GSTA's 2003 Worldwide Viewer Research Program

EVALUATING LOCAL MARKET ADD-ON STUDIES

By Mary Kaye Kennedy

In winter and spring 2003, the Giant Screen Theater Association (GSTA) and research firm TNS Intersearch (TNS) invited all GSTA theater members not only to participate in GSTA's Viewer Research Program taking place in summer 2003, but also receive profiles of their own visitors by cost-effectively piggybacking on GSTA's comprehensive international program. With these local market add-ons, GSTA theater members were able to include localized questions on the GSTA questionnaire, increase their theater's sample size and receive a theater-specific report that highlighted their viewers—and compared their responses to GSTA's worldwide viewer results. In this article, the third in a series about GSTA's 2003 Worldwide Viewer and Nonviewer Research Programs, six theater representatives evaluate their local market add-on experiences, as does Doug Keith, vice president, Media and Entertainment Group for TNS, who supervised GSTA's Viewer and Nonviewer Programs, plus the local market studies.

Eight GSTA members contracted with TNS for an add-on local market research program in which the number of viewer respondents was increased to an average of 234 for each theater (up from the 50 required for the GSTA viewer study), and five minutes of local market questions were added to the online questionnaire. The larger sample size and addition of local market questions allowed TNS to gather and analyze sufficient data to provide each member with a market-specific report for its giant screen theater.

The eight participants are as follows:

- Cincinnati Museum Center, Cincinnati, Ohio
- Exploris, Raleigh, North Carolina
- Kirkpatrick Science and Air Space Museum at Omniplex, Oklahoma City, Oklahoma
- Museum of Science, Boston, Massachusetts
- Museum of Science and Industry, Chicago, Illinois
- Science Museum of Minnesota, St. Paul, Minnesota
- Science North, Sudbury, Ontario, Canada
- St. Louis Science Center, St. Louis, Missouri

As with GSTA's Viewer Study, each theater's staff members recruited potential respondents through a short "screener" questionnaire distributed at the theater. Theaters returned their completed screeners to TNS. TNS then e-mailed interested viewers, inviting them to fill out the online questionnaire. Participating respondents received two free tickets to the theater by completing the survey; TNS mailed the tickets, supplied by each theater, to the respondents.

One set of local questions was used for all participating theaters; however, local specifics were added to tailor the standard questions for each of the eight theaters. For example, each questionnaire listed local and regional newspapers and magazines, radio and TV stations, and giant screen theater Web sites so that theater marketers received information about the local media outlets with which their viewers can most effectively be reached.

TNS worked directly with representatives of the eight theaters to complete the local market add-on and deliver report materials, presenting each of the participating theaters with a PowerPoint presentation deck containing key data from the local market study compared to the worldwide GSTA Viewer Study results.

The theaters paid TNS an average of $5,750 (USD) for each local market report, with each theater's cost influenced by the number of completed questionnaires evaluated by TNS and any additional requests made of TNS. For example, at the request of Mike Day and for a nominal additional fee, TNS's Keith presented the report results in person at the Science Museum of Minnesota.

The biggest advantage of the local market add-on study to participants was the reduced cost. On average, the price for a custom project (designed and implemented from scratch) covering the same specifications would range from $15,000 to $20,000. Additionally, because theaters participated at the same time the main GSTA Viewer study was being conducted, they were able to see their own results presented side-by-side with those of theaters worldwide.

To evaluate the local market add-ons, I invited representatives of the eight participating theaters and TNS to be interviewed. Representatives from six of the eight theaters were available, as was TNS's Doug Keith. Many thanks to the following theater representatives for their willingness to share their experiences to benefit their industry colleagues.

LOCAL MARKET RESEARCH QUESTIONS ADDRESSED THE FOLLOWING:

- The likelihood of recommending the specific local theater to others
- The likelihood of returning to theater
- If willing to return, how soon
- Why specifically they would or would not return
- When they first attended the theater
- Whether they were visiting the theater less than in past
- If they are visiting less frequently, is it because of attendance to other giant screen theaters in area
- Which local giant screen theater Web sites were visited and how often
- Which local and regional newspapers and magazines were read and how often in the last month

- Which local radio stations were listened to and how often
- Which TV and cable stations, including locals, were watched most often in an average week
- Which local attractions were visited and how many times in a year

EVALUATING LOCAL MARKET ADD-ON STUDIES

They will be featured—by last name—throughout the article:

- Rod Brooks, vice president for administration, Exploris
- Mike Day, director and executive producer, William L. McKnight-3M Omnitheater, Science Museum of Minnesota
- Dave Duszynski, vice president of theaters, Cincinnati Museum Center
- Gretchen Jaspering, vice president, marketing and communications, St. Louis Science Center
- Cherie Rivers, manager, Omni Theater marketing, Museum of Science
- Brenda Tremblay, director of business operations, Science North

What types of research does your theater typically do (including topic testing, concept testing, film testing and market-level studies), if any?

Brooks: Theater testing has been fairly limited but has included at times title testing and preview screenings of prospective films with our members. The local add-on report for the GSTA Viewer Study was the first comprehensive study done of our IMAX theater audience.

Day: The Science Museum of Minnesota does ongoing seasonal demographic and psychographic research of audiences who have attended a film: film topic testing, concept testing, film preview testing and focus group sessions for films at all stages of production (rough cut, fine cut and evaluation cut).

Duszynski: We do topic testing a couple of times a year and onscreen testing of new films when available. We also occasionally do market studies, but prior to the TNS add-on, it has been at least four years since the last comprehensive study.

Jaspering: We film-topic test every fall, and in the spring we screen test. By June we have made the preliminary [film-selection] decisions for the year. We also do visitor profile surveys four times a year to identify trends in attendance, such as number of tourists to locals, how visitors find out about us, what media they use to get information about us, what they visit once they are here and how much they spend.

Rivers: We do topic and title testing and market-level studies.

Tremblay: We do customer service satisfaction surveys, including overall satisfaction with the IMAX experience, cleanliness of the theater area, IMAX as educational, IMAX as fun, IMAX offering something for all ages and then specifics about the staff delivery. These complement our service theme at Science North, but one thing that we have never done is differentiate between viewer satisfaction of the IMAX experience versus the film product, which the TNS survey did and was a good lesson for us.

We also do film testing, where we bring films in to test and ask about enjoyment of the film—"Would you see it again?," "Would you recommend it?"—and then demographics and market specifics.

In this case, they [viewers] are rating the film, and we use this along with a few other Science North criteria to select our films.

We are also looking to do a specific survey in the evenings to see the differences between our daytime and evening visitors, their likes and dislikes.

Title and topic testing seems to be the most prevalent type of research across the industry . . .

Keith, TNS: The theaters that participated in the local market study were all research savvy to at least some degree. Title and topic testing seems to be the most prevalent type of research across the industry, and the local market participants are all typically doing some form of it. Film testing is done to a lesser extent; market level studies appear to be done infrequently. The theaters that have been able to maintain or grow their respective audiences over the past few years, though, seem to have regular film testing programs and a good understanding of their markets. Based on our research, these two types of initiatives—especially film testing, based on that market understanding—are key to the future of the industry.

If you do conduct research for your theater, whom do you typically interview for the research projects (members, frequent visitors, a cross-section of visitors, etc.)?

Brooks: In the past, we have surveyed members and a small sample of general visitors. This has been pretty limited due to other organizational priorities and lack of resources.

Day: Film topic testing, concept testing and preview testing are done with large sample sizes (minimum of 300) over a multi-day or multi-week period with audiences that are coming to the theater during the test period. Focus group test audiences have historically been drawn from the museum's large membership base of 28,000 households.

Duszynski: For topic testing, we have always polled our visitors in the building who were attending the Omnimax presentation. But for the most recent round of topic testing, we simultaneously polled our visitors in the building and our Omnimax eClub electronic newsletter subscribers. The results from the two groups were very similar, and the electronic survey was much less work and delivered a much higher sample size.

For onscreen testing we have always announced the extra screening as a surprise extra benefit for those attending particular screenings. But for the last year, we have also announced the screenings in our Omnimax eClub newsletters, so now we get a mixture of surprised visitors and "knowing" visitors, still heavily weighted to the surprised visitors.

Jaspering: We interview four times a year and approach every sixth person to cross the interviewers' path, so we get members, frequent visitors, tourists, families and adults without children.

Rivers: We interview frequent visitors of the theater, as well as general visitors and members.

Tremblay: Our surveys are done year-round and therefore capture all our types of visitors, including first-time, members, frequent viewers, tourists, locals, etc.

Keith: In general, members seem to be a frequently used base for research studies. However, as members typically represent a small (but vocal, of course) proportion of visitors (10–20 percent), it would be wise to also sufficiently represent nonmembers in research projects (as a number of local market participants have done). If research is conducted, it is vitally important that a good cross-section of the visiting population is included; otherwise, data could be skewed toward a sub-group of visitors.

Why did you decide to participate in the local market add-on to the worldwide GSTA Viewer Study?

Brooks: We saw this as a terrific opportunity to learn much needed information about our audience at a significantly reduced rate compared to commissioning a study of this magnitude ourselves. We also felt that while the GSTA General Viewer Study was useful for the industry as a whole, we also needed information specific to our particular location.

Day: The GSTA research project was being done at a level of rigor that exceeded our previous work and with one of the top worldwide research firms. The option to work with that firm, and at a higher level than before, was an extraordinary opportunity, one that cost far less financially than had we tried to be that rigorous on our own. The Science Museum of Minnesota has been actively engaged in audience research of all types on an ongoing basis, placing research as a priority of the operation. The GSTA/TNS platform was a gift to any theater wishing to further the professional development of its operation.

Duszynski: Two primary reasons: First, since we occasionally do this type of research anyway, it adds to the body of knowledge that we have built up over the years. Second, I guessed that the international research, since it included visitors of theaters in other countries and visitors of commercial theaters, would not give an accurate picture [on which] to base assumptions for our market. In other words, some of the results of the international study would be valuable for us; others would not.

Jaspering: The results from the international survey were so intriguing, and we wanted to know if we fit into the trends identified in the study or if we had different issues to confront.

Rivers: It was a chance to better understand our market in the context of the greater study.

Tremblay: We thought it was more detailed and would get answers that we may not have been getting. We also knew we could learn from it and hopefully implement based on some of the new things we learned, even if it is the way we ask our questions in the future.

What were the most important things you learned from the results of the local market add-on?

Brooks: The local study confirmed some of our assumptions about our audience members, such as the amount of time they travel to our theater, the higher percentage of attendance by local visitors and issues of concern such as parking. We also learned, however, that the higher prices we charged for [IMAX] DMR films, which were playing while the survey was conducted, may have engendered an overall sense of our theater being expensive. This remains to be seen through further testing when we are not showing DMR films. The study also revealed that we have done a good job of attracting male viewers, and we could expand attendance by female viewers through film selection.

Day: The printed report we received for our theater presented the results from the worldwide aggregate report along with our individual theater results. It gave us valuable comparative data highlighting issues

VIEWER DEMOGRAPHICS:
ADD-ON THEATERS COMPARED TO OVERALL GSTA STUDY RESULTS

	Overall	Boston Museum of Science	Cincinnati Omnimax	Exploris IMAX	Science Museum of Minnesota	Science North IMAX	St. Louis Omnimax
Gender							
Male	43%	40%	40%	48%	35%	36%	42%
Female	57%	60%	60%	52%	65%	64%	58%
Have Children Under 18	51%	51%	47%	48%	50%	68%	54%
Distance Traveled							
In Minutes	35.8	44.6	28.1	28.1	32.5	45.1	34.3
Age							
16-24	13%	27%	12%	11%	20%	11%	11%
25-34	24%	18%	17%	29%	24%	14%	26%
35-49	41%	39%	39%	34%	35%	61%	41%
50+	23%	16%	32%	26%	21%	14%	22%
Median	22.0	23.0	36.0	34.0	26.0	28.0	29.0
Mean	26.9	27.6	35.5	35.2	29.0	28.8	30.2
Income							
<$50K USD	35%	27%	30%	36%	41%	24%	34%
$50K+ USD	65%	73%	70%	64%	59%	76%	66%
Income (Median) in US Dollars	$65,000	$78,000	$68,000	$73,000	$58,000	$74,000	$67,000
Education							
High School Graduate or Less	22%	24%	19%	14%	20%	18%	16%
Some College/Trade or Technical School	12%	3%	9%	11%	10%	44%	8%
College Graduate	39%	39%	43%	46%	41%	22%	48%
Post-Graduate Degree	27%	35%	29%	29%	30%	15%	27%
Viewer Age *Age of all Visitors in Party*							
0-9	22%	14%	11%	7%	12%	15%	20%
10-15	17%	10%	11%	9%	19%	23%	13%
16-29	22%	36%	19%	25%	26%	13%	17%
30-49	24%	29%	31%	37%	26%	38%	32%
50+	15%	12%	27%	23%	17%	11%	18%
Number of Giant Screen Films Seen—Lifetime							
Mean	9.9	9.9	11.8	7.9	13.5	10.7	9.6
Median	6.0	8.0	10.0	5.0	10.0	7.0	6.0
What Viewers Call Film/Theater							
Omnidome	5%	11%	5%	X	9%	X	3%
Omnitheater	11%	57%	10%	2%	68%	X	10%
IMAX	65%	42%	23%	95%	33%	93%	27%
Omnimax	15%	25%	78%	1%	21%	6%	74%
IMAX Dome	14%	16%	10%	2%	15%	3%	14%
Two dimensional (2D)	2%	3%	1%	1%	2%	1%	1%
Three dimensional (3D)	13%	6%	4%	4%	4%	6%	4%
Giant Screen	24%	20%	16%	37%	15%	20%	16%
Dome Screen	14%	31%	25%	1%	22%	1%	23%
Large Screen	X	X	6%	15%	X	9%	2%
Big Screen	X	X	5%	20%	X	9%	4%
Extreme Screen	X	X	2%	2%	X	3%	1%
Cinedome	X	X	1%	X	X	X	X
Flat Screen	X	X	X	7%	X	3%	X

specific to our theater, especially with respect to critical items like price and amenities such as parking.

The differences and similarities in results demonstrated to us that we had made a wise investment in participating in the local market add-on. One of the key findings was that it appears our advertising strategy, which puts most of our spending in TV, is having results. The research focus on how we communicate indicates our audiences are learning about our programming much more through advertising in general, and TV specifically, than the average theater participating in the [GSTA Viewer] study. As part of our add-on study, we also measured the frequency with which our audiences are reading specific newspapers and listening to specific radio stations, plus what TV channels they are watching. The data we obtained can be broken down by audience segment, such as age, which will further advance our use and placement of paid advertising, pursuit of promotional partnerships and public relations.

Duszynski: Many of the conclusions of the survey supported previous studies (perceived cost of ticket is higher than reality, advertising is not making an impact, etc.). Although this may seem redundant and of little value, actually confirming other results is quite valuable. Issues that showed up here more strongly than on previous studies include the reliance on print advertising and listings for information, plus the dislike of our paid parking.

Jaspering: We learned that "Omnimax" is very well known in our market. Omnimax viewers were most likely to be our members. Our viewers enjoy the overall experience more than giant screen viewers in general. Contrary to what we thought, our viewers did not perceive that the experience was expensive but really disliked paying for parking.

Rivers: We learned how important film satisfaction is to return viewership and that it is better to show one good film than multiple lower-quality films. The theater should be marketed independently from the museum, using the "Mugar Omni Theater" name, to encourage theater-only visitation.

Tremblay: We learned the value of differentiating between the IMAX experience and the film product. And our local results showed some significant differences from the overall GSTA study, which I suspected.

Keith: As might be expected, there certainly were differences across theaters in a number of areas, including content preferences (especially educational/learning components), film-only versus combination ticket purchases, vacation visitation, etc. However, these local studies brought into sharp relief a key finding from the overall project: The issue of film quality is a real one.

Individual films that tested well in the [GSTA Viewer] study were recognized across markets as being enjoyable, leading to higher overall enjoyment of the experience. Conversely, theaters that showed films with lower enjoyment scores [as rated in the GSTA Viewer Study] saw greater gaps in film versus experience enjoyment. This is, no doubt, an intuitive finding, but local market participants were generally surprised to see that films that had been carefully chosen for good reasons (mission fit, time of year to be shown, etc.)—even tested to some degree—could prove to be detrimental to experience enjoyment. And, experience enjoyment is the top contributor to interest in future visitation.

Are these different from the results you found most significant in the GSTA's Viewer Study results?

Brooks: The general viewer survey placed much more emphasis on the film/content and experience factors, which, again, were very useful. The most useful information revealed in the local market study related to our specific visitor experience, which could be not gained in the more general survey.

Duszynski: Perhaps the most intriguing finding from the larger study is that those who come to the theater specifically for the film enjoy the film more than those who combine a visit to the theater with a visit to other attractions in our buildings.

Rivers: It [the importance of film quality and satisfaction to repeat visitation] stood out more in our study, probably due to the films we were showing at the time of the study. [Regarding using the Mugar Omni Theater name to promote the theater], the museum has 16 years of marketing dollars invested in the use of the theater's name, so this may be unique to our study.

Tremblay: There were a lot of differences from the GSTA study—gender, age, income level, etc. IMAX is very well recognized to our viewers, and they know it's here in Sudbury. Our viewers tend to be happier with the film product that we are showing compared to overall GSTA survey study [results], so this is a good thing and makes me feel good about the way we are choosing our films. [Our local market results] also confirmed some of the issues that were identified in our own surveys but were not identified in the overall GSTA survey. For example, our visitors think the IMAX [theater] is too loud.

Keith: We ended up with a range of situations across the eight participating theaters. Some had been in the market for many years; some had opened

The issue of film quality is a real one. . . . experience enjoyment is the top contributor to interest in future visitation.

recently. Some were more rural; some were in large metropolitan areas. Some play only one film at a time; some play several. Some played several DMR titles; some played none. These eight theaters essentially represented a microcosm of the GSTA membership, and while individual theaters are bound to face issues relevant only to them, this research demonstrated that the biggest issues facing theaters are generally similar across all theaters.

What have you learned, if anything, about your theater that you feel is unique to your market and/or institution?

Brooks: The IMAX Theatre at Exploris is relatively new, having opened in November 2001. Interestingly, we found that there was good brand recognition in our market, which speaks well of our marketing efforts and word-of-mouth. The study also found that our theater viewers tend to enjoy the overall experience about the same or slightly more than giant screen viewers in general, which is probably due to the age of our theater.

Day: Brand is always a point of discussion, and often contention, in our industry. We worked hard to develop our theater name as a brand from the launch of our first theater 25 years ago. Doing the local market add-on confirmed the positive value and high recognition of our brand, "Omnitheater," and the uniqueness factor it provides in our region.

Duszynski: The local study confirmed that our brand equity in the name "Omnimax" is high in our market.

Jaspering: We need to cultivate younger audiences who tend to associate the theater with a school trip experience only.

Rivers: Our audience is younger than the typical giant screen viewers. The time needed to get to our theater is longer. We have a significant problem with the perception of the cost of the theater and parking. There was a substantial gap between how viewers feel about the film itself versus the experience of seeing giant screen films at our theater.

Tremblay: IMAX is very well recognized.

Keith: Although the overall findings tended to be similar with regard to film selection and quality, it was apparent that each theater had somewhat unique demographic and attitudinal characteristics. Demographic factors tended to be driven by the makeup of the theater's market. Visitor attitudes toward giant screen films, though, seemed to be shaped by theater-specific factors, such as length of time in market, marketing strategy and mission.

Also, it is clear that knowledge of and experience with the giant screen format differ widely from market to market, as local theaters generally are the ones that define the giant screen experience for visitors.

What did you learn that you think would be applicable to any theater or market?

Brooks: This type of research is indispensable to the effective operations of a theater!

Day: You should be continuously monitoring how your audience values each and every film you put on screen to understand the satisfaction level you have to achieve—and maintain—with each new film to sustain a solid core audience.

Duszynski: It doesn't make any sense to show multiple films within a single genre.

Rivers: The importance of showing quality films and marketing the theater separately from the institution.

Tremblay: There is still potential to grow the audience.

Keith: Because individual theaters gained an understanding of what their own visitors thought of individual films, they seemed to recognize the importance of testing film content and using the results as a guide to what to show—and what not to show. They also understood the importance of using a broad base of visitors to do the testing.

One interesting finding that would seem to apply to all theaters is the impact of DMR exhibition. Participating local market theaters that showed more DMR titles tended to have higher audience expectations in terms of entertainment. The upside is that there was a smaller gap between film and experience enjoyment; the downside is that the limited number of entertainment titles diminishes a theater's ability to continuously meet these audience expectations. This could be especially instructive to new theaters, as the temptation might be to "open strong" by showing a string of high profile DMR titles. Visitation could be high at the start, but visitors are also being trained to expect mostly entertainment content, such that the later introduction of more traditional giant screen films could prove to be a disappointment to visitors. Additionally, if DMR features are priced at a premium, audience perceptions of the typical price of a giant screen film could end up artificially higher.

Will you make any changes to your research, marketing, programming, operations, or other initiatives based on your local market results? If so, what will they be?

Brooks: Yes. We plan to introduce 3D in our market this fall. As a result of the local study, we will work hard to emphasize the film content equally with the 3D experience, recognizing that both are important to our audience. The topics and titles tested in the local survey revealed that space and adventure were appealing topics in our market, which has influenced our choice of films for the 3D launch.

Day: Yes. We have already modified our topic testing, concept testing and preview testing instruments. We actually hired TNS to fly in and present our theater results to our sales and marketing staff and an audience development committee of our board of trustees. This stimulated a lot of valuable in-house thinking and discussion. We also used the opportunity to review with TNS all our testing methodology and instruments to bring a new level of sophistication to our research.

One major change is that we are now doing more segregating of our test audiences, by age and, most importantly, by how many films viewers have seen before. One of the key findings of the TNS work, both worldwide and with our own theater, is that there is an at-risk group, those viewers who have seen two to nine films previously. If they [at-risk Viewers] come and see a film that does not meet their expectations for a film in our theater, we are at risk that they will not come again. We are now paying close attention to what that [at-risk] audience segment says in our topic testing and film previews.

We are also asking audiences on all our test instruments to provide us an e-mail address if they would like to come to future film previews. This will allow us to test films and conduct focus groups with targeted audience segments, if we wish. For example, we may want to conduct a focus group with the at-risk audience or a certain age demographic. Now we will have an audience base that we can contact by e-mail to invite them to a preview.

We are also incorporating the 10-point rating system for both the enjoyment of the film and of the experience of the theater, as proposed by TNS. In addition, we are now asking on our film preview test instrument to have viewers circle from a set of 16 descriptors, both positive and negative, how they would describe the presentation. These include verbiage such as "family friendly," "boring," "absorbing," "wholesome," etc. This adds a new level of analysis to our film preview testing.

Jaspering: We will program differently going forward. We've been a one-film-at-a-time theater for 12 years, but recent experimentation has shown us that our market is hungry for multiple films. This past fall we launched "The Great Adventure Series," which featured *Everest, Lewis & Clark: Great Journey West* and *Shackleton's Antarctic Adventure* running in rotation from September to January. In addition, in December we ran a short run of *Santa vs. the Snowman*. We saw marked increases in our attendance, and our visitor satisfaction rating was very high. Keeping our mission in mind, but expanding our audience, will require that we run more than one film at a time and program them according to audience visitation. We are a one-of-a-kind theater, and we plan to enhance that image more than ever. For instance, we will expand our theater hours into the evening in order to take advantage of films geared toward a young-adult audience and run films during the day that appeal to families and school audiences.

Rivers: We have already started using the word IMAX in our marketing since this is a word that is used frequently in our market, especially since other theaters are now here. We will be more careful in selecting films that meet expectations of our visitors. We will consider showing more adult-oriented films since a portion of our theater-only visitors have expressed interest. We will market to niche areas, although it is difficult due to limited budget and film availability. The parking issue needs addressing.

Tremblay: Better research and more targeted marketing.

Based on this local market study, would you be inclined to commit additional resources specifically to research?

Brooks: Yes, as resources are available.

Day: Yes. The local market study confirms our belief in the need for doing extensive research, on an ongoing basis, and having a professional team, both internally and externally, analyzing the research and directing our behavior accordingly.

Duszynski: I'm always inclined to commit resources to research.

Jaspering: Yes. The research has been invaluable and been the catalyst for change.

Rivers: Yes, depending on the study details.

Tremblay: Yes.

Any cons of participating in the local market add-on?

Brooks: No.

Day: The local market add-on was conducted, like the GSTA research, in a narrow window of time when only one film was on screen. We would like to do it again over a full-year period to extract any seasonal bias.

Duszynski: Recruiting participants was a drain on internal resources, and dealing with participants who had difficulty accessing the online questionnaire and in receiving their rewards has created more work for me than I anticipated.

Jaspering: No, it was worth the time, effort and resources.

Rivers: It was difficult and time-consuming to get the number of completed screeners, but the incentive [of two free tickets to the theater] helped drive a high rate of completed surveys.

Tremblay: In our small market, we had trouble getting the completes [completed questionnaires] necessary. And, it would have been beneficial to get some nonviewer research done.

Keith: There's not too much we can do about the recruiting methodology, although the eight local market add-on participants had considerably more work to do because they needed a greater number of completed screeners in order to recruit a sufficient number of viewer respondents. Recruiting onsite, using theater personnel, keeps the overall costs of the study very low.

As for the online program, we continue to make improvements to our system so that it's easier for respondents to complete surveys online. And I think we have an idea to deal with the ticket fulfillment issue. We'd create one voucher that would cover every participating theater—one that would be fraud-proof. That way, every participating theater—49 in the case of the 2003 GSTA Viewer Study—would not have to mail us tickets, and TNS could mail out incentives as soon as the respondents complete the survey.

Any other comments?

Tremblay: We're glad we did it. We learned lots, and this confirms that we need to do more. This was an awesome initiative on GSTA's part, and we're looking forward to getting deeper into it.

Keith: I found that these study participants were determined to address the issues facing their respective theaters, and they are, therefore, quite open to making adjustments in a number of areas (research, marketing, pricing, etc.). This kind of attitude will be key to the survival of individual theaters and the industry.

SUMMARY

Piggybacking on GSTA's first ever worldwide Viewer Study, conducted among more than 1,600 respondents recruited at 49 theaters in 11 countries, provided a valuable membership benefit to eight GSTA members—comprehensive local market research at a greatly reduced price. These initial research programs—GSTA and local—have yielded important findings, and through the process of conducting the studies, the GSTA and TNS have identified areas for improvement.

Feedback from representatives of theaters that participated in GSTA's 2003 Viewer Study and local market add-ons is critical, as GSTA continues to evaluate its research efforts to date and plans for follow-up Viewer and Nonviewer Research Programs, slated for 2005. TNS has proposed viewer research year-round, to cover possible seasonal changes in film programming, tourism, general viewership, etc. GSTA is committed to encouraging more commercial theaters and more international theaters to participate in the next wave. TNS and GSTA are evaluating every aspect of the Viewer and Nonviewer programs to identify ideas for improvement, but theater staff members were on the front lines, so any feedback is welcomed. If you have any—positive or negative—please e-mail mary_kaye_kennedy@wgbh.org. ■

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

If you are interested in conducting a local market add-on study in 2004, please contact Doug Keith at TNS, doug.keith@tns-i.com or 215-444-9674. Please note that your 2004 local market results can be compared to the GSTA's 2003 viewer results, but the GSTA will not be conducting viewer research again until 2005. In 2005, the GSTA and TNS will once again offer GSTA members the opportunity to participate in both the Viewer Study and local market add-ons.