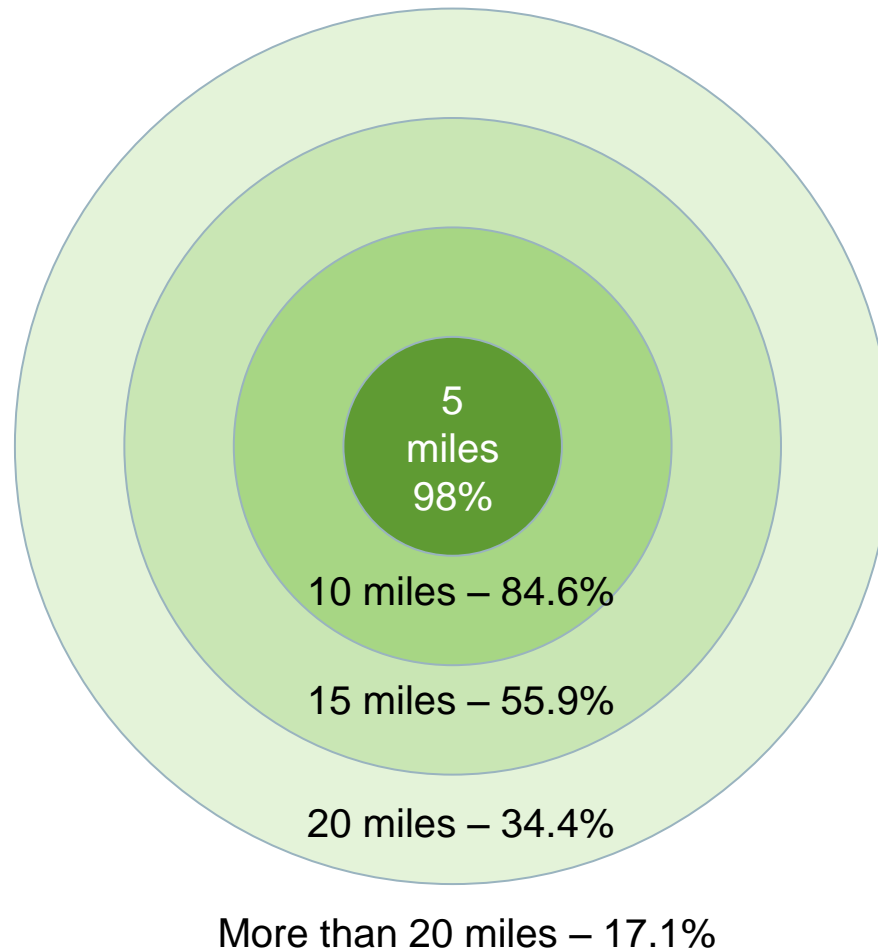
Think about all of the movies you have seen in the past year. What percentage of these have you seen in the following formats and settings?



Willingness to Travel

- 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

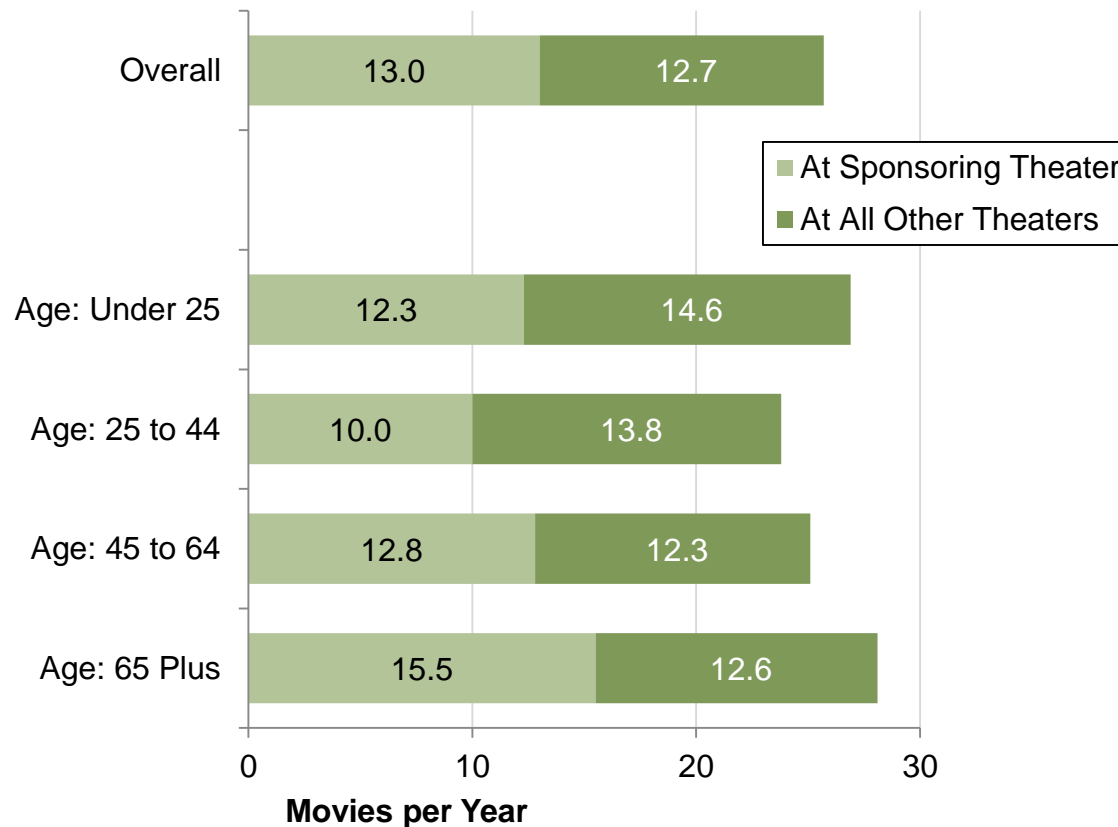
What is the greatest distance that you are willing to travel from your home to see a movie in a movie theater?



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)

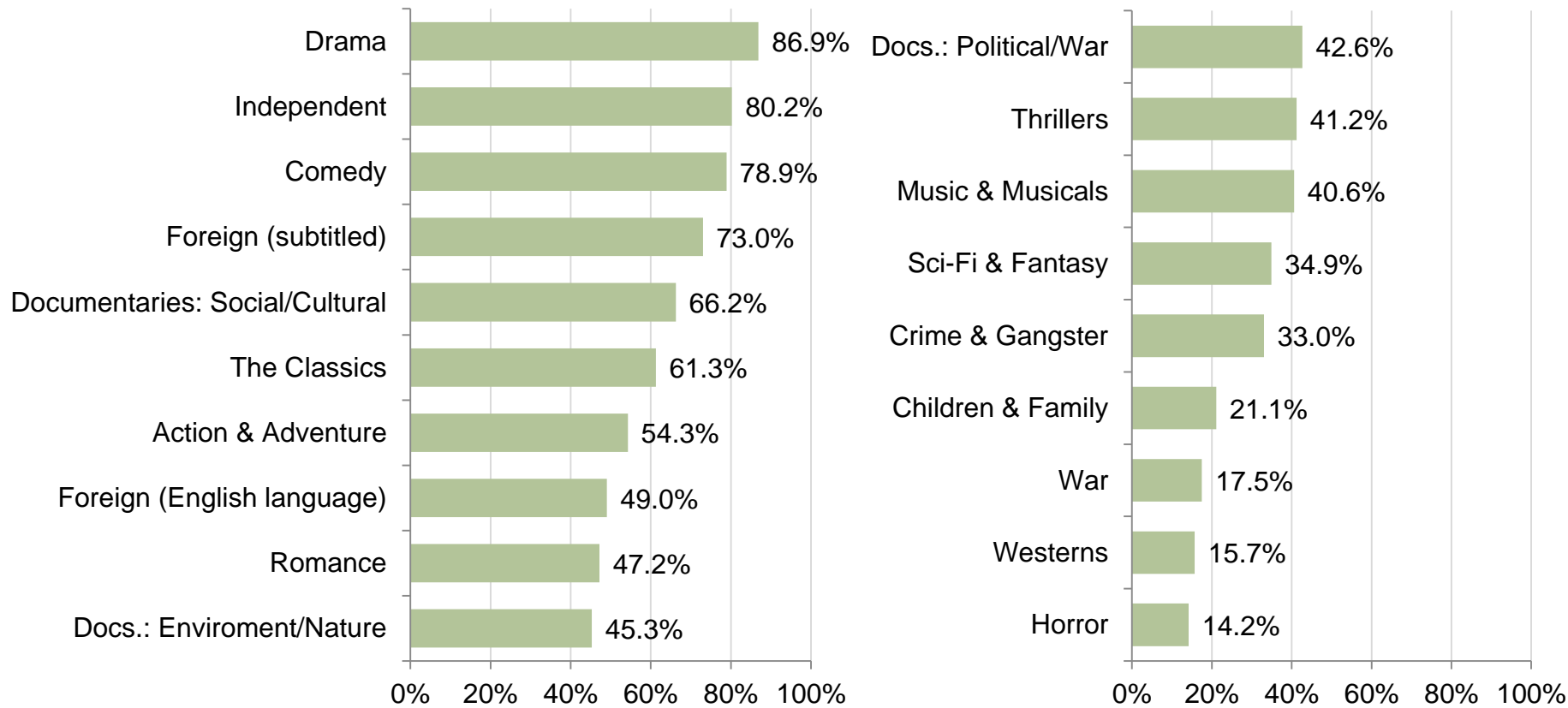
How often do you typically see movies at SPONSORING THEATER? AND How often do you typically see movies at all other types of movie theaters put together?



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

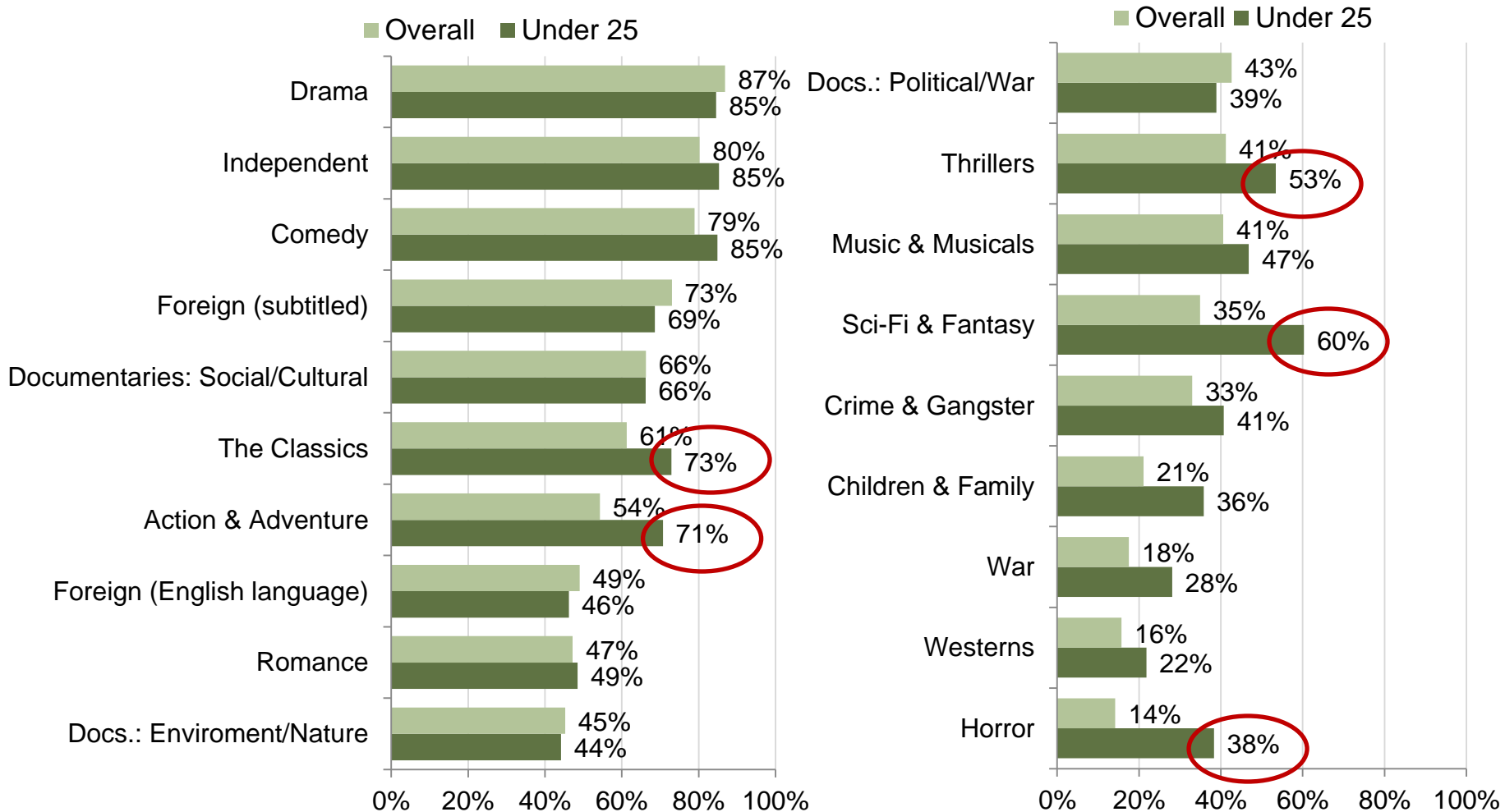
Which of the following movie types or genres, if any, do you enjoy? (select all that apply)



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)

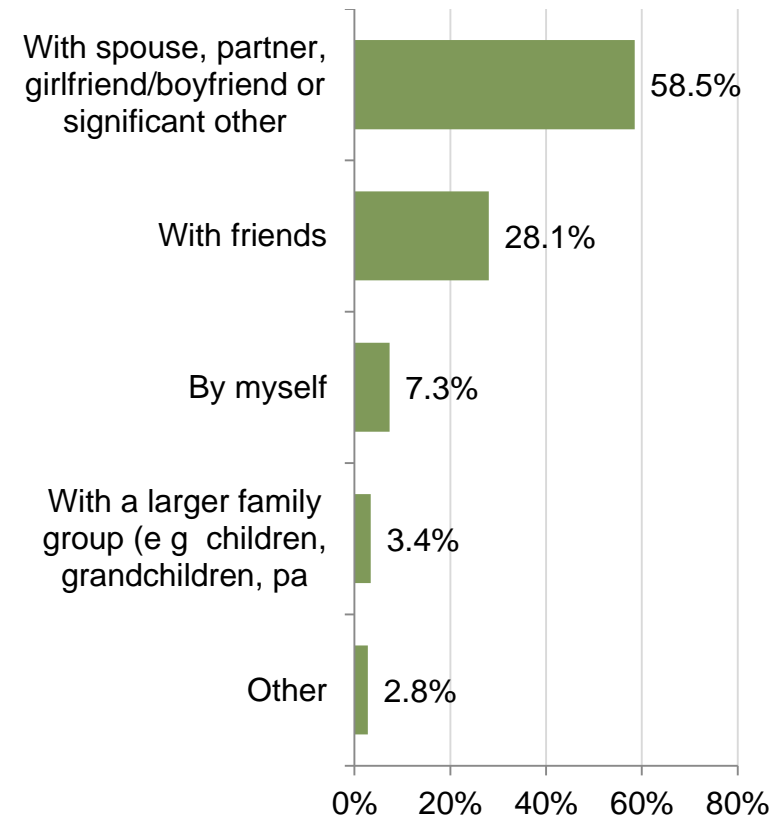
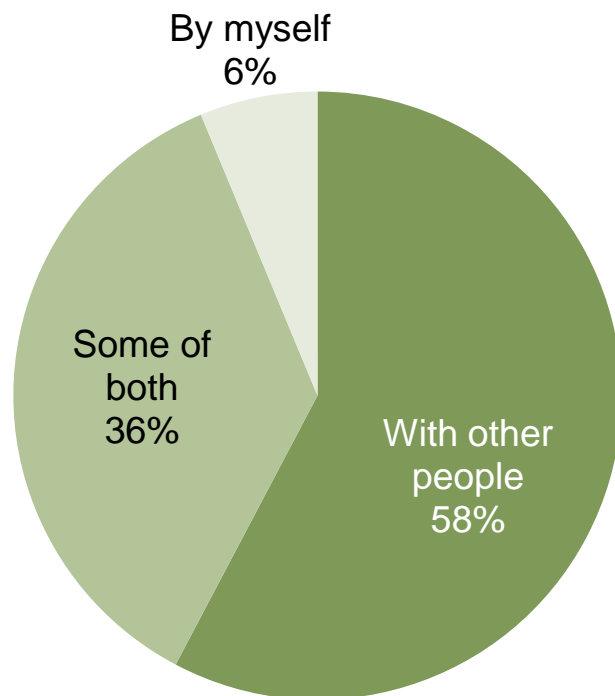


Alone vs. In Company of Others

- 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?

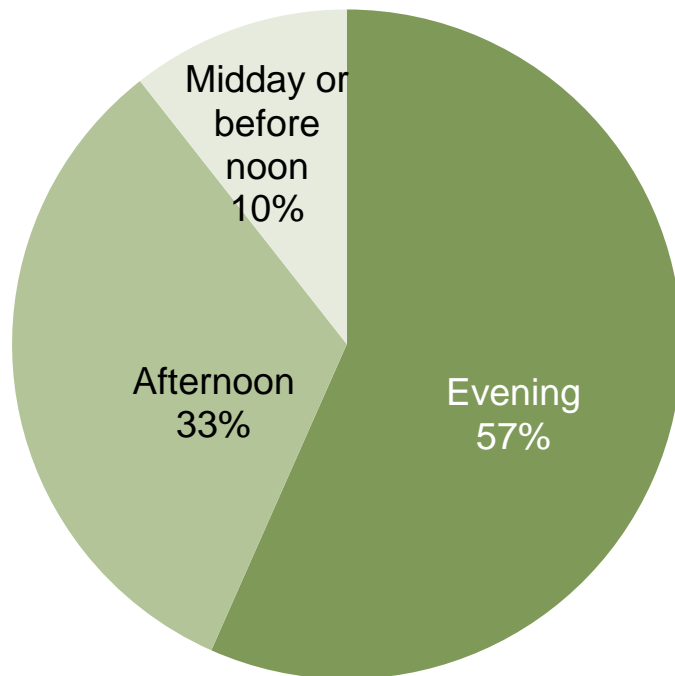
With whom, if anyone, do you most often go to SPONSORING THEATER? (of those who go to SPONSORING THEATER with other people)



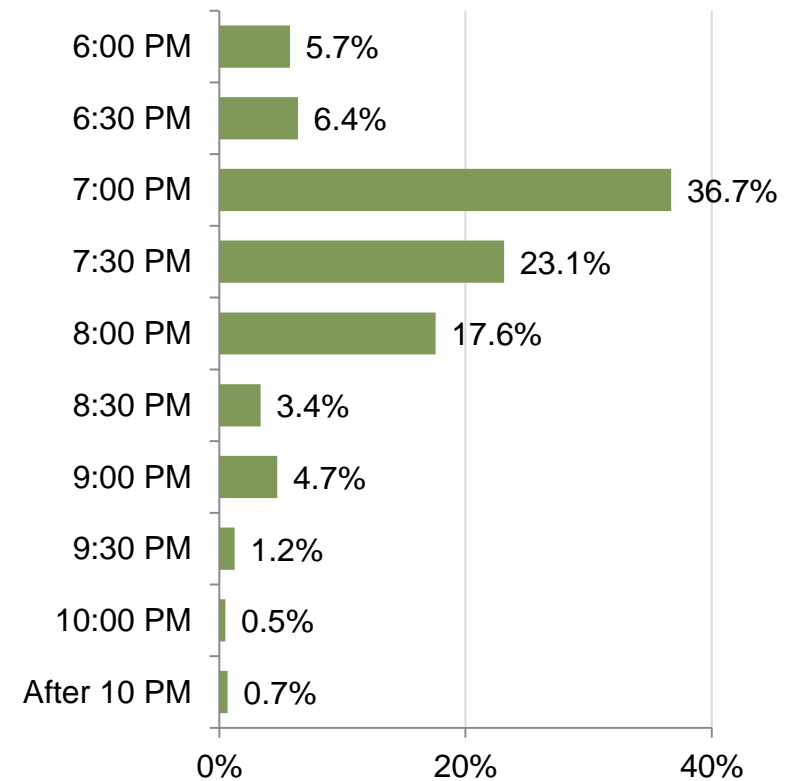
Preferred Movie Times

- 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?



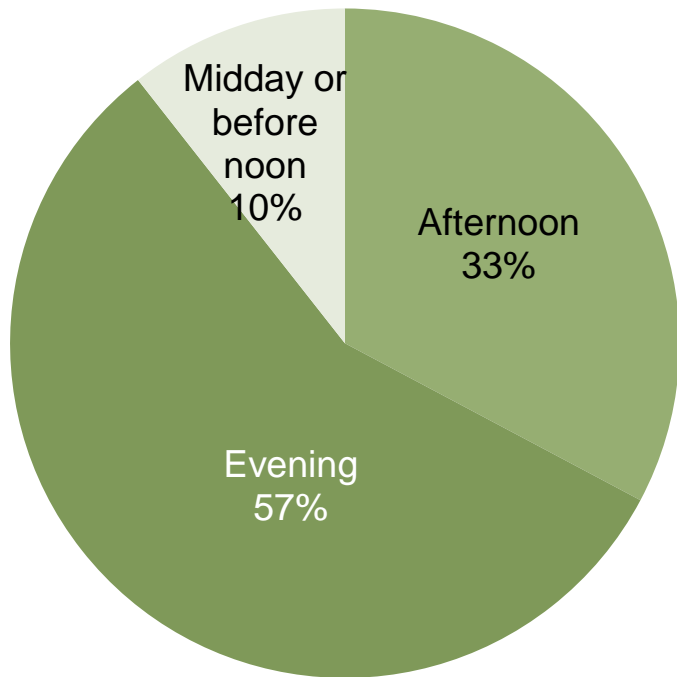
What is your favorite time to go to an evening movie?



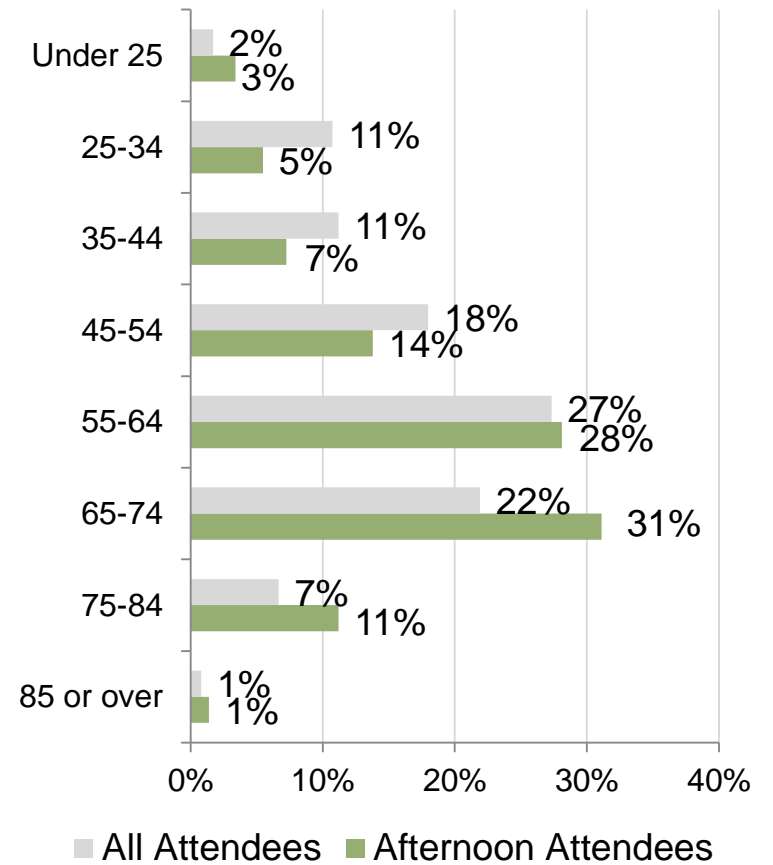
Afternoon Attendees

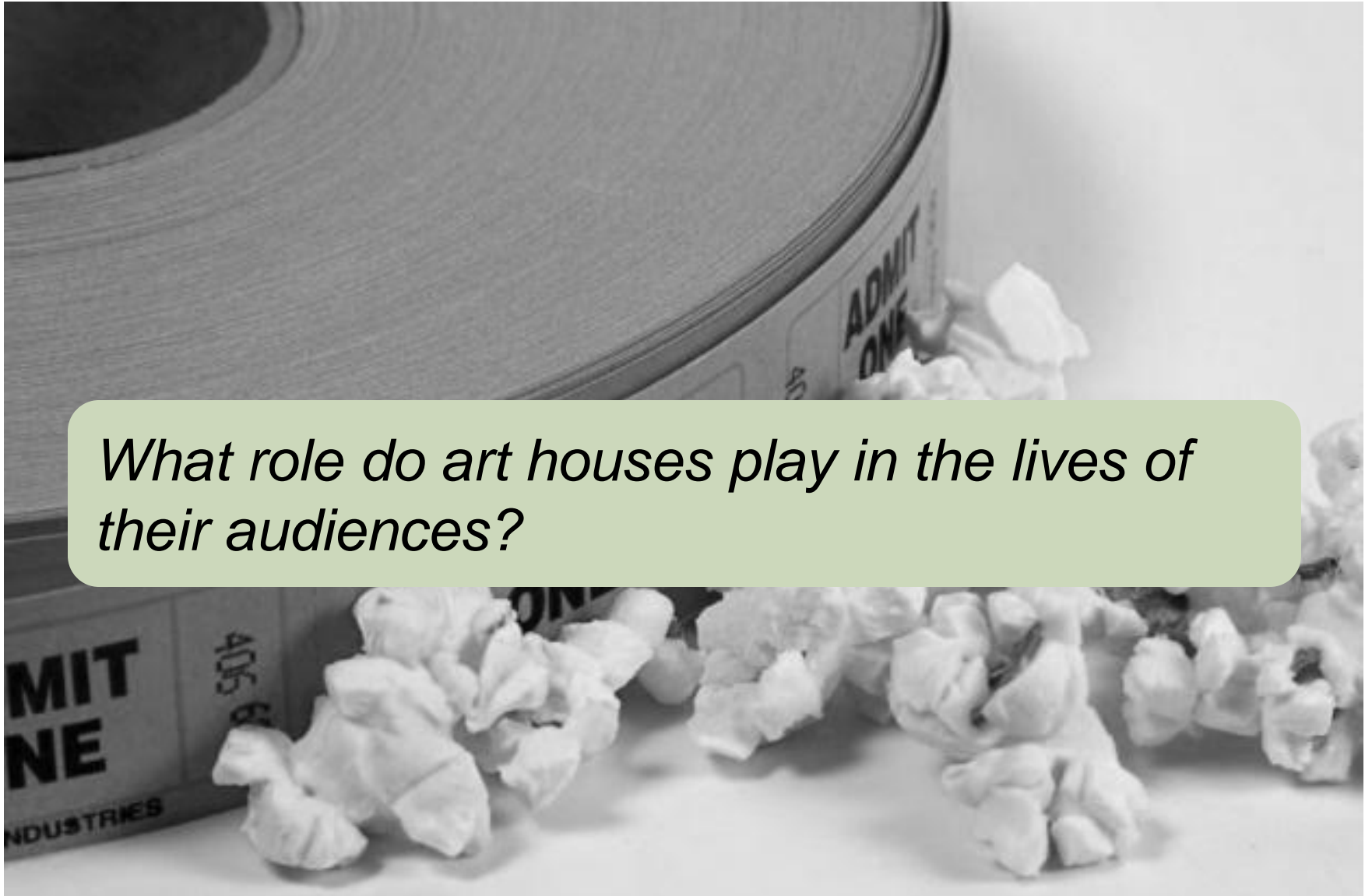
- Those who would prefer to attend movies in the afternoon tend to be older

What is your favorite time to go to a movie?



Age



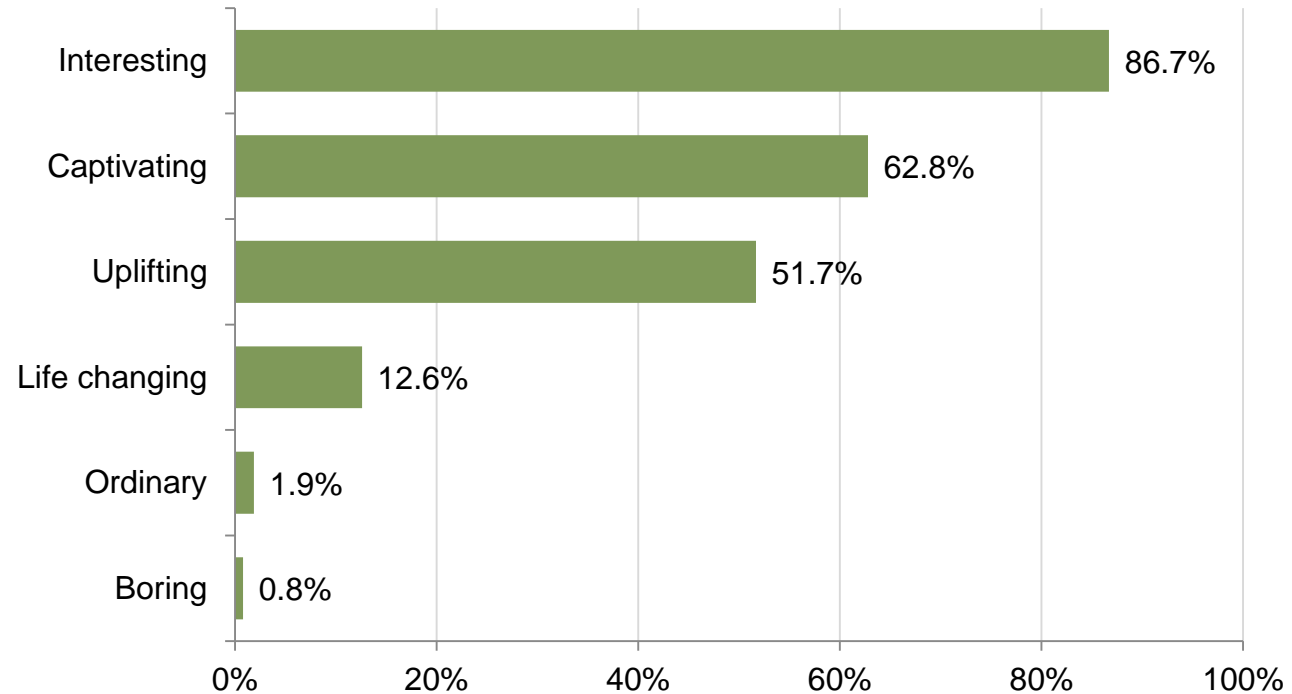


What role do art houses play in the lives of their audiences?

The Art House Experience

- The art house experience is almost never boring or ordinary.
- On the contrary, it is typically interesting, captivating and uplifting

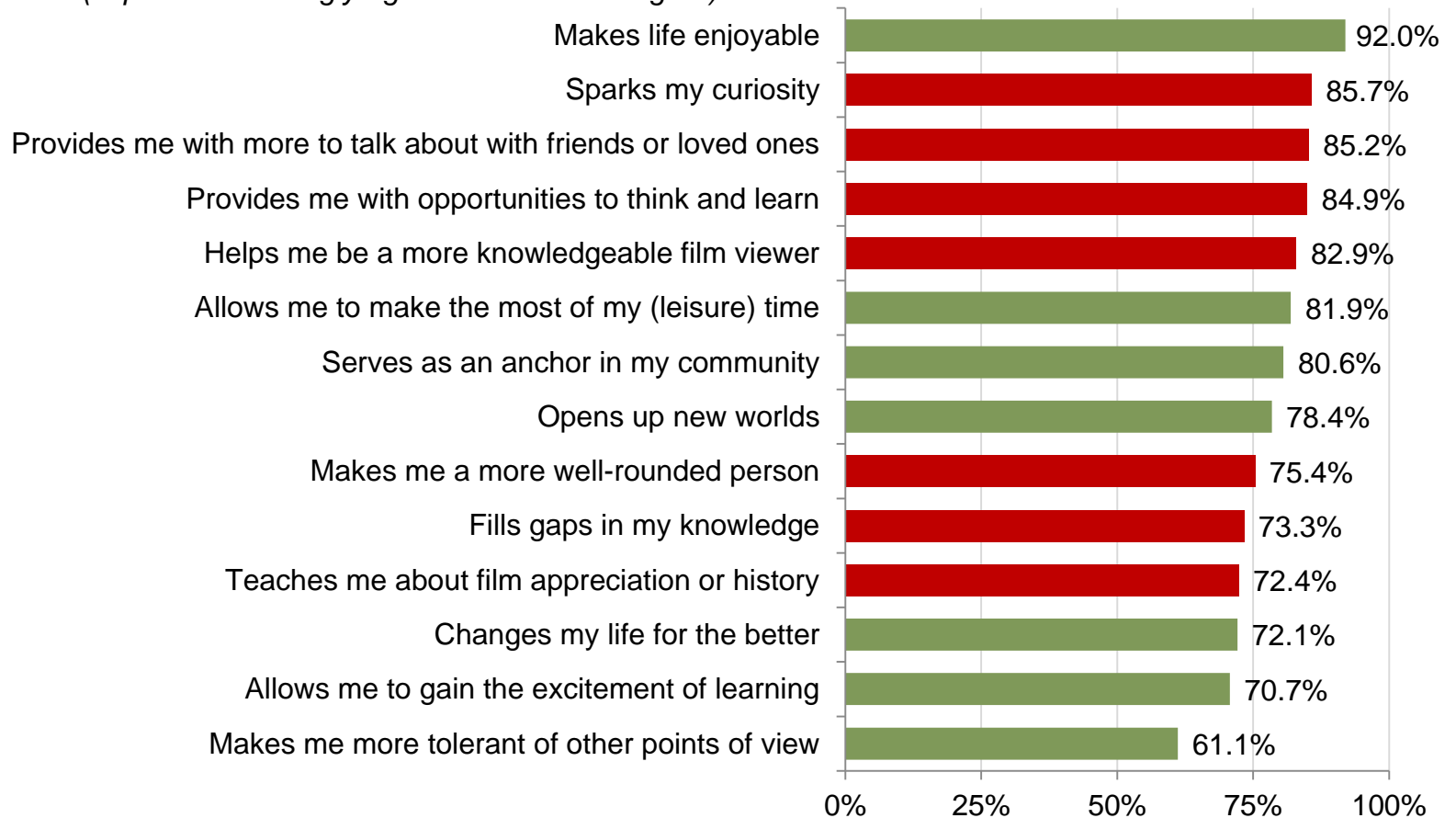
In the last 12 months, how often would you say your experience of watching movies at SPONSORING THEATER matches the following terms? (Top 2 Box – Always or Usually)



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

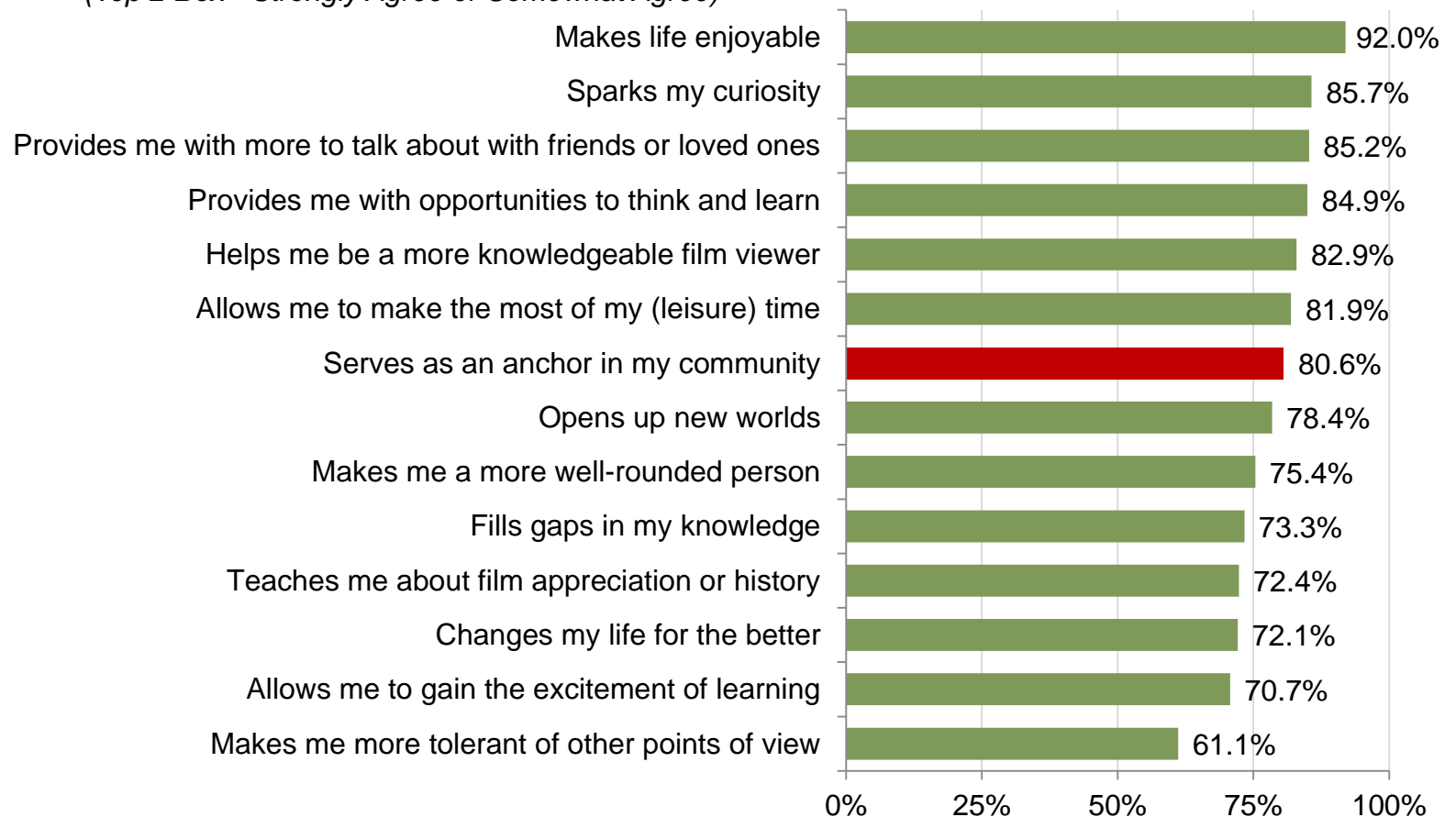
*To what extent do you agree with the following statements about SPONSORING THEATER?
(Top 2 Box - Strongly Agree or Somewhat Agree)*



Benefits (Community)

- Art houses anchor communities

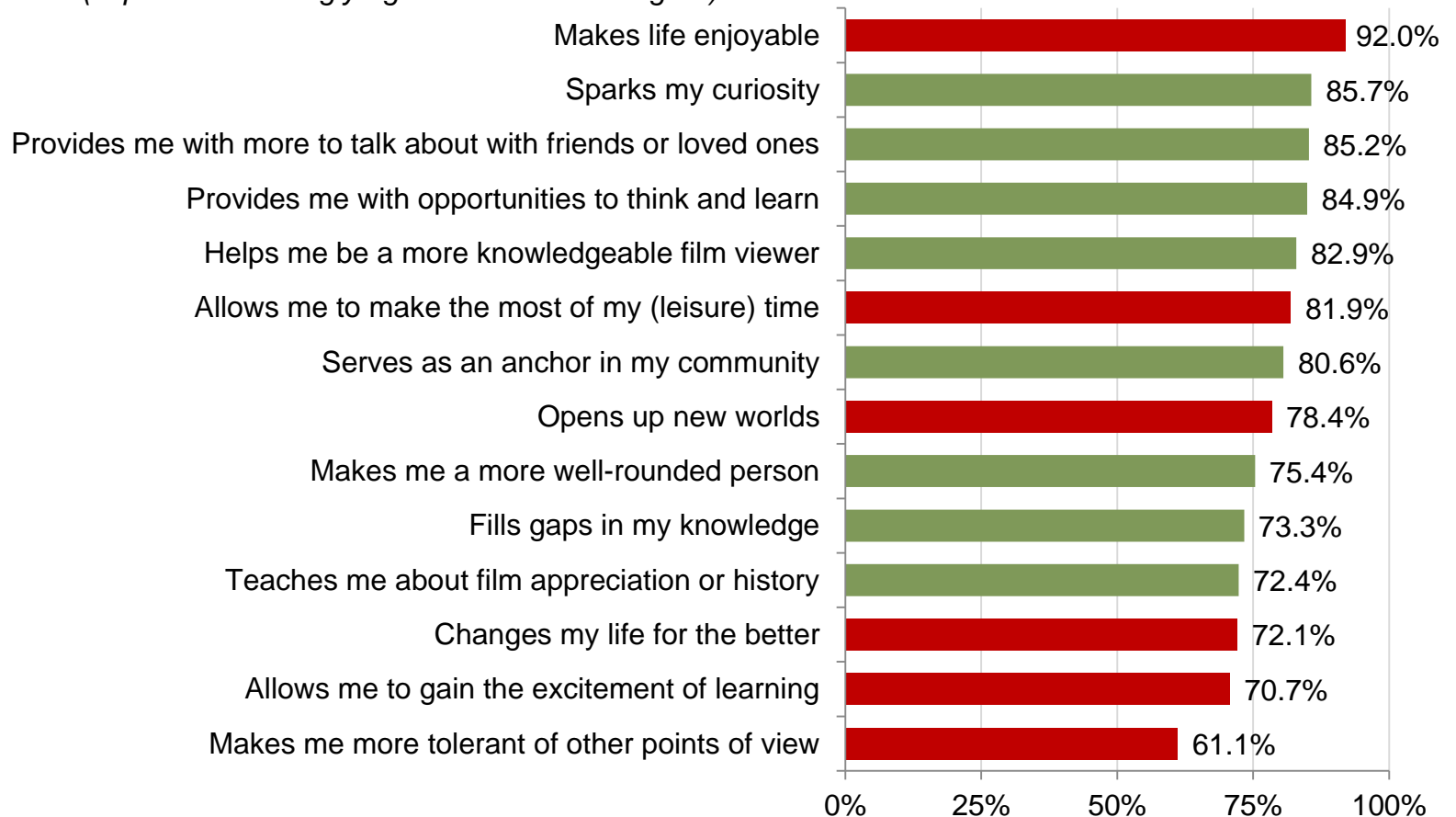
*To what extent do you agree with the following statements about SPONSORING THEATER?
(Top 2 Box - Strongly Agree or Somewhat Agree)*



Benefits (Quality of Life)

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

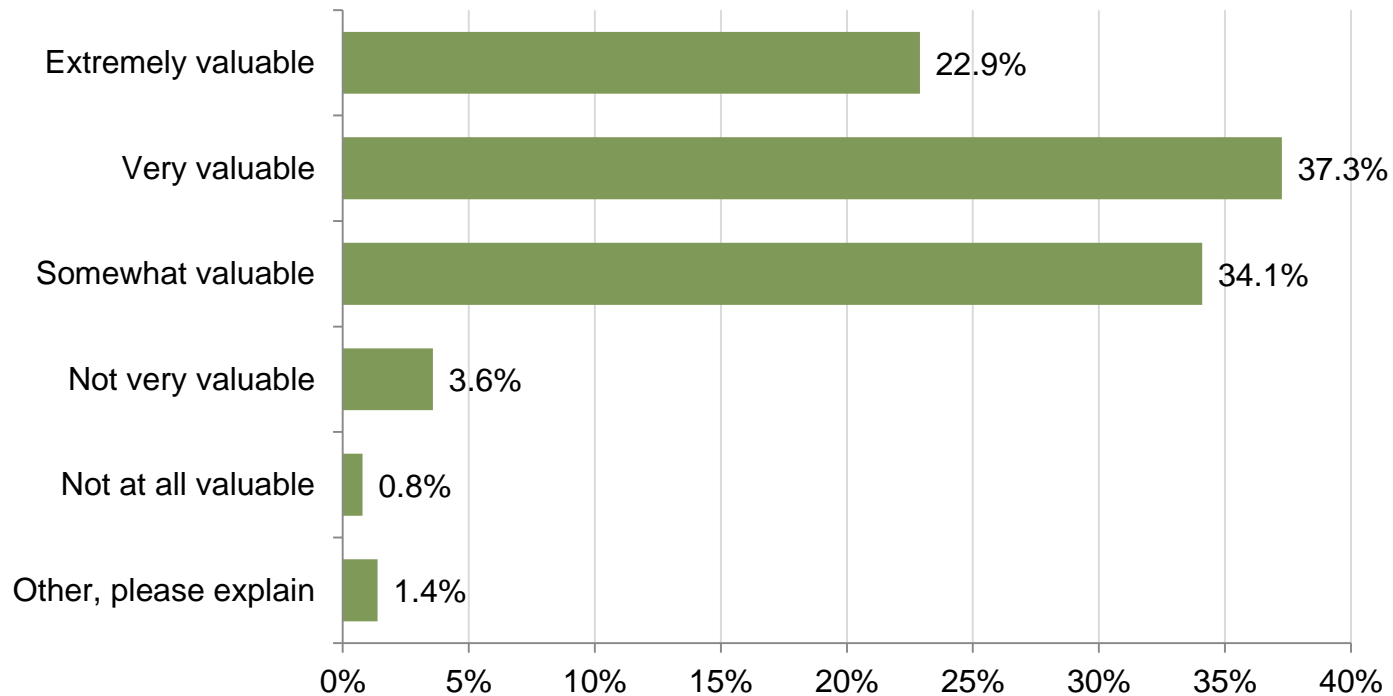
*To what extent do you agree with the following statements about SPONSORING THEATER?
(Top 2 Box - Strongly Agree or Somewhat Agree)*

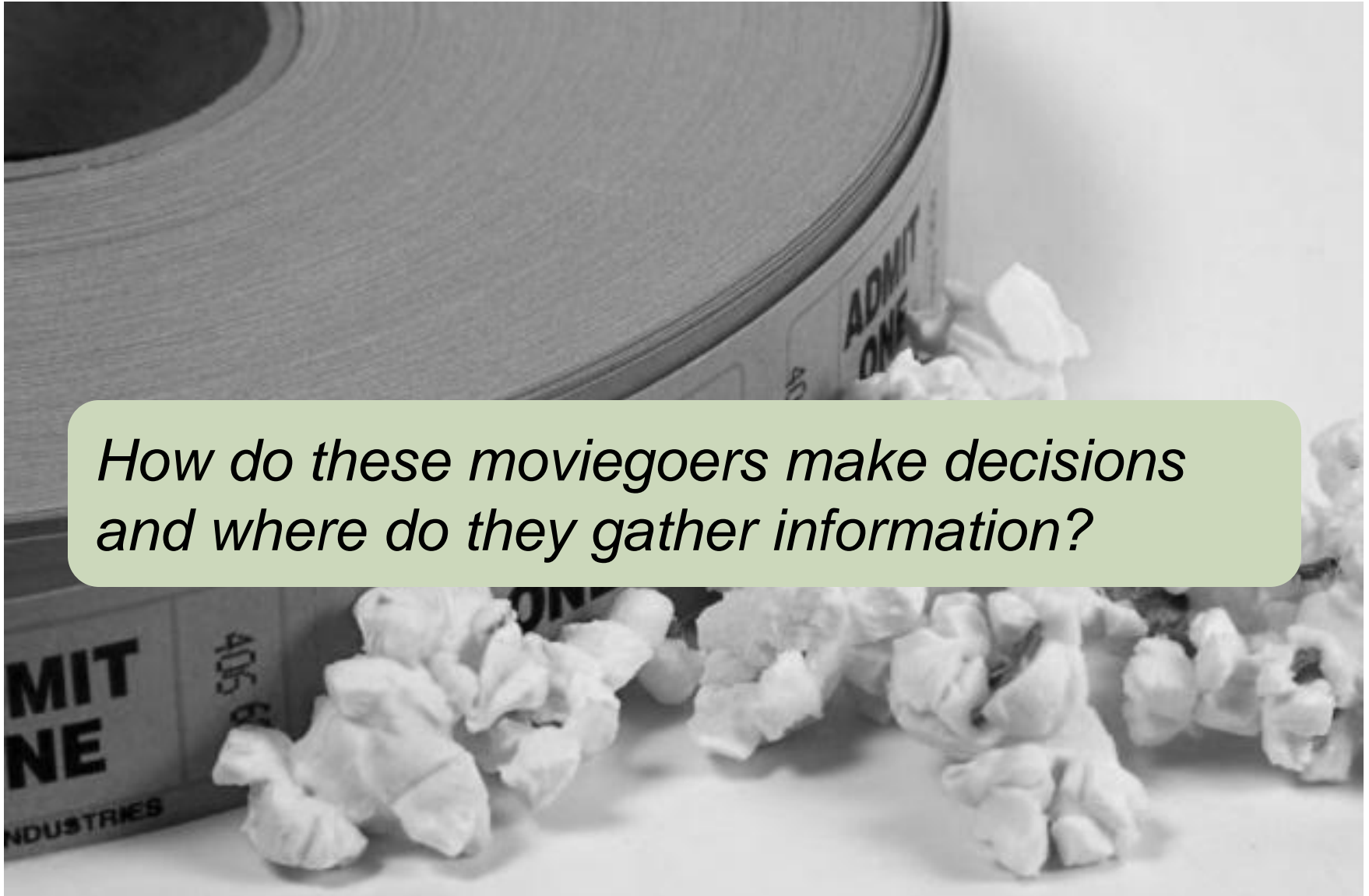


Art Houses and Quality of Life

- 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?



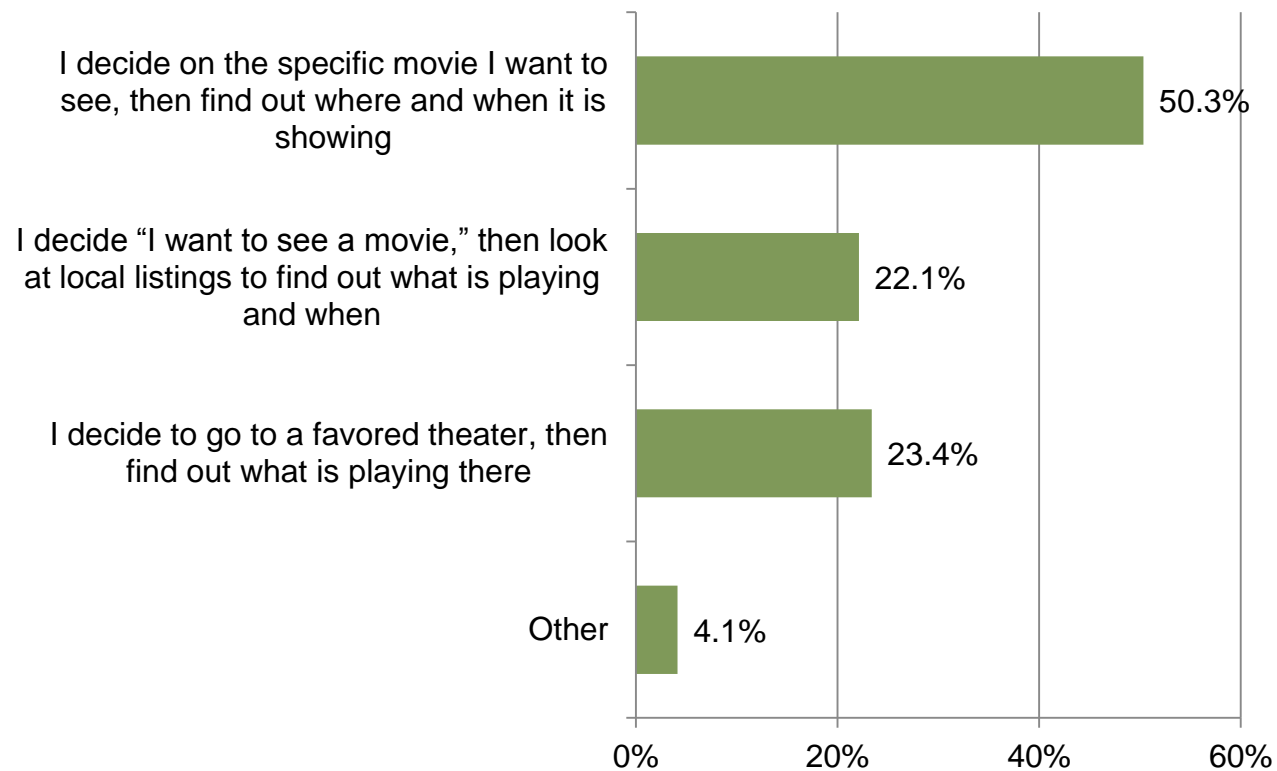


How do these moviegoers make decisions and where do they gather information?

Decision Process

- Attendees typically decide on a specific movie they want to see; then figure out where and when they will see it

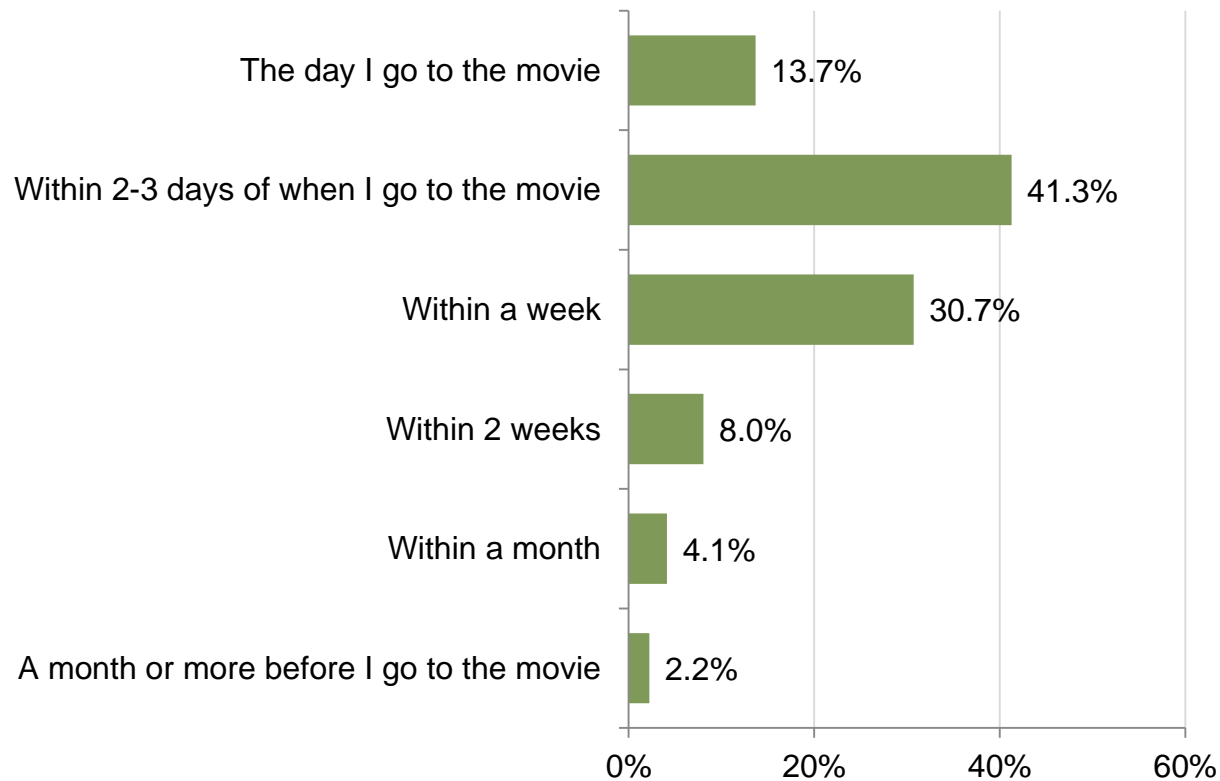
When you go to the movies in a movie theater, which is most often true about how you decide what to see?



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

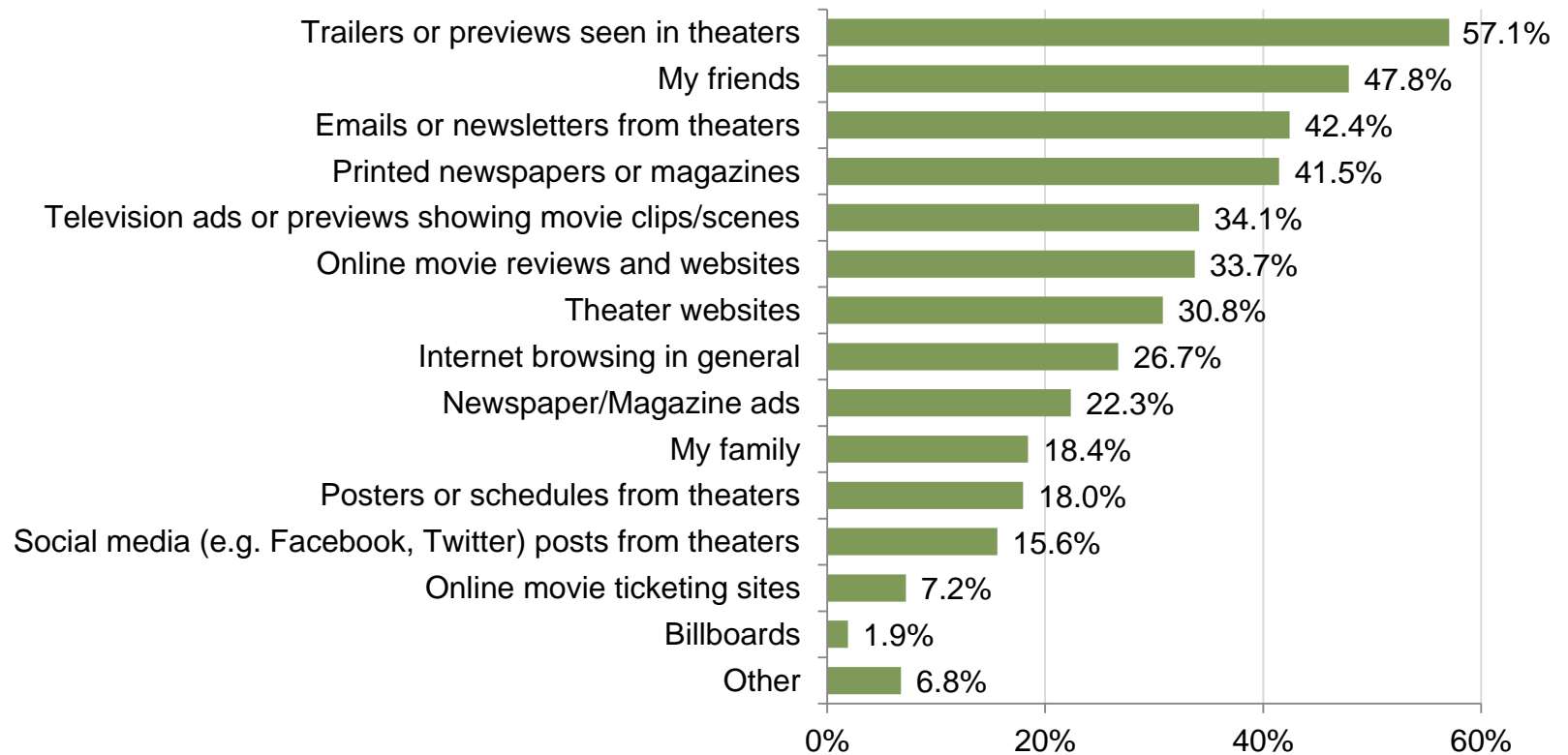
How far in advance do you typically decide to see a particular movie in the theater?



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

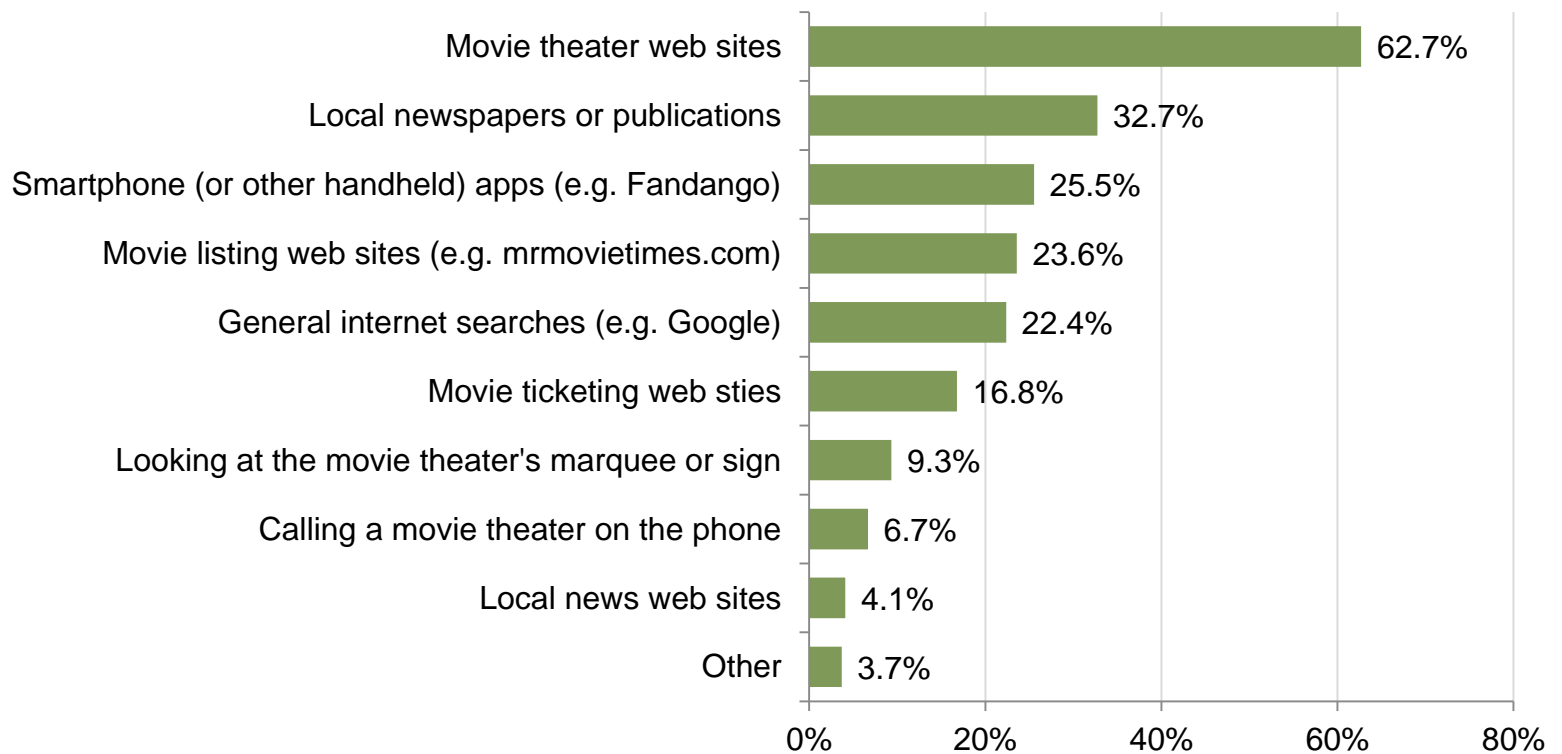
How do you typically learn about which movies you might be interested in seeing in movie theaters? (select all that apply)



Finding Screening Times

- 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

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



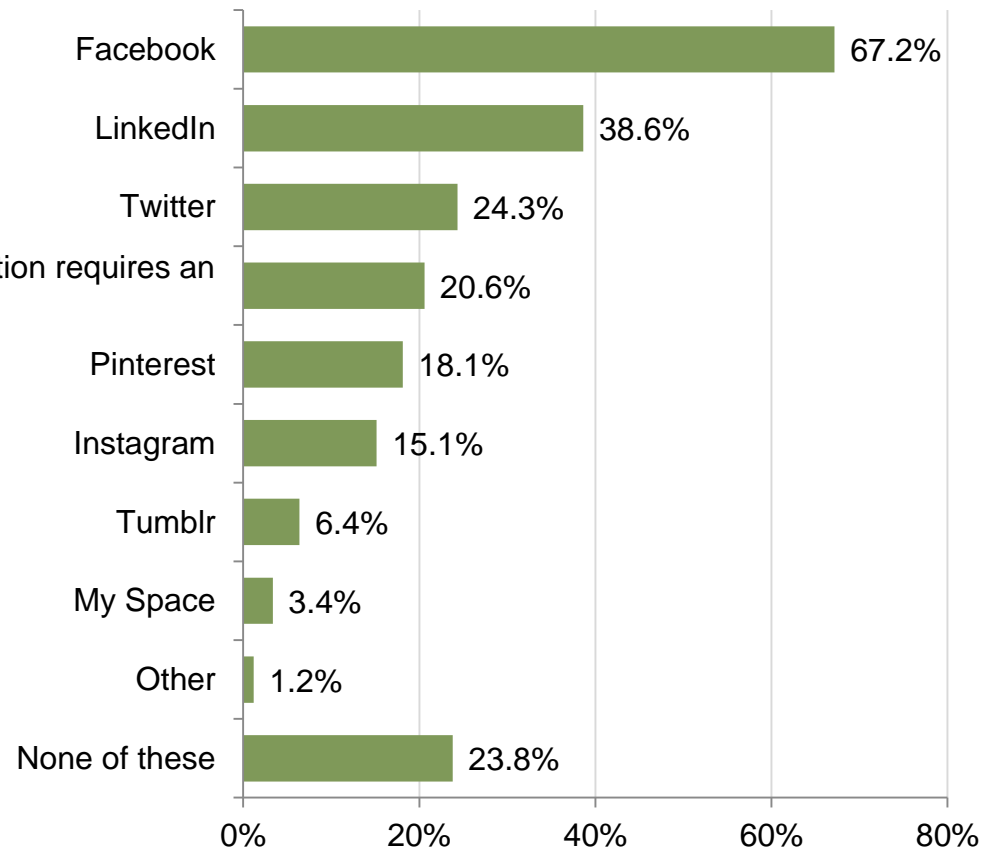
Social Media Participation

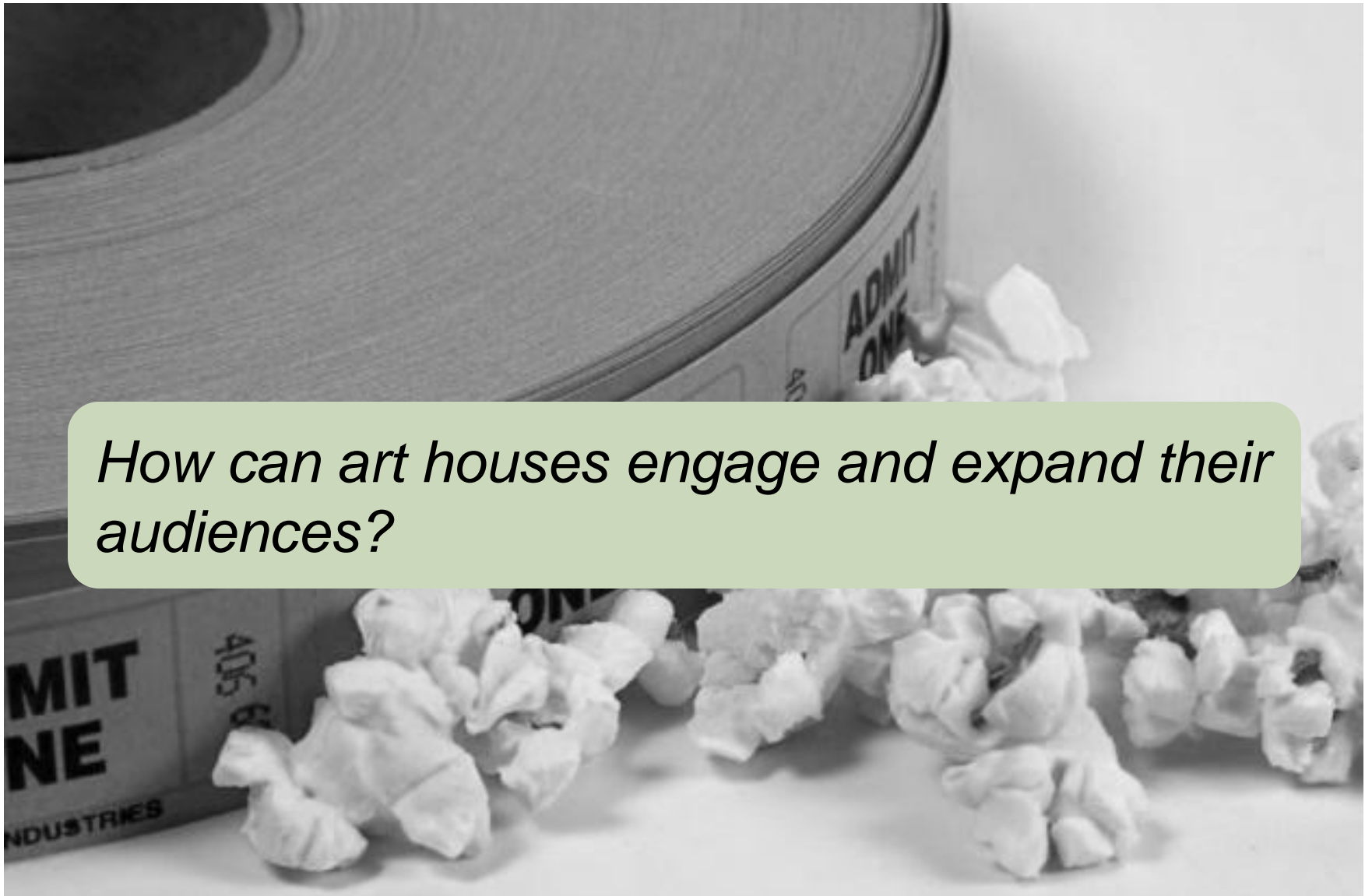
- 76.2% of respondents have subscribed to one or more social media sites
- Most popular among these is Facebook, although there are a number of subscribers to many other social media

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



Google+ (Google's social networking function requires an account)



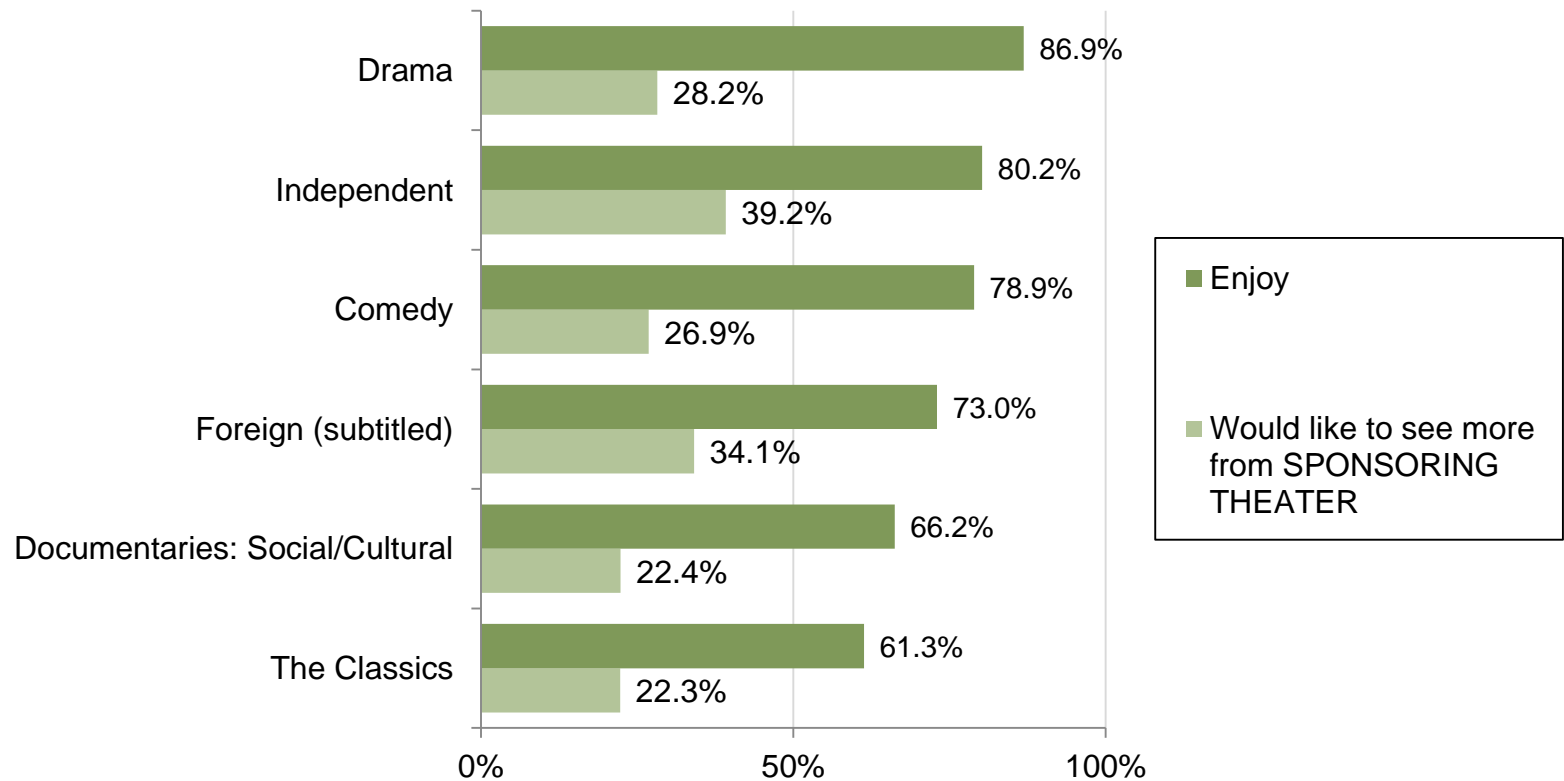


How can art houses engage and expand their audiences?

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)

Rank	Site	Overall
1	Quality of movies offered	88.8%
2	Picture quality	85.2%
3	Sound quality	79.7%
4	Sound volume	78.8%
5	Variety of movies offered	76.6%
6	Affordability of tickets	76.3%
7	Screening times	68.4%
8	Length of movie runs	61.9%



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)

Rank	Site	Overall
1	Customer service of staff/volunteers	86.2%
2	Knowledge of staff/volunteers	85.0%
3	Appearance of staff/volunteers	81.6%
4	Nearby dining options	74.3%
5	Availability of parking	46.9%



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)

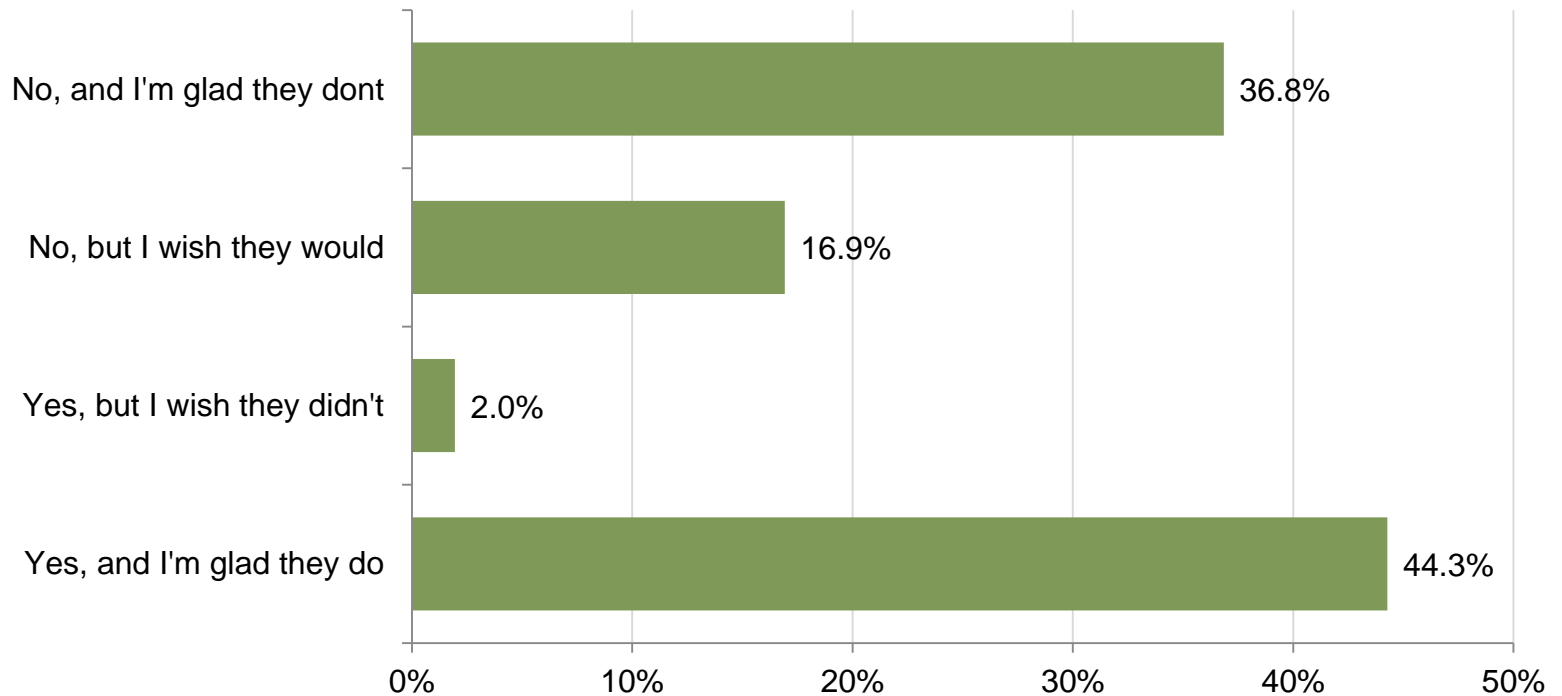
Rank	Site	Overall
1	Cleanliness of the theater overall	83.9%
2	Cleanliness of lobby	83.9%
3	Cleanliness of bathrooms	78.3%
4	Temperature of the theater	73.2%
5	Variety of concessions options	69.5%
6	Affordability of concessions	62.4%



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

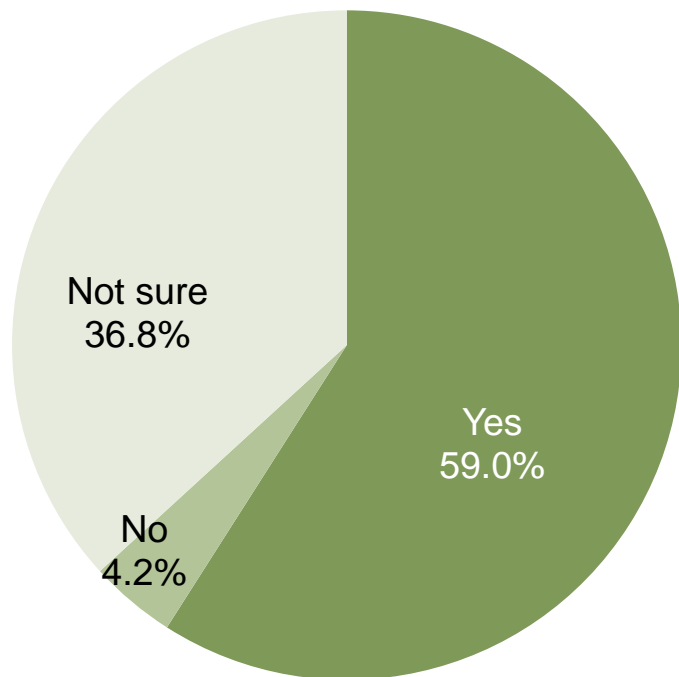
Does SPONSORING THEATER serve alcoholic beverages?



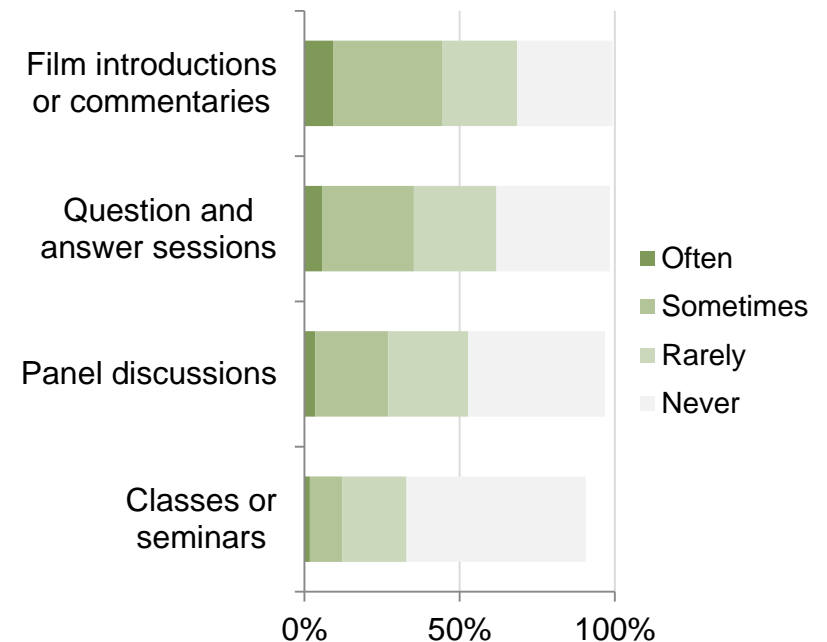
Educational Content

- 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?



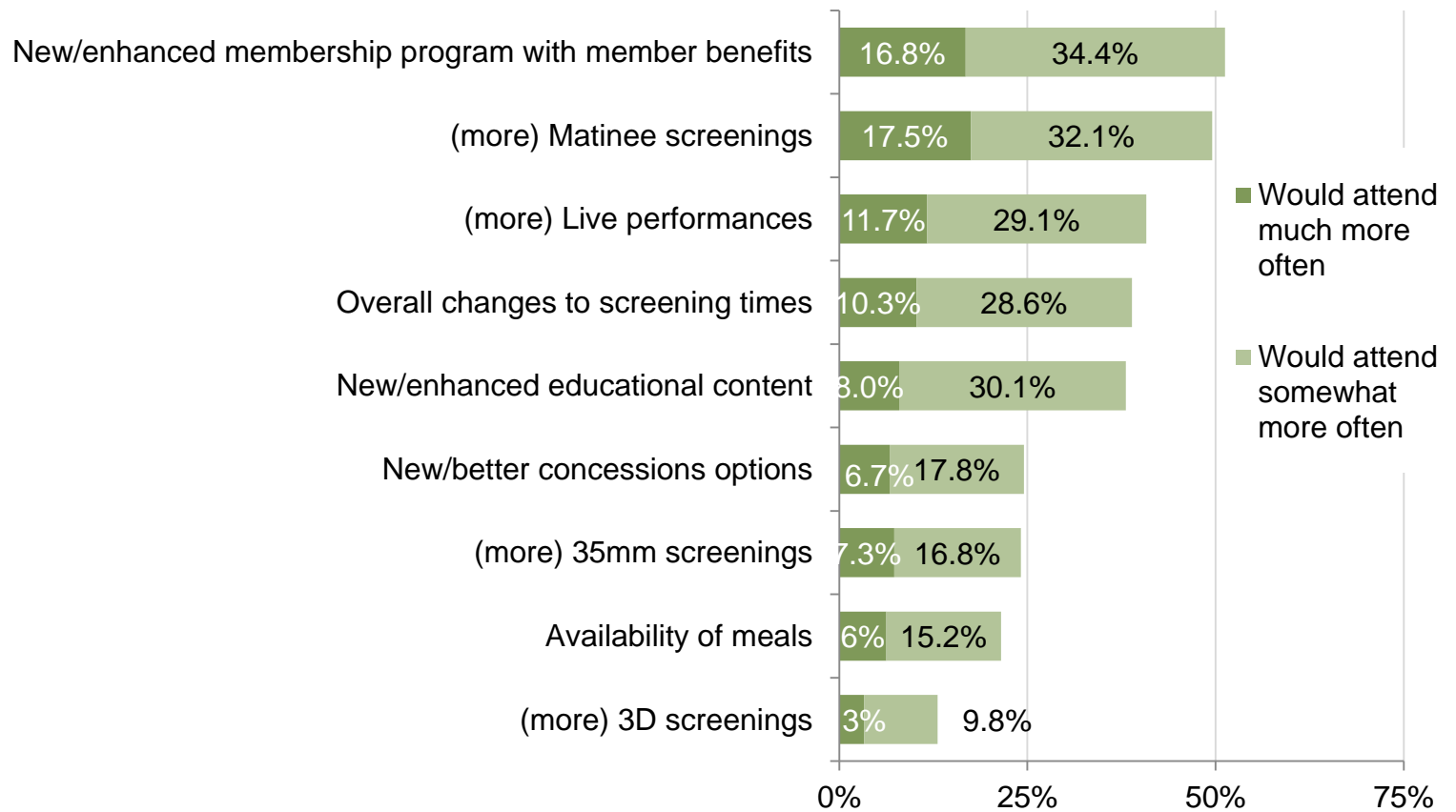
How often do you attend each of the following at SPONSORING THEATER? (of those answering "Yes" to the prior question)



Building Attendance

- 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?



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.”



Increasing Frequency – Verbatim Comments (continued)

Please complete the following sentence: “I would attend movies at SPONSORING THEATER 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.”



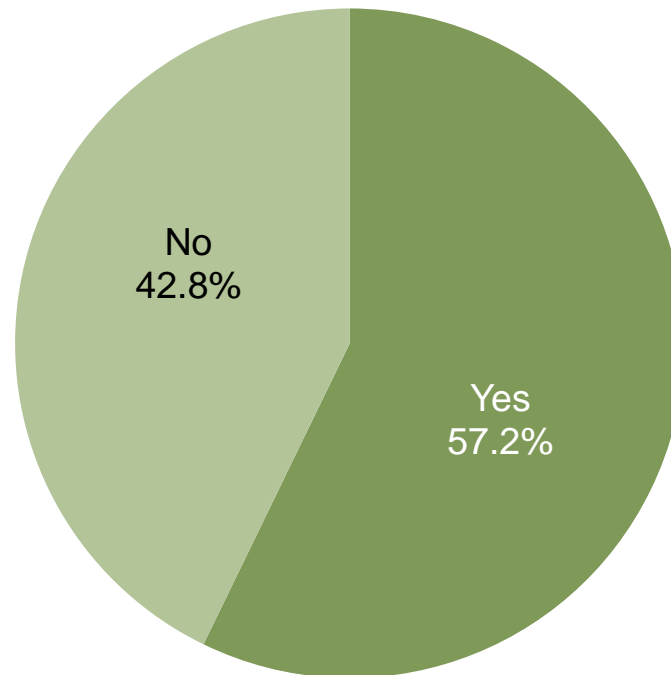


How can art houses expand their bases of financial support?

Providing 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

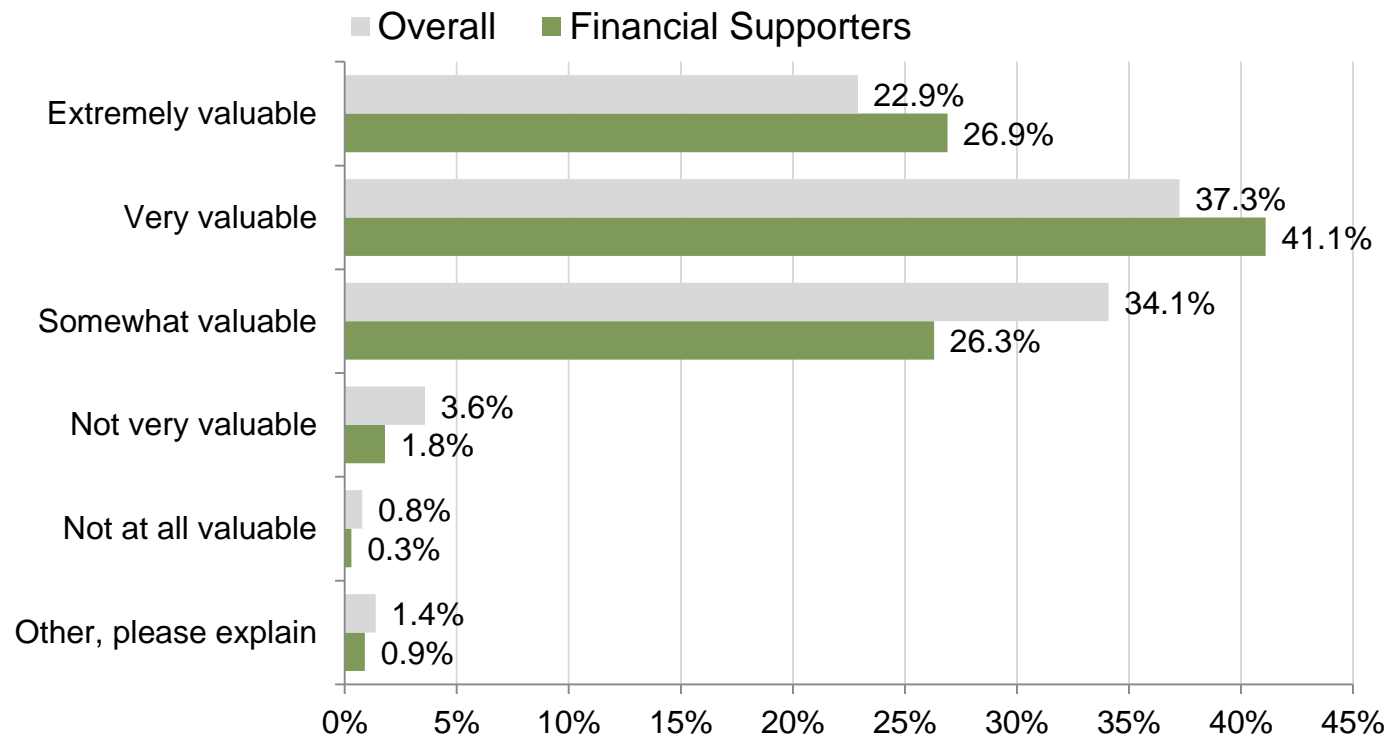
Do you provide financial support to SPONSORING THEATER, aside from purchasing tickets to see movies there? (e.g. give donations, purchase memberships)



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?



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)



Rank	Site	Correlation
1	Quality of movies offered	0.321
2	Variety of movies offered	0.314
3	Affordability of tickets	0.279
4	Picture quality	0.249
5	Customer service of staff/volunteers	0.228
6	Cleanliness of lobby	0.226
7	Screening times	0.225
8	Affordability of concessions	0.223


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.



Robert Wood Johnson Foundation

