At the Giant Screen Theater Association (GSTA) 2003 International Conference session titled “Understanding the Giant Screen Audience: An Analysis of the Results of the GSTA’s 2003 Viewer and Nonviewer Research Programs,” Doug Keith, vice president of media and entertainment research for TNS Intersearch, summarized the results of the GSTA’s Consumer Research Program. The first non-brand-specific international research program in the giant screen theater and film industry’s 33-year history, the GSTA’s Consumer Research Program, conducted in summer 2003, included both a viewer research study and a general population study in which current viewers, lapsed viewers and nonviewers were interviewed.

With the research results now in hand, GSTA’s board of directors has charged GSTA’s Consumer Research Work Team with sharing these important findings—and recommendations about how to use them to inform business decisions—with the giant screen theater and film industry.

The Consumer Research Program results are documented in a comprehensive written report that is for sale through GSTA. Also for sale is a video of the conference session. To order the report, the video or both, e-mail your request to the GSTA office at tori@giantscreentheater.com.

Beyond the written report and video the Consumer Research Work Team will disseminate the research results in several ways—as “white papers,” or mini reports, on key issues; as summaries presented at industry conferences; during a session at the GSTA 2004 International Conference in Montréal, Québec, Canada; on the GSTA web site, www.giantscreentheater.com; and using other appropriate communications vehicles. This article is the first in a series of features that will appear in The Big Frame, focusing on key research results, how to interpret the findings and recommendations about how to use them to benefit the industry.
BACKGROUND
At the GSTA 2002 Committee Midwinter meeting held in Valencia, Spain, GSTA’s board approved the recommendation of GSTA’s Economic Impact Task Force to conduct a Consumer Research Program, citing it as one of GSTA’s key initiatives to “enhance the economic success of our business.”

In spring 2002, GSTA formed the Consumer Research Work Team, whose members jointly represent almost every aspect of the giant screen theater and film industry, and gave it responsibility for coordinating the viewer research program. From spring to fall 2002, the work team developed a request for proposal, identified 11 qualified research firms, evaluated the proposals submitted by seven research companies, and recommended a research firm and program to the GSTA board. At the GSTA 2002 International Conference in Toronto, Ontario, Canada, the GSTA board approved the hire of TNS Intersurvey [TNS], which is based in Philadelphia, Pennsylvania, USA, and the recommendation to use Internet methodology to conduct viewer research, pending a pilot study to evaluate the likelihood of viewers completing the questionnaire online.

After evaluating the current state of the industry, including the need to grow the existing, declining attendance base, the work team and TNS recommended research not only among viewers, but also among nonviewers, so that those most likely to “convert”—if any—would be identified. At the GSTA 2003 Committee Midwinter meeting in Tampa, Florida, the work team proposed an international nonviewer research program, conducted alongside the viewer research study, allowing the viewer and nonviewer results to be compared, contrasted and

Special thanks to Dave Duszynski of the Cincinnati Museum Center, who, as a member of GSTA’s Economic Impact Task Force, recommended a worldwide consumer research program; Mike Day of the Science Museum of Minnesota, chair of the Economic Impact Task Force, for spearheading the initiative; and the members of the GSTA Consumer Research Work Team, who have worked since spring 2002 to develop the GSTA’s viewer and general population studies—and are now responsible for disseminating the results. Work team members are:

- Mary Kaye Kennedy (Chair), WGBH Enterprises
- Mark Bretherton, World’s Biggest Screens Pty. Ltd.
- Michele Canto, Canadian Museum of Civilization
- Dave Duszynski, Cincinnati Museum Center
- Chris Hurtubise, COSI Columbus
- Gretchen Jaspering, St. Louis Science Center
- Tadashi Kusumi, Sarai, Inc.
- Berend Reijnhoudt, Omniversum
- Romi Schutzer, IMAX Corporation
- Nick Yates, Jordan’s IMAX Theaters

With the research results now in hand, GSTA’s board of directors has charged the Consumer Research Work Team with sharing these important findings and recommendations about how to use them to inform business decisions.
presented side-by-side at the GSTA 2003 International Conference. The members of the GSTA board unanimously approved the recommendation. TNS and the work team developed a draft viewer research study questionnaire and in March 2003 tested it and the Internet methodology in a pilot program conducted in four theaters (two commercial 3D theaters and two institutional 2D dome theaters) in four countries. As a result, TNS fine-tuned the questionnaire and improved the process used to recruit giant screen viewers to complete the online survey. Providing valuable feedback on the pilot program were Jason Bainbridge of the BFI London IMAX Cinema, London, UK; Andy Wood of the Franklin Institute Science Museum’s Tuttleman IMAX Dome Theater, Philadelphia, Pennsylvania, USA, Mark Bretherton of the LG IMAX Theatre, Sydney, New South Wales, Australia, and Glenn Shaver of the Ontario Science Centre’s Shopper’s Drug Mart Omnimax Theatre, Toronto, Ontario, Canada.

After presenting the results of the pilot program to the executive committee of the GSTA board in April 2002, the work team and TNS received permission to move forward to conduct the viewer research study, via the Internet, and a general population study, in which current viewers, lapsed viewers and nonviewers would be interviewed by phone.

Both the viewer research study and the general population study were conducted and analyzed on a macro level, with an eye toward reporting findings in aggregate across the general population in markets with giant screen theaters.

RESEARCH OBJECTIVES
The three primary objectives for the Consumer Research Program’s viewer and general population studies were:

1. To gather information about current and “likely” giant screen film viewers that will enable giant screen theater staff members to cost-effectively increase attendance through film selection, film scheduling, theater and film marketing, theater and film sponsorship, ticket pricing and theater operations.

2. To aim giant screen filmmakers, distributors and financiers by gathering information about the film topics that are appealing to current and “likely” giant screen viewers and will therefore be appealing to the theater staff members responsible for film selection.

3. To collect demographic and psychographic data about current viewers that will assist in attracting sponsorship support to the industry.

Please note that the term “likely” is used because it is stronger than “potential” or “prospective,” for every person can be considered a potential or prospective viewer. One of the goals of the general population study was to identify those most likely to become new viewers.

VIEWER RESEARCH STUDY
Beginning in December 2002, the work team encouraged GSTA members with giant screen theaters to participate in the upcoming viewer research study, stressing that “as more theaters are involved, the research results will become more representative of [and relevant to] the worldwide giant screen theater and film industry.” From June through August 2003, 49 GSTA members with giant screen theaters—44 institutional theaters and 5 commercial theaters located in 11 countries—participated in the viewer research study.

At each venue, giant screen theater staff members encouraged viewers (ages 16 and older, not visiting as part of a school group) to fill out a paper screener that asked if
PARTICIPATING THEATERS

MANY THANKS TO THE FOLLOWING 49 GSTA MEMBERS IN 11 COUNTRIES:

Audubon Nature Institute, New Orleans, Louisiana, USA
California Science Center, Los Angeles, California, USA
Canadian Museum of Civilization, Hull, Québec, Canada
Centro de Ciencias y Artes, A.C., Nuevo Leon, Mexico
Charleston IMAX Theater, Charleston, South Carolina, USA
Cincinnati Museum Center, Cincinnati, Ohio, USA
Comcast IMAX Theater at Jordan’s Furniture, Natick, Massachusetts, USA
COSI Columbus, Columbus, Ohio, USA
Duluth OMNIMAX Theatre, Duluth, Minnesota, USA
Explorit, Raleigh, North Carolina, USA
Franklin Institute Science Museum, Philadelphia, Pennsylvania, USA
Great Lakes Science Center, Cleveland, Ohio, USA
Gulf Coast Exploreum, Mobile, Alabama, USA
Heureka, The Finnish Science Centre, Vantaa, Finland
IMAX Theatre at-Bristol, Bristol, UK
Kirby Science Discovery Center, Sioux Falls, South Dakota, USA
Kirkpatrick Science and Air Space Museum at Omniplex, Oklahoma City, Oklahoma, USA
La Géode, Paris, France
LG IMAX Theatre, Sydney, New South Wales, Australia
Liberty Science Center, Jersey City, New Jersey, USA
Louisville Science Center, Louisville, Kentucky, USA
Maritime Aquarium at Norwalk, South Norwalk, Connecticut, USA
Maryland Science Center, Baltimore, Maryland, USA
McWane Center/Discovery 2000 Inc., Birmingham, Alabama, USA
Museum of Discovery and Science, Fort Lauderdale, Florida, USA
Museum of Science, Boston, Massachusetts, USA
Museum of Science and Industry, Chicago, Illinois, USA
Museum of Science and Technology, Syracuse, New York, USA
National Geographic Theatre, Victoria, British Columbia, Canada
National Museum of Photography, Film and Television, Bradford, UK
National Science & Technology Museum, Kaohsiung, Taiwan
Omniversum, The Hague, The Netherlands
Ontario Science Centre, Toronto, Ontario, Canada
Orlando Science Center, Orlando, Florida, USA
Pacific Science Center, Seattle, Washington, USA
Reuben H. Fleet Science Center, San Diego, California, USA
Saskatchewan Science Centre, Regina, Saskatchewan, Canada
Science Museum, London, UK
Science Museum of Minnesota, St. Paul, Minnesota, USA
Science World British Columbia, Vancouver, British Columbia, Canada
Singapore Science Centre, Singapore
Sprint IMAX Theater, Kansas City, Missouri, USA
St. Louis Science Center, St. Louis, Missouri, USA
Swedish Museum of Natural History, Stockholm, Sweden
Tech Museum of Innovation, San Jose, California, USA
Tennessee Aquarium, Chattanooga, Tennessee, USA
Texas State History Museum, Austin, Texas, USA
Western Fair, London, Ontario, Canada
World Golf Hall of Fame, St. Augustine, Florida, USA
they would be interested in participating in research, and, if so, requested their e-mail addresses for follow-up. TNS e-mailed the viewers, inviting them to log on to a secure Internet web site to answer 75 questions (written in their local language), with the goal of 50 completed interviews for each theater. As an incentive, respondents who completed the questionnaire received two free tickets to any giant screen theater participating in the viewer research study. More than 1,400 viewers completed the 25-minute online questionnaire, for a margin of error of +/-2.6 percent.

GENERAL POPULATION STUDY
TNS and the work team designed the general population study to mirror the viewer research study's timing and geographic representation. In July 2003, in 8 of the 11 countries covered in the viewer study, TNS researchers conducted 20-minute phone interviews with 763 nonviewers (those, ages 16 and older, who had not seen a giant screen film in the past 12 months), for a margin of error of +/-3.6 percent. Interviewers selected phone numbers via Random Digit Dial (or equivalent sample), and respondents received no incentive to participate, which is the norm for telephone research.

During the screening portion of the 50-question survey, interviewers also identified 234 viewers (those who had seen a giant screen film in the past 12 months) and asked them age, gender, giant screen awareness and intent-to-return questions only.

CONSUMER RESEARCH PROGRAM TERMS
The following terms will be used throughout the article. All respondents were ages 16 or older, and all viewers were general visitors, rather than members of school groups. All references to general population are to the general population in markets with giant screen theaters.

Trial Viewers: Those who have seen one or two giant screen films in their lifetime.

At-Risk Viewers: Those who have seen two to nine giant screen films.

Frequent Viewers: Those who have seen 10 or more giant screen films.

Viewers: The 24 percent of the general population that has seen a giant screen film within the past 12 months.

Lapsed Viewers: The 37 percent of the general population that has seen one or more giant screen films, but not in the past 12 months.

Never Viewers: The 39 percent of the general population that has never seen a giant screen film.

Nonviewers: The 76 percent of the general population, composed of Lapsed Viewers and Never Viewers, that has not seen a giant screen film in the past 12 months—or ever.

Likely Viewers: The 21 percent of the general population that has expressed significant interest in seeing a giant screen film. Half are Lapsed Viewers, and half are Never Viewers.

PROFILING GIANT SCREEN VIEWERS—CURRENT AND LIKELY
In the past, the core giant screen theater and film audience consisted of middle- to upper-class, college-educated, primarily Caucasian adults with children ages 3 to 12. With the recent changes in the industry—the proliferation of commercial theaters; the emergence of entertainment-based films, including digitally re-mastered versions of 35mm Hollywood hits; and the production of films tailored for the teen and young-adult market—the members of the industry have been unsure of the current “definition” of the core giant screen Viewer. Nor have they been confident about which subsets of the population might become Viewers, in general and now that new, nontraditional films are available.

Without knowing who the primary giant screen Viewers are, it has been difficult for filmmakers, film distributors and theater directors to program for them and market to them. And, few have been willing to use their limited financial resources to target the broad market of potential viewers, without some confidence that their risks will reap rewards.

Therefore, one of the objectives of the GSTA's viewer research study was to define current Viewers demographically and psychographically, and the general population study was designed to identify Likely Viewers in the same fashion. Because the written GSTA Consumer Research Program report features great detail about Viewers and Likely Viewers, this article will provide only an overview.

VIEWERS
In markets with giant screen theaters, 24 percent of the general population has visited a giant screen theater in the past 12 months. Of these Viewers, TNS's Doug Keith says, “There’s a lot of good news here. Viewers are relatively young, they’re well-educated and they have high incomes—very attractive.”
The profile of the typical Viewer is:

- Male or female
- Median age of 22, mean age of 26.9
- Median household income of $65,000 USD
- 65 percent are college graduates; 27 percent have post-graduate degrees
- 51 percent have children under 18
- On average, travel time from home to theater is 35.8 minutes
- In the United States, 92 percent are White; 3 percent, Hispanic; 2 percent, African American; 2 percent, Asian; and 1 percent, “Other”

Key research findings have led TNS to segment Viewers into three groups—Trial Viewers, At-Risk Viewers and Frequent Viewers—based on their visitation patterns and film enjoyment ratings. In general, as the number of giant screen visits increases, Viewers’ enjoyment of the films diminishes, and their visits decrease in frequency or stop altogether.

Trial Viewers rate their enjoyment as high for the one or two films they’ve seen. However, enjoyment ratings decrease for each additional film screened. For example, those who have seen three films rate their enjoyment higher than those who have seen six films; those who have seen six films have higher enjoyment ratings than those who have seen nine. And, corresponding with this downslide in enjoyment, Viewers who have seen three or more films are choosing to be Nonviewers, which is why TNS has defined them as “At-Risk.”

The exceptions to the above are the Frequent Viewers, those who have seen 10 or more giant screen films, whose film and experience enjoyment ratings are consistently high. Frequent Viewers love the giant screen experience so much that all films satisfy them.

**LIKELY VIEWERS**

The general population study gathered information about Nonviewers [half of which are Never Viewers and half of which are Lapsed Viewers] in an attempt to identify Likely Viewers—those with significant potential for “conversion” into Viewers.

Overall, the demographics and content interests of Never Viewers are not consistent with current giant screen Viewers. However, the demographics and content interests of Lapsed Viewers, who haven’t seen a giant screen film in the past 12 months, closely match those of current Viewers, which is a good sign. Yet, while Lapsed Viewers communicate interest in seeing additional films, a stunning 62 percent stopped seeing giant screen films after two or three visits. Their transitions from At-Risk Viewers into Nonviewers were rapid.

While, when considering the above, it may seem as if the research uncovered bad news on both fronts, the results showed that subsets of both Never Viewers and Lapsed Viewers communicate willingness to exert special effort to see a giant screen film. These Likely Viewers represent the greatest opportunity for growth in the Nonviewer group.

While 24 percent of the general population [in markets with giant screen theaters] are Viewers, 21 percent are Likely Viewers, so the GSTA’s general population study identified a market, almost as large as the giant screen industry’s current Viewer base, composed of people highly interested in seeing a giant screen film.

Comparing the Likely Viewer and current Viewer demographics (see the Likely Viewer Demographics chart on page 46) shows a greater proportion of Nonviewer teens, young adults and seniors who are interested in the giant screen experience—ages 16 to 24 [20 percent Likely, 13 percent Viewer] and ages 55 and older [21 percent Likely, 13 percent Viewer]. Evaluating education and income, Likely Viewers are comparable on the education front, but much lower on income, which could be a reflection of the number of 16- to 24-year-olds and seniors who expressed significant interest in the giant screen format.
KEY RESULTS

LIKELY VIEWER DEMOGRAPHICS

<table>
<thead>
<tr>
<th>Gender</th>
<th>Current</th>
<th>Lapsed</th>
<th>Never</th>
<th>Likely Viewer</th>
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<tr>
<td>Male</td>
<td>43%</td>
<td>46%</td>
<td>44%</td>
<td>47%</td>
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<tr>
<td>Female</td>
<td>57%</td>
<td>54%</td>
<td>56%</td>
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<table>
<thead>
<tr>
<th>Age</th>
<th>Current</th>
<th>Lapsed</th>
<th>Never</th>
<th>Likely Viewer</th>
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</thead>
<tbody>
<tr>
<td>16-24</td>
<td>13%</td>
<td>15%</td>
<td>14%</td>
<td>20%</td>
</tr>
<tr>
<td>25-34</td>
<td>24%</td>
<td>22%</td>
<td>20%</td>
<td>21%</td>
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<td>35-54</td>
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<td>55+</td>
<td>13%</td>
<td>23%</td>
<td>32%</td>
<td>21%</td>
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</table>

<table>
<thead>
<tr>
<th>Income</th>
<th>Current</th>
<th>Lapsed</th>
<th>Never</th>
<th>Likely Viewer</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;$50K</td>
<td>35%</td>
<td>59%</td>
<td>65%</td>
<td>65%</td>
</tr>
<tr>
<td>$50K+</td>
<td>65%</td>
<td>41%</td>
<td>35%</td>
<td>35%</td>
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</table>

<table>
<thead>
<tr>
<th>Education</th>
<th>Current</th>
<th>Lapsed</th>
<th>Never</th>
<th>Likely Viewer</th>
</tr>
</thead>
<tbody>
<tr>
<td>High School Graduates or Less</td>
<td>22%</td>
<td>23%</td>
<td>38%</td>
<td>35%</td>
</tr>
<tr>
<td>Some College or More</td>
<td>78%</td>
<td>77%</td>
<td>62%</td>
<td>65%</td>
</tr>
</tbody>
</table>

GIAN SCREEN AWARENESS

The GSTA's viewer research and general population studies identified the magnitude of the giant screen industry's awareness problem—at all levels. Initially testing awareness of the variety of terms and brands used in the giant screen industry, the general population study's phone interviewers read respondents the name of each term or brand. As seen in the Familiarity with Theater Types Worldwide chart on page 47, 75 percent of respondents were aware of the word IMAX, with other terms and brands used in the industry registering various levels of awareness. However, when read a definition of giant screen theaters and films, only 55 percent of these same respondents registered awareness of the giant screen theater and film format.

What does this mean? While respondents were aware of one or more of the terms and brands used in the industry, only about half knew what the terms and brands represented. In markets with giant screen theaters, a significant 45 percent of the general population has no idea what a giant screen theater or film is. Among Never Viewers, this figure rises to 73 percent.

More astonishing is that, of the 55 percent who communicated awareness of giant screen theaters and films, nearly half of the respondents were not aware that one or more giant screen theaters are located in their home cities. This includes 34 percent of Viewers and 54 percent of Lapsed Viewers.

How could a Viewer or Lapsed Viewer who has seen a giant screen film—who, based on the research, is likely to be interested, at some level, in seeing another—not be aware of the theater[s] in his/her own hometown? According to the results of the viewer and general population studies, easily.

Of course, it’s hard to understand the significant lack of awareness of an industry that has become well-established over the past 33 years, an industry that boasts the world's best-quality film experience, an industry whose state-of-the-art theaters and films generate strong word-of-mouth, an industry whose members so passionately promote the giant screen experience.

But, step back to look at “the big picture.” The giant screen industry is composed of theaters with differing names and brands, which is common for any industry, product or service. However, the
Approximately 350 theaters are located throughout the world, forming a small network as far as industries go. Yet, these 350 theaters are marketed under a myriad of names... Regardless of brands and features, no universal term is used to connect them, to link them together, in the minds of Viewers, Likely Viewers and even Never Viewers.

giant screen industry’s associations, individuals and publications don’t have a consistent term with which to connect or combine these names and brands, which is not the norm.

In the automotive industry, for example, cars are Nissans, Fords and Subaruses, while being station wagons and SUVs and boasting features such as four-wheel-drive, all-wheel-drive, sunroofs and leather seats. But, regardless of brands and features, they are universally known as cars.

Today, approximately 350 giant screen theaters are located throughout the world, forming a small network as far as industries go. Yet, these 350 theaters are marketed under a myriad of names. They are Extreme Screen Theaters, OmniTheaters and Omni Theaters, CineDomes, IMAX Theaters and IMAX Filmltheaters, OMNIMAX Theaters and IMAX Dome Theaters, IMAX 3D Theaters, Super Screen Theaters, Space Theaters, an Omniversum, an Odyssey Theater, a Cosmonova, an IMAX Megapantalla, a Planetario Alfa, a La Géode, a Cine Planetario, a L’Hemisferic, and so on. Further, some IMAX-branded theaters, having replaced their projection systems with 8 perf/70mm models, have changed from IMAX-branded theaters to ones with other names.

These theaters feature domed screens, flat screens or both, and some do double duty as planetariums. These theaters are 2D and/or 3D. They have projection systems that run 15 perf/70mm, 10/70 or 8/70 films. They have stadium seating and impressive watts of digital surround sound. But, regardless of brands and features, no universal term is used to connect them, to link them together, in the minds of Viewers, Likely Viewers and even Never Viewers.

When promoting giant screen films, distributors also use differing terms—“A Large Format Science
Viewers and Likely Viewers may hear a different term every time they learn about a new film . . . so it is understandable that GSTA's Consumer Research Program showed confusion in the general market, even among Viewers, over what giant screen is, why it is unique and how to explain it to others . . .

Beyond communicating with their giant screen constituencies, some industry associations are beginning to promote the giant screen experience to the media and general public, in hopes of furthering the marketing efforts of their members. Just as each association uses a different term in its name, each uses varying terms—or several—to describe the industry it represents.

Filmmakers and film distributors sometimes launch national advertising campaigns, using their own financial resources or those of films' corporate sponsors, while local and regional promotions efforts are traditionally coordinated by theater marketing staffers, who often use the trailers, advertising creative and collateral materials provided by film distributors. Because differing terms are used in film marketing campaigns—IMAX, giant screen, large format or large screen—Viewers and Likely Viewers may hear a different term every time they learn about a new film.

Every industry association, filmmaker, film distributor, publicist and theater marketing director impacts every other one, but, regardless of best intentions, the members of the giant screen theater and film industry have been operating as individual retailers—as independent of the others in the industry.

With every means of communicating with Viewers and Likely Viewers—films, trailers, film websites, television spots, radio spots and print ads—using varying terms, it's understandable that GSTA's Consumer Research Program showed, according to TNS, "confusion in the general market, even among Viewers, over what giant screen is, why it is unique, and how to explain it to others—which affects word-of-mouth."

To combat these research results, determining a unified way to refer to the industry is imperative. Inconsistency has made it difficult for Viewers to talk about their viewing experiences with others, and the viewer research study results reveal that 21 percent of Viewers find out what films are being shown through word-of-mouth.

The industry forever will feature different brands. IMAX Corporation, giant screen theaters and even film production companies have built their individual brands, in some cases for decades, these brands have value, at the local level or beyond, and individual brands are not at fault. The problem is the lack of a term to connect these brands.

In the general population study, IMAX was the
brand or term with the highest awareness rating, however, because it is a trademark authorized for use only by IMAX theaters and by films produced by or associated with IMAX Corporation, it cannot be used throughout the industry.

The good news is that awareness of the non-brand-specific term “giant screen” was second only to that of the IMAX brand. Of course, this term does not communicate the phenomenal sound systems that giant screen theaters boast, nor the types of films shown. Just the same, the word “car” does not communicate a mode of transportation, four wheels, a metal frame and a steering wheel. Yet, the word “car” was defined and described successfully to the general public.

In the entertainment industry, through consolidated marketing and promotion, previously unknown terms have become widely recognized among consumers. The term DVD is an example. TNS’s Keith says that his 3-year-old twins have no idea what the letters stand for, but they know well what the term DVD represents when they ask, “Dad, can we watch a DVD?”

The already well-known term “giant screen” will become the universally understood “blanket term” for the industry, its theaters and its films if the members of the industry band together to consistently define and describe what they want “giant screen” to represent:

- specially designed 2D or 3D theaters, each of which features a multi-story screen and a powerful surround-sound system that together immerse viewers in larger-than-life, crystal-clear images and realistic sound, making them feel as if they are literally “in the picture” and
- the films shown in these venues.

The members of the general population, Viewers and Nonviewers alike, will understand that an IMAX Theater is a giant screen theater, that an OmniTheater is a giant screen theater, that an Extreme Screen Theater is a giant screen theater and that NASCAR 3D: The IMAX Experience is a giant screen film, as are Roar: Lions of the Kalahari, Bugs! and Coral Reef Adventure. If Viewers saw Pulse: a Stomp Odyssey in an Omnimax Theater while on vacation, they will know that they had a giant screen
experience, just like they have had at the CineDome Theater at home.

Of course, it will be difficult to alter existing materials cost-effectively; therefore, industry associations, film distributors, theater marketing directors and others will have to work, at least in the short-term, with materials already developed. However, if organizations or individuals must use (or choose to use) “large format” or another term, they can still benefit the industry by inserting the following at the end of all future communications with members, Viewers, Likely Viewers, the media and the general public:

Please note that “large format [or other term],” used here to describe films, theaters and the industry as a whole, is synonymous with “giant screen,” another term used to describe the industry.

If the members of the industry work together to use “giant screen” where appropriate, from this point on, Viewers and Nonviewers will know “what to call it, why it is unique and how to explain it to others,” because the industry will have provided them with the information.

**FILM PROGRAMMING**

While increasing awareness of the giant screen format is key to stimulating visitation in the first place, film programming is the top factor affecting repeat visitation. The results of GSTA's viewer research study show that Viewers' enjoyment of the film[s] seen is the main component of their enjoyment of their overall giant screen experience. Further, TNS's Keith explains, “Film quality drives the enjoyment of the experience, and enjoyment of the experience is the best indicator of future visitation.”

Trial Viewers report high enjoyment ratings for their first and second giant screen films. However, with the exception of Frequent Viewers, as Viewers see more films, their enjoyment of the films decreases, and, somewhere between their second and ninth visits, At-Risk Viewers stop attending giant screen theaters. They become Nonviewers.

“The films themselves can have a wide range of enjoyment levels, while the rating of the [giant screen] experience tends to remain fairly consistent,” Keith says. “However, as we have learned, enjoyment of the experience tends to decrease as the number of giant screen films seen increases, mainly due to lack of film enjoyment. Films that have a wide gap between [Viewers' ratings of] enjoyment of film and enjoyment of experience, therefore, could be reducing the likelihood of future visits” (see the Cross of Film and Experience Enjoyment chart on page 52).

Based on this research, film programming—what's available and then what's selected—can make or break a theater business. And, individual theaters are the bread and butter of the giant screen industry.

Ever since commercial theaters established themselves as a major part of the giant screen

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**Film programming is the top factor affecting repeat visitation. The results of GSTA's viewer research study show that Viewers’ enjoyment of the film(s) seen is the main component of their enjoyment of their overall giant screen experience. Film quality drives the enjoyment of the experience, and enjoyment of the experience is the best indicator of future visitation.**

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BIG FILMS
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network in 1997, resulting in an increase in entertainment-based and 3D film production, film programming has been one of the most contentious issues facing the industry. In fact, film programming is often cited as a primary cause of the global decline in giant screen attendance. However, no consensus exists regarding the programming pattern or patterns at fault.

Believing that “the sins of one will affect the others,” industry members have blamed the loss of Viewers on:

- theaters showing low-quality films—films that, however, feature very appealing titles and/or topics—in their strategies to increase short-term attendance, to the detriment of the Viewer experience and long-term attendance.
- institutional theaters showing entertainment-based films and potentially diluting or tainting the positioning of all institutional giant screen theaters.
- commercial theaters programming films with non-family-friendly content, such as violence, sex or horror scenes, that could adversely affect the giant screen theater and film industry’s brands and reputations.
- 3D theaters promoting 2D films as inferior, which is detrimental to the industry as a whole, only to have to run 2D films because of the inability to maintain exclusive or even primary 3D programming due to the lack of 3D film product.
- commercial theaters running 35mm films, such as Gladiator—sometimes positioning the films as giant screen films, inadvertently or purposely—creating confusion among Viewers about what the giant screen experience is.

- theaters showing giant screen “re-masters” of Hollywood’s 35mm hits and running films that have originated entirely in digital. Some fear that these films’ varying image quality (when compared to original giant screen footage) and the oft-required masking on the screen (resulting in images that are not full-screen, as with films featuring giant screen images) will be detrimental to Viewers’ perceptions of and enjoyment of the overall giant screen experience.

The results of the GSTA’s viewer research study show that one issue is paramount to maintaining Viewers. It is not whether the film is education-focused or entertainment-based, not whether it is 2D or 3D, not whether it is rated G or PG or PG-13, and not whether it originated in a giant screen film format. It is, plain and simple, enjoyment of the film. Enjoyment of the film, or lack thereof, determines whether the film is hurting or enhancing the giant screen experience—and whether Viewers stay or go.

A good film-to-experience rating is the result of testing the film among a variety of Viewers, especially At-Risk Viewers, to evaluate the...
relationship between their enjoyment of the film and of the experience, marketing the film to the Viewer and Likely Viewer niche audiences that will most enjoy it, rather than assuming that the film is appropriate for all audiences, programming the film in the time slots most conducive to attracting these niche audiences (such as evening showings for 16- to 29-year-olds and afternoon showings for Viewers ages 50 and older), and developing marketing materials that accurately promote both the film content and the giant screen experience the film will stimulate.

To produce films with good film-to-experience ratings, filmmakers need to test their film projects at all stages—concept/topic, title, rough cut—with randomly-selected Viewers, making sure the pool of respondents includes Trial, At-Risk and Frequent Viewers of both genders and all ages. And, it is the responsibility of theater operators to ensure that the films available to them are deemed enjoyable for both film and experience.

When conducting film-evaluation research, the three most important questions are:

1. How many giant screen films have you seen in your lifetime?
2. How would you rate your enjoyment of the film you saw, including the story, location[s], actors, soundtrack and narration? Please use a 10-point scale, where 10 means you “loved the film,” and 1 means you “hated the film.”
3. How would you rate the overall experience of seeing the film in this theater, including the size of the screen, the sound system, the picture size and clarity, and the 3D effects (if any)? Again, please use a 10-point scale, where 10 means you “loved the experience,” and 1 means you “hated the experience.”

To evaluate the results for each film, first determine the percentage of the total respondents who rated their film enjoyment as a 9 or 10. Second, determine the percentage of respondents who rated the experience as a 9 or 10. More than 50 percent of respondents should have rated film enjoyment as a 9 or 10, and the experience rating should be no more than 18 percentage points higher than the film enjoyment rating. If, for example, 60 percent of respondents rated their film enjoyment as a 9 or 10, and 75 percent rated the experience as a 9 or 10, the high film enjoyment percentage and 15-point spread demonstrates that the film is a good selection for the theater conducting the research. If, however, 50 percent of respondents rated film enjoyment as a 9 or 10, compared to 75 percent for the experience, the 25-point gap between the two ratings is a warning sign, especially when considering At-Risk Viewers.

When deciding which films to make or to show, filmmakers and theater operators should note that 74 percent of Viewers expressed interest in seeing films with PG, PG-13 or R-rated content. Interestingly, this level of interest is consistent, whether Viewers had seen their most recent films as part of a film-only visit or as part of combination visit with a museum, science center, zoo or aquarium.

Summarizing the research findings, TNS’s Keith says, “Viewers are most likely to return if the quality and the diversity of the [film] content matches the quality of the [giant screen] experience. The experience is already there.

One issue is paramount to maintaining Viewers. It is not whether the film is education-focused or entertainment-based, not whether it is 2D or 3D, not whether it is rated G or PG or PG-13, and not whether it originated in a giant screen film format. It is, plain and simple, enjoyment of the film.
SK FILMS HELICOPTERS STRAIGHT UP
P/U FALL 03 PAGE 25
FULL-PAGE AD
You have to keep working on the content, and entertaining, informative content is key to drawing viewers back.”

Regarding the Lapsed Viewers who are Likely Viewers, Keith notes, “Certainly, they’ve gone [to see a giant screen film] in the past, but they were not necessarily receiving the value they expected. The film content is going to be important to attracting Lapsed Viewers, because they’ve already gone—they know what the experience is—so you don’t have to explain that. However, you do have to remind them, ‘Remember that great experience you had?’”

Never Viewers who are Likely Viewers express interest in typical giant screen film topics, but mainly are drawn to standard TV and movie genres (see the breakdown in the Content of Interest to Likely Viewers chart below). “Because they’ve never had the giant screen experience, they place more value on film content than on experience, so entertaining content, well-marketed, is paramount to attracting this group,” says Keith.

The GSTA’s viewer research and general population studies explored not only the topics that a re of interest to the target market of Likely Viewers, but also those of interest to Viewers, Lapsed Viewers and Never Viewers, the results of which are available in the written report.

**MARKETING AND SPONSORSHIP**
Detailed recommendations about how to market the giant screen industry, its theaters and films will be addressed in an article in the spring issue of The Big Frame, plus at a session at the GSTA 2004 International Conference.

Using the results of the GSTA’s viewer research study, industry members can leverage the upscale demographic characteristics of Viewers to increase sponsorship, whether for theaters or films. The GSTA’s Sponsorship Work Team, chaired by Jane Eastwood of the Science Museum of Minnesota, has begun work to determine what will make an international or national film sponsor successful for local theaters.

**SUMMARY**
As a result of the GSTA’s Consumer Research Program, the industry is now armed with comprehensive information about current Viewers and Likely Viewers—who they are today, how they perceive the giant screen theater/film experience, what will stimulate them to attend, how they can be reached, how they can be stimulated to return, and so on. Using these research results, GSTA’s 360 members in 33 countries—including filmmakers, film distributors, and theater owners and operators—can work to increase awareness of the giant screen format, produce better films, make informed film programming decisions, market theaters and films more effectively, develop stronger film and theater sponsorships, and increase

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**CONTENT OF INTEREST TO LIKELY VIEWERS**

<table>
<thead>
<tr>
<th>Genre</th>
<th>Percentage</th>
</tr>
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<tbody>
<tr>
<td>Comedy</td>
<td>59%</td>
</tr>
<tr>
<td>Action/Adventure</td>
<td>46%</td>
</tr>
<tr>
<td>Drama</td>
<td>44%</td>
</tr>
<tr>
<td>Nature/Natural History</td>
<td>33%</td>
</tr>
<tr>
<td>Concert/Music</td>
<td>32%</td>
</tr>
<tr>
<td>Historical</td>
<td>32%</td>
</tr>
<tr>
<td>Sports/Extreme Sports</td>
<td>32%</td>
</tr>
<tr>
<td>Science/Technology</td>
<td>27%</td>
</tr>
<tr>
<td>Biographical</td>
<td>25%</td>
</tr>
<tr>
<td>Travel</td>
<td>25%</td>
</tr>
<tr>
<td>Science Fiction</td>
<td>23%</td>
</tr>
<tr>
<td>Animation</td>
<td>21%</td>
</tr>
<tr>
<td>Natural Disasters</td>
<td>19%</td>
</tr>
<tr>
<td>Space</td>
<td>18%</td>
</tr>
</tbody>
</table>

Base: Likely Viewers
Interest rated an 8, 9, or 10 for content shown in Hollywood-style movies and on television.
After millions of years,

they now have starring roles in hit films.
attendance to giant screen theaters and films around the world.

To lead the charge, GSTA's Consumer Research Work Team will continue to share the results of the Consumer Research Program's viewer and general population studies, along with recommendations for how to use them. To increase awareness of the giant screen industry and its individual theaters, the work team has proposed the following to GSTA:

- Use the “giant screen” term consistently in The Big Frame, the “GSTA E-Newsletter,” the GSTA web site, www.giantscreentheater.com, and in all other communications with members, Viewers, Likely Viewers and the press.
- Add a listing of all member theaters to the GSTA web site, with links to each venue's website.
- Encourage all GSTA members to link their web sites to the theater-listing section of the GSTA site.
- Investigate the possibility of developing a brochure, explaining the giant screen experience and listing all GSTA member theaters, that would be distributed to Viewers, whether locals or vacationers, at all GSTA theaters around the world in 2004.

These GSTA initiatives would help establish an identity for the giant screen theater network, direct the large number of vacationing Viewers to the giant screen theaters in their home markets, and aid traveling Viewers looking for giant screen theaters in the cities in which they will be vacationing.

To improve Viewers' enjoyment ratings through the development and presentation of high-quality film programming, the work team
has recommended that the GSTA and TNS develop research programs that utilize the already existing database of more than 800 viewer research study respondents who expressed interest in being involved with future research.

Because the most expensive part of conducting research is recruiting participants, GSTA members will be able to cost-effectively test their film topics, titles and film content among Viewers from around the world—among Viewers who can be selected for a specific research program based on age, gender, geographic region, visitation patterns, and so on, for GSTA and TNS have demographic and psychographic profiles on each and every one of them.

The work team is investigating the possibility of coordinating regularly scheduled research programs, twice each year, for example, in which all interested filmmakers and film distributors could participate, so multiple titles, topics, etc., would be tested at once.

In addition, the work team recommends that the GSTA pursue the following:

- developing template questionnaires for topic, title and film research, along with guidelines for recruitment of respondents, analysis of the data, etc., so the industry has a standard procedure for conducting effective research.
- conducting research among schoolchildren (and the teachers who make the visit decisions) in spring 2004 and presenting the results at the GSTA 2004 International Conference in Montréal, Québec, Canada.
- repeating the viewer research and general population studies, beginning in fall 2004 and running through summer 2005 to cover all four seasons of business, and presenting the results at the GSTA 2005 International Conference in Osaka, Japan.

The GSTA Board has asked the Work Team to present proposals and budgets for these four research initiatives at the GSTA 2004 Committee Midwinter meeting in Berlin, Germany. Final decisions will be made accordingly.

The GSTA's 2003 Consumer Research Program will be a springboard for positive industry change and for future research. But perhaps more significant will be its role in stimulating business decisions based on sound research results, rather than speculation.

Mary Kaye Kennedy is director of marketing and distribution, giant screen films, for WGBH Enterprises. She is chair of GSTA's Consumer Research Work Team and a member of GSTA's Associate Members Steering Committee. She can be e-mailed at mary_kaye_kennedy@wgbh.org.
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