GSTA's 2003 Worldwide Viewer and Nonviewer Research Programs

PROFILING AT-RISK VIEWERS

By Mary Kaye Kennedy

When analyzing the results of the Giant Screen Theater Association's 2003 Worldwide Viewer and Nonviewer Research Programs, research firm TNS defined a subset of the giant screen viewer audience as "at-risk" and identified a segment of the nonviewer population who are most "likely" to become new giant screen viewers.

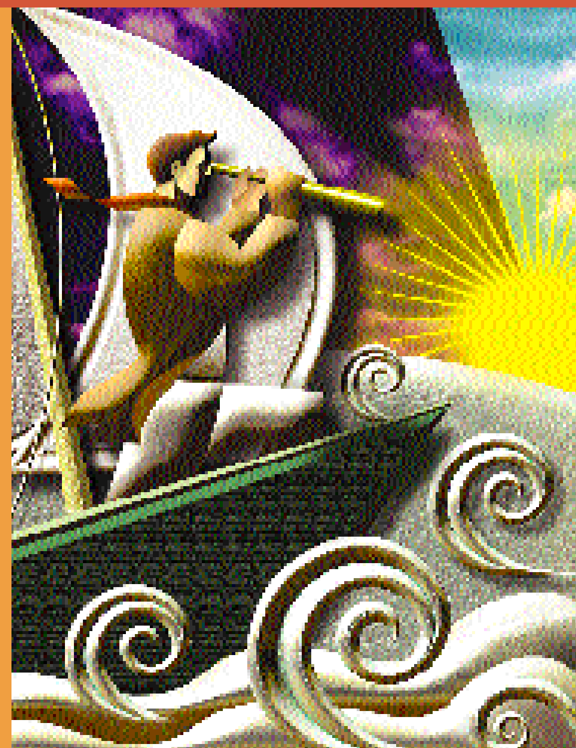
Preliminary information about both groups—dubbed At-Risk Viewers and Likely Viewers—was presented at the GSTA 2003 International Conference and has been summarized in subsequent articles in *The Big Frame.* However, in order for GSTA members to maintain and build their audiences—by identifying and satisfying At-Risk Viewers and recruiting and converting Likely Viewers—in-depth profiles of both markets were needed.

To provide GSTA members with all relevant information about At-Risk and Likely Viewers, TNS conducted detailed analyses of both target audiences, using the data from GSTA's 2003 Worldwide Viewer and Nonviewer Research Programs. The resulting profiles were presented at a GSTA 2004 International Conference session, and At-Risk Viewers are featured in this article, the fourth in the series focusing on key research findings, how to interpret the results, and how to use them to benefit the giant screen industry.

IDENTIFYING AT-RISK VIEWERS

To summarize the information presented in previous articles, TNS divided giant screen viewers into three groups based on their visitation patterns and film enjoyment ratings: Trial Viewers, who have seen one or two giant screen films in their lifetimes; At-Risk Viewers, who have seen two to nine films; and Frequent Viewers, who have seen 10 or more films. With the exception of Frequent Viewers, in general, as viewers see more films, their enjoyment of the films decreases. This was a critical finding because the GSTA research results showed that film

Identifying At-Risk Viewers, the factors that put them at risk of not returning to theaters and what will encourage them to visit again.



enjoyment is the primary factor influencing interest in and enjoyment of the giant screen experience—enjoyment of the experience is the best indicator of future visitation.

At-Risk Viewers, which represent 43 percent of the viewer population, are defined as "at-risk" precisely because of their decreasing film enjoyment levels. While film and experience ratings are high for Trial Viewers, who have had only one or two giant screen film experiences, viewers who have seen three films rate their third film and giant screen experience as less enjoyable than Trial Viewers. Those who have seen four films enjoy their fourth film less than those who have just attended their third film, and so on. However, many At-Risk Viewers never make it beyond two or three visits. Among Lapsed Viewers, those who have not seen a giant screen film in the past year, a surprising 62 percent reported that they became nonviewers after seeing two or three giant screen films.

Assuming that it will be more cost effective for GSTA members to keep At-Risk Viewers in their audiences, as opposed to recruiting Likely Viewers, At-Risk Viewers represent both significant risk and opportunity. Therefore, it is important to understand the factors that drive their enjoyment of giant screen films and their likelihood of returning in the future.

While the following represents the analysis of At-Risk Viewers around the globe (based on the results of the GSTA's 2003 Worldwide Viewer and Nonviewer Research Programs, which included interviews with more than 1,400 viewers recruited at 49 giant screen theaters in 11 countries), it is important for giant screen theater operators and marketers to identify and profile the At-Risk members within their own audiences. Suggestions for doing this local research are addressed in the Identifying and Profiling Local At-Risk Viewers section at the end of this article.

PROFILING AT-RISK VIEWERS

Because viewers who have seen two films may be Trial Viewers or At-Risk Viewers, based on their film and experience enjoyment ratings, for the purposes of

AT-RISK VIEWERS

this analysis At-Risk Viewers will be defined as those who have seen three to nine films.

For basic demographics of At-Risk Viewers, see the Number of Giant Screen Films Seen—Lifetime chart, 3-5 and 6-9 columns, at right. When comparing the demographics of Trial Viewers (1 and 2 columns), At-Risk Viewers, and Frequent Viewers (10+ column), At-Risk Viewers do not stand out from the other two groups based on gender, income or education. However, one interesting finding within the At-Risk Viewer group is that one-third of At-Risk Viewers who have seen six to nine films are ages 50 and older, compared to only 17 percent of those who have seen three to five films.

NUMBER OF GIANT SCREEN FILMS SEEN — LIFETIME

	1	2	3-5	6-9	10+
Gender					
Male	40%	43%	44%	42%	44%
Female	60%	57%	56%	58%	56%
Age					
16-24	14%	27%	15%	11%	9%
25-34	36%	21%	25%	22%	23%
35-49	37%	42%	43%	39%	39%
50+	13%	11%	17%	28%	29%
Income					
<$50K USD	42%	49%	33%	28%	33%
$50K+ USD	58%	51%	67%	72%	67%
Education					
High School Graduate or Less	31%	31%	21%	25%	19%
Some College or More	69%	69%	79%	75%	81%

In general, these demographics show that At-Risk Viewers cannot be identified by demographic characteristics but must be "found" via more in-depth probing. For example, note the gender and age similarities between the six- to nine-film At-Risk Viewers, who are "at-risk" because of their low film and experience enjoyment ratings, and the Frequent Viewers, who have consistently high ratings in both areas. Here, enjoyment ratings are the factors distinguishing the two groups, because they are virtually identical from a demographic standpoint.

Doug Keith, vice president of media and entertainment research for TNS, says, "The differences [between At-Risk Viewers who have seen three to five films and those who have seen six to nine] may indicate the shifting away of younger viewers as they proceed along the giant screen film viewership timeline. It makes intuitive sense that those who have seen more giant screen films will be older, and this fact bodes well for targeting lighter and Likely Viewers in the 50-plus age group. However, it is of some concern that the younger viewers from the lighter viewing groups are not found in similar proportions in the heavier viewing groups."

For example, 50 percent of those who have seen one film are ages 16–34, compared to 48 percent of those who have seen two films, 40 percent of those who have seen three to five films, 33 percent of those who have seen six to nine films, and 32 percent of those who have seen 10 or more films.

Given the lower overall age of the At-Risk group, when compared to Frequent Viewers, "At-Risk Viewers may be new(er) generation viewers used to having more entertainment options than previous generations had available," says Keith. "The giant screen format is more than 30 years old, and its core viewership is aging, leaving behind younger viewers who are of vital importance to the current and future health of the giant screen industry."

Beyond demographics, overall findings for At-Risk Viewers are:

- About two-thirds have seen three to five films, while one-third have seen six to nine films. This data, along with the above information about the majority of Lapsed Viewers ending their visitation of giant screen films after seeing two or three films, demonstrates that At-Risk Viewers are choosing to become nonviewers early in the two- to nine-film life cycle.
- About one-half attended their most recent film with children under age 16, and they are not

likely to return without children, with only 25 percent saying they'd be extremely likely to attend without children in tow.

- Almost two-thirds purchased combination tickets to a giant screen theater and another attraction, compared to about one-half of Frequent Viewers. If these At-Risk Viewers had intended to see the attraction only, but were up-sold theater tickets on-site, this could negatively impact their enjoyment ratings.

The following excerpt from the "Marketing to Maximize" article in the spring 2004 issue of *The Big Frame* explains the relationship of combination ticket purchase to film and experience enjoyment: "In short, intent is a major contributor to film enjoyment. Viewers who intended to see a film and only a film—and did so—had the highest film enjoyment ratings. Next were those who intended to see the film and attraction and attended both. Last were those who intended to see the attraction, but were up-sold a ticket on-site. Considering that film enjoyment is the top factor influencing interest in and enjoyment of the giant screen experience, [Doug] Keith, [vice president of Media and Entertainment research for TNS] said the research indicates, 'The selling of combination tickets could be a detriment to the overall giant screen experience when a visitor has come mainly to see attractions, not a film.'"

- Critical factors influencing the film enjoyment levels of At-Risk Viewers are related to film content, including educational material, picture clarity and customer service. Negatively affecting film enjoyment is "illness." See the Key Drivers of Film Enjoyment by Number of Films Seen chart, 3-9 column, below.
- While the content of each film is important to At-Risk Viewers, they appear to have a weaker affinity for giant screen film genres in general than either Trial Viewers or Frequent Viewers. In the Key Drivers of Film Enjoyment chart, "biographical" and "historical" are drivers of film enjoyment for Trial Viewers, as are "oceans," "family-appropriate content" and "nature/natural history" for Frequent Viewers. No specific genre is a "key driver" for the At-Risk group overall.

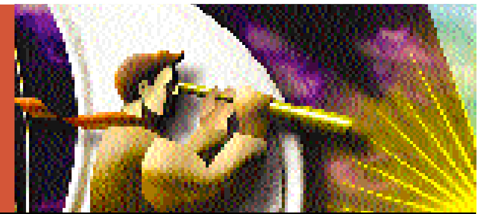
KEY DRIVERS OF FILM ENJOYMENT BY NUMBER OF FILMS SEEN

1-2	3-9	10-19	20+
Clarity of Image	Films are Educational	Films are Absorbing	Nature/Natural History
Customer Service	Clarity of Image	Customer Service	Concerned About Films Too Short
Biographical	Customer Service	Oceans	*Not* There to be Educated
Historical	Content of Film	Family-Appropriate Content	
Not Hollywood Films	Illness a Major Negative Factor	*Not* There to be Educated	

SUBSEGMENTING AT-RISK VIEWERS

"Because the At-Risk group represents such a large proportion of viewers," says Keith, "we felt it could be important to further break the group down into two components: those who have seen three to five films and those who have seen six to nine films. At first glance, the demographic characteristics of the six- to nine-films group appeared to mirror more closely those of the Frequent Viewers group [as compared to the three- to five-films group]; this is especially true in terms of age. Armed with this initial knowledge, advanced analyses were conducted on members of each of the subgroups of At-Risk Viewers."

To further understand the two At-Risk Viewer subgroups, regression analyses were performed on data from the viewer portion of the GSTA's 2003



Worldwide Research Programs. "Regressions," as defined by Keith, "are statistical techniques used to measure the ability of several independent variables to predict the value of a dependent variable. For example, a regression analysis could be used to predict which web site characteristics (the independent variables) are most influential to a person's likelihood of returning to the site (the dependent variable). They measure derived importance, not stated importance, meaning significant relationships can be found that would not be discovered by examining standard tables.

"Separate regressions were run using two questions [from the GSTA's 2003 Viewer Program survey] as dependent variables," Keith continues, "overall enjoyment of the film itself and time frame for seeing another giant screen film. As many independent variables as we felt could possibly influence behavior were included in the analyses."

FILM-ENJOYMENT REGRESSION ANALYSIS

The results of the GSTA's 2003 Worldwide Viewer and Nonviewer Research Programs showed that—for the majority of viewers—film enjoyment is the top contributor to interest in and enjoyment of the giant screen experience, and "experience enjoyment" is the primary factor influencing return visits.

For those At-Risk Viewers who have seen three to five films, the list of factors impacting film enjoyment is somewhat longer than that of those who have seen six to nine. Among the key drivers, five of which positively influence film enjoyment and two of which negatively affect it, are:

- The giant screen film attribute, "educational"
- Overall customer service
- The clarity of the image
- Parking
- The content of the film
- Dizzy/queasy (negative)
- Came mainly to visit the attraction, not to see the film (negative)

According to Keith, "Among these factors, 'educational' was by far the most positive. The negative factors of 'dizzy/queasy' and 'came mainly to visit the attraction' seem to be strong deterrents to film enjoyment.

"With regard to the factors that drive film enjoyment," continues Keith, "the three- to five-films group seems to focus largely on factors external to the film itself, including customer service, the clarity of the image and parking. Aspects related to the film—'educational' and content issues not related to enjoyment—even seem to reflect an external concern: the impact of the film on the children seeing the film with the adult, not the adult's personal enjoyment."

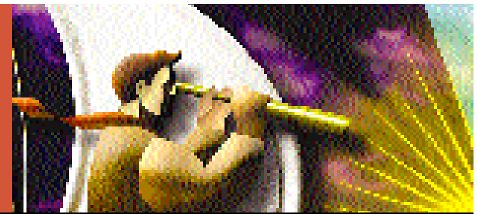
In short, the At-Risk Viewers in this subgroup appear not to care if they themselves enjoy the films as long as their children "get something out of it" from educational and enjoyment perspectives. Of course, this perspective is likely the result of their film enjoyment levels being low in the first place. Because these At-Risk Viewers no longer experience high enjoyment levels when seeing giant screen films, yet believe the films have educational value for children, they may "tolerate" attendance with their families.

Providing an example (from the conventional film industry) that demonstrates a case when personal film enjoyment is not closely tied to experience enjoyment, Keith explains: "I took my daughters to see a recent children's film because I thought they would like it. I didn't have much desire to see it, and I slept for 20 minutes during it, but I didn't care because they had a great time. I could, therefore, be generally positive about the film, though not personally interested in it, because it produced the effect I wanted—happiness for my kids, therefore, happiness for me."

The analysis of At-Risk Viewers who have seen six to nine films found fewer key drivers of film enjoyment, which makes sense, considering that their enjoyment levels are lower than those of At-Risk Viewers who have seen three to five films. Among those that did surface, only one of which negatively influences film enjoyment, are the following:

- Science genre
- Travel genre
- Films give the feeling of being taken somewhere one could not normally go
- Offers good value for the money
- Dizzy/queasy (negative)

As mentioned previously, for At-Risk Viewers, film enjoyment decreases as the number of films seen increases. "With regard to the factors that influence film enjoyment, however, this list provides another indication that At-Risk Viewers in the six- to nine-films group are closer in attitude to Frequent Viewers than they are to the At-Risk Viewers who have seen three to five films," says Keith. "The science and travel genres are important, as is being taken somewhere else by the film, all of which are hallmarks of the giant screen experience. However, 'dizzy/queasy' is a strong negative factor."



TIME-FRAME-TO-RETURN REGRESSION ANALYSIS

The results of the regression analysis for "time frame to return to see another giant screen film" demonstrated that, for At-Risk Viewers overall, convenience factors, such as parking, time waiting in line and distance traveled, appear to be most important in their decisions about how soon to revisit a giant screen theater. Once again, this may be because, in general, the film enjoyment ratings of At-Risk Viewers are low; therefore, enjoyment of the films is less of an impetus to return. Because film enjoyment isn't sufficient or present, these other factors surface when At-Risk Viewers are making decisions about how quickly to return.

At-Risk Viewers are less impacted by film enjoyment . . . than by what they perceive as convenience problems related to returning to a giant screen theater . . .

Therefore, At-Risk Viewers are less impacted by film enjoyment (and the factors related to it, outlined in the preceding section) than by what they perceive as convenience problems related to returning to a giant screen theater—convenience problems that, in their opinions, negatively affect the overall giant screen experience. And, the research did show that At-Risk Viewers travel greater distances to see giant screen films than, for example, Frequent Viewers.

Looking only at the members of the three- to five-films group, the important factors affecting the time frame for returning—all of which negatively affect At-Risk Viewers seeing another giant screen film in the near future—include:

- Theater is too far from home (negative)
- Last time saw a giant screen film (negative)
- Learning as a reason for returning (negative)
- Seeing films that no other theater has (negative)
- Going to Hollywood-style movies (negative)

Says Keith, "They seem to be visiting because of reasons other than the film itself—in terms of their own personal satisfaction, anyway. Of all the factors included in the analysis, 'theater is too far from home' is the overwhelming factor in not returning more quickly to see a giant screen film. Also, it appears that the frequency of seeing movies at regular theaters negatively impacts their desire to see giant screen films; therefore, Hollywood-style movies shown in 35mm theaters could be serving as replacements for giant screen films among these At-Risk Viewers."

Keith continues, "This same dependent variable [time frame for seeing another giant screen film] proved to be a good measure of the attitudes of the six- to nine-films group. Yet, as with the three- to five-films group, all of the factors prove to be negative with regard to time frame for returning." The five strongest among them are:

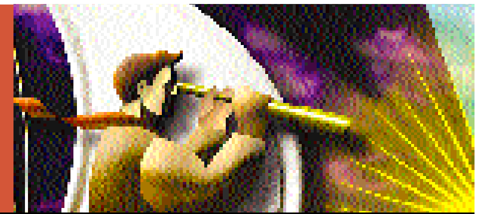
- Theater is too far from home (negative)
- Last time saw a giant screen film (negative)
- Expensive (negative)
- Overall enjoyment of the film (negative)
- Going to Hollywood-style movies (negative)

"Interestingly, while those who have seen six to nine films have enjoyed giant screen films and/or the giant screen experience enough to visit six to nine times—a substantial number—the indication here is that there are more overwhelming reasons for not returning in the near future. Chief among the reasons, as with the three- to five-films group, is the distance to the theater, the 'recency' of seeing other giant screen films and the expense. In this analysis, overall film enjoyment, in fact, does not surface as a factor driving the time frame for returning," concludes Keith.

"It is interesting," says Keith, "to see that the two At-Risk subgroups are somewhat united in terms of the reasons for not coming back soon, especially with regard to the distance required to travel to the theater (which proves to be an issue for the Frequent Viewer group as well, incidentally, but high levels of film and experience enjoyment are more likely to overcome those objections). Also, for both At-Risk subgroups, the ease, convenience and content provided by Hollywood-style films (at regular theaters) seem to represent a barrier to returning."

Generalizing, it seems as if these At-Risk Viewers, especially those who have seen six to nine films, enjoyed giant screen films in the past, so they keep giving the films a chance. However, as they have lower and lower film enjoyment ratings with each visit, other factors have greater power to stall or end their visitation.

AT-RISK VIEWERS



While the previous findings are relevant because they provide GSTA members with information about At-Risk Viewers globally, it is important that theater operators and marketers conduct research to identify At-Risk Viewers in their own markets, in addition to the local factors that will stimulate or deter their visitation.

IDENTIFYING AND PROFILING LOCAL AT-RISK VIEWERS

As mentioned, while the previous findings are relevant because they provide GSTA members with information about At-Risk Viewers globally, it is important that theater operators and marketers conduct research to identify At-Risk Viewers in their own markets, in addition to the local factors that will stimulate or deter their visitation.

This investment in research is critical. “First, it is important to note that only 40 percent of At-Risk Viewers who have seen three to five films appear to make it into the six- to nine-films group; restated, about two-thirds of viewers in the three- to five-films group will never return,” says Keith. Unless, of course, their “likes” are promoted to them and their “dislikes” are addressed, where possible.

This local research can be done on-site via paper surveys or at computer kiosks. Once e-mail addresses are collected from viewers, all additional research can be conducted online.

In the “Marketing to Maximize” article in the spring 2004 issue of *The Big Frame,* the following was suggested: “At the base level, it will be beneficial for theaters to build a viewer database, positioned as either a theater membership program or a viewer loyalty program, by collecting the e-mail addresses of its viewers, along with basic demographics and the number of films seen, so viewers can be contacted about the films that will be most appealing to them, based on age, gender and visitation patterns. For example, theater marketing managers will know to e-mail all Frequent Viewers about every upcoming film and to offer special incentives to entice Trial and At-Risk Viewers back to the theater.”

While identifying At-Risk Viewers is as simple as logging the viewers who have seen two to nine films, determining what will encourage them to return (including what is pushing them against retaining their viewer status) is equally important. Included in GSTA’s Viewer and Nonviewer Research Study report, available for sale through the GSTA office, is the viewer questionnaire used during the summer 2003 research program. This questionnaire was inserted into the report as a service, so that GSTA members can pick and choose questions, already tested and proved to be effective, to conduct their own local programs. Many questions in the questionnaire will elicit the drivers (and lack thereof) of repeat visitation for At-Risk Viewers. Some examples follow:

Question 17.
Why did you choose to come to this particular theater? (SELECT ALL THAT APPLY)

(Rotate questions from viewer to viewer to eliminate bias based on order)

1. Geographic location (close to your home, easy to get to, etc.)
2. Affiliation with other attraction(s), such as museum, aquarium, science center, zoo
3. Type of theater screen (dome or flat)
4. Type of viewing (2D or 3D)
5. Lower ticket price than other theaters
6. Ease of parking
7. Low-cost/free parking
8. Quality of theater
9. Only giant screen theater in area
10. Only theater in area showing this film

When the impetuses for return visits have been determined, promote them if they are existing assets—or try to create them.

11. Wanted to see this particular film
12. Wanted to see any giant screen film
13. Other (PLEASE SPECIFY) ___ (Present last in list)

Question 19.
Now please rate some specific aspects of your most recent visit to (INSERT THEATER NAME). Again, use a 10-point scale, where 10 means you "loved this aspect of the experience," and 1 means you "hated this aspect of the experience."

PLEASE RECORD A NUMBER BETWEEN 1 AND 10 & Don't Know

(Rotate questions from viewer to viewer to eliminate bias based on order)

A. Theater location (the area in which it's located, other nearby attractions, etc.)
B. Parking
C. Ease of ticket purchase, whether in-person, by phone or Internet
D. Concessions (selection, pricing, line, cleanliness)
E. Wait in theater line
F. Theater cleanliness (lobby and auditorium itself)
G. On-screen image quality
H. Theater sound system
I. Overall customer service of theater personnel
J. Distance/travel time from home to theater
K. Comfortable seating
L. Image size
M. Size of theater screen

Question 31.
There are many different reasons people have for wanting to see giant screen films in the future. Based on what you know about giant screen films, which of the following describe why you, personally, want to see giant screen films in the future, if at all?

Please use a 10-point scale, where 10 means "this statement describes your feelings completely," and 1 means "this statement does not describe your feelings at all."

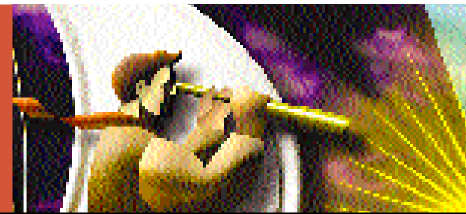
SCRAMBLE

A. Is fun for the whole family
B. Seeing films that no other theater has
C. Haven't seen a giant screen film in a few years
D. Offers good value for the money
E. The length of the film
F. The size of the image
G. The sound
H. Learning
I. Being entertained/having fun
J. Seeing the film alongside an exhibition of the same theme
K. Having an experience you can't get anywhere else
L. The content of the film, including the location, theme, actors, story, etc.
M. Seeing popular regular films presented on the giant screen, such as *Star Wars* or *The Lion King*
N. Content is appropriate for all family members
O. The films give me the feeling of taking me somewhere I could not normally go
P. It was recommended by a friend
Q. The clarity of the image
R. Being part of an audience experience

Question 32.
Regardless of how frequently you see giant screen films, why don't you go to see giant screen films more often? (SELECT ALL THAT APPLY)

(Rotate questions from viewer to viewer to eliminate bias based on order)

1. Theaters are too far from home
2. Too expensive
3. Have had bad experiences
4. Theater not in good condition
5. Poor film selection
6. Not aware of what is currently playing
7. Poor film quality
8. Not interested in films being shown
9. Films are too long
10. Films are too short
11. Children are older now
12. Less time
13. Less money
14. Other (please specify) ___
15. None of the above



PROMOTING FILM AND EXPERIENCE ASSETS

When the impetuses for return visits have been determined, promote them if they are existing assets—or try to create them. For At-Risk Viewers in the three- to five-films group, for example, the GSTA research demonstrated that "they appear to pick educational films for their children instead of entertaining films for themselves, and thus the educational nature of films is both an attraction for families but a repellent for adult viewers themselves," says Keith. To address this, program films that have been proved, through filmmaker, distributor or local theater research, to be enjoyable for viewers of all ages, in addition to having educational content that will make At-Risk Viewers feel good about the experience they are providing for their children.

If, as in the GSTA results, At-Risk Viewers in the six- to nine-films group show preferences for certain giant screen film genres, e-mail them when films of these types are showing, perhaps offering an incentive to visit within a certain time frame.

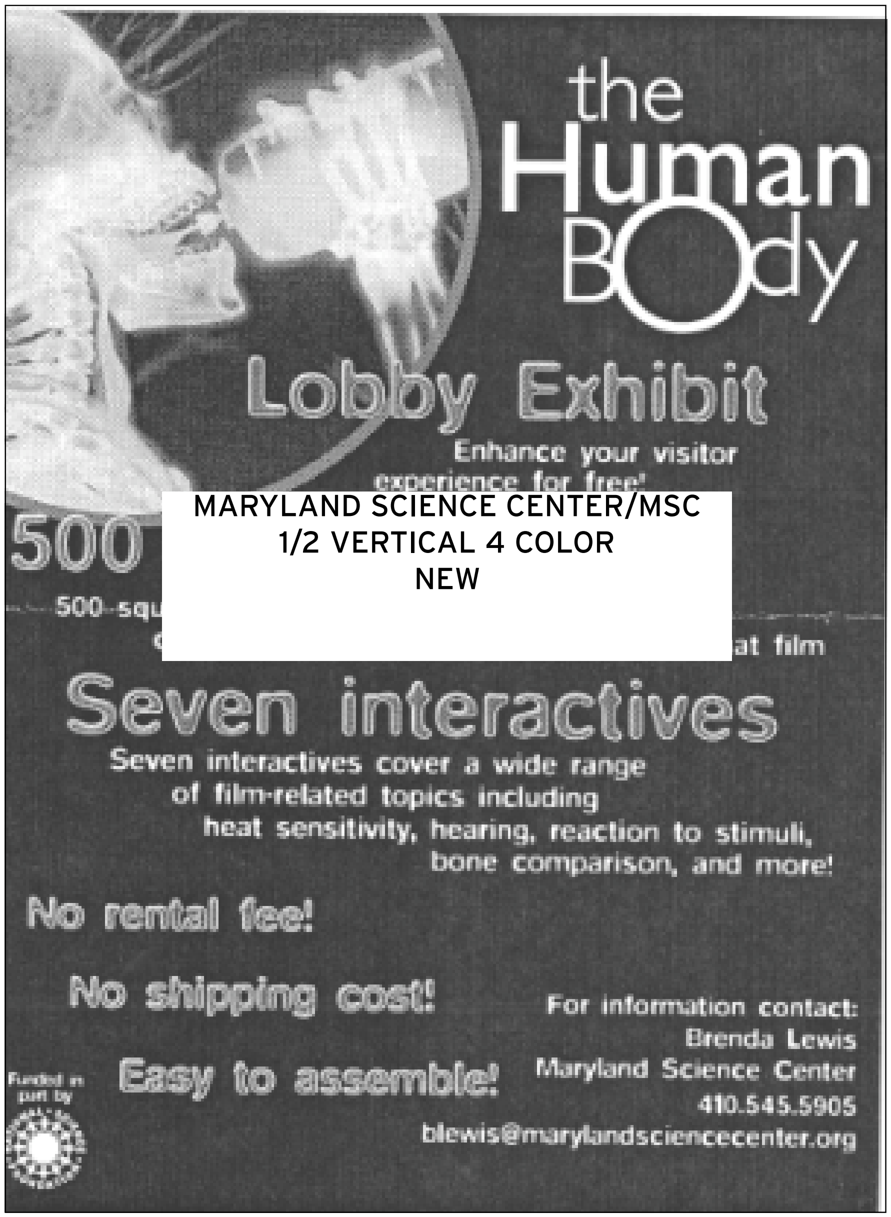
Additionally, because "clarity of the image" is a driver for At-Risk Viewers who have seen three to five films, while "films give the feeling of being taken somewhere one could not normally go" is a driver for those who have seen six to nine films, ensure that your marketing materials remind viewers of these key attributes of the giant screen experiences—attributes that all viewers, whether Trial, At-Risk or Frequent, appreciate.

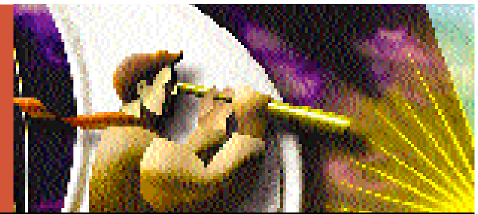
Where convenience factors, such as parking or admission prices that offer good value for the money, are assets, publicize these non-film aspects of the experience.

ADDRESSING DETERRENTS TO RETURN VISITS

For the three- to five-films group of At-Risk Viewers, "came mainly to visit the attraction, not to see the film" has a negative influence on film enjoyment. This issue is featured in depth in the "Marketing to Maximize" article in the spring 2004 issue of *The Big Frame,* an excerpt of which is above; however, in recognition that up-selling film tickets to visitors coming to see an attraction is a common practice, two recommendations for up-selling which may not result in low enjoyment levels are as follows. Have theater box-office staff members ask:

1. "How long will you be at the museum/science center/zoo/aquarium/etc. today, and what did you want to see?" If the family mentions a number of non-theater attractions (and therefore did not plan to see a





giant screen film, which negatively affects enjoyment levels if up-sold theater tickets) and will be spending a limited amount of time at the venue, encourage the family members to see a film on a day when they can devote more time to the experience, when the attendees can select, in advance, a film that they are all interested in seeing. In addition, possibly provide a discounted pass to give them an incentive to make an upcoming theater visit.

2. "What types of films do you all enjoy?" Especially when several types of films are being shown, encourage the family to see one that all members may be more likely to enjoy, or suggest that they come back on a day when a film known to be enjoyable to viewers of all ages will be on screen.

Recognizing that "dizzy/queasy" is a negative factor for both subgroups of At-Risk Viewers, don't promote this potential side effect of the giant screen experience. And, have theater announcements address ways in which viewers can avoid feeling ill during screenings; by being proactive, theaters can eliminate illness altogether for the majority of viewers, a major deterrent to film enjoyment.

The six- to nine-films group cites "expensive" as a negative driver of return visitation. To combat this, "given the higher median age of this group, the targeting of associations for older people would seem to be a good approach—especially where group visits, which limit both the parking and admission expense, can be organized," suggests Keith.

It would be beneficial to recruit all At-Risk Viewers into a theater membership program or viewer loyalty club, as mentioned above. Such programs will enable GSTA theater operators and marketers options to tailor their communications with At-Risk Viewers of both subgroups, promoting the "pros" of the giant screen films, experience and particular venue; addressing the "cons"; providing regular updates about appropriate upcoming films; and offering incentives for return visits.

PROGRAMMING HIGH-QUALITY, ENTERTAINING FILMS

Most critical is to show the best giant screen films available. The importance of film enjoyment is addressed in detail in the winter 2004 *The Big Frame* article, "GSTA's Viewer and Nonviewer Research: Key Results and How to Use Them." And, as found through the above-described regression analyses, if fil m enjoyment is low or nonexistent, At-Risk Viewers look for other reasons not to return to giant screen theaters. Theater operators and marketers can address these other factors, such as customer service, parking, up-selling that can backfire, expense, etc., but these issues pale in comparison to film enjoyment. Frequent Viewers, for example, cite some of the same deterrents to visitation, yet they return again and again because they love the giant screen films they've seen.

Suggestions for effective film-evaluation research questions are listed in the above-mentioned article. More detailed, however, are the film title, film topic and finished film research recommendations presented by TNS at the GSTA 2004 International Conference, which included questionnaire templates, suggested sampling techniques and information about how to perform data analysis. For a copy of these recommended research strategies, e-mail mary_kaye_kennedy@wgbh.org. ■

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The results of the GSTA's 2003 Worldwide Viewer and Nonviewer Research Programs are available in a comprehensive 150-page written report for sale through the GSTA. Also available are video and DVD recordings of the GSTA 2003 International Conference session, "Understanding the Giant Screen Audience: An Analysis of the Results of the GSTA's 2003 Viewer and Nonviewer Research Programs." To order the report, video or DVD, e-mail tori@giantscreentheater.com.