

# Art House Convergence National Audience Study 2014

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

# Overview



In October, 2014 the Art House Convergence, Bryn Mawr Film Institute and Avenue ISR partnered to conduct the second National Audience Study to develop a deep understanding of art house patron profiles, attitudes and beliefs.

More than 20,000 art house attendees from across the United States and Canada participated in this landmark study (20,835 unique individuals participated) .

# Participating Theaters

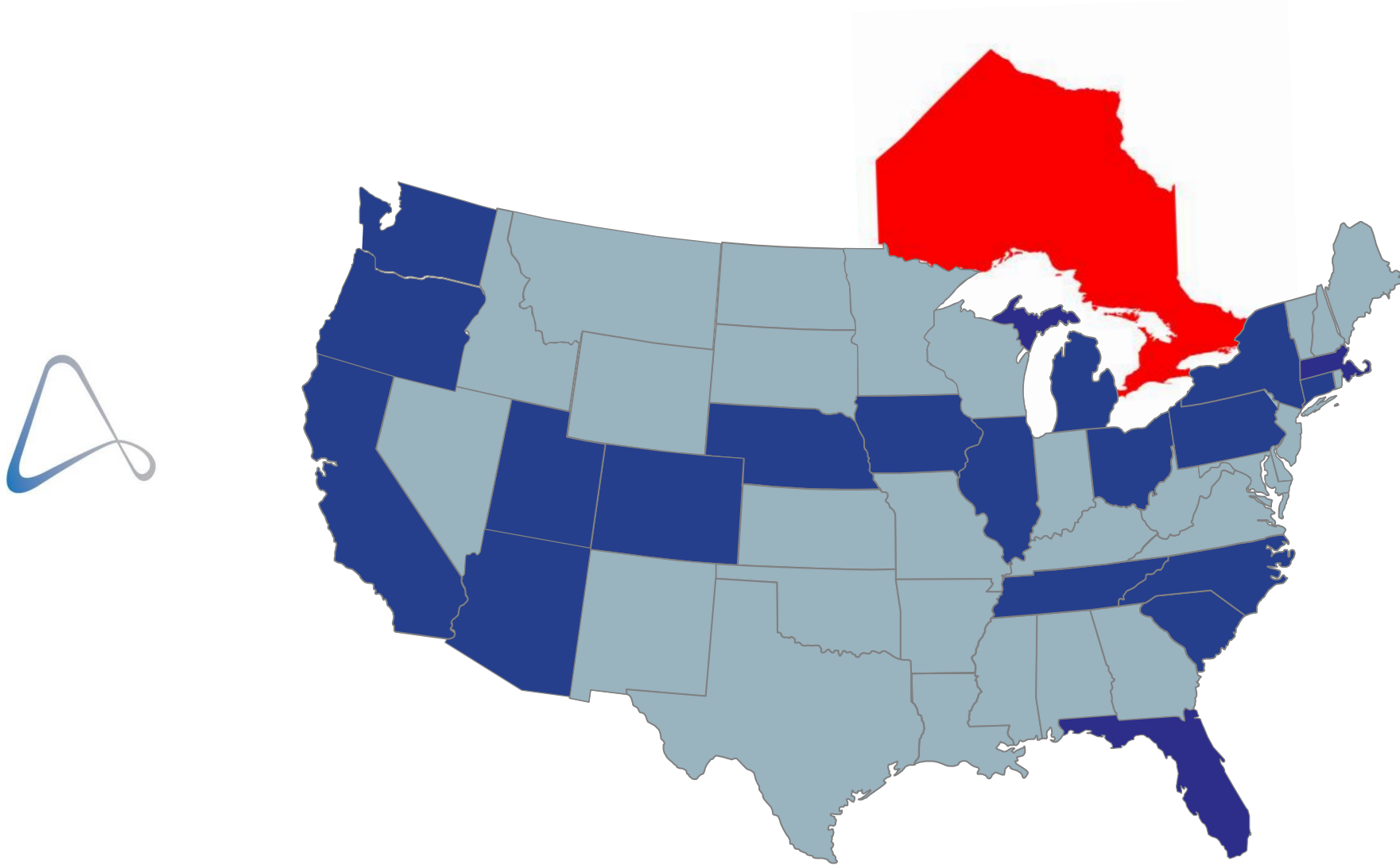
- Thank you to the 30 North American art houses who participated in the study!

Rank	Site	Rank	
1	a/perture cinema, Winston-Salem, NC	16	Music Box Theatre, Chicago, IL
2	Amherst Cinema, Amherst, MA	17	Tampa Theatre, Tampa, FL
3	Belcourt Theatre, Nashville, TN	18	The Avon Theatre, Stamford, CT
4	Bloor Hot Docs Cinema, Toronto, ON	19	The Bijou By the Bay, Traverse City, MI
5	Bryn Mawr Film Institute, Bryn Mawr, PA	20	The Cinefamily, Los Angeles, CA
6	Camera Cinemas, San Jose, CA	21	The Coolidge Corner Theatre, Brookline, MA
7	Cinema Arts Centre, Huntington, NY	22	The Grand Cinema, Tacoma, WA
8	Cinemapolis, Ithaca, NY	23	The Loft Cinema, Tucson, AZ
9	Civic Theatre of Allentown, Allentown, PA	24	The Michigan Theater, Ann Arbor, MI
10	Denver Film Society, Denver, CO	25	The Midwest Theater, Scottsbluff, NE
11	FilmScene, Iowa City, IA	26	The Nantucket Dreamland, Nantucket, MA
12	Gateway Film Center, Columbus, OH	27	The Nickelodeon Theatre, Columbia, SC
13	Hollywood Theatre, Portland, OR	28	The Salt Lake Film Society, Salt Lake City, UT
14	Images Cinema, Williamstown, MA	29	The State Theatre, Traverse City, MI
15	Martha's Vineyard Film Center, Martha's Vineyard, MA	30	TIFF Bell Lightbox, Toronto, ON



# Audience Study By the Numbers

- 20,000 Respondents Attending 30 Art Houses in 2 Countries



# ***Table of Contents***

- 1. Overall Trends and Changes**
- 2. Expanding the Art House Audience**
- 3. Building Revenue and Sponsorship**
- 4. Enhancing Community Support**
- 5. Supporting Those with Visual/Hearing Impairments**



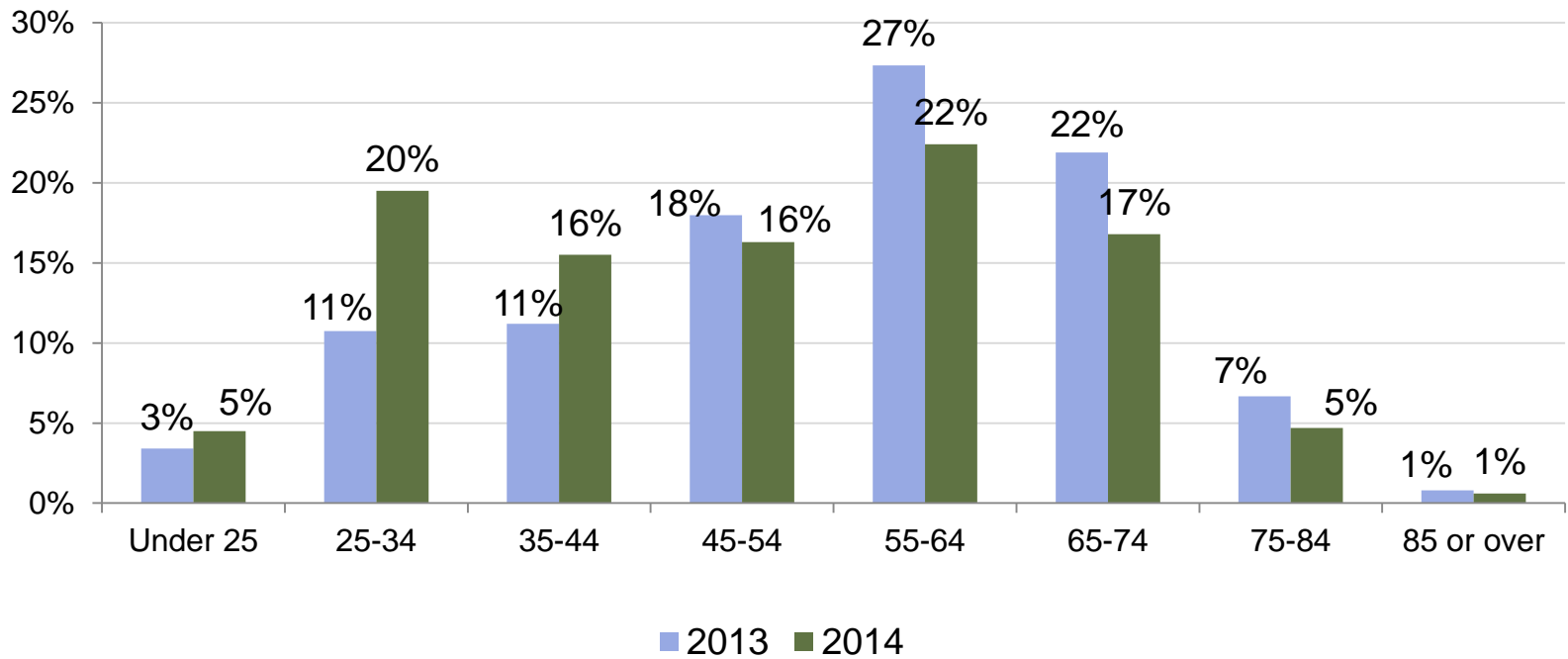
# 1. Overall Trends and Changes



# Age of Audience

- The respondents to the 2014 survey tend somewhat toward a group of younger attendees than in 2013
- This does not represent a sea change; participating theater numbers are fairly steady
- It does show that some art houses in some communities have a substantial base of younger viewers

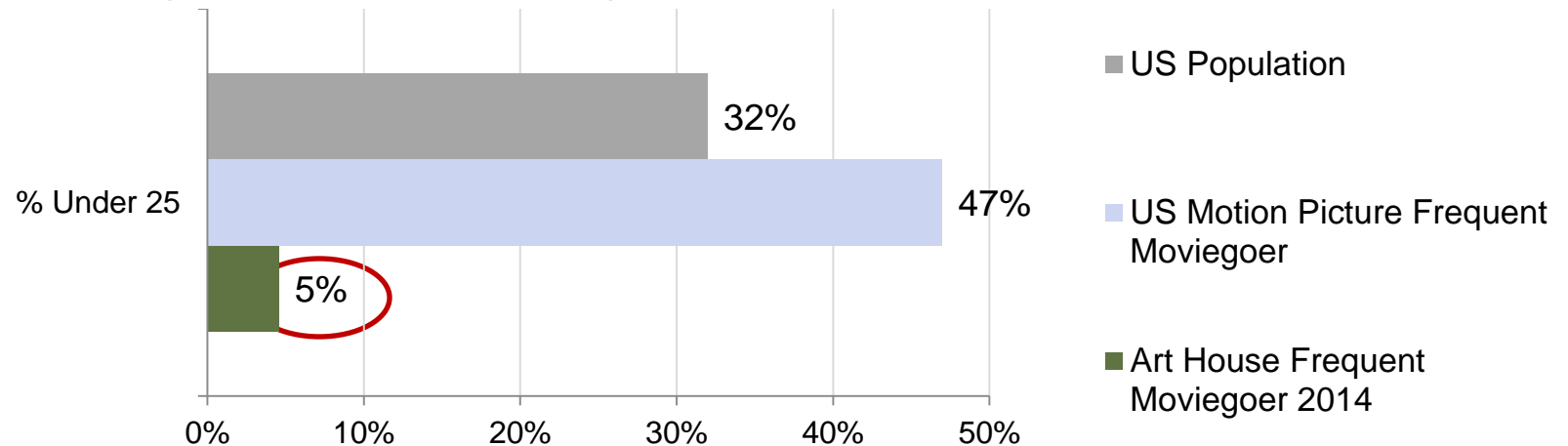
Age of Respondent



## Age of Audience, Cont.

- Those under 25 make up 40% of frequent moviegoers (1+ movies per month) for the US film industry generally
- They made up just 5% of the art house audience in 2014

Percentage 24 Years Old and Younger



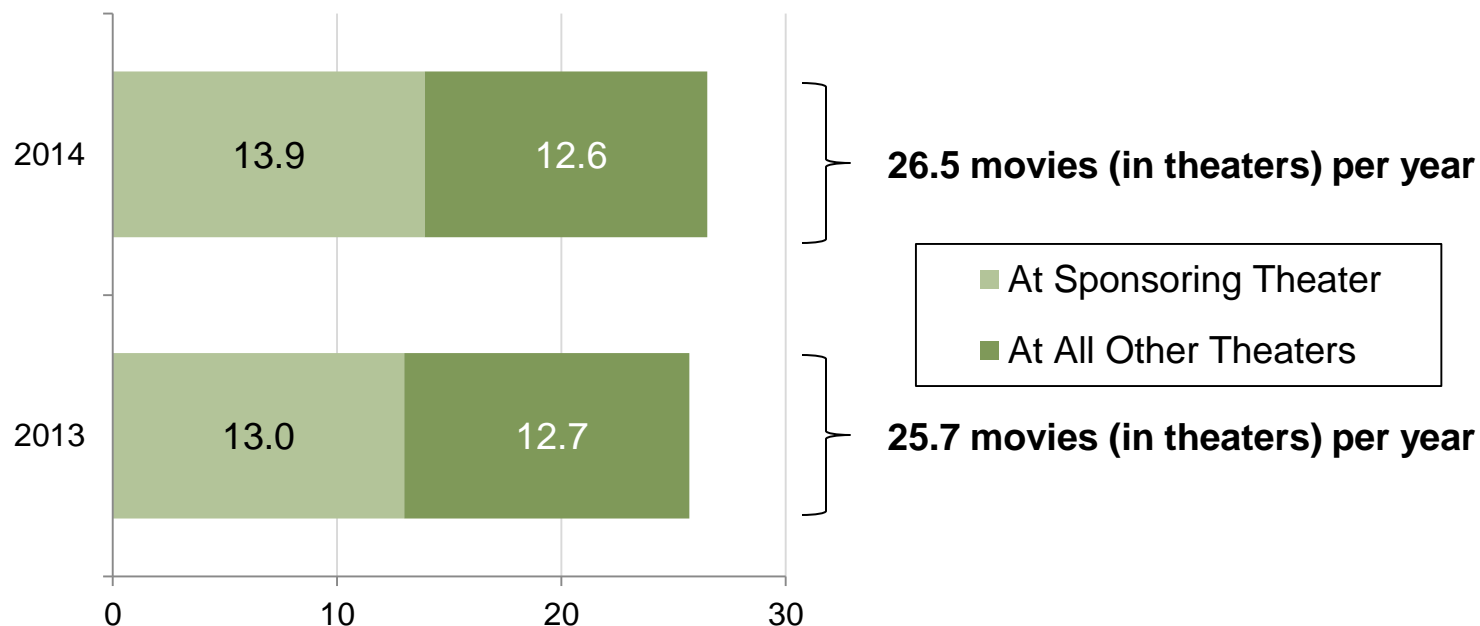
Sources for Comparisons: *Theatrical Market Statistics 2013*, Motion Picture Association of America Inc.; *2013 American Community Survey*, United States Census Bureau

# Frequency of Attending

- The average art house attendee reports seeing 26.5 movies per year, up slightly from 25.7 in 2013, essentially unchanged
- Any given art house attendee is seeing just over half of all movies at a given favored art house

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

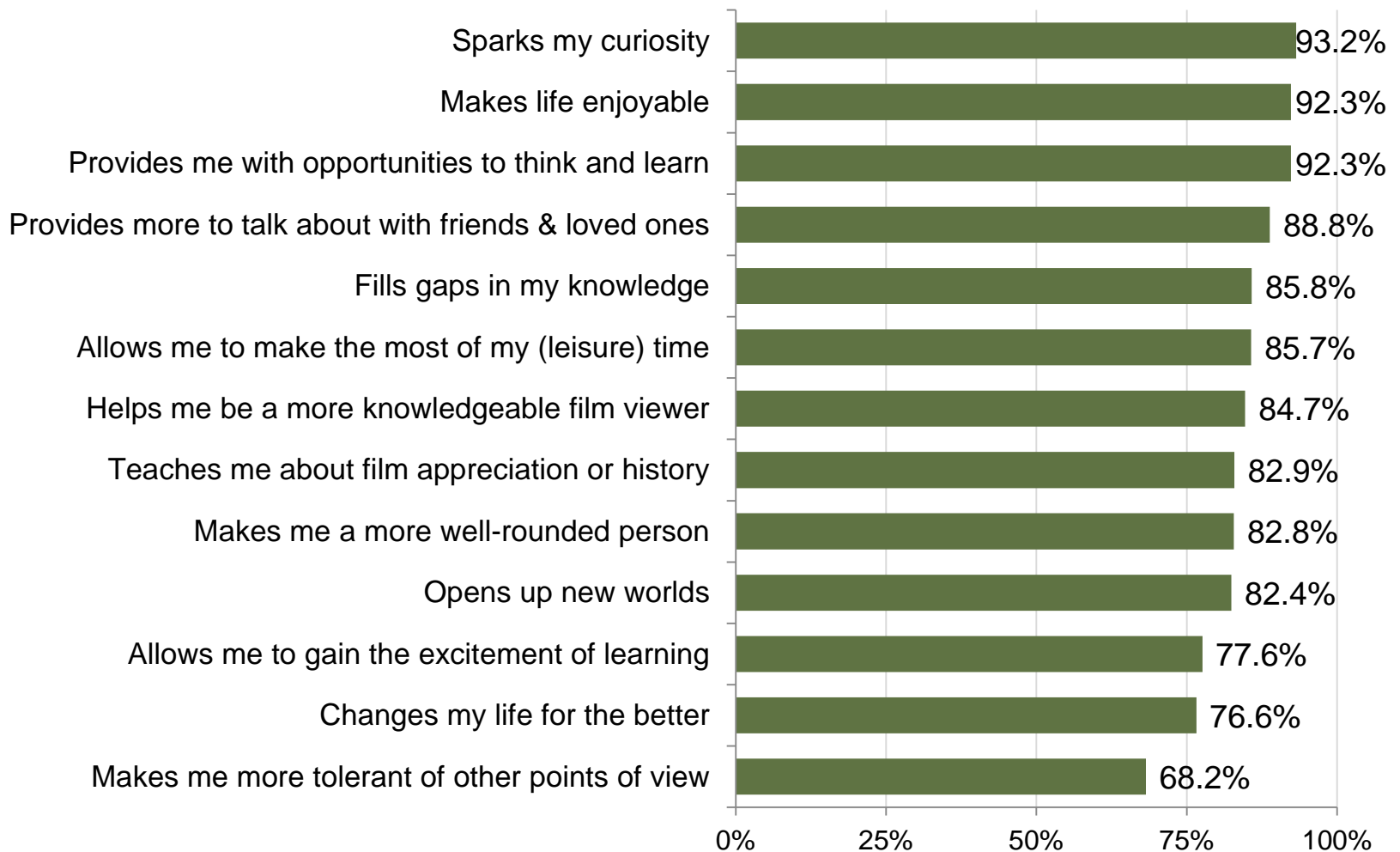
**Movies Per Year**



# Passion and Engagement

- Art house audiences have enriching and transformative experiences because of their favored theaters

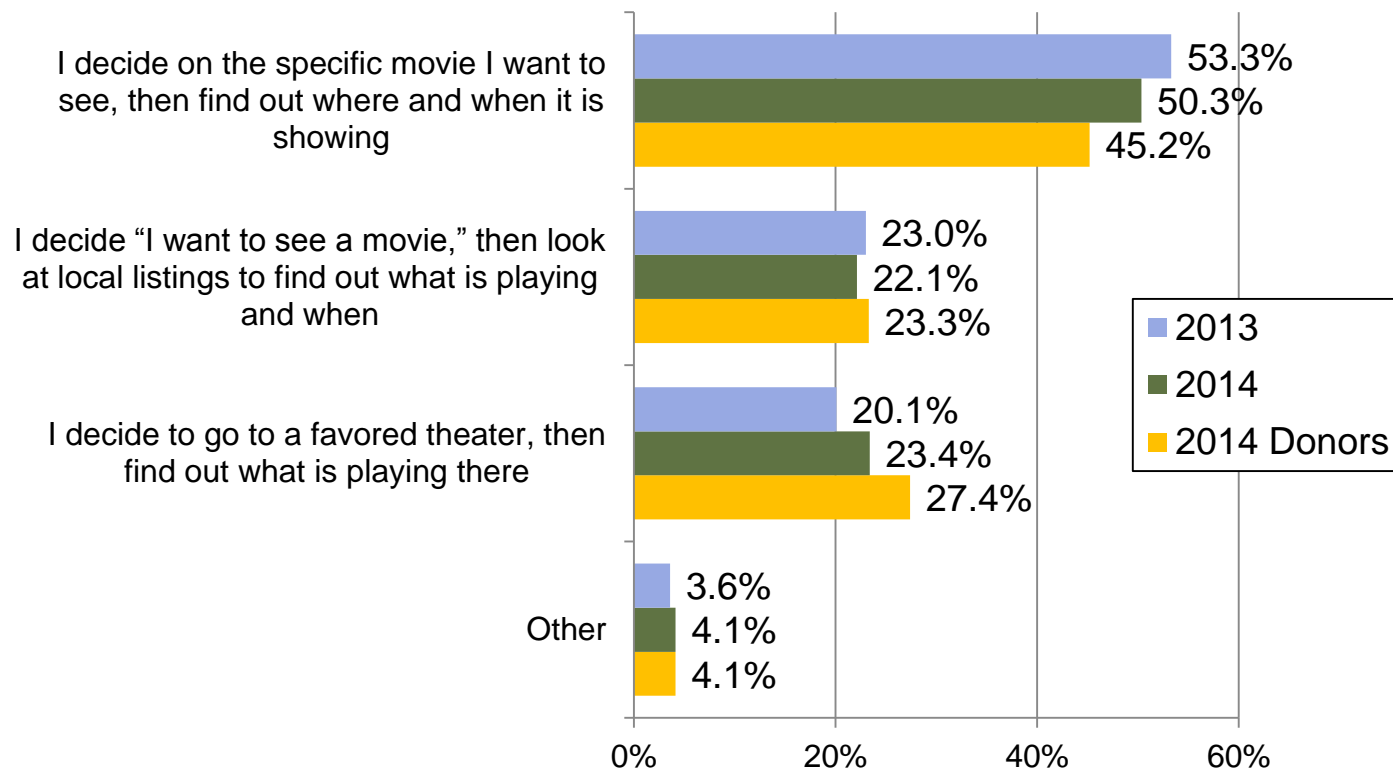
*To what extent do you agree with the following statements about SPONSORING THEATER?  
(Top 2 Box - Strongly Agree or Somewhat Agree)*



# Decision Process

- As in 2013, attendees typically decide on a specific movie they want to see; then figure out where and when they will see it
- Donors tend to be a more engaged and therefore slightly more loyal group

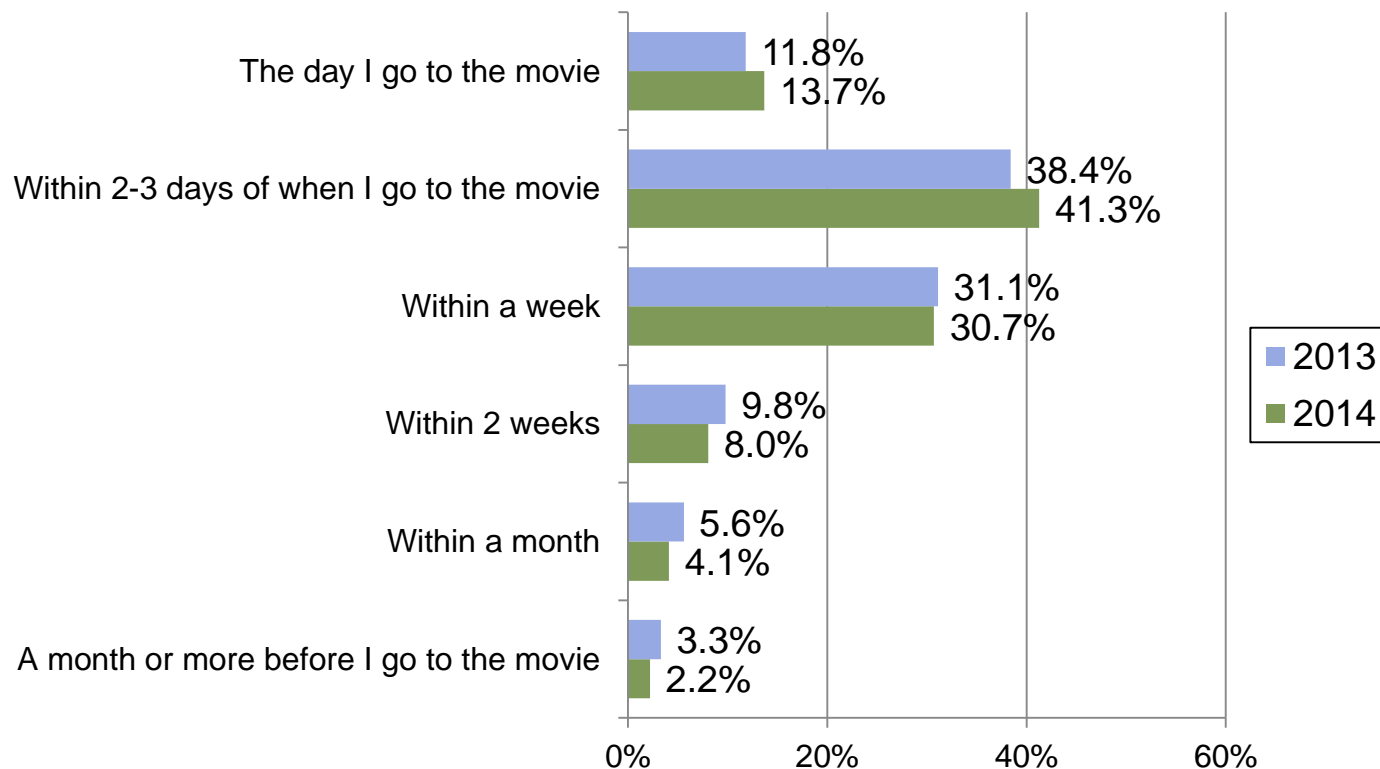
*When you go to the movies in a movie theater, which is most often true about how you decide what to see?*



## Decision Process (cont.)

- As in 2013, attendees make the decision to attend a particular theater within 1-3 days of when they see the movie
- By implication, long term scheduling should be supplemented by short form reminders within 2-3 days of peak viewing times

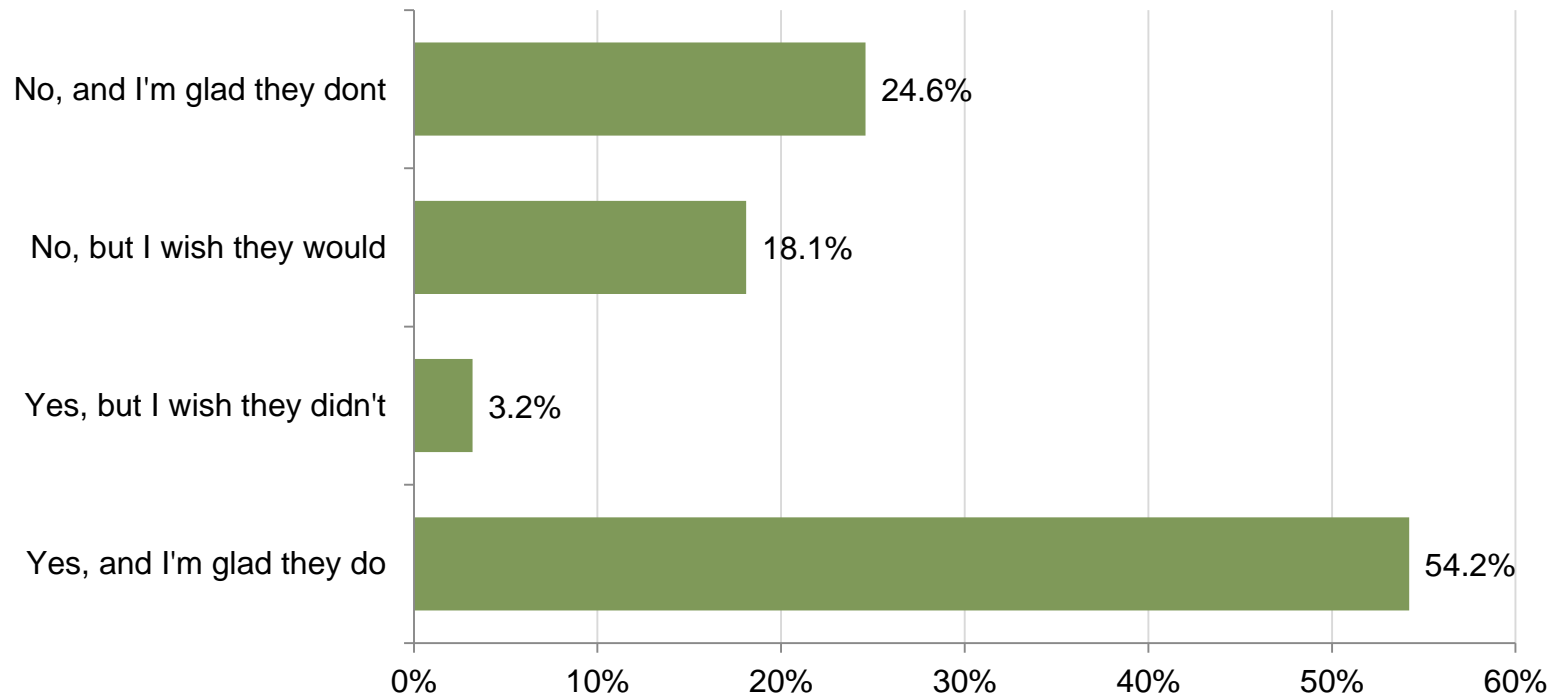
*How far in advance do you typically decide to see a particular movie in the theater?*



# Alcoholic Beverages

- Similar to 2013, the 57% 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

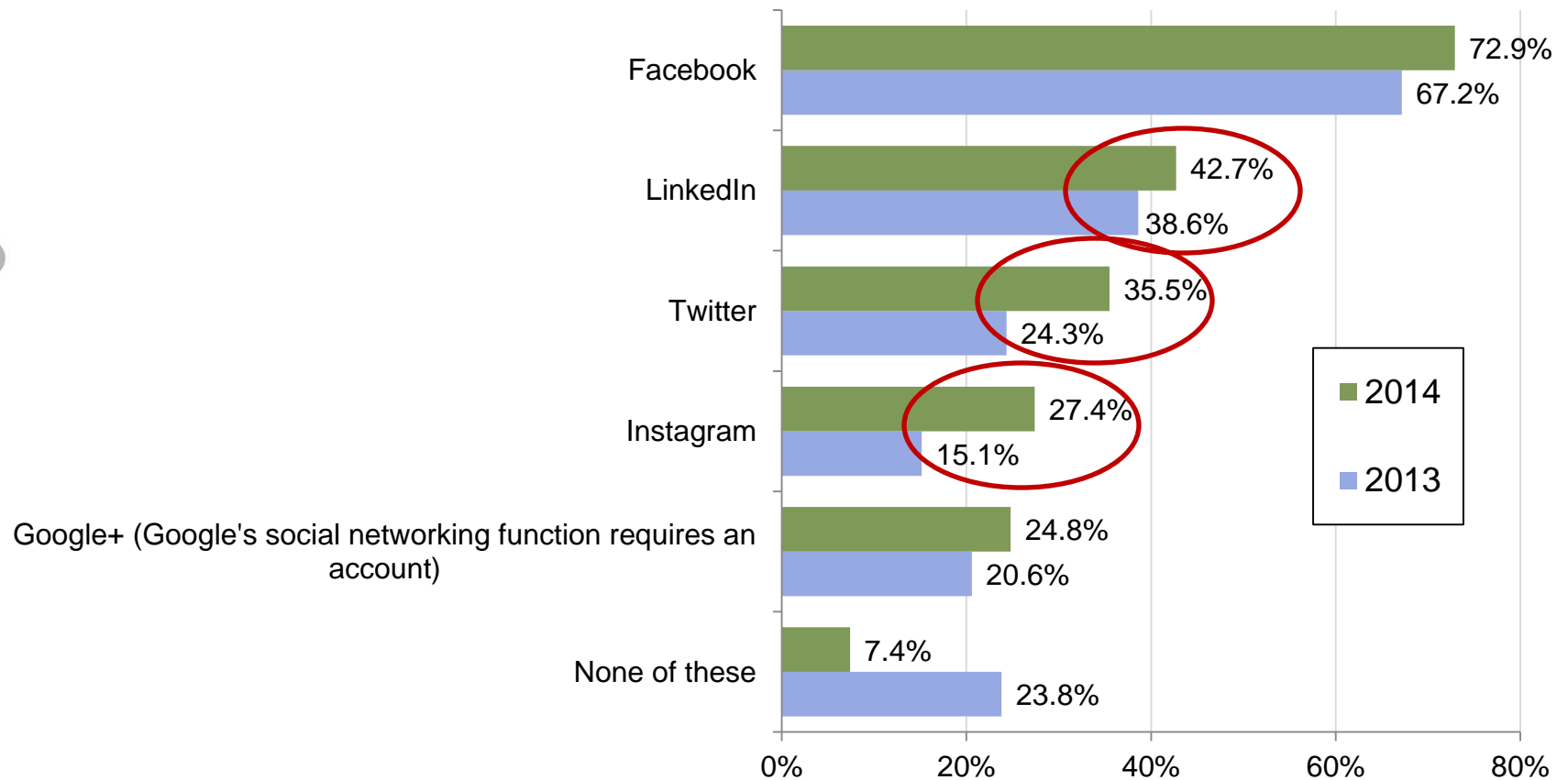
*Does SPONSORING THEATER serve alcoholic beverages?*



# Social Media Participation

- Respondents are avid social media users with 92.6% subscribing to some type of social medium
- In the past year LinkedIn, Twitter and Instagram saw significant upticks
- Other social media fall below the 20% line

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



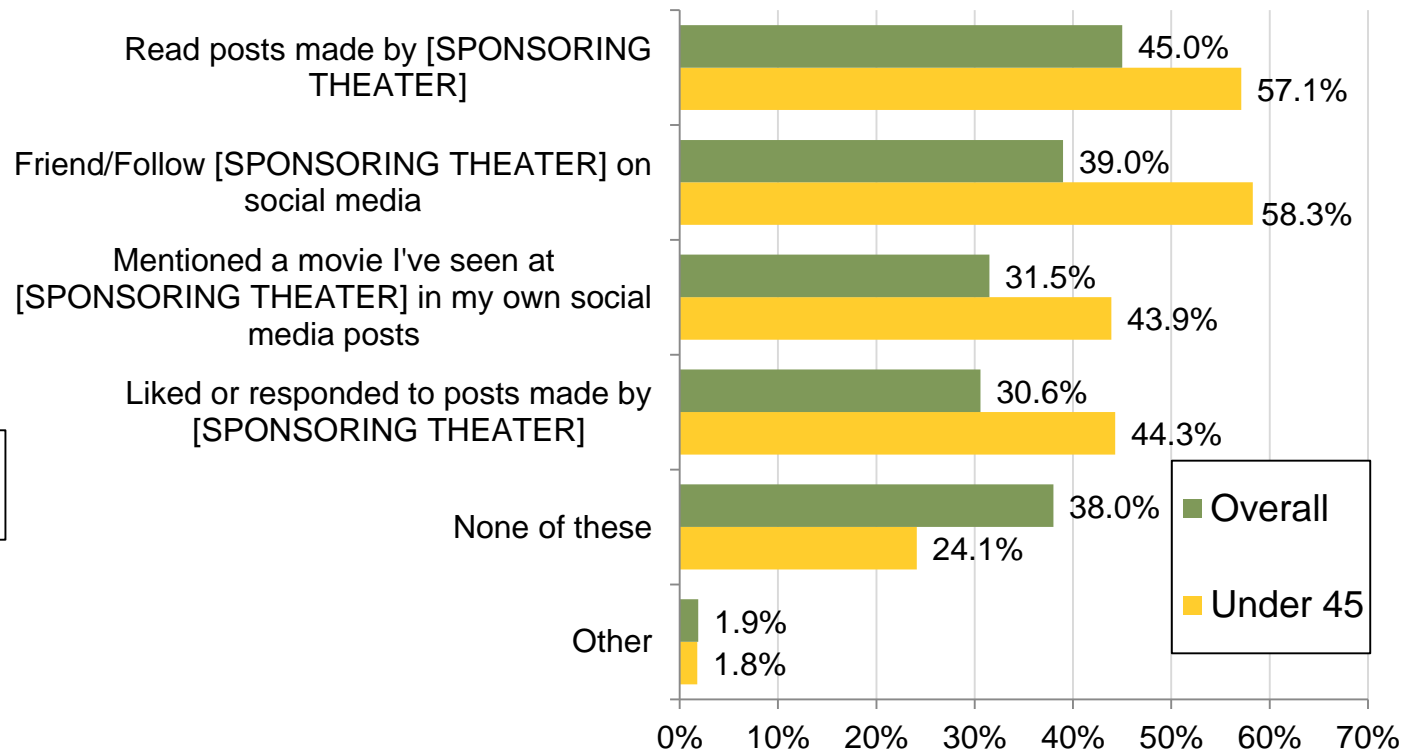
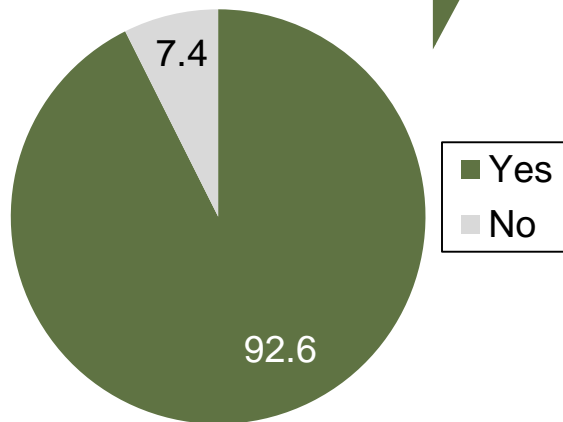
# Social Media Usage and Art Houses

- Of the 92.6 percent of respondents who are subscribed to social media at least 62 percent of them have had interactions with an art house theater through social media
- Age does dictate social media to some extent, and those under 45 are much more liable to have interacted with art houses using social media

*To which, if any, social media sites have you subscribed? (select all that apply) and Which, if any, interactions have you had with [SPONSORING THEATER] on social media?*



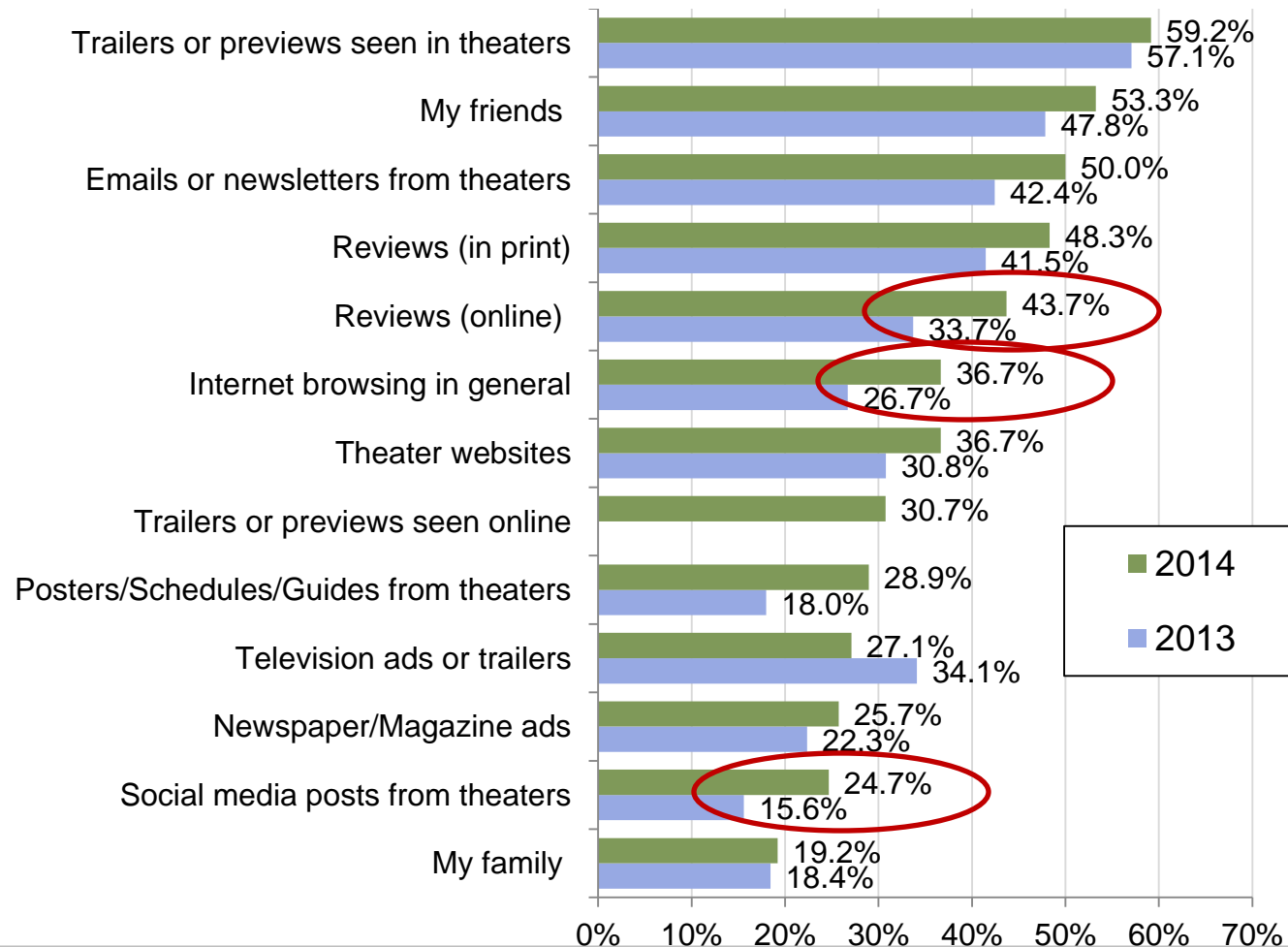
Use social media?



# Choosing Films to Watch

- Movie trailers or previews are the most important means by which attendees learn about movies they want to see, followed by friends
- Online sources saw a significant increase, but so did posters, schedules, guides and printed materials from theaters

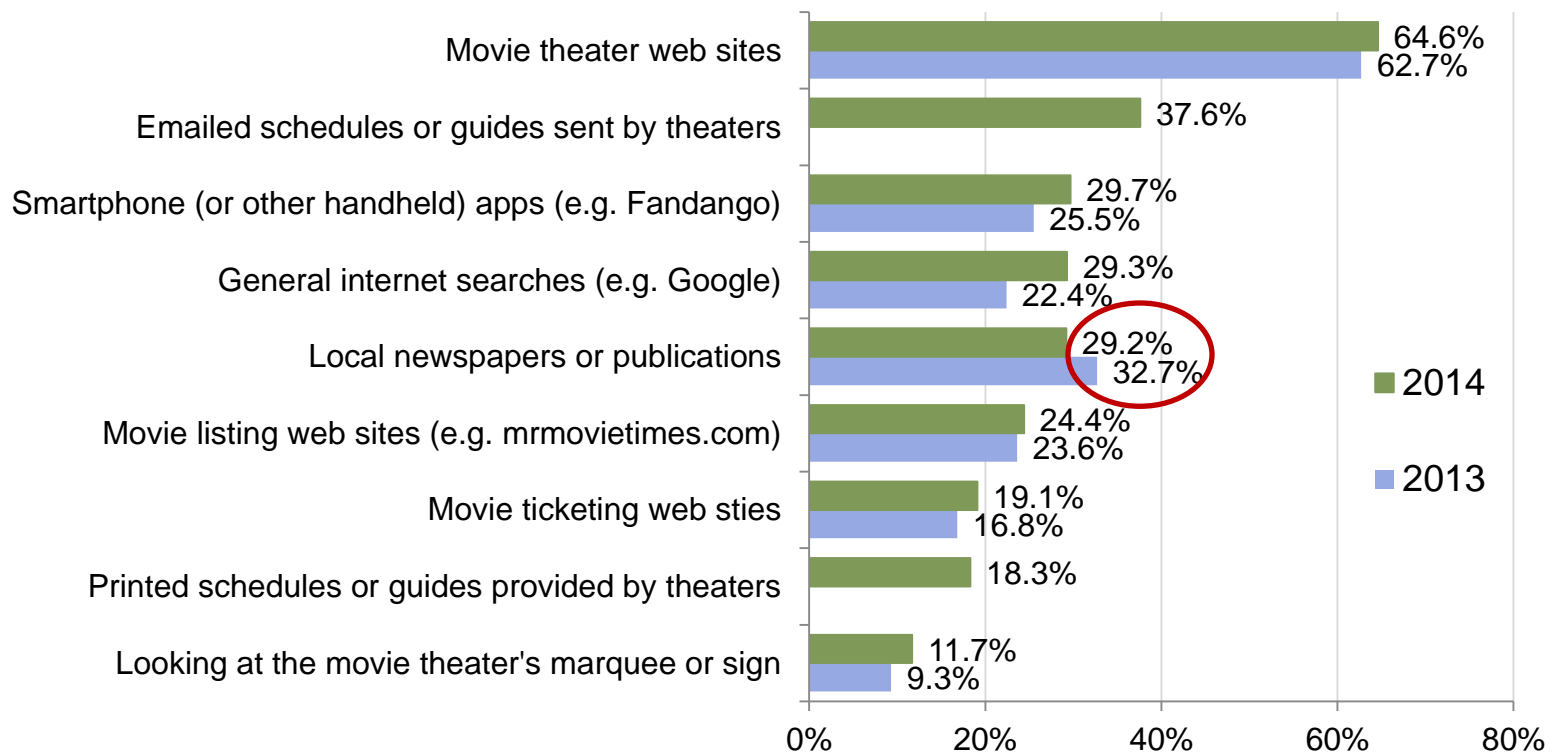
*How do you typically learn about which movies you might be interested in seeing in movie theaters? (select all that apply)*



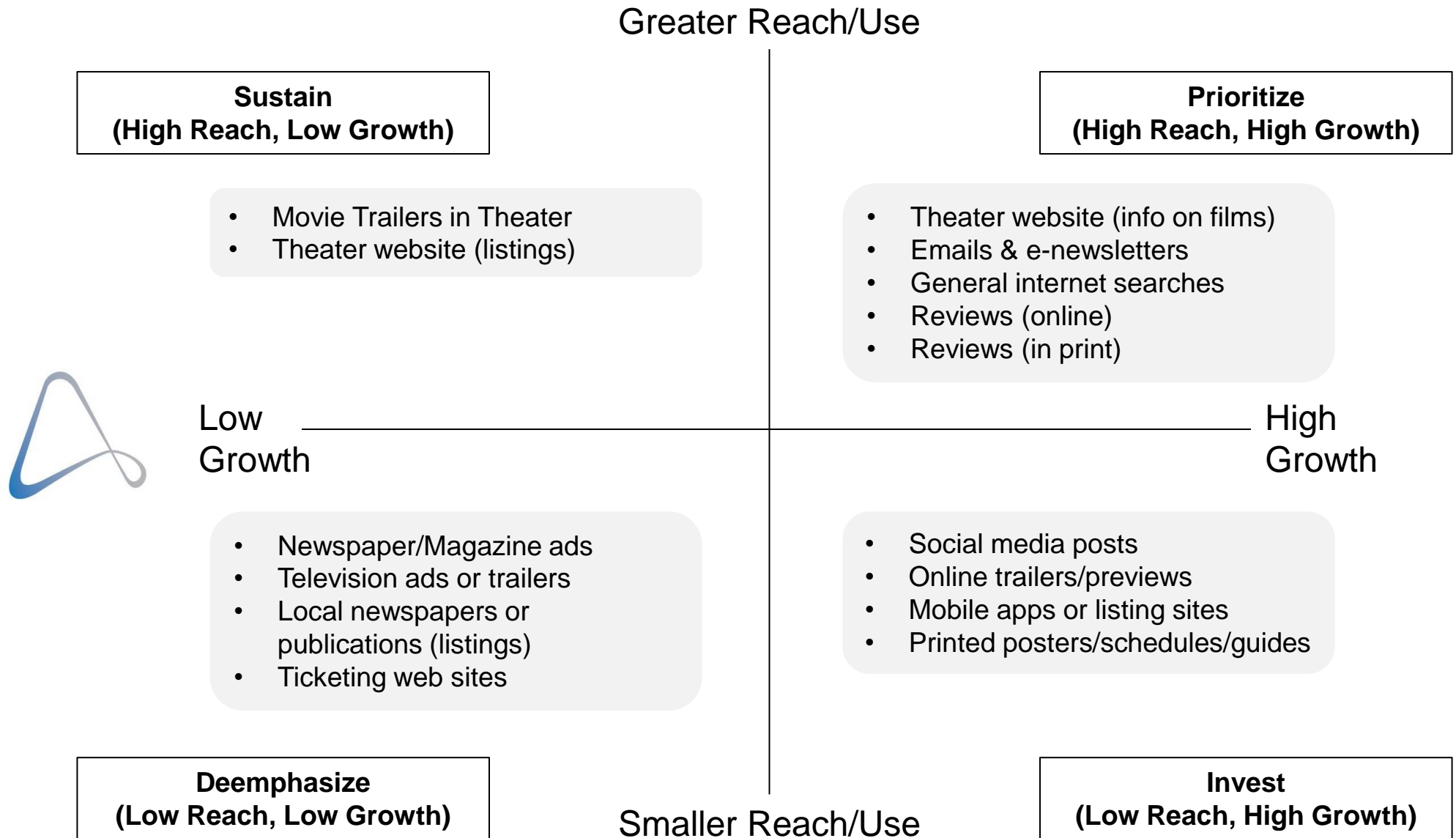
# Finding Screening Times

- As if this weren't enough, audiences are using a variety of other information sources to look for screenings and show times
- Nearly 65% use movie theater web sites
- Others use a variety of electronic and non-electronic means
- Local newspapers may be declining but are still used by some

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



# Media Patterns and Implications



# Varied Communications Approaches

- Different audiences and situations may warrant a variety of approaches
- Print materials may be the best vehicle for community outreach and a long form format to tell the art house story



*The Loft Cinema, Tucson, Arizona*



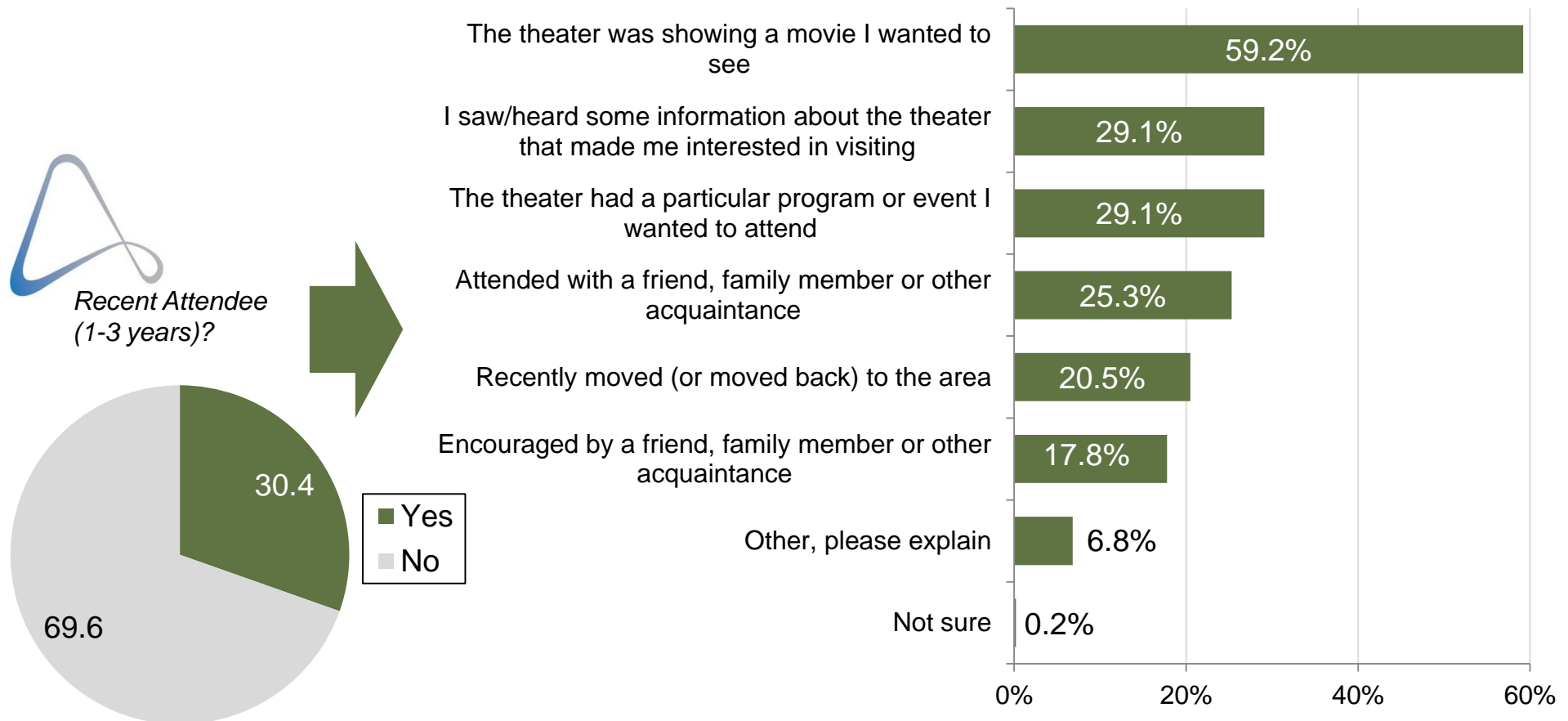
## *2. Expanding the Art House Audience*



# What Attracted Recent Attendees?

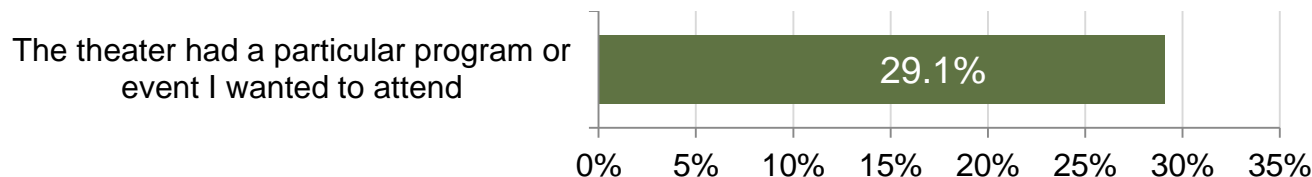
- For most it was a specific movie, but specific programs, events and communications helped to open the door wider

*What first caused you to attend a movie at [Sponsoring Theater]? (select all that apply) (for those who answered "1 year or less" or "2-3 years to question "how long have you been attending movies at [sponsoring theater?])*



# Building Audience: Programs/Events

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



- **Enriched/Enhanced programming**

- *“A class on Quentin Tarantino (this was when I started going regularly)”*
- *“Silent movie with Wurlitzer theatre organ.”*
- *“B Movie Bingo”*

- **Community partnerships and co-promotions**

- *“A local brewery was debuting a summer beer to a showing of Wet Hot American Summer.”*
- *“A fundraiser for a food pantry”*
- *“Multiple events associated with local non-profits; the arts, music, and the environment.”*

- **Special guests and star power**

- *“A screening of The Monster Squad with Fred Decker”*
- *“A screening of The Room with an appearance by Tommy Wiseau.”*
- *“A Filmusik event. Voice over actors and Foley artists did a live soundtrack to stop animation movie.”*



***The Michigan Theater, Ann Arbor***



# Building Audience: Programs/Events



***Bryn Mawr Film Institute***



***Bloor Hot Docs Cinema, Toronto, ON***



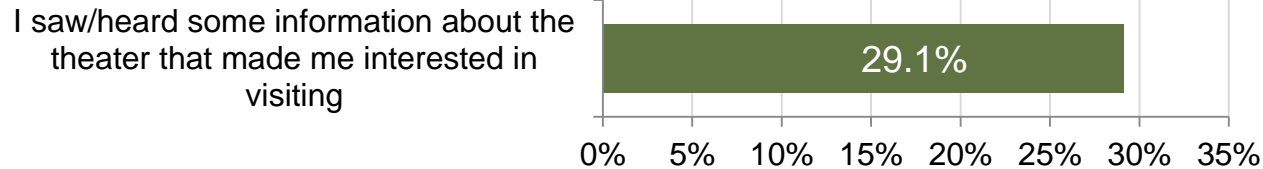
***Tampa Theatre***



***Hollywood Theatre, Portland, OR***

# Building Audience: Communications

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



- **Word of mouth, including social media**

- *"Friends told me they sold beer!"*
- *"New neighbors said it was a great theater"*
- *"Friends on Facebook making a plan"*
- *"My real estate agent mentioned it as one of the great things about the neighborhood"*

- **PR and media outlets**

- *"Local newspaper story"*
- *"Radio interview with director"*
- *"Numerous reviews of the venue as a special place to see a movie."*
- *"BlogTO or Torontoist"*

- **Affiliate group communications**

- *"Camino movie – heard from my hiking group"*
- *"Tampa History Museum email"*



*a/perture cinema, Winston-Salem, NC*



# A Final Word on Communications

*“How, if at all, can [SPONSORING THEATRE] better communicate with you?”*

## • Some info for long term planners

- *“I’d love to know approximately when special events are happening so I can plan (for instance, the sound of music sing along).”*
- *“Give me more than one or two days advance notice about the next film they will be showing.”*

## • In favor of mobility

- *“An actual movie app to check times would be great. The mobile version of the website doesn’t work that well.”*
- *“An app with a schedule that you can browse and even select certain films to add to a watch list within the app. Maybe they would even export to your calendar.”*
- *“Texts about a special screening would be nice. Often by the time I read my email, free tickets for member events are gone.”*

## • Social media diversification

- *“Be more active on Twitter (tweet special screenings, when movies arrive/leave, etc.)”*
- *“Facebook and Twitter. They need to increase that presence ahead of time. If you are anticipating a movie’s release, post a trailer, link to reviews, interviews, etc.”*

## • Customized communications

- *“Customized notifications. Allow me to enable/disable notifications regarding certain types of films.”*
- *“Develop some way of establish a patron's preferences so they get specific emails sent to them about upcoming films. Maybe have the calendar be selectable for notifications and alarms for movies?”*



### *3. Building Revenue and Sponsorship*



# Audience Experience: Solid Performance

- We asked about 20 metrics of the audience experience, from sound quality to affordability of tickets
- These top 10 are areas where art houses most meet expectations

*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	90.4%
2	Picture quality	87.8%
3	Knowledge of staff/volunteers	86.2%
4	Customer service of staff/volunteers	86.2%
5	Variety of movies offered	84.1%
6	Cleanliness of lobby	82.3%
7	Welcoming atmosphere	81.7%
8	Cleanliness of the theater overall	81.4%
9	Appearance of staff/volunteers	81.3%
10	Sound quality	81.3%



# Audience Experience: Areas of Opportunity

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

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

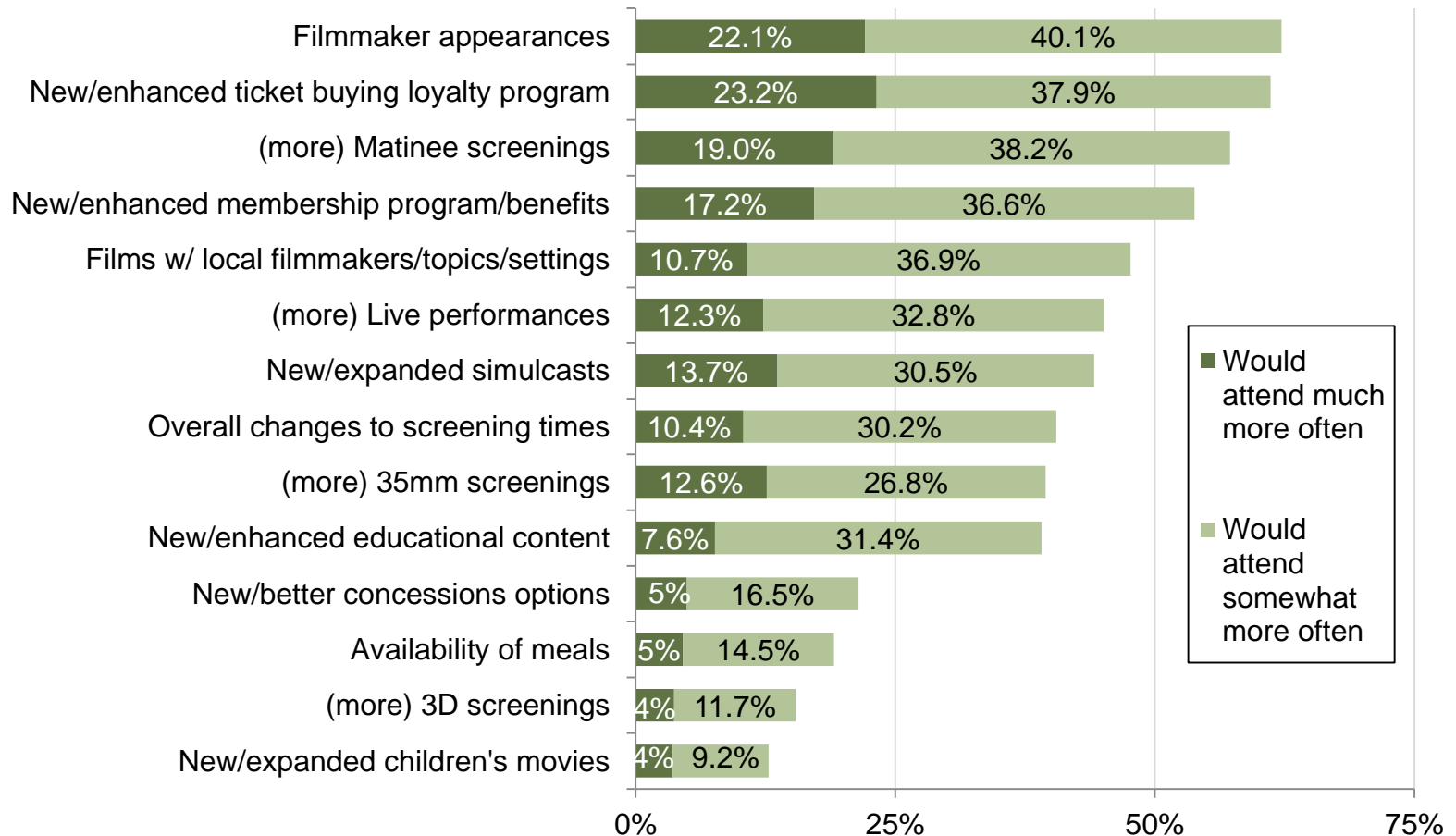
Rank	Site	Overall
11	Sound volume	78.3%
12	Cleanliness of bathrooms	78.1%
13	Fun atmosphere	76.3%
14	Affordability of tickets	72.9%
15	Temperature of the theater	69.1%
16	Screening times	66.9%
17	Nearby dining options	66.3%
18	Affordability of concessions	63.5%
19	Length of movie runs (days or weeks film is showing)	62.4%
20	Variety of concessions options	60.2%
21	Availability of parking	47.2%



# Accelerating Attendance

- Respondents indicated that a number of changes to programming would cause them to attend more often
- While some of these may be difficult to consistently deliver, others are not

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



# Accelerating Attendance, cont.

*I would attend movies at [SPONSORING THEATRE] more often if...*

- **Offer more interactivity**

- *"If there was more audience participation -- panels with Q&A and participation from audience regarding both older and newer films."*
- *"I'd love to see a discussion format offered with appropriate films. I leave some wishing I could discuss it with some group, not just leave."*
- *"The Guillermo Del Toro intro to Eastern Promises, screening and Q&A with Cronenberg afterwards was a brilliant night. Absolutely brilliant. More of this! Please!"*

- **Present a range of artistic media**

- *"They offered the HD Met operas"*
- *"It offered more simulcast or previously taped showings of British theater. I absolutely love the National Theater showings and hope there will be many more!"*

- **Emphasize the community**

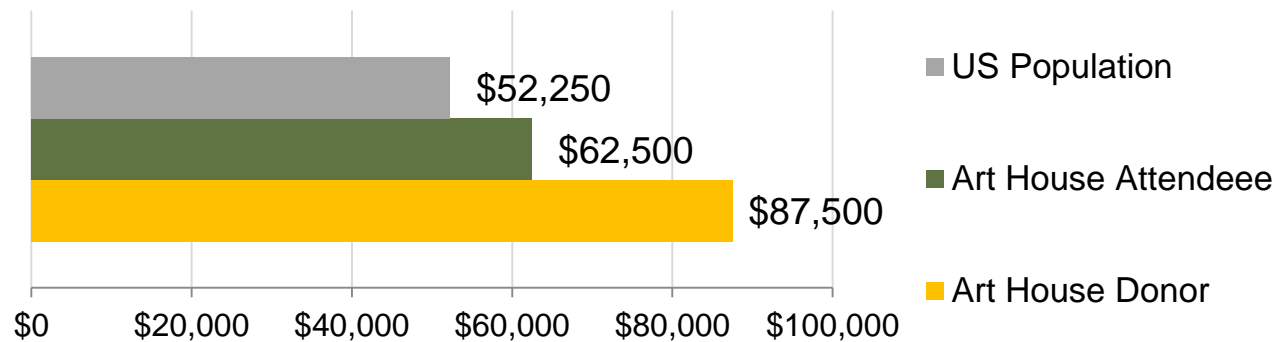
- *"Movies were tied to celebrations and local festivals."*



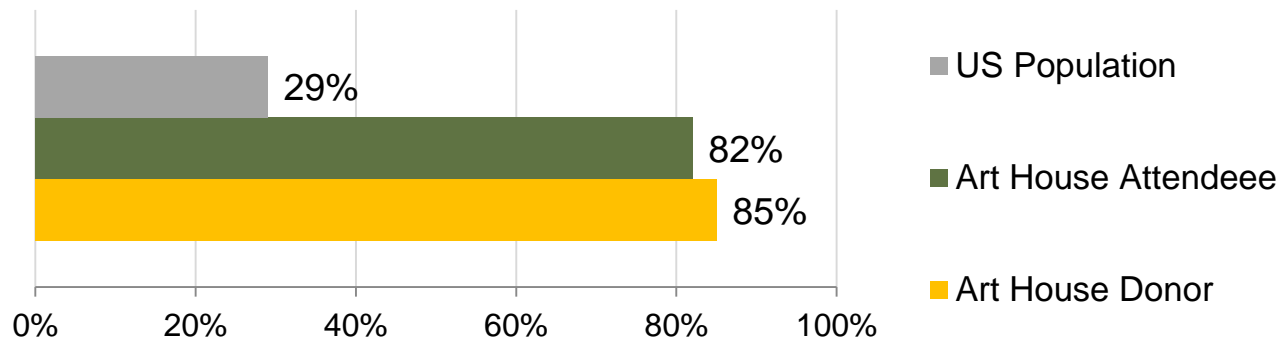
# Attracting Sponsors

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

## Income



## Education (Bachelor's Degree or Higher)

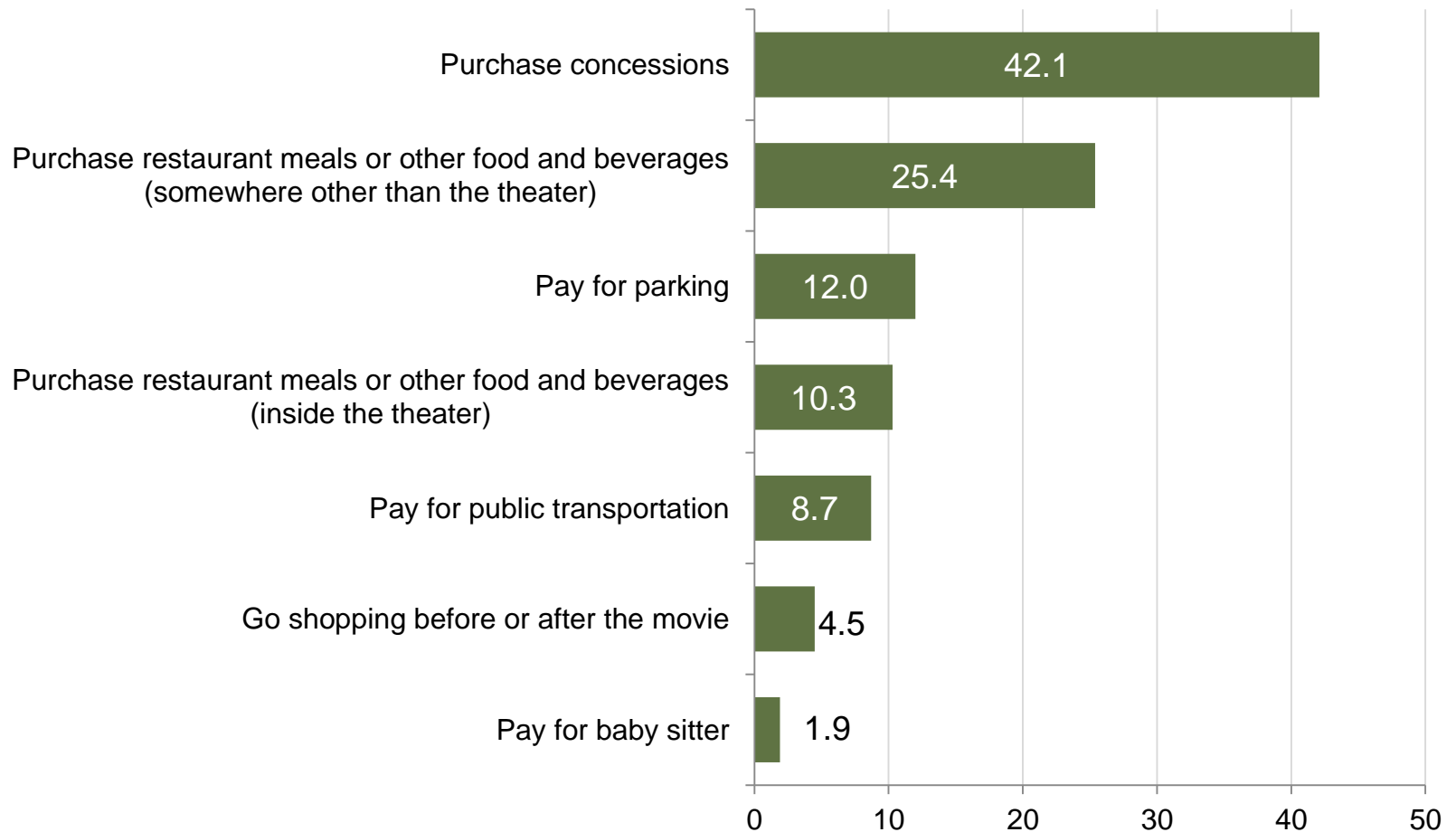


Sources for Comparisons: 2013 American Community Survey, United States Census Bureau

# Related Spending

- More than one in four movie trips also results in a meal being purchased
- Restaurants, parking garages and downtown districts should all pay a share for the economic benefits that art houses bring

*When you go out to the movies, which of the following are true?*



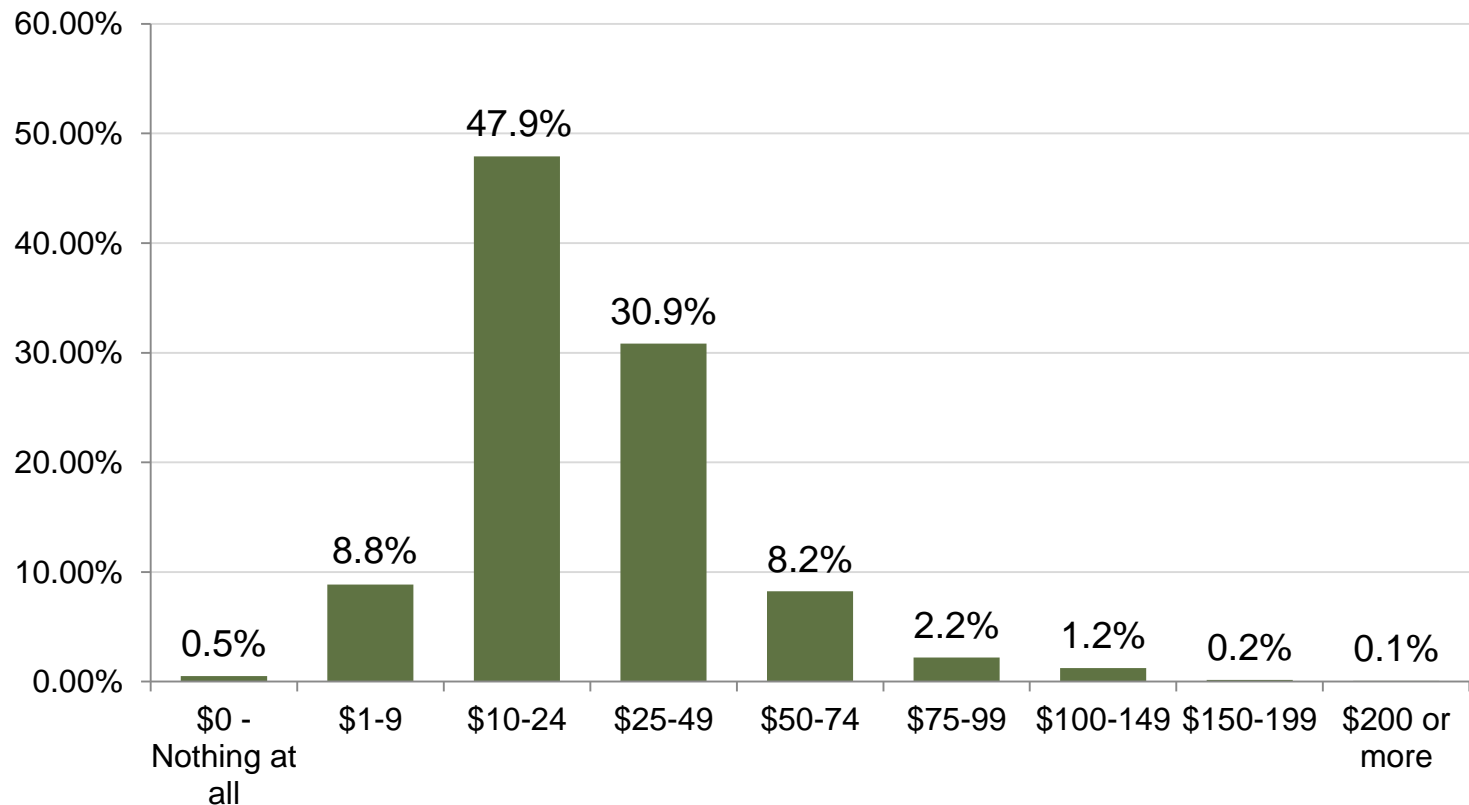
## *4. Enhancing Community Support*



# Spending and Economic Impact

- On average, a movie attendee spends \$29 on a trip to the movies
- For an art house selling 75,000 tickets per year this represents \$2,175,000 in direct spending
- Film festivals and series that attract overnight guests are likely to have even greater community impact

*All told, how much would say you spend on a typical trip that involves going to the movies, including movie tickets, concessions, food/beverages, transportation, other shopping, etc.?*

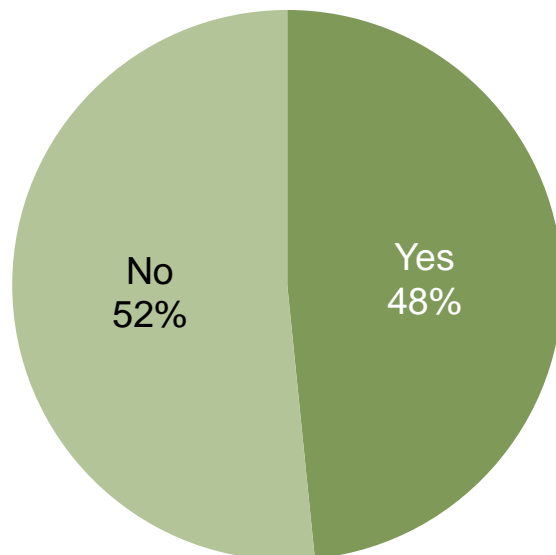


# Community Impact

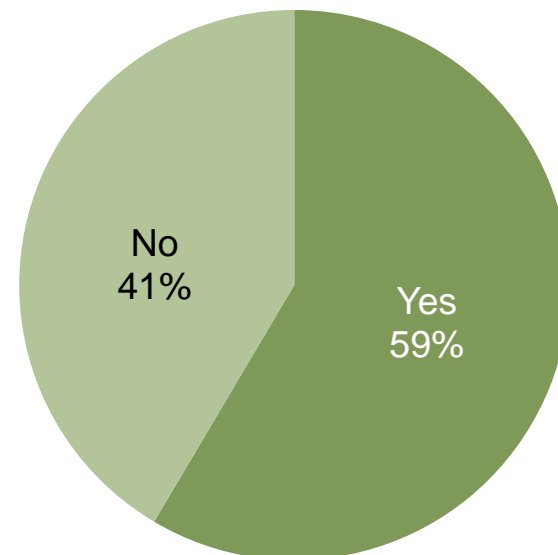
- Art houses contribute to the economic vitality of their communities

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

**Is an anchor in the community**



**Adds to the economic vitality of the community**

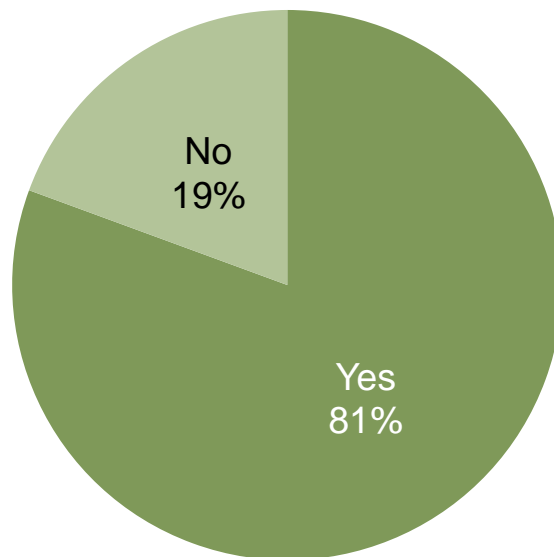


## Community Impact (cont.)

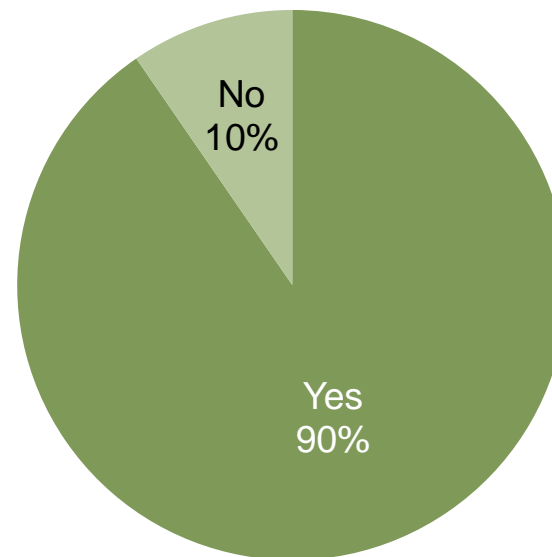
- The vast majority of respondents see art houses as important cultural institutions in their communities

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

**Is an important cultural Institution**



**Enhances the cultural life of the community**

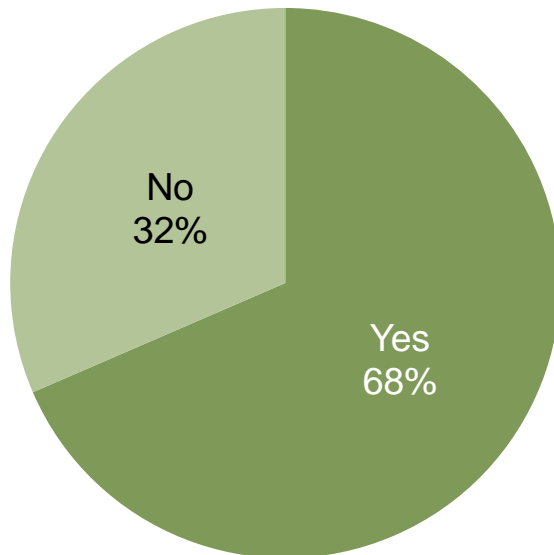


## Community Impact (cont.)

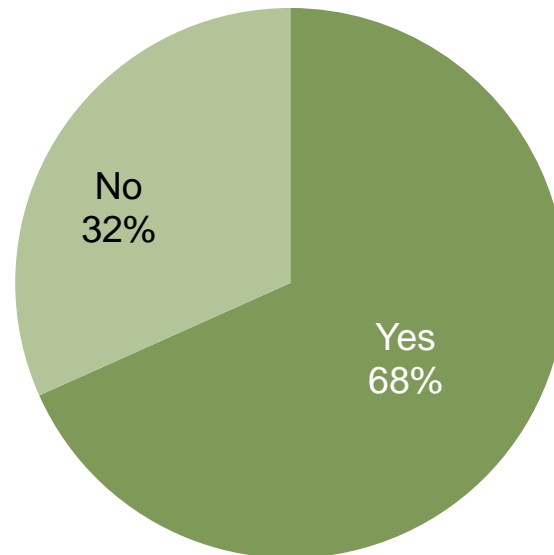
- For the majority, their sense of community is squarely based around an art house at the center

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

**Helps support a sense of community**



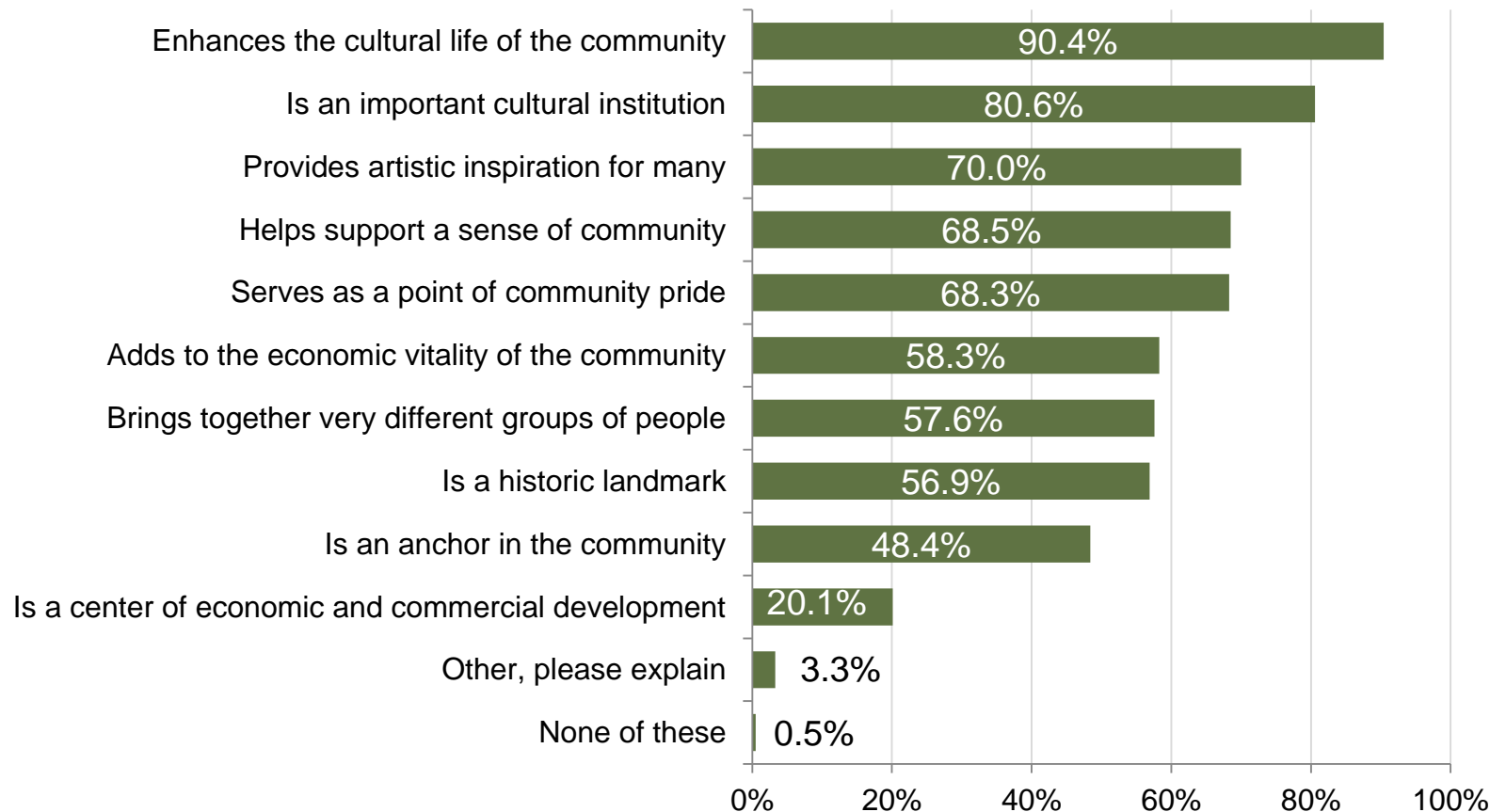
**Serves as a point of community pride**



# A Host of Community Benefits

- Taken singly or together, these attributes should persuade any funder or community leader that the path to community impact begins at the art house door...they don't even need to like movies!

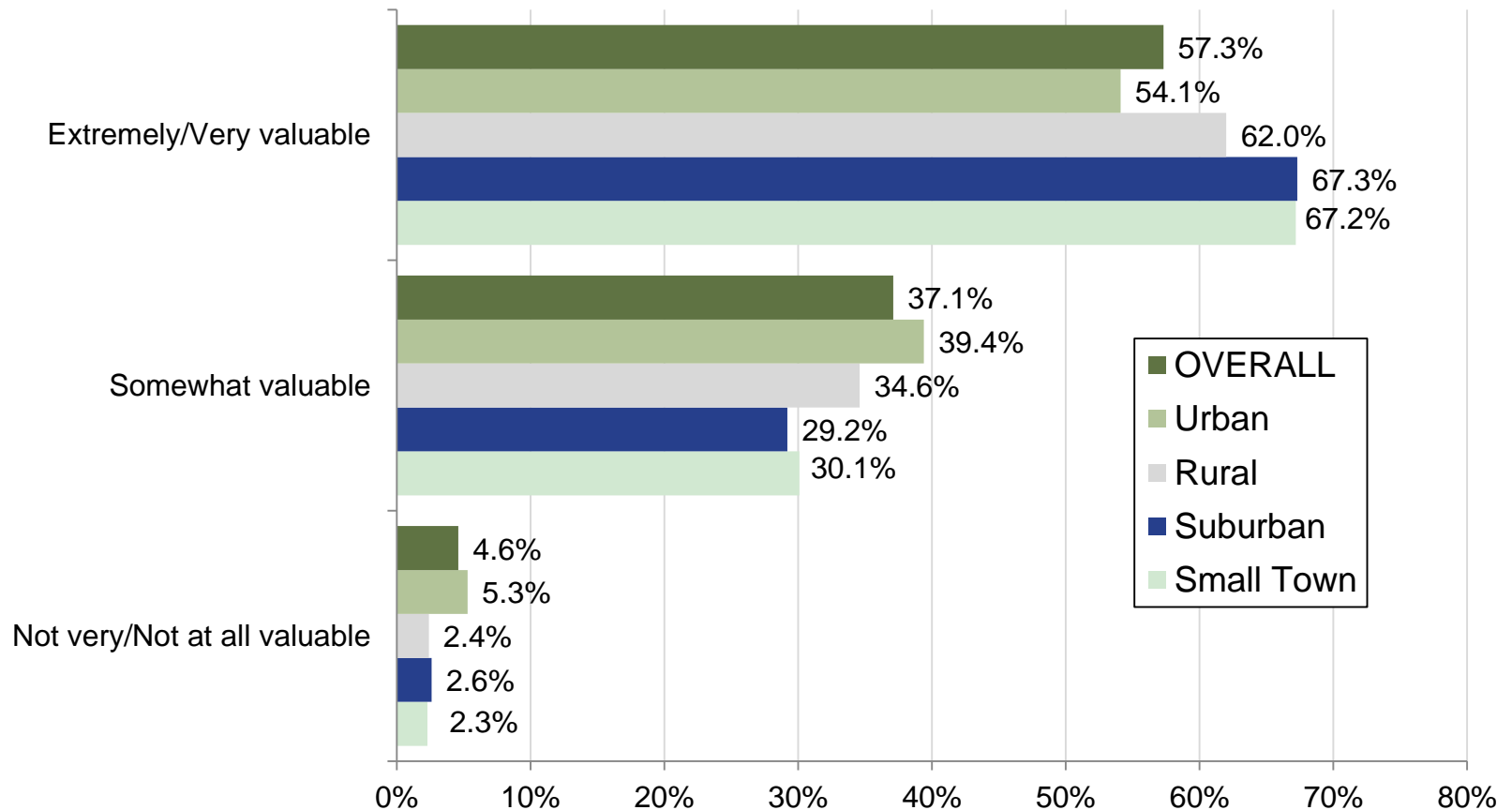
*What role would you say [SPONSORING THEATER] provides to its community? (select all that apply)*



# Art Houses and Quality of Life

- More than 57% overall would say that the Art House they patronize is Very or Extremely valuable to their quality of life
- This number rises to more than two-thirds in suburban areas and small towns

*How valuable is [PIPED: THE SPONSORING THEATER] to your overall quality of life?*



## Community Impact (cont.)

*“After the State Theater was shuttered and stores moved away, downtown Traverse City truly suffered. The re-opening of the theater changed ALL that AND improved the overall community and downtown experience.”*

*“[The Loft Cinema is] a Tucson gem!”*

*“BMFI is such a significant theater...provides low cost movies for seniors and low income and is truly incredible.”*

*“Everyone loves the 'Box. It fosters a love of Chicago.” (Music Box Theatre)*

*“[Hollywood Theatre] Makes going to the movies a lot of fun.”*

*“[The Michigan Theater] Demonstrates to other communities the economic and cultural vibrancy a single institution can bring to a town.”*



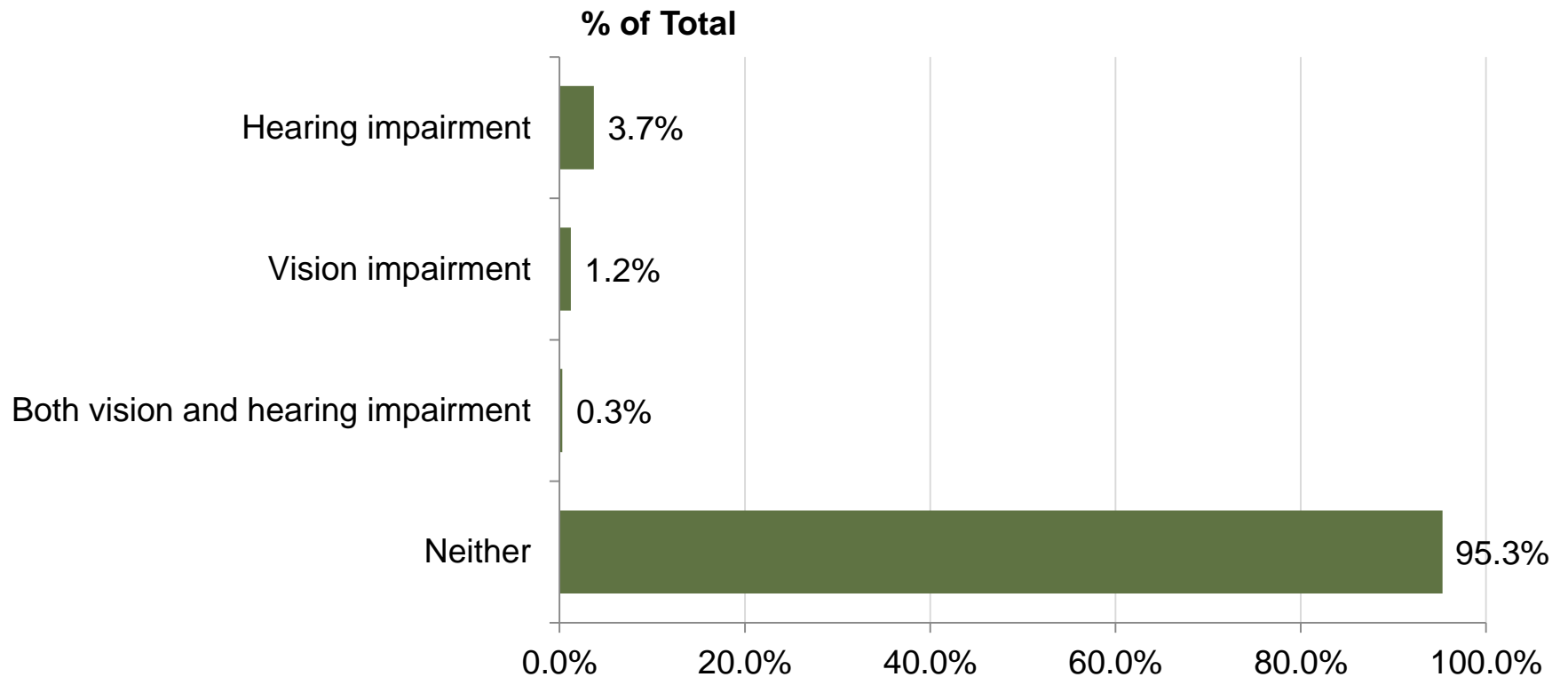
## *5. Supporting Those with Visual/Hearing Impairments*



# Frequency of Impairments

- 4.7% of attendees report vision impairment, hearing impairment or both
- One out of every 21 attendees is likely to have a hearing or vision impairment

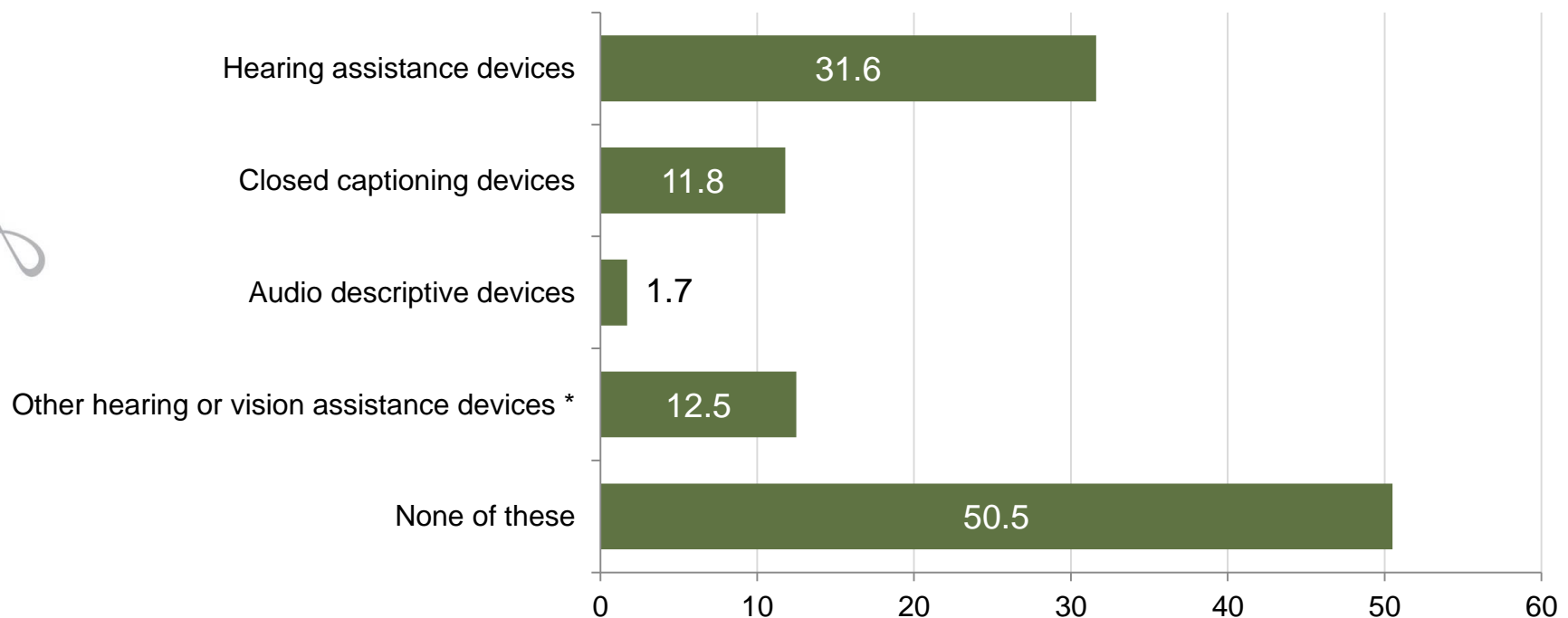
*Do you have any impairments to your vision or hearing that affect your movie going experience?*



# Use of Devices (those with Vision or Hearing Impairment Only)

- Of those with vision or hearing impairment, only half use some form of hearing or vision assistance device
- Most of these (31.6%) use earphone amplification devices

*Which of these do you use, if any? (select all that apply) [THOSE WITH VISION OR HEARING IMPAIRMENT ONLY]*

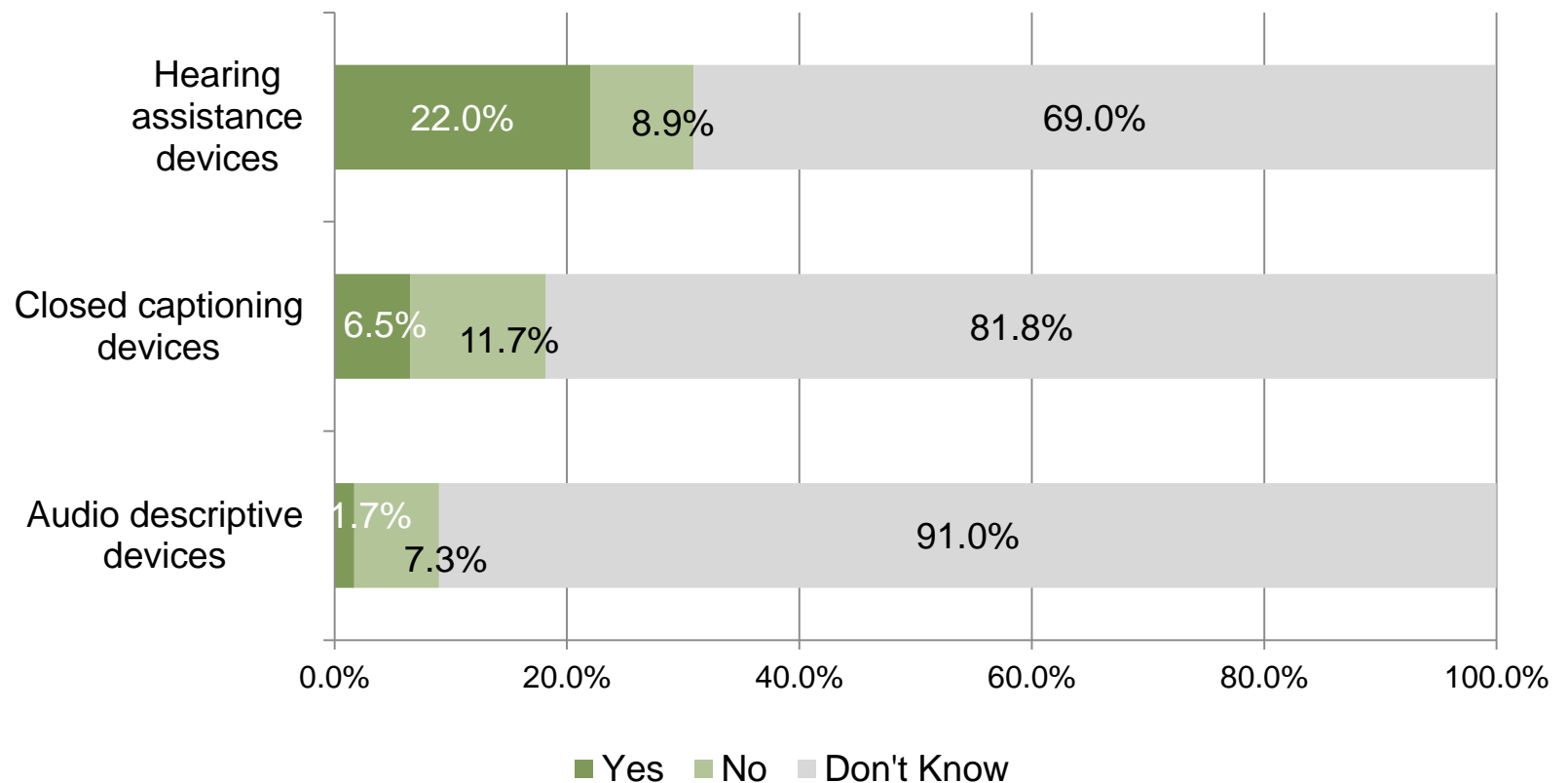


*\* "Other hearing or vision devices" top responses (rank ordered): personal hearing aid(s), eyeglasses, ear plugs (because of sound sensitivity), sitting near the front of the theater, captions and subtitles*

# Availability of Audio/Visual Assistance (those with Hearing Impairment)

- The vast majority (69%) of those with impairments are not sure whether their preferred art house theater offers the technology
- Suggests a need for better or more promotion of available devices

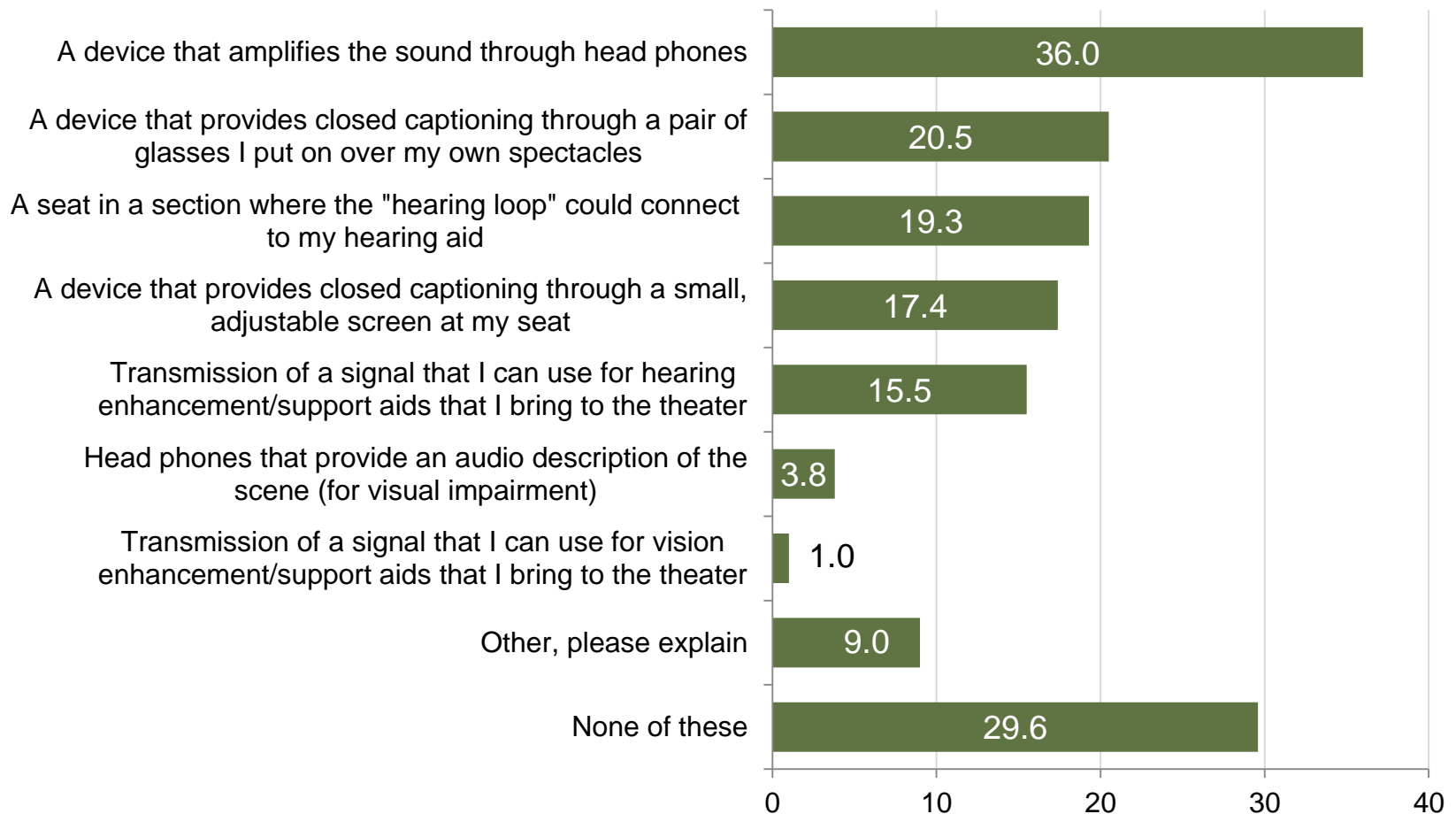
*Does [THE SPONSORING THEATER] offer any of the following devices to assist with seeing and/or hearing? [THOSE WITH HEARING IMPAIRMENT ONLY]*



# Ideal Devices and Technologies (those with Vision or Hearing Impairment Only)

- The most widely sought technology for those with vision or hearing impairment is a device that amplifies sound through headphones

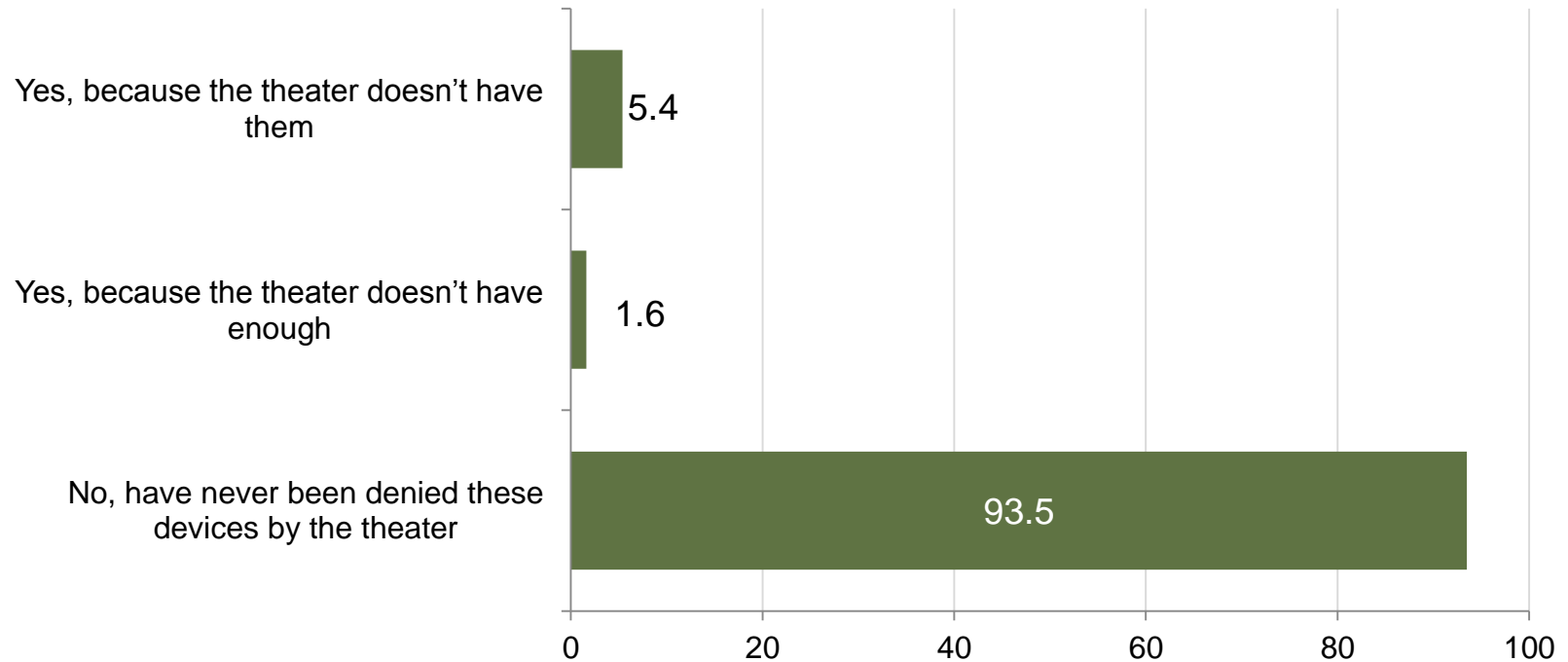
*Which of the following devices/technologies would you ideally like made available to you by [THE SPONSORING THEATER]? (select all that apply)*



# Access to Devices (those with Vision or Hearing Impairment Only)

- 6.5 percent of those with hearing or vision impairment report being denied devices to assist with hearing or vision
- Thus, about 0.3% ( $4.7\% \times 6.5\%$ ) report both having a hearing/vision impairment and being denied devices to assist with hearing or vision

*Have you ever been denied devices to assist with hearing or vision, either because [THE SPONSORING THEATER] doesn't have them or doesn't have enough? [THOSE WITH VISION OR HEARING IMPAIRMENT ONLY]*




# Overall Takeaways

1. Although the means through which art house attendees gather information is changing rapidly, the fundamental art house experience remains fairly consistent.
2. A range of marketing and communication strategies are necessary to reach a diverse audience with varied information sources. However, theaters may want to invest in electronic media to get closer to the point of decision making.
3. Unique and enhanced programming can be a means of differentiating and winning newer, wider audiences.
4. Leveraging PR and affiliate groups can magnify your communications efforts and reach wider interest groups.
5. Art house audiences are generally pleased with the core movie going experience. Amenities and membership/loyalty programs may be the best means to enhance attendance.
6. A range of arguments can be made about the importance of art houses – they spark economic vitality, inspire and educate, promote tolerance and anchor communities...all at an accessible price!



# 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.

