

Martha's Vineyard Film Center Research Results

National Art House Audience Survey 2022

MVFC Individual Results

December 21, 2022

Table of Contents

I. Restoring and Expanding the Audience

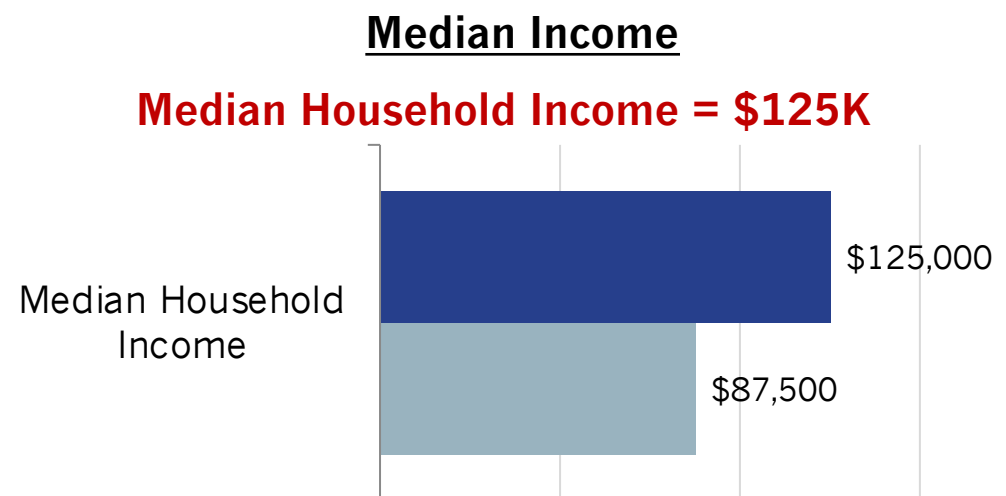
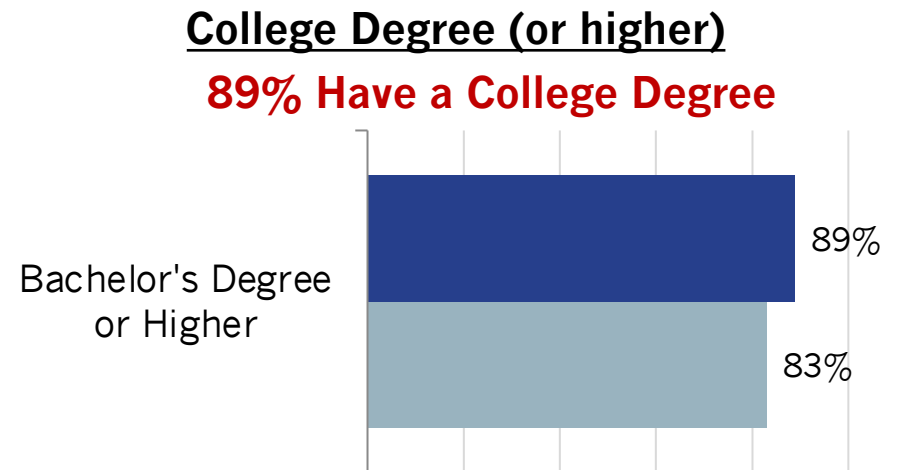
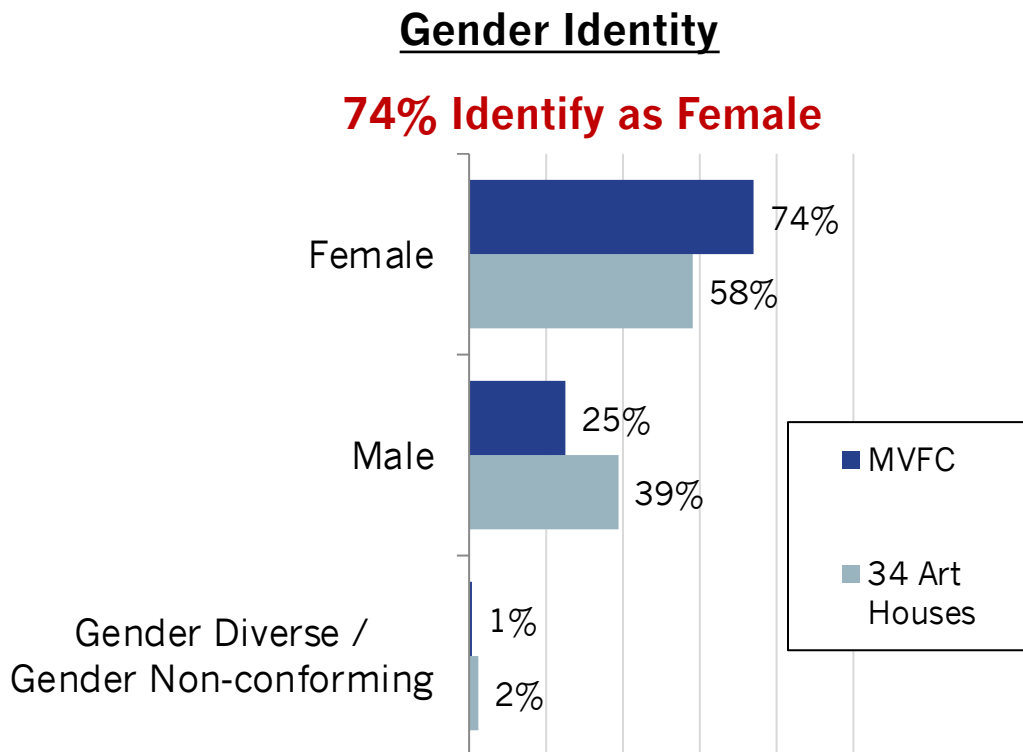
II. Communications and Engagement

III. Membership and Financial Support

IV. Community Impact

Even among a national sample of art house patrons, Martha's Vineyard Film Center respondents stand out.

- Martha's Vineyard Film Center respondents tend to be more female, better educated and have higher income than the national art house audience

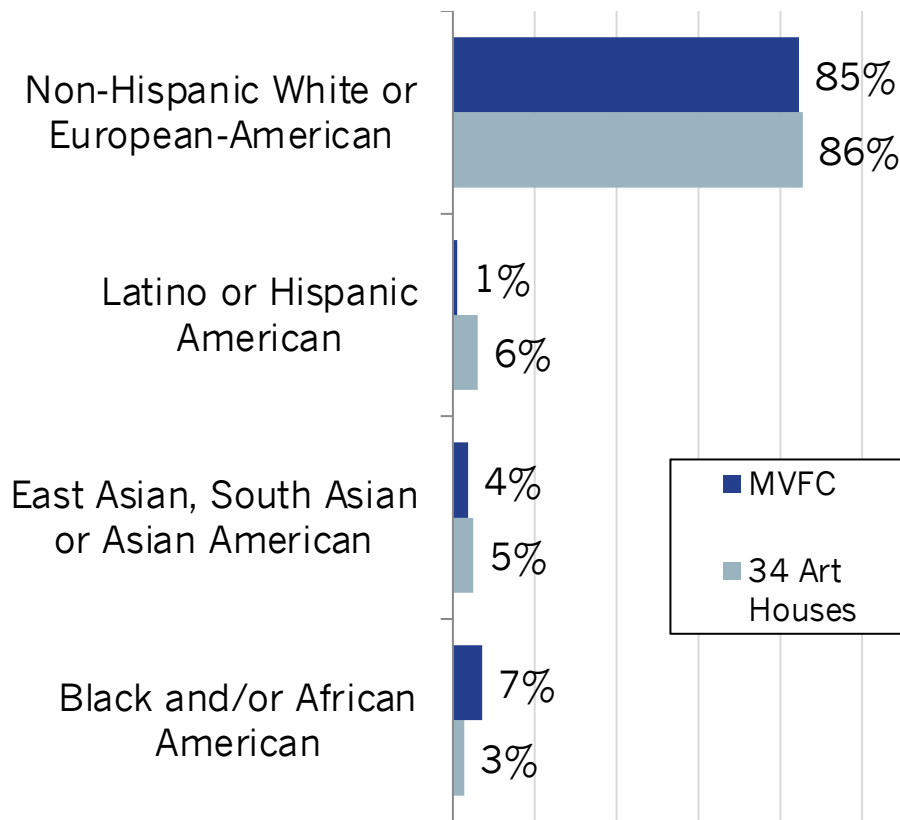


Martha's Vineyard Film Center respondents are significantly older than the national art house audience. The non-Hispanic white percentage of respondents is on par

- Overall, this points to opportunities to build a younger audience

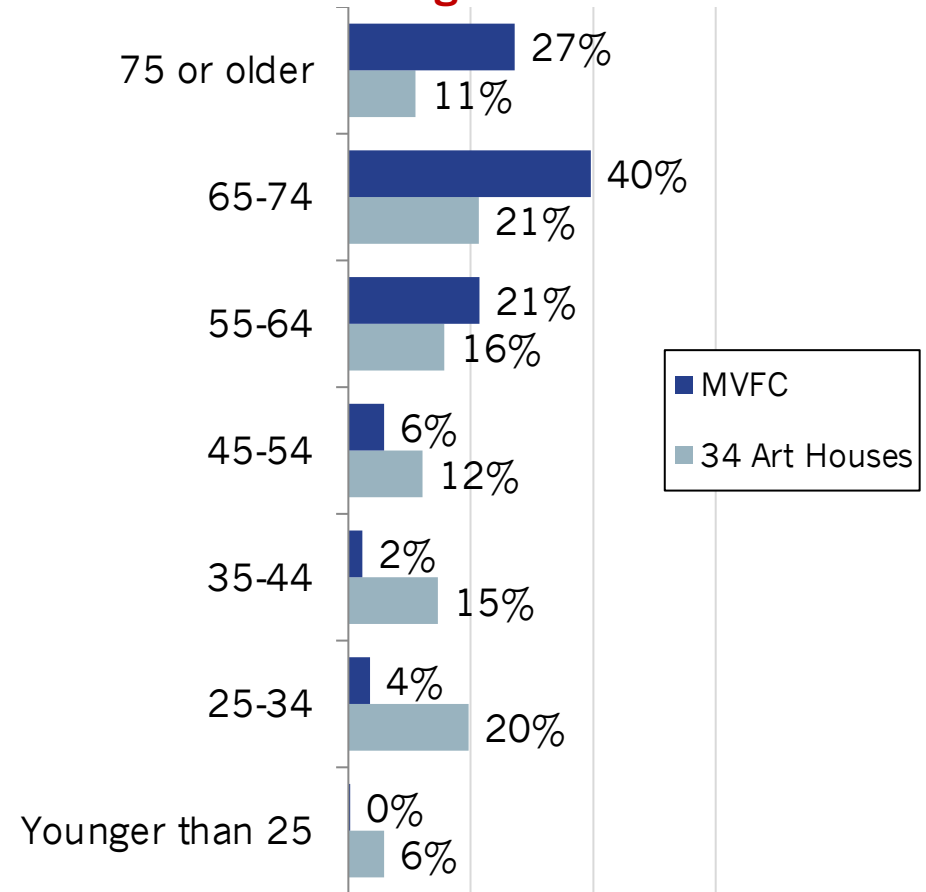
Racial or Ethnic Background

89% Non-Hispanic White



Age (Adult Population)

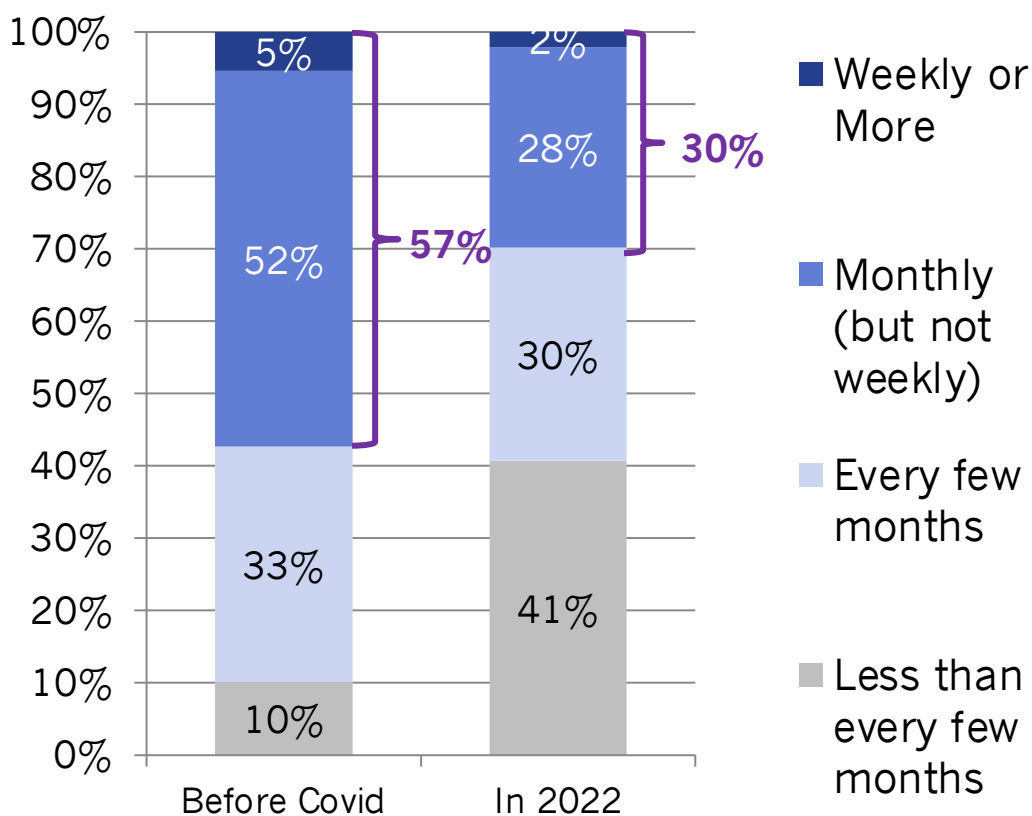
Mean Age is 67



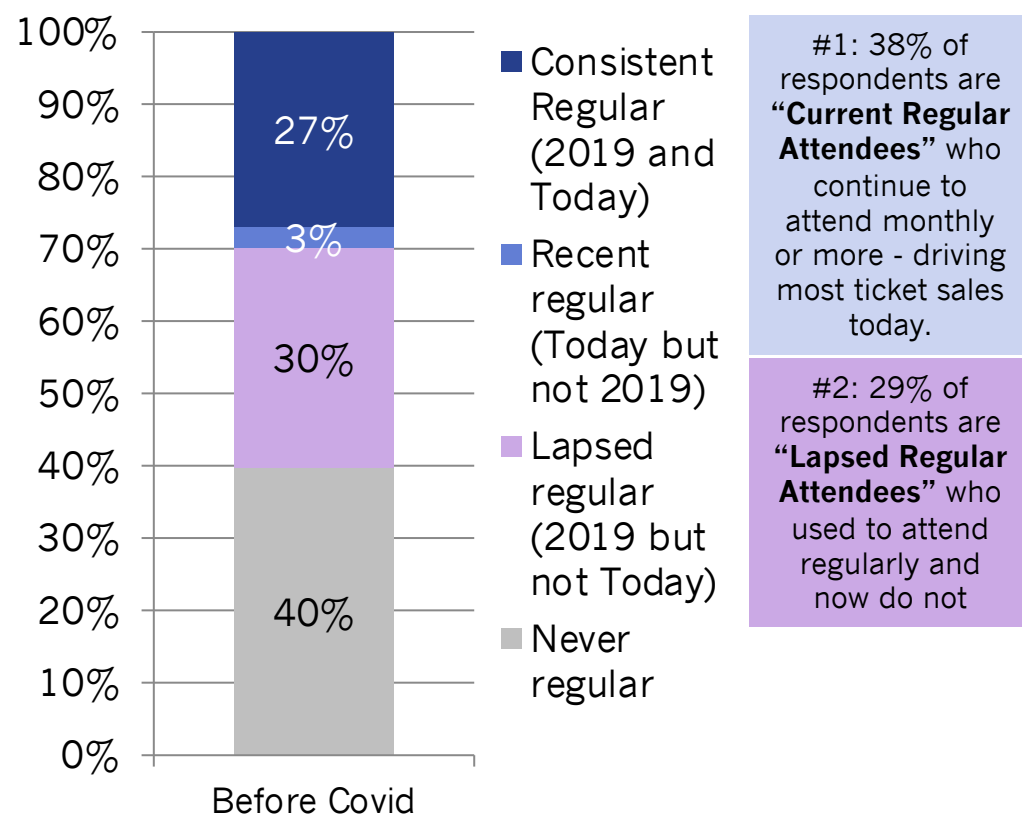
To understand where there might be opportunities to restore and expand film audiences, it is useful to look at three distinct groups, two of them presented here.

- #1: “Current Regular Attendees” attend monthly or more in 2022 – this group is driving most ticket sales today
- #2: “Lapsed Regular Attendees” used to attend monthly or more, but do not now

Frequency of Attending Films in the Theater – Before Covid vs 2022



Implied Regular Attendance (monthly or more) Status

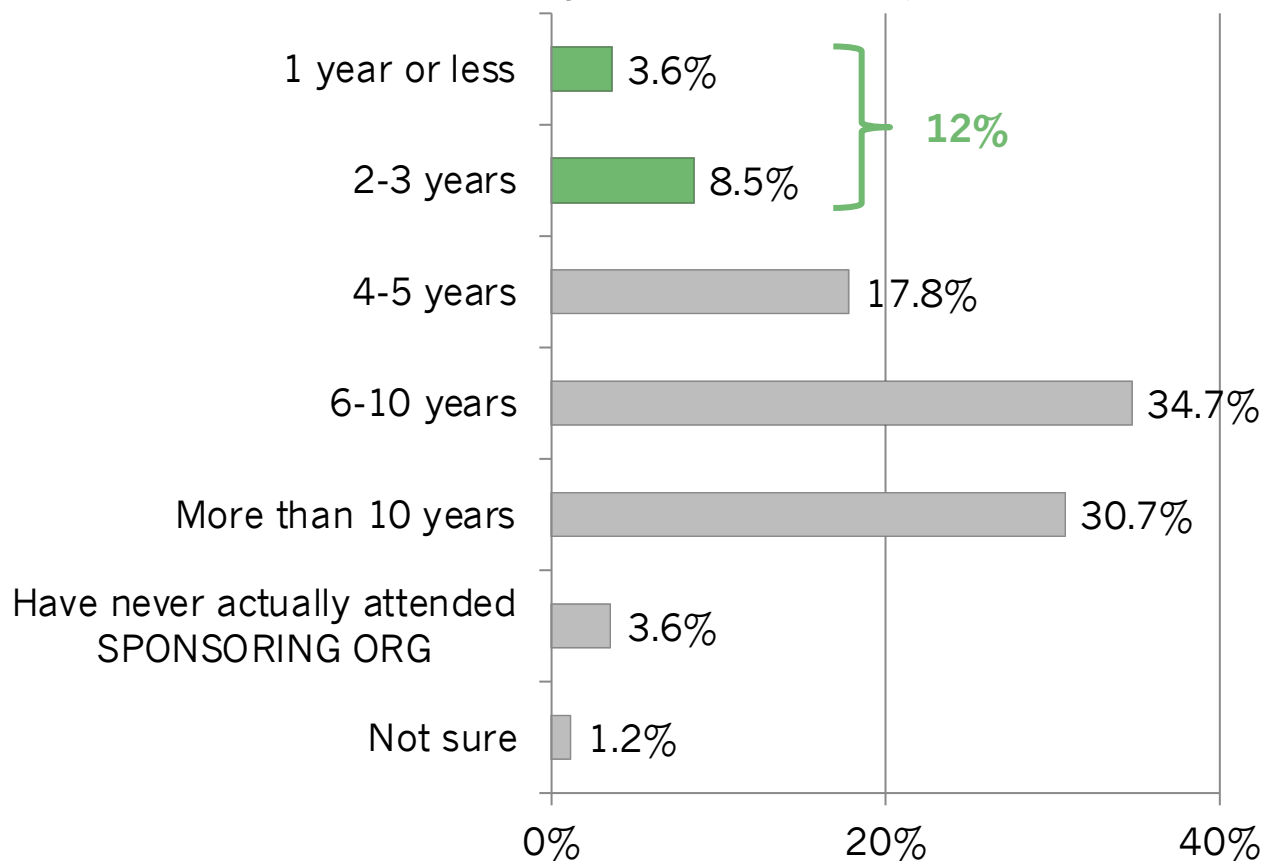


Question: In 2022, about how often do you go out and see movies on the big screen (in person live screening)? Before the beginning of Covid, about how often would you go see movies on the big screen (in person live screening)?

Even though many art houses have seen a drop off in attendance, overall they have continued to win over new audiences.

- 13% of respondents began attending MVFC within the past 3 years (somewhat less than the 19% across 34 national art house theaters)

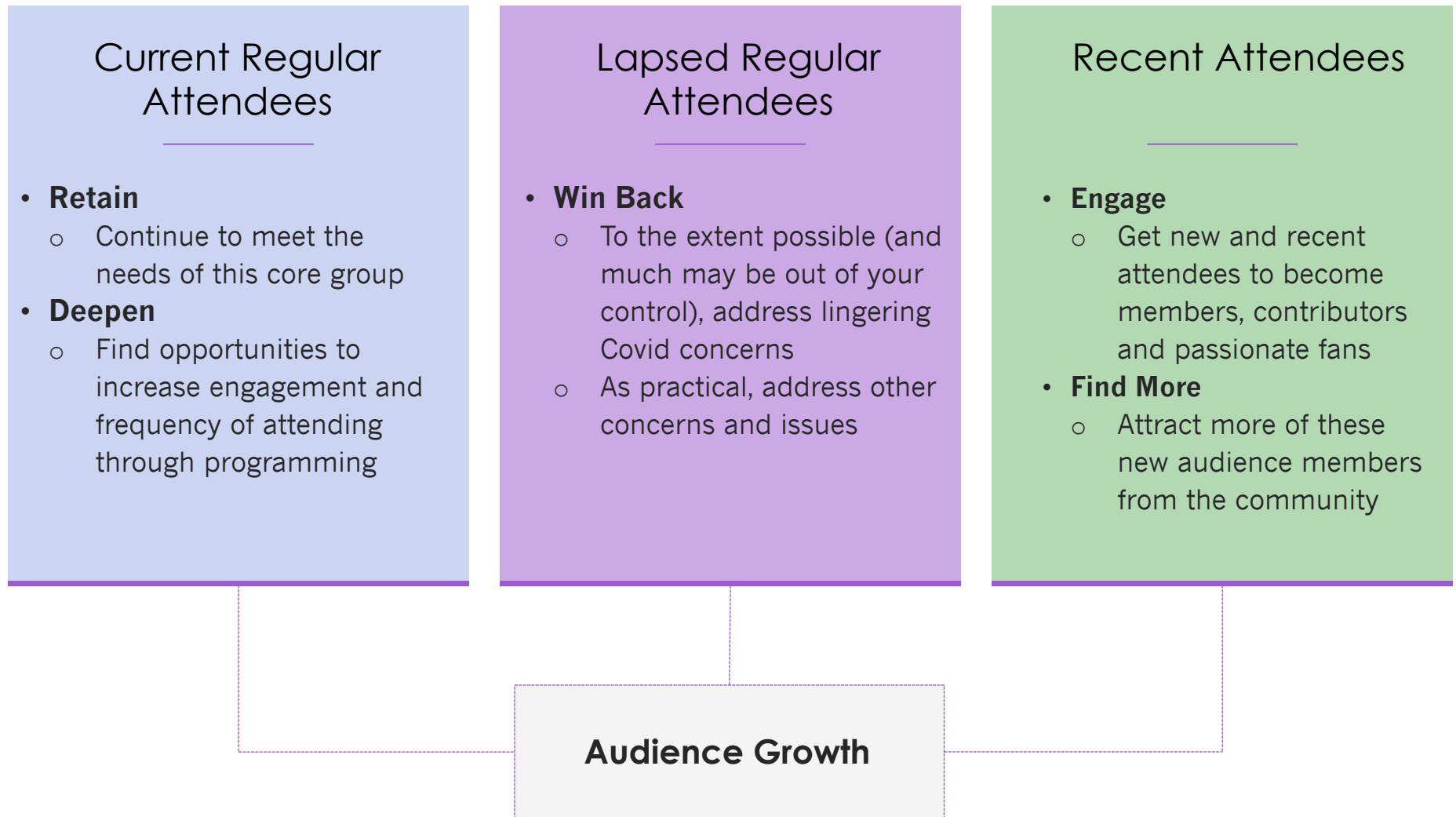
Tenure (Number of Years Attending Martha's Vineyard Film Center)



#3: 10% of respondents are **"Recent Attendees"** who began attending Martha's Vineyard Film Center within the past 3 years

Question: How long have you been attending movies at Martha's Vineyard Film Center?

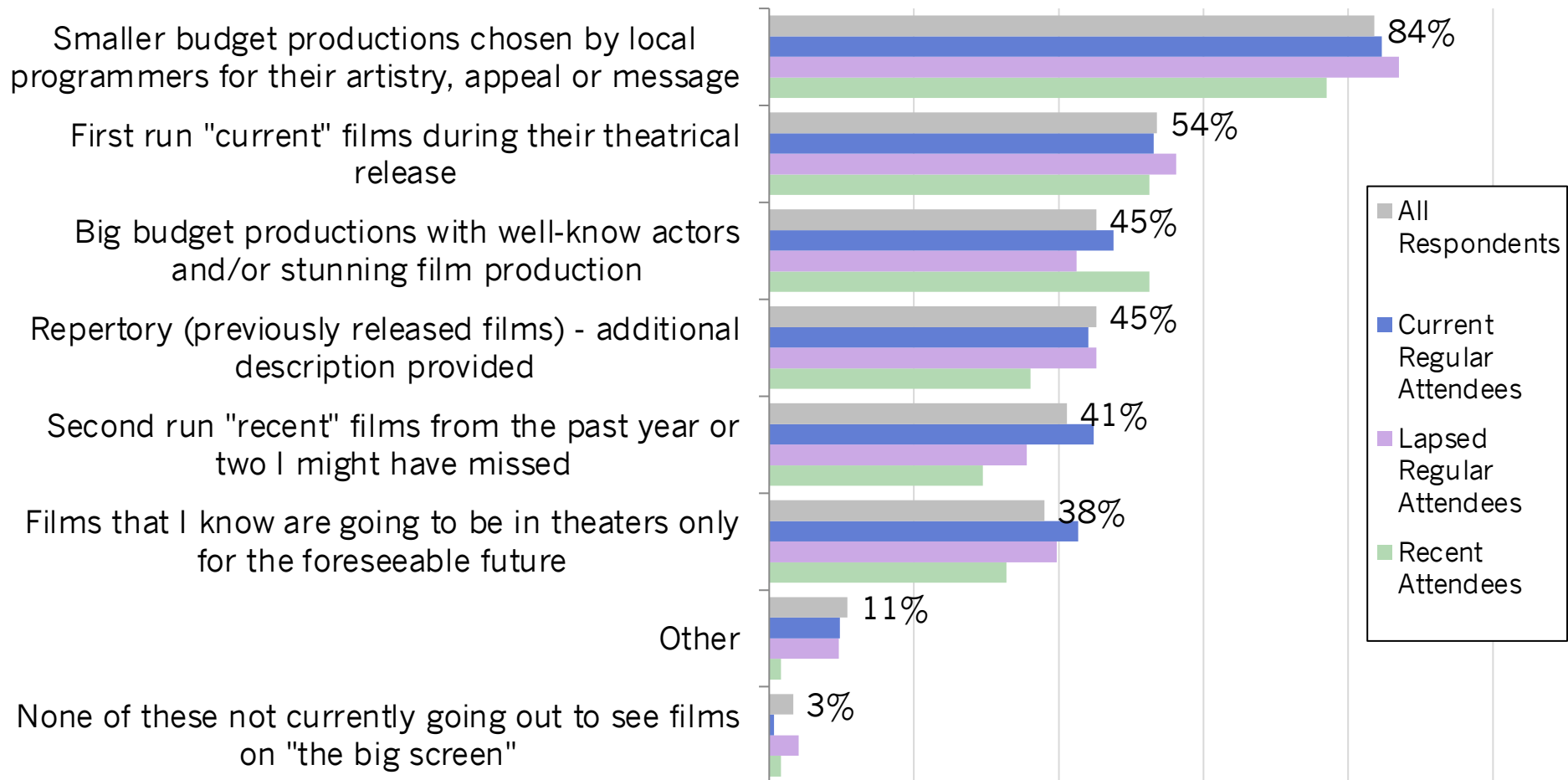
Restoring and expanding the audience involves a mix of approaches geared toward different audiences.



At a basic level, all key audiences seek similar types of programming from Martha's Vineyard Film Center.

- Current regular attendees are slightly more likely to want to come out for various types of programming and content

Reasons to Go to the Movies



Question: Which types of films are you most likely to want to go out and see on "the big screen" at a local film venue? Please select all that apply

Martha's Vineyard Film Center patrons subscribe widely to streaming platforms.

- This implies that a typical patron now subscribes to about four streaming services, making it more difficult to compete purely on content

Use of Streaming Services in 2022

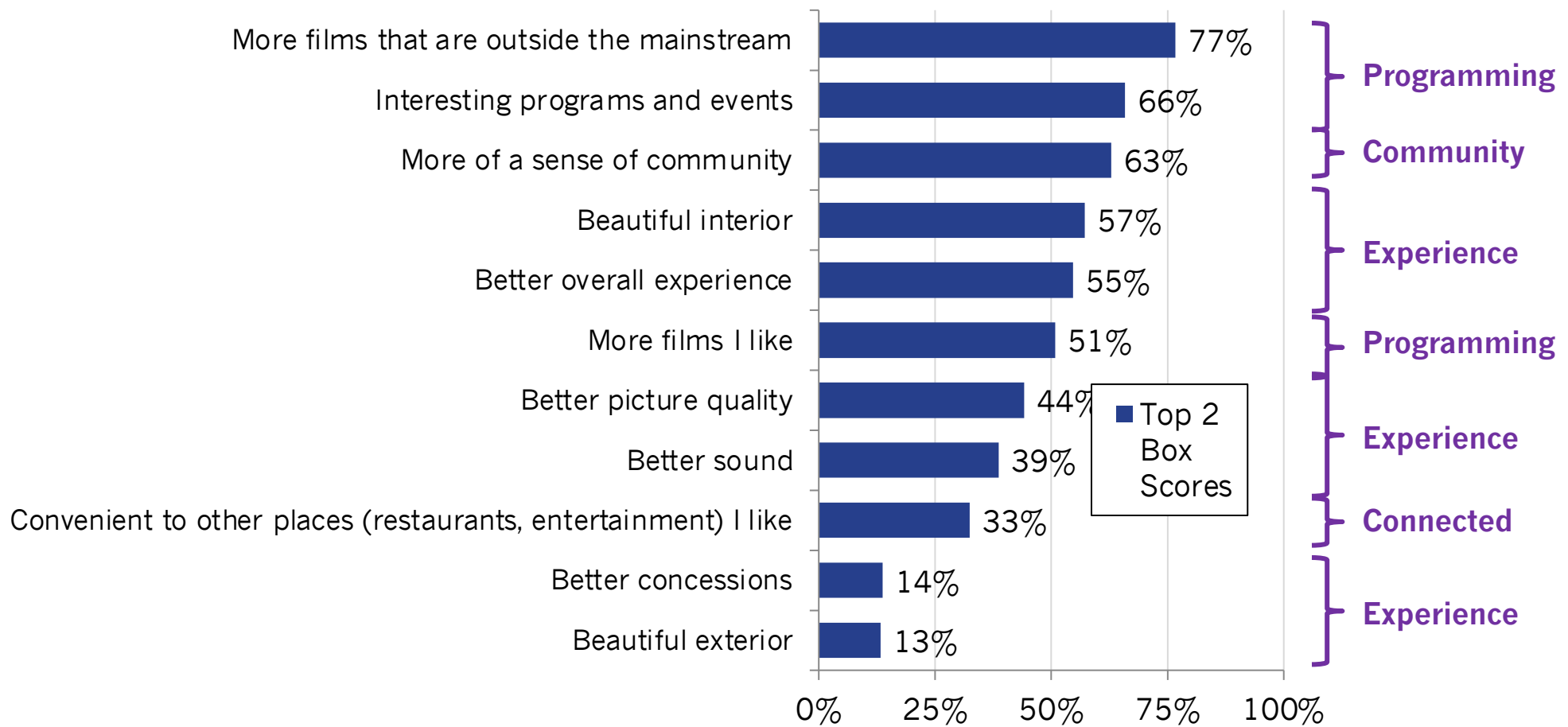
STREAMING SERVICE	2022
Netflix	80%
Amazon Prime	77%
HBO Max	45%
Apple TV	41%
Hulu	39%
Peacock	30%
Disney +	24%
Showtime	21%
Paramount	13%
Kanopy	10%
Discovery+	9%
Criterion	6%
MUBI	3%
Docsville	2%
None of these	6%

Question: *To which, if any, of the following streaming services do you subscribe?*

Compared to other film venues, Martha's Vineyard Film Center is differentiated across many dimensions.

- Programming tops the list, but a sense of community, connected experiences with other destinations and an overall high-quality experience are essential

Differentiators (Relative to Other Theaters and Film Venues)

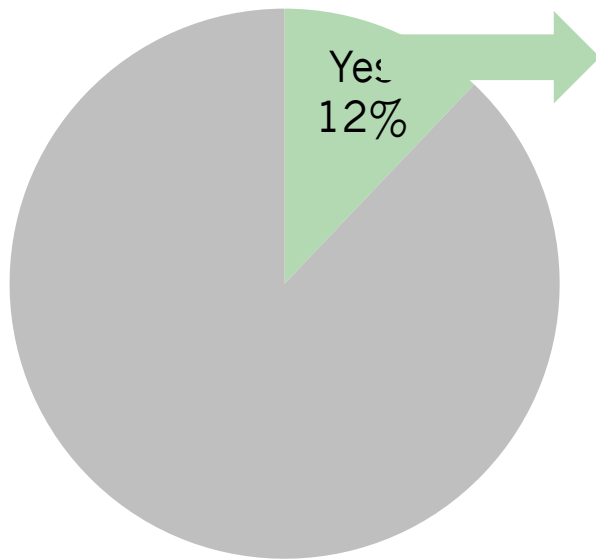


Question: In which ways is Martha's Vineyard Film Center different or better than other theaters and film venues? Please select all that apply

For the 12% of respondents who are Recent Attendees, a personal introduction is often central.

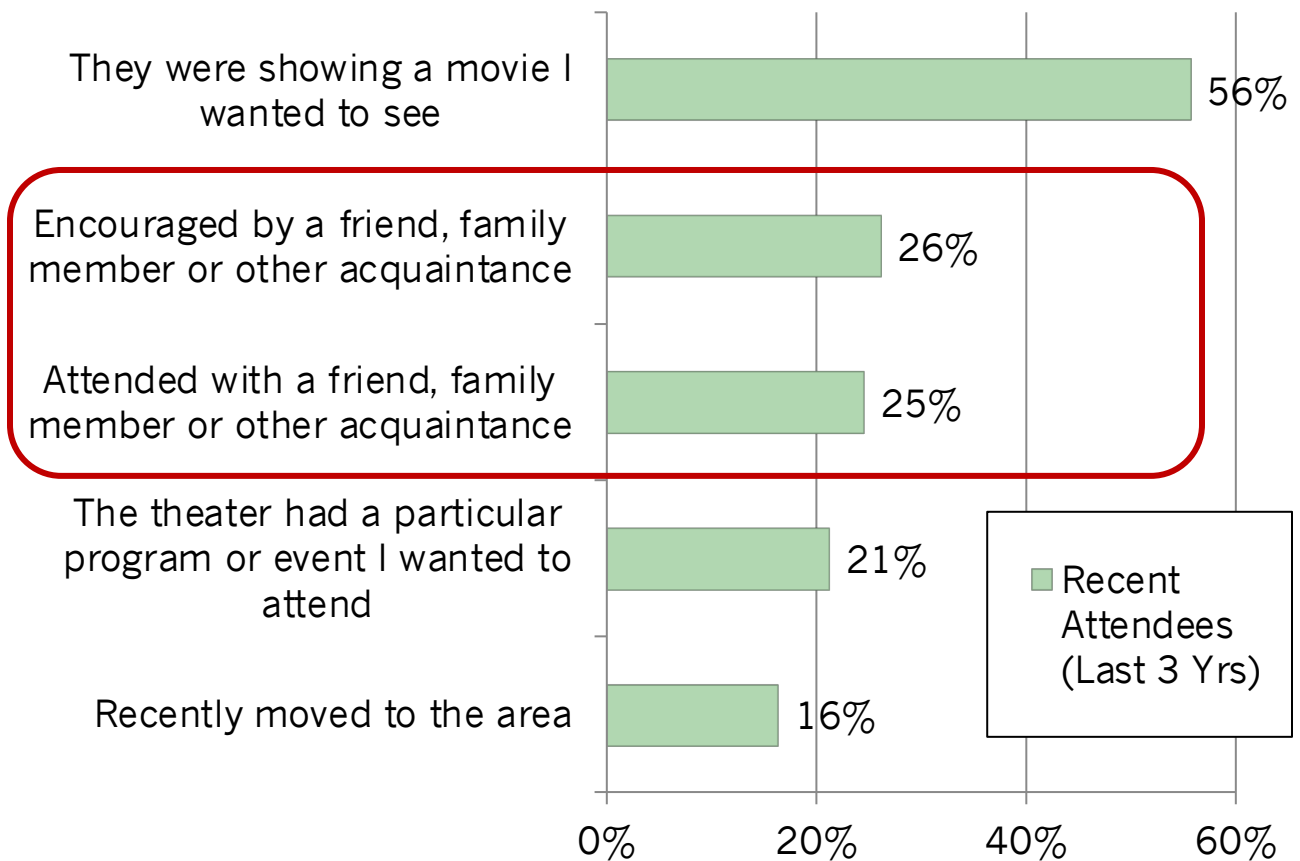
- “You and a friend” type promotions may be reasonable ways to continue to bring in new audience members

**Recent Attendee: 3 Years of Less
Seeing Movies at Martha's
Vineyard Film Center**



Question: How long have you been attending movies at Martha's Vineyard Film Center?

Reasons to Begin Attending Martha's Vineyard Film Center

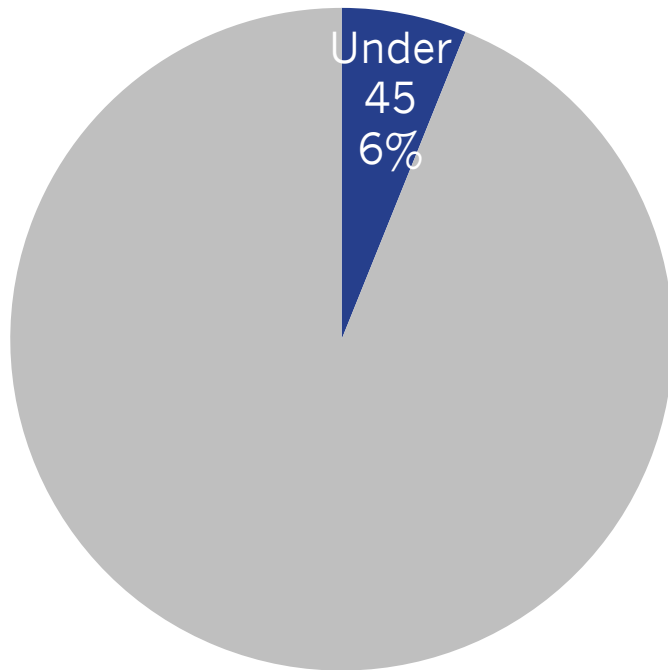


Question: What caused you to first attend a movie at Martha's Vineyard Film Center? (select all that apply)

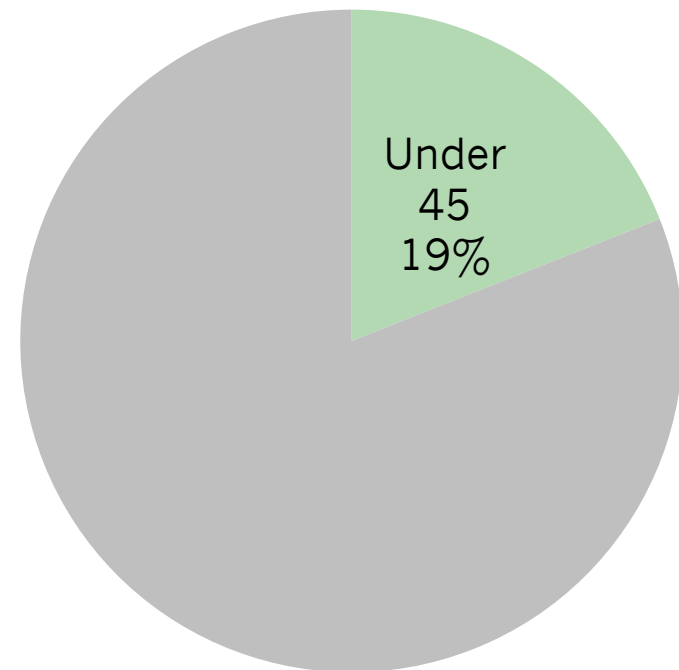
Recent attendees skew younger, though this effect is less dramatic than for the nationwide art house cinema audience.

- Although most recent attendees continue to be older, a significant number of those coming to the Martha's Vineyard Film Center in the last 3 years are younger than 45
- Average age of recent attendees is 56, 10 years lower than the overall average

% of Overall Audience Under 45



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

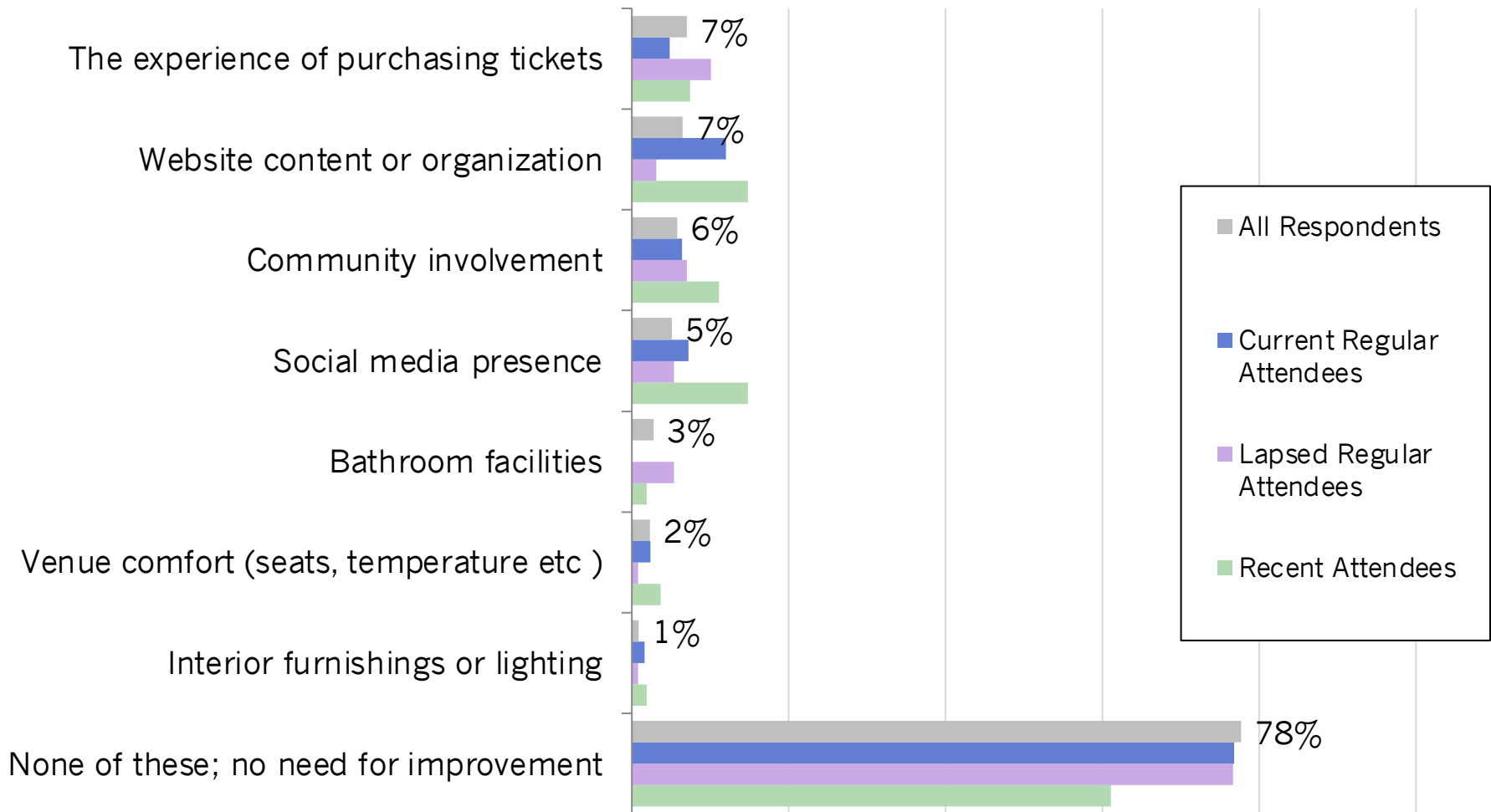


Question: *How long have you been attending movies at Martha's Vineyard Film Center?*

A handful of operational changes could help strengthen engagement overall and with key audiences.

- There is no one silver bullet, but all of these changes can reduce barriers to regular attendance

Potential Operational Changes



Question: *Would you like to see improvement in any of the following aspects of Martha's Vineyard Film Center?*


Those who are currently driving ticket sales appear to have an appetite for enhanced programming such as seminars and film series, along with enhanced “dinner and a movie” combinations.

- Experimenting with options for those who are “already coming” may be the most direct way to increase ticket sales

Moves to Increase Frequency (Top 10 of 17) – Top Box: “Much More Often”

Potential Change	All Respondents	Current Regular Attendees	Lapsed Regular Attendees	Recent Attendees
New/expanded matinee screenings	16%	22%	16%	8%
More special events (filmmaker or special guest appearances, Q&A's, discussion, etc)	11%	13%	14%	15%
New/expanded film seminars - "deep dive" learning opportunities around a film, genre, filmmaker, etc. led by engaging experts	10%	11%	15%	11%
"Dinner and a Movie" deals with area restaurants	10%	10%	7%	11%
Earlier announcement of upcoming titles so I can plan to see them at MVFC	8%	12%	3%	12%
New/expanded screenings of restored and remastered repertory films	7%	13%	7%	6%
Offering/Maintaining reserved seating that allows ticket buyers to choose their seats when they buy tickets	7%	7%	7%	11%
Films by local filmmakers or featuring local topics/settings	7%	7%	8%	6%
Enhanced annual membership program that offers discounted admission and other benefits for an annual fee	7%	8%	7%	4%
New/enhanced membership program with expanded member benefits	5%	7%	6%	6%

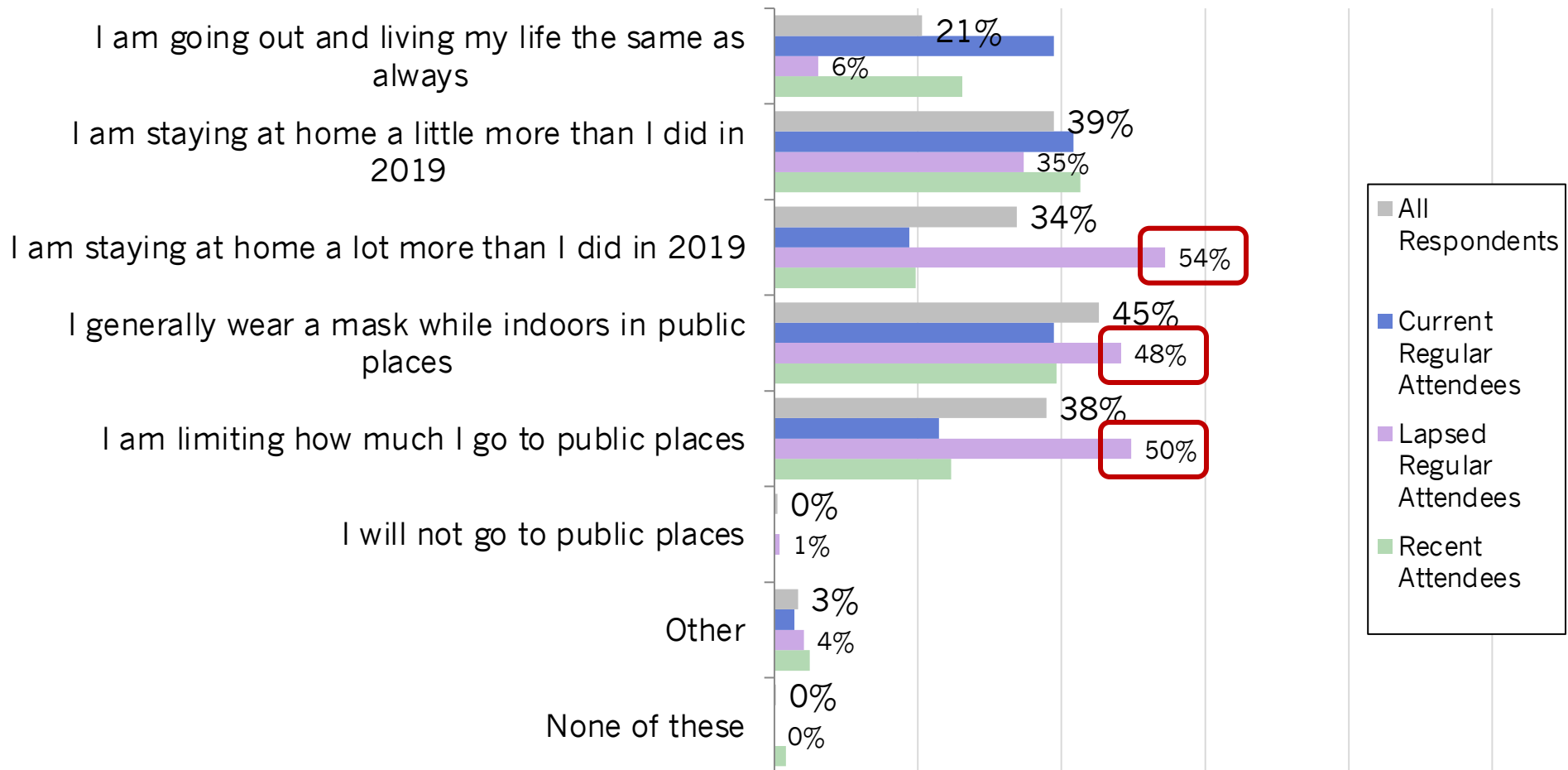
Question: *Would any of the following changes cause you to attend Martha's Vineyard Film Center more often?*

 = 10%+

Lapsed Regular Attendees are largely staying away from MVFC because of ongoing concerns about the Covid virus.

- This is point in time research on attitudes that are likely in flux

Covid-Related Behaviors

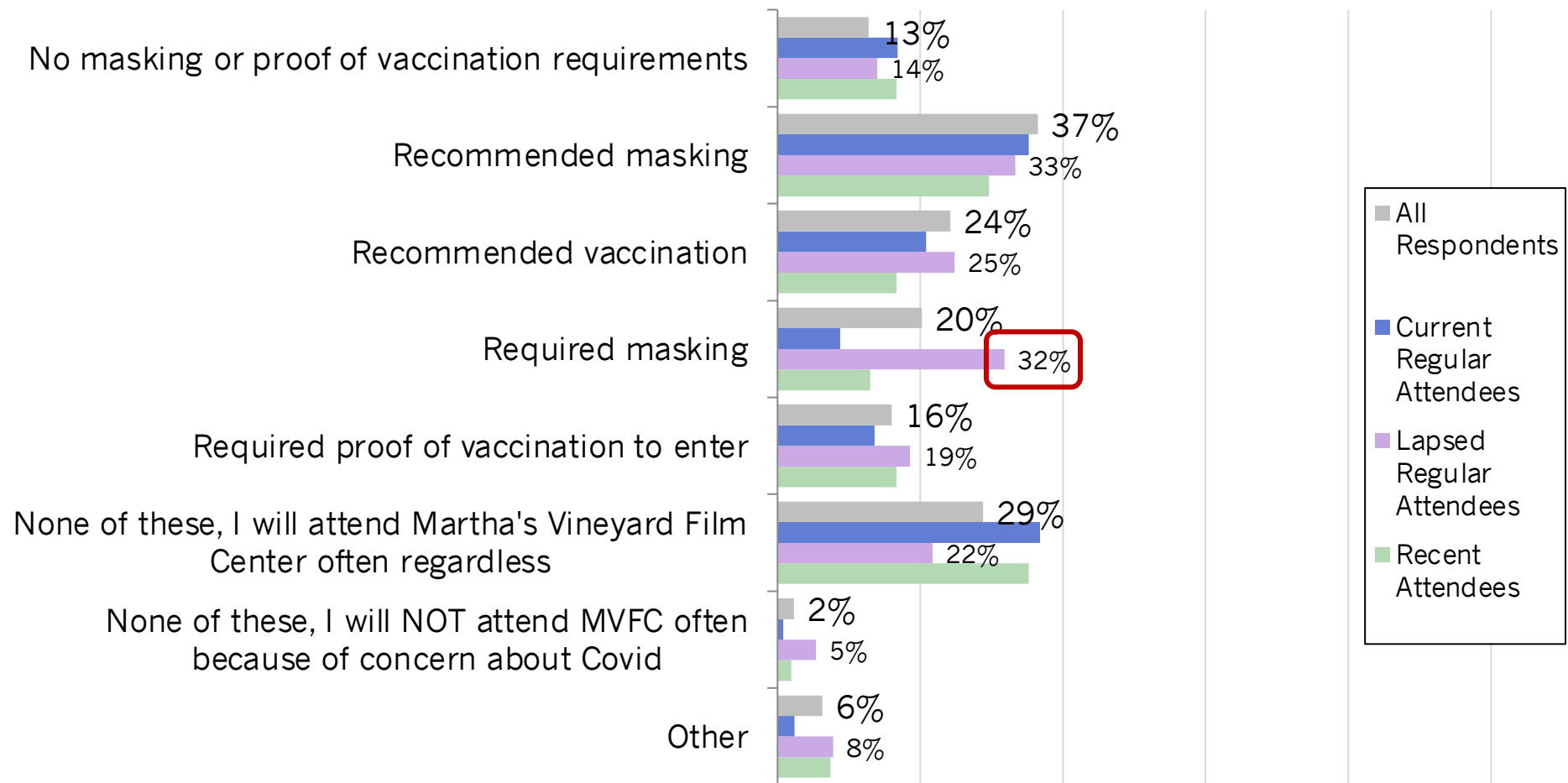


Question: Some people have changed their behaviors a lot since 2019 (the beginning of Covid). Others not at all. Which of the following, if any, is true of you? today? Please select all that apply

Lapsed Regular Attendees are more likely to want masking mandates for entry into MVFC.

- However, many support recommended vaccination and masking as much as required vaccination and masking

Desired Covid Policies

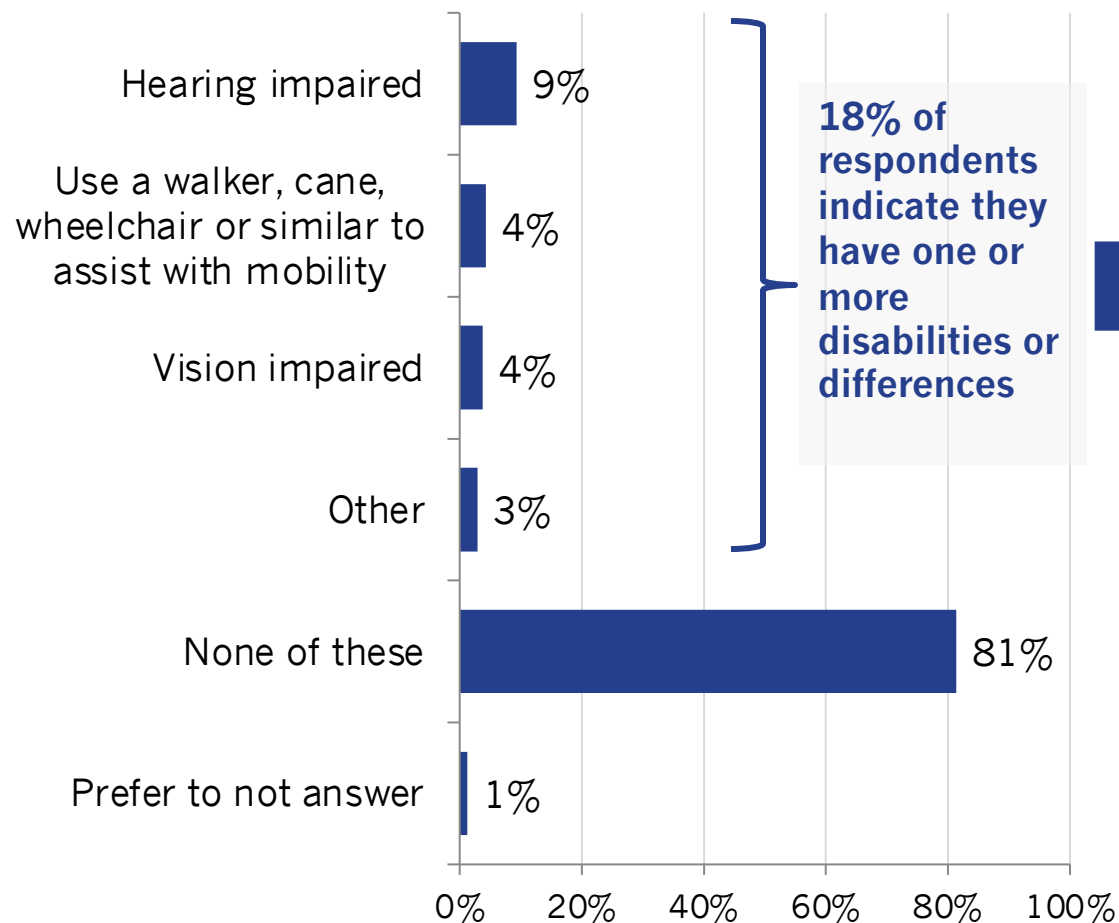


Question: What Covid policies, if any, would make you MOST LIKELY to attend Martha's Vineyard Film Center often? Please select all that apply

A large number of these MVFC patrons indicate they have one or more disabilities or differences impacting their experience of watching movies.

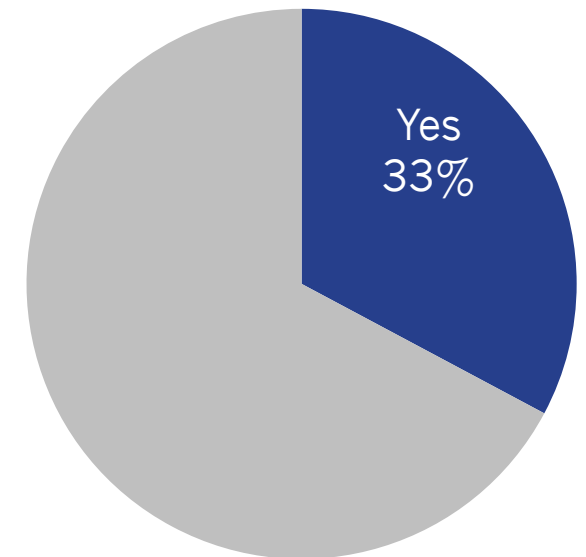
- Many of these patrons have specific requests of accommodations

Incidence of Disabilities and Differences



Question: Do you have any physical disabilities or differences that impact your experience of watching a movie in a movie theater?

Can Martha's Vineyard Film Center Do Anything to Better Accommodate?



Question: Is there anything Martha's Vineyard Film Center could do or provide to better accommodate your needs? Please be as specific as possible

Section Takeaways

- It may be useful to think about 3 broad groups of audience members as you develop a plan to get back to where you were.
 - Those who have already come back as regular filmgoers (first priority). These are avid movie lovers who attend art houses frequently; for this group there is an opportunity to give them new occasions to attend
 - Those who have recently started attending (second priority). Many of these audience members are younger than 45 and many of them are relatively recent movers into the area of the sponsoring art house; providing this group with additional occasions to attend is also likely to be successful, along with communicating using the media they prefer
 - Those who used to be regularly attendees but have not yet returned on a monthly basis or more (third priority). These are the respondents who are most likely to have changed their behavior because of Covid; it may be difficult to provide these folks ENOUGH assurances that they feel comfortable, but some Covid policies (where allowed) and reserved seating may help
- Changes should not compromise the core differentiators of art houses: strong curation, a sense of community and an outstanding moviegoing experience

Table of Contents

I. Restoring and Expanding the Audience

II. Communications and Engagement

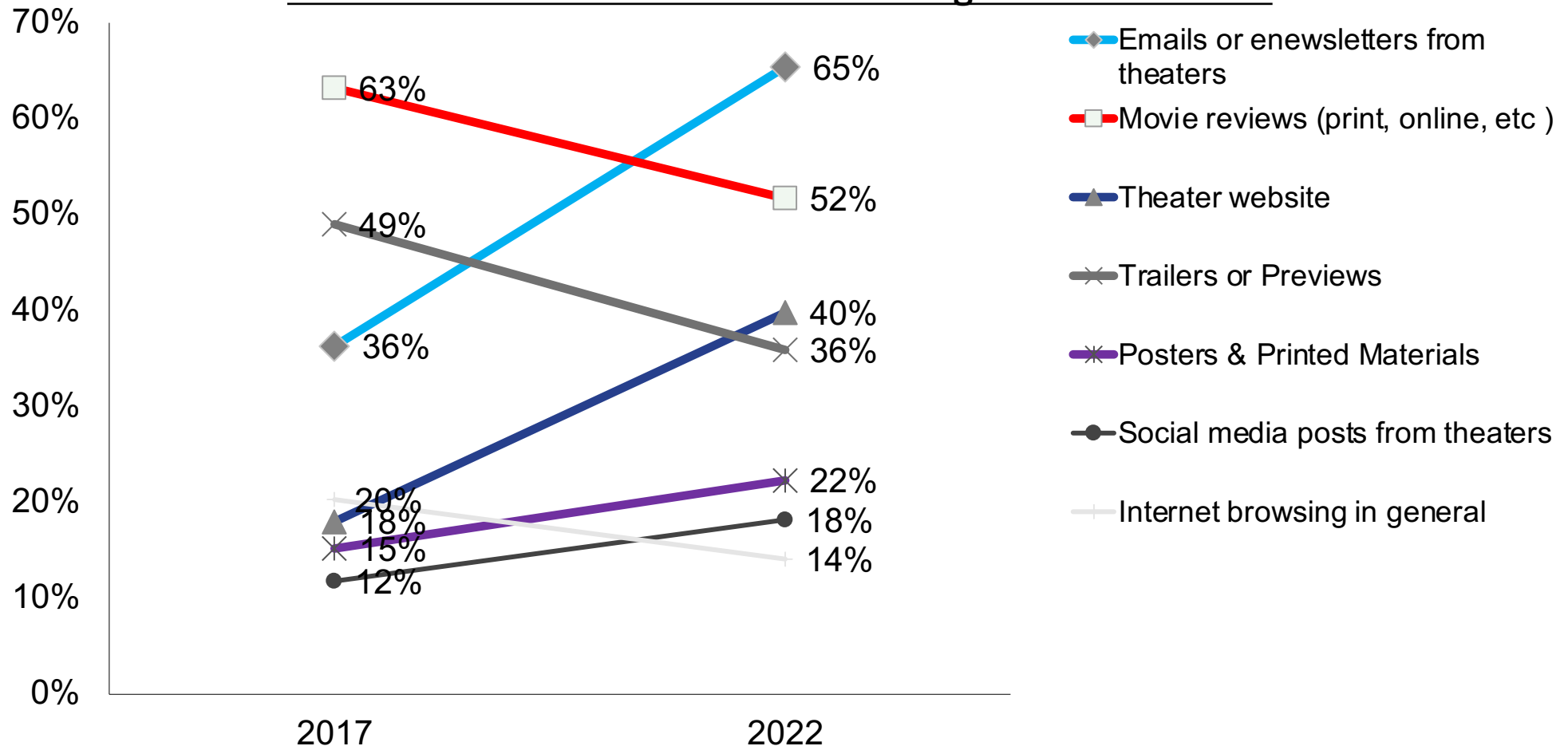
III. Membership and Financial Support

IV. Community Impact

The importance of digital media (emails, website, social media) has grown substantially since 2017.

- Theater emails have grown dramatically in importance to driving movie viewing

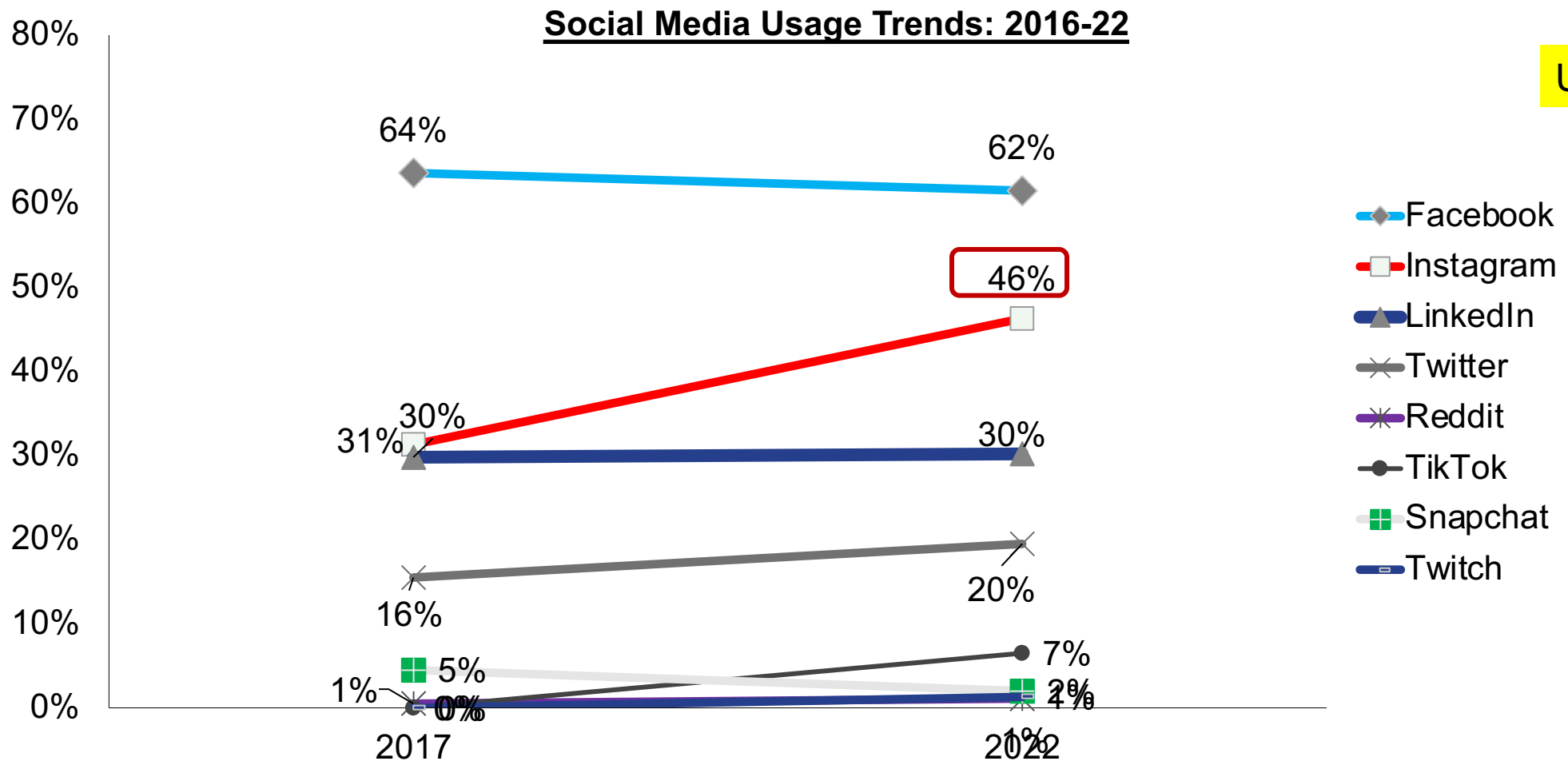
Select Communications Vehicles – Finding Out About Movies



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

Participation in Instagram among Martha's Vineyard Film Center patrons continues to climb, approaching Facebook.

- Many other social media platforms have been fairly flat for years



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

Table of Contents

I. Restoring and Expanding the Audience

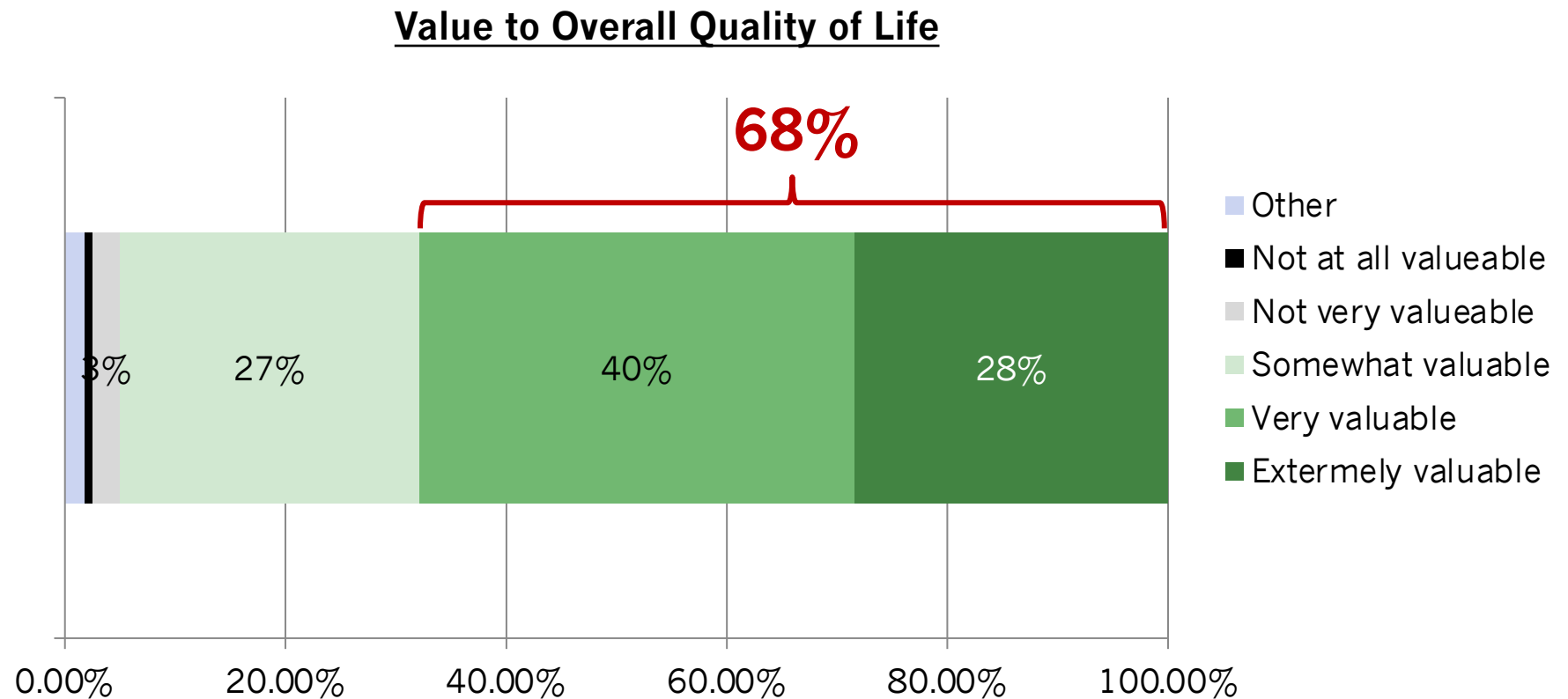
II. Communications and Engagement

III. Membership and Financial Support

IV. Community Impact

Martha's Vineyard Film Center is tremendously valuable to the quality of life of its patrons.

- 68% of patrons report that the Martha's Vineyard Film Center is “extremely” or “very” valuable to their overall quality of life, up from 64% in 2017

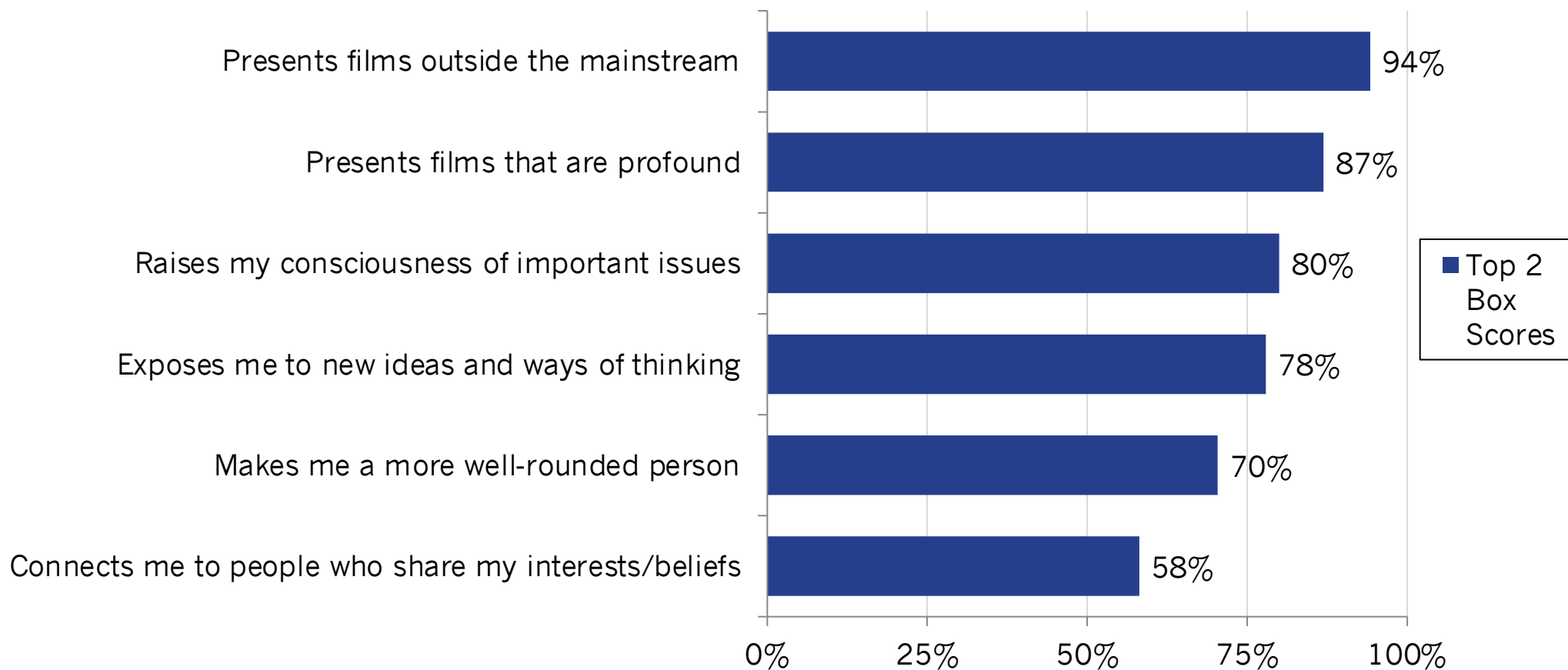


Question: *How valuable is Martha's Vineyard Film Center to your overall quality of life?*

On a personal level, MVFC patrons have profound experiences while being exposed to films outside the mainstream and new ideas and ways of thinking.

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

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

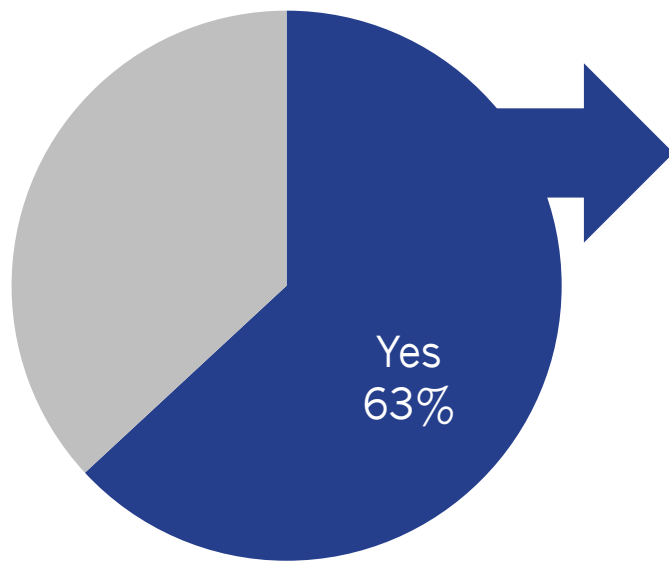


Question: *To what extent do you agree with the following statements about Martha's Vineyard Film Center?*

For the 63% (well above the average of 42% for all 2022 art house theaters) who are members, the decision is balanced between support of the mission and more transactional benefits.

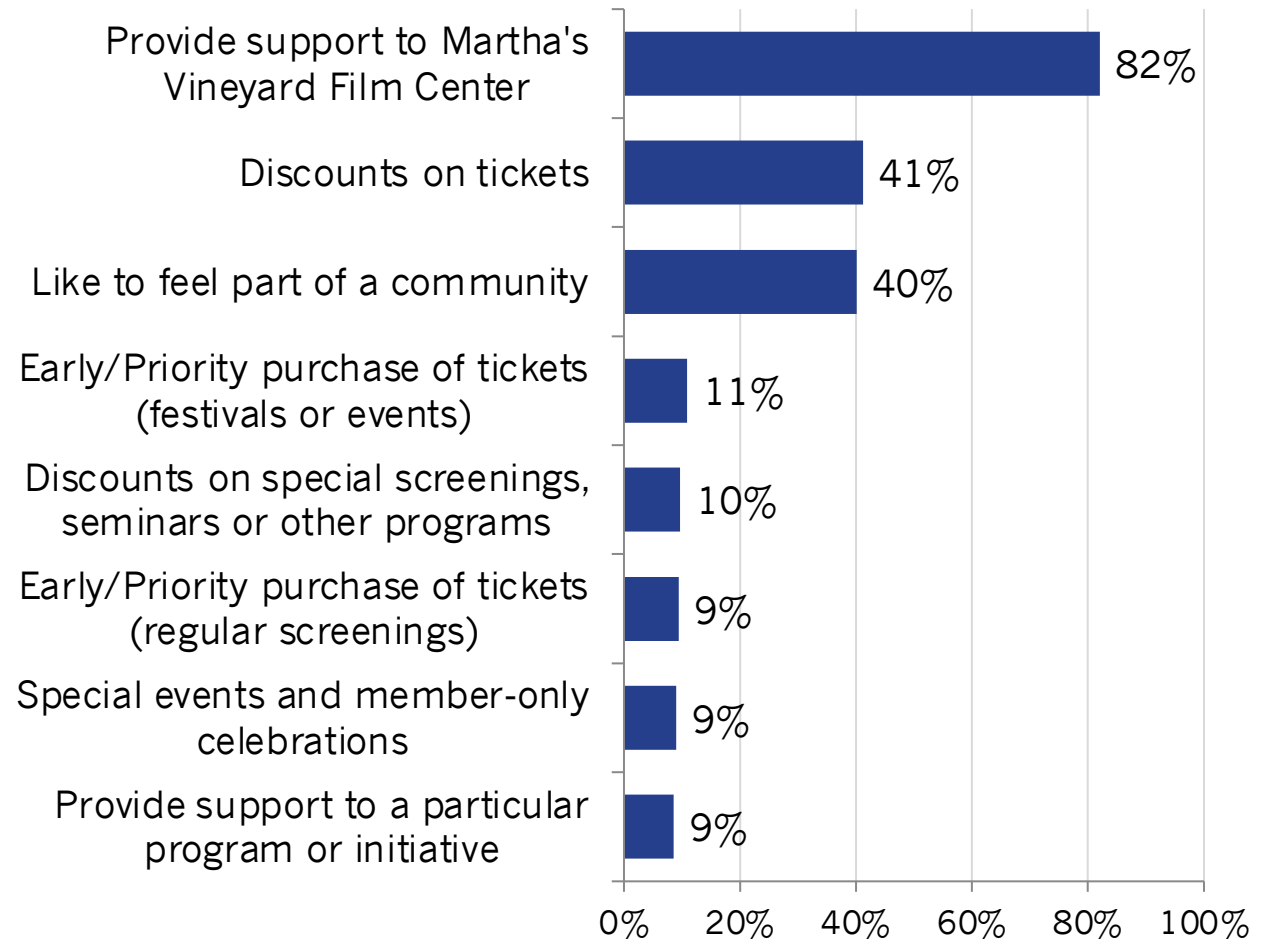
- Connecting members with community impact while delivering tangible benefits is needed to sustain and expand membership

**Currently a Member of
Martha's Vineyard Film
Center?**



Question: Are you currently a “member” of Martha's Vineyard Film Center?

Reasons For Membership (Top 8 Results)

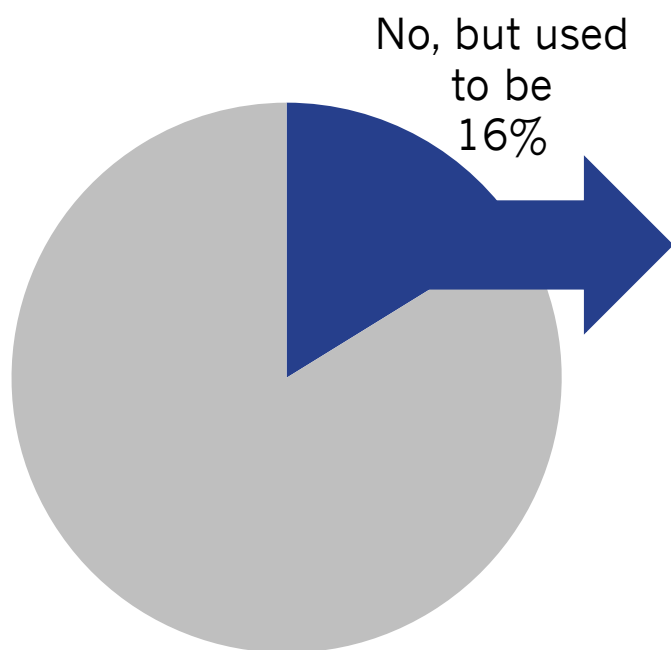


Question: What are the most important reasons you are a member of Martha's Vineyard Film Center (select no more than 3)

The primary reason members let their subscriptions lapse is essentially inertia.

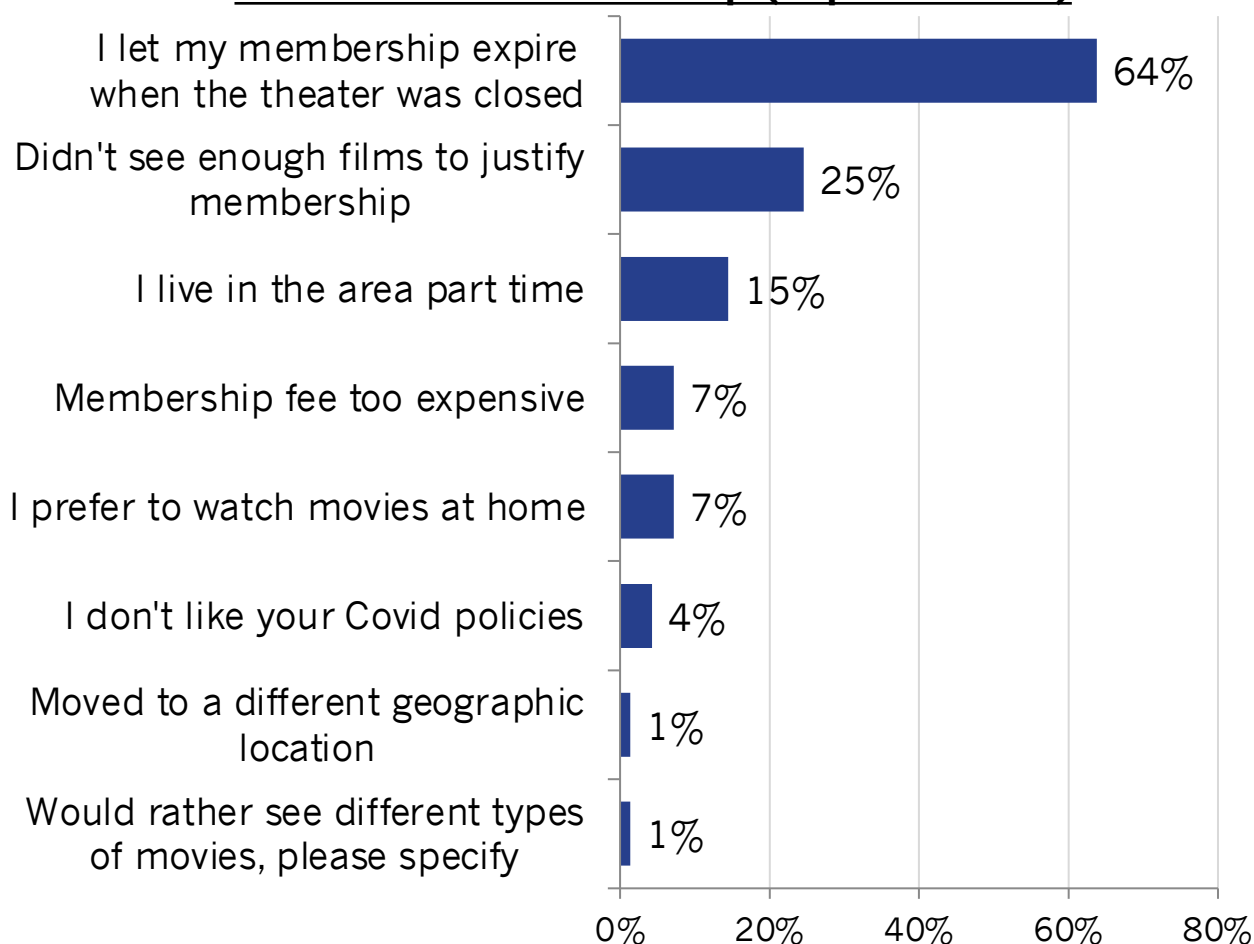
- MVFC closure caused many to drop off, and they have not yet returned

Currently a Member of Martha's Vineyard Film Center?



Question: Are you currently a "member" of Martha's Vineyard Film Center

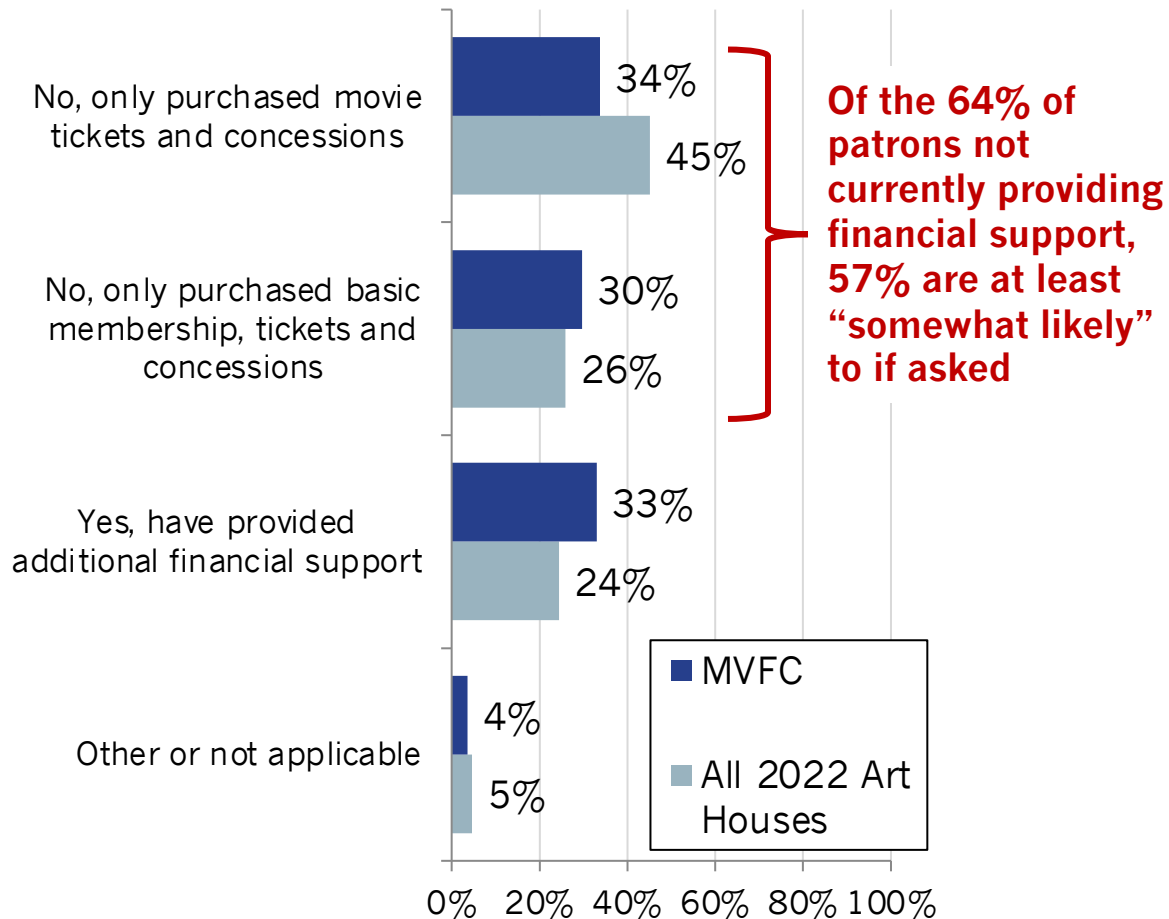
Reasons For Membership (Top 8 Results)



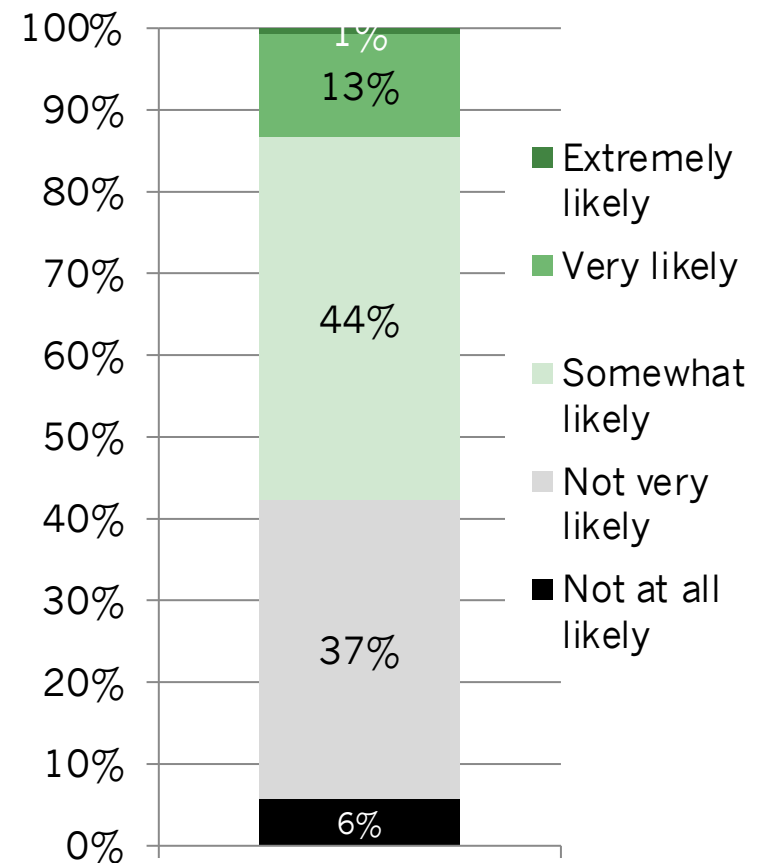
Question: You indicated you used to be a member of Martha's Vineyard Film Center but are not now. Why? Please select all that apply

There are many who are not currently providing financial support who would if asked, though MVFC appears to do a better job than most of recruiting members.

Current Financial Contributions



Potential Financial Contributions



Question: In the past two years, have you provided financial support to Martha's Vineyard Film Center, aside from purchasing tickets to see movies there or purchasing a basic level of membership?

Question: How likely would you be to make a financial contribution, if asked?

Table of Contents

I. Restoring and Expanding the Audience

II. Communications and Engagement

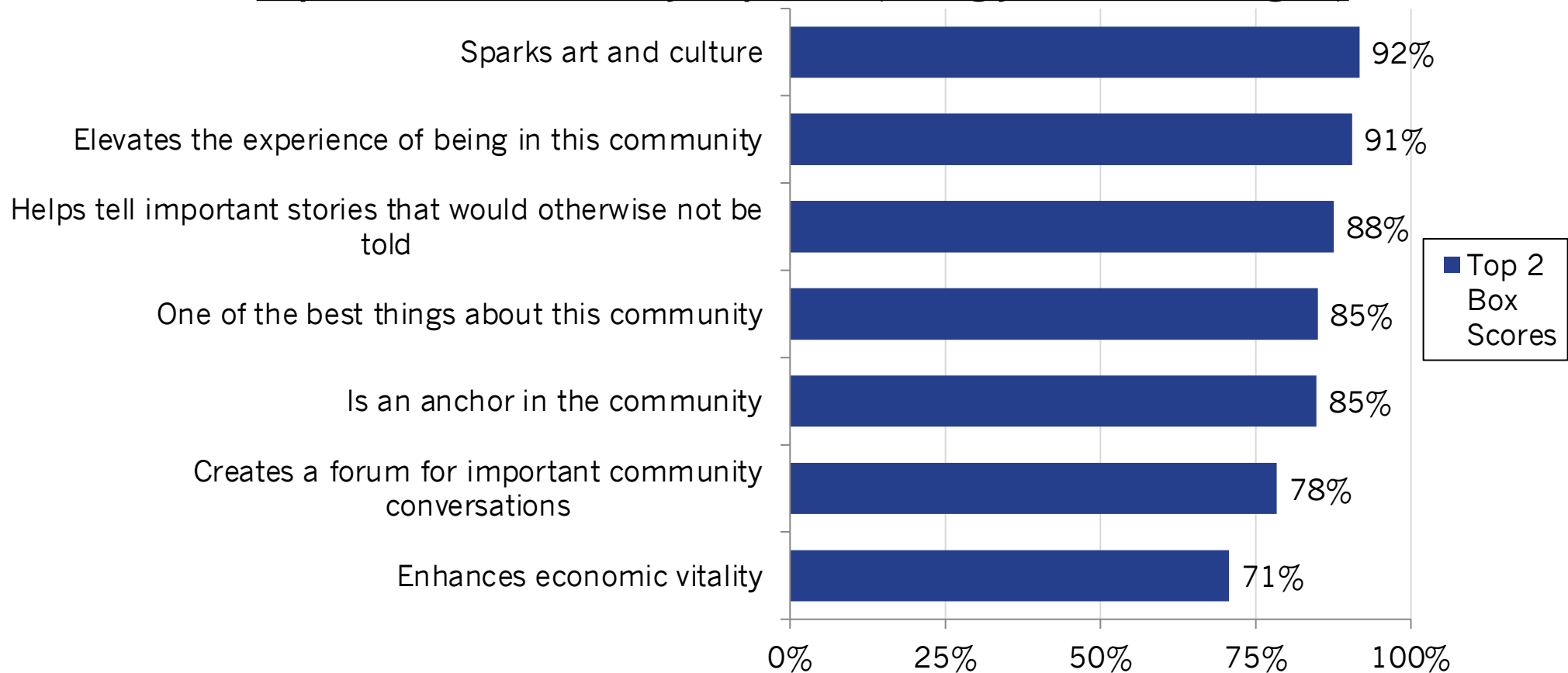
III. Membership and Financial Support

IV. Community Impact

The island benefits from MVFC through the spark of art and culture that is often one of the best things about the community.

- When presenting to local governments, civic groups and potential sponsors and funders, there is a strong case to make that MVFC serves as the backbone for the artistic, civic and economic vitality of Martha's Vineyard

Impacts on the Community: Top 2 Box (Strongly or Somewhat Agree)



Question: *To what extent do you agree with the following statements about Martha's Vineyard Film Center?*