Art House Convergence
National Audience Study 2014

Conceived and Presented in Consultation with
Bryn Mawr Film Institute

Avenue ISR • www.avenue isr.com

January 20, 2015
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).
Thank you to the 30 North American art houses who participated in the study!

<table>
<thead>
<tr>
<th>Rank</th>
<th>Site</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>a/perture cinema, Winston-Salem, NC</td>
<td>16</td>
</tr>
<tr>
<td>2</td>
<td>Amherst Cinema, Amherst, MA</td>
<td>17</td>
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<tr>
<td>3</td>
<td>Belcourt Theatre, Nashville, TN</td>
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<tr>
<td>4</td>
<td>Bloor Hot Docs Cinema, Toronto, ON</td>
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<td>5</td>
<td>Bryn Mawr Film Institute, Bryn Mawr, PA</td>
<td>20</td>
</tr>
<tr>
<td>6</td>
<td>Camera Cinemas, San Jose, CA</td>
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<td>7</td>
<td>Cinema Arts Centre, Huntington, NY</td>
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<td>8</td>
<td>Cinemapolis, Ithaca, NY</td>
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<td>9</td>
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<td>10</td>
<td>Denver Film Society, Denver, CO</td>
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<td>11</td>
<td>FilmScene, Iowa City, IA</td>
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<td>12</td>
<td>Gateway Film Center, Columbus, OH</td>
<td>27</td>
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<tr>
<td>13</td>
<td>Hollywood Theatre, Portland, OR</td>
<td>28</td>
</tr>
<tr>
<td>14</td>
<td>Images Cinema, Williamstown, MA</td>
<td>29</td>
</tr>
<tr>
<td>15</td>
<td>Martha's Vineyard Film Center, Martha's Vineyard, MA</td>
<td>30</td>
</tr>
</tbody>
</table>
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
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**

![Bar chart showing age distribution of respondents in 2013 and 2014](chart.png)
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.

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**

<table>
<thead>
<tr>
<th>Year</th>
<th>At Sponsoring Theater</th>
<th>At All Other Theaters</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>13.0</td>
<td>12.7</td>
</tr>
<tr>
<td>2014</td>
<td>13.9</td>
<td>12.6</td>
</tr>
</tbody>
</table>

26.5 movies (in theaters) per year

25.7 movies (in theaters) 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)*

- Sparks my curiosity: 93.2%
- Makes life enjoyable: 92.3%
- Provides me with opportunities to think and learn: 92.3%
- Provides more to talk about with friends & loved ones: 88.8%
- Fills gaps in my knowledge: 85.8%
- Allows me to make the most of my (leisure) time: 85.7%
- Helps me be a more knowledgeable film viewer: 84.7%
- Teaches me about film appreciation or history: 82.9%
- Makes me a more well-rounded person: 82.8%
- Opens up new worlds: 82.4%
- Allows me to gain the excitement of learning: 77.6%
- Changes my life for the better: 76.6%
- Makes me more tolerant of other points of view: 68.2%
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?*

**Graph:**
- **I decide on the specific movie I want to see, then find out where and when it is showing:**
  - 2013: 53.3%
  - 2014: 50.3%
  - 2014 Donors: 45.2%
- **I decide “I want to see a movie,” then look at local listings to find out what is playing and when:**
  - 2013: 23.0%
  - 2014: 22.1%
  - 2014 Donors: 23.4%
- **I decide to go to a favored theater, then find out what is playing there:**
  - 2013: 20.1%
  - 2014: 23.4%
  - 2014 Donors: 27.4%
- **Other:**
  - 2013: 4.1%
  - 2014: 4.1%
  - 2014 Donors: 4.1%
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?*

- Yes, and I'm glad they do: 54.2%
- No, and I'm glad they don't: 24.6%
- Yes, but I wish they didn't: 18.1%
- No, but I wish they would: 3.2%
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)

- Facebook (72.9%, 67.2%)
- LinkedIn (42.7%, 38.6%)
- Twitter (35.5%, 24.3%)
- Instagram (27.4%, 15.1%)
- Google+ (Google's social networking function requires an account) (24.8%, 20.6%)
- None of these (7.4%, 23.8%)
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.
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)

- Trailers or previews seen in theaters: 59.2% (2014), 57.1% (2013)
- My friends: 53.3% (2014), 47.8% (2013)
- Emails or newsletters from theaters: 42.4% (2014), 50.0% (2013)
- Reviews (in print): 41.5% (2014), 48.3% (2013)
- Reviews (online): 33.7% (2014), 43.7% (2013)
- Internet browsing in general: 26.7% (2014), 36.7% (2013)
- Theater websites: 30.8% (2014), 36.7% (2013)
- Trailers or previews seen online: 30.7% (2014)
- Posters/Schedules/Guides from theaters: 28.9% (2014)
- Television ads or trailers: 27.1% (2014), 34.1% (2013)
- Newspaper/Magazine ads: 25.7% (2014), 22.3% (2013)
- Social media posts from theaters: 15.6% (2014), 24.7% (2013)
- My family: 19.2% (2014), 18.4% (2013)
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.

**Finding Screening Times**

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

<table>
<thead>
<tr>
<th>Source</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Movie theater web sites</td>
<td>64.6%</td>
<td>62.7%</td>
</tr>
<tr>
<td>Emailed schedules or guides sent by theaters</td>
<td>37.6%</td>
<td></td>
</tr>
<tr>
<td>Smartphone (or other handheld) apps (e.g. Fandango)</td>
<td>29.7%</td>
<td>25.5%</td>
</tr>
<tr>
<td>General internet searches (e.g. Google)</td>
<td>29.3%</td>
<td></td>
</tr>
<tr>
<td>Local newspapers or publications</td>
<td>29.2%</td>
<td>32.7%</td>
</tr>
<tr>
<td>Movie listing web sites (e.g. mrmovietimes.com)</td>
<td>24.4%</td>
<td>23.6%</td>
</tr>
<tr>
<td>Movie ticketing web sites</td>
<td>19.1%</td>
<td></td>
</tr>
<tr>
<td>Printed schedules or guides provided by theaters</td>
<td>16.8%</td>
<td></td>
</tr>
<tr>
<td>Looking at the movie theater’s marquee or sign</td>
<td>11.7%</td>
<td>9.3%</td>
</tr>
</tbody>
</table>
**Media Patterns and Implications**

**Greater Reach/Use**
- **Prioritize** (High Reach, High Growth)
  - Theater website (info on films)
  - Emails & e-newsletters
  - General internet searches
  - Reviews (online)
  - Reviews (in print)

**Smaller Reach/Use**
- **Deemphasize** (Low Reach, Low Growth)
  - Newspaper/Magazine ads
  - Television ads or trailers
  - Local newspapers or publications (listings)
  - Ticketing web sites

**Low Growth**
- **Sustain** (High Reach, Low Growth)
  - Movie Trailers in Theater
  - Theater website (listings)

**High Growth**
- **Invest** (Low Reach, High Growth)
  - Social media posts
  - Online trailers/previews
  - Mobile apps or listing sites
  - Printed posters/schedules/guides

**Theater website (info on films)**
**Emails & e-newsletters**
**General internet searches**
**Reviews (online)**
**Reviews (in print)**
**Movie Trailers in Theater**
**Theater website (listings)**
**Newspaper/Magazine ads**
**Television ads or trailers**
**Local newspapers or publications (listings)**
**Ticketing web sites**
**Social media posts**
**Online trailers/previews**
**Mobile apps or listing sites**
**Printed posters/schedules/guides**
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.

For those who answered “1 year or less” or “2-3 years” to question “how long have you been attending movies at [sponsoring theater?]”

- The theater was showing a movie I wanted to see (59.2%)
- I saw/heard some information about the theater that made me interested in visiting (29.1%)
- The theater had a particular program or event I wanted to attend (29.1%)
- Attended with a friend, family member or other acquaintance (25.3%)
- Recently moved (or moved back) to the area (20.5%)
- Encouraged by a friend, family member or other acquaintance (17.8%)
- Other, please explain (6.8%)
- Not sure (0.2%)
Building Audience: Programs/Events

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

- The theater had a particular program or event I wanted to attend - 29.1%

- **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.”
Building Audience: Programs/Events

Bloor Hot Docs Cinema, Toronto, ON

Bryn Mawr Film Institute

Tampa Theatre

Hollywood Theatre, Portland, OR
Building Audience: Communications

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

I saw/heard some information about the theater that made me interested in visiting

- **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”

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- **I saw/heard some information about the theater that made me interested in visiting**
  - Word of mouth, including social media (29.1%)
  - PR and media outlets
  - Affiliate group communications

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*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)

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

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

<table>
<thead>
<tr>
<th>Change</th>
<th>Would attend much more often</th>
<th>Would attend somewhat more often</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filmmaker appearances</td>
<td>22.1%</td>
<td>40.1%</td>
</tr>
<tr>
<td>New/enhanced ticket buying loyalty program</td>
<td>23.2%</td>
<td>37.9%</td>
</tr>
<tr>
<td>(more) Matinee screenings</td>
<td>19.0%</td>
<td>38.2%</td>
</tr>
<tr>
<td>New/enhanced membership program/benefits</td>
<td>17.2%</td>
<td>36.6%</td>
</tr>
<tr>
<td>Films w/ local filmmakers/topics/settings</td>
<td>10.7%</td>
<td>36.9%</td>
</tr>
<tr>
<td>(more) Live performances</td>
<td>12.3%</td>
<td>32.8%</td>
</tr>
<tr>
<td>New/expanded simulcasts</td>
<td>13.7%</td>
<td>30.5%</td>
</tr>
<tr>
<td>Overall changes to screening times</td>
<td>10.4%</td>
<td>30.2%</td>
</tr>
<tr>
<td>(more) 35mm screenings</td>
<td>12.6%</td>
<td>26.8%</td>
</tr>
<tr>
<td>New/enhanced educational content</td>
<td>7.6%</td>
<td>31.4%</td>
</tr>
<tr>
<td>New/better concessions options</td>
<td>5%</td>
<td>16.5%</td>
</tr>
<tr>
<td>Availability of meals</td>
<td>5%</td>
<td>14.5%</td>
</tr>
<tr>
<td>(more) 3D screenings</td>
<td>4%</td>
<td>11.7%</td>
</tr>
<tr>
<td>New/expanded children’s movies</td>
<td>1%</td>
<td>9.2%</td>
</tr>
</tbody>
</table>
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**

- US Population: $52,250
- Art House Attendee: $62,500
- Art House Donor: $87,500

**Education (Bachelor’s Degree or Higher)**

- US Population: 29%
- Art House Attendee: 82%
- Art House Donor: 85%

*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?*

- Purchase concessions: 42.1%
- Purchase restaurant meals or other food and beverages (somewhere other than the theater): 25.4%
- Pay for parking: 12.0%
- Purchase restaurant meals or other food and beverages (inside the theater): 10.3%
- Pay for public transportation: 8.7%
- Go shopping before or after the movie: 4.5%
- Pay for baby sitter: 1.9%
4. Enhancing Community Support
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.?
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
  - Yes: 48%
  - No: 52%

- Adds to the economic vitality of the community
  - Yes: 59%
  - No: 41%
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
  - Yes: 81%
  - No: 19%

- Enhances the cultural life of the community
  - Yes: 90%
  - No: 10%
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
  - Yes: 68%
  - No: 32%

- Serves as a point of community pride
  - Yes: 68%
  - No: 32%
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)*

- Enhances the cultural life of the community: 90.4%
- Is an important cultural institution: 80.6%
- Provides artistic inspiration for many: 70.0%
- Helps support a sense of community: 68.5%
- Serves as a point of community pride: 68.3%
- Adds to the economic vitality of the community: 58.3%
- Brings together very different groups of people: 57.6%
- Is a historic landmark: 56.9%
- Is an anchor in the community: 48.4%
- Is a center of economic and commercial development: 20.1%
- Other, please explain: 3.3%
- None of these: 0.5%
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 [PIPE: THE SPONSORING THEATER] to your overall quality of life?
“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?

- Neither: 95.3%
- Vision impairment: 1.2%
- Hearing impairment: 3.7%
- Both vision and hearing impairment: 0.3%
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]

- Hearing assistance devices: 31.6%
- Closed captioning devices: 11.8%
- Audio descriptive devices: 1.7%
- Other hearing or vision assistance devices*: 12.5%
- None of these: 50.5%

* “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]

- Hearing assistance devices
  - Yes: 22.0%
  - No: 8.9%
  - Don’t Know: 69.0%

- Closed captioning devices
  - Yes: 6.5%
  - No: 11.7%
  - Don’t Know: 81.8%

- Audio descriptive devices
  - Yes: 1.7%
  - No: 7.3%
  - Don’t Know: 91.0%
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)

- A device that amplifies the sound through head phones: 36.0%
- A device that provides closed captioning through a pair of glasses I put on over my own spectacles: 20.5%
- A seat in a section where the "hearing loop" could connect to my hearing aid: 19.3%
- A device that provides closed captioning through a small, adjustable screen at my seat: 17.4%
- Transmission of a signal that I can use for hearing enhancement/support aids that I bring to the theater: 15.5%
- Head phones that provide an audio description of the scene (for visual impairment): 3.8%
- Transmission of a signal that I can use for vision enhancement/support aids that I bring to the theater: 1.0%
- Other, please explain: 9.0%
- None of these: 29.6%
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% x 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]

- Yes, because the theater doesn’t have them: 5.4%
- Yes, because the theater doesn’t have enough: 1.6%
- No, have never been denied these devices by the theater: 93.5%
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.