

Memory-Makers of The Future...



A Tale of 4 Generations



Welcome

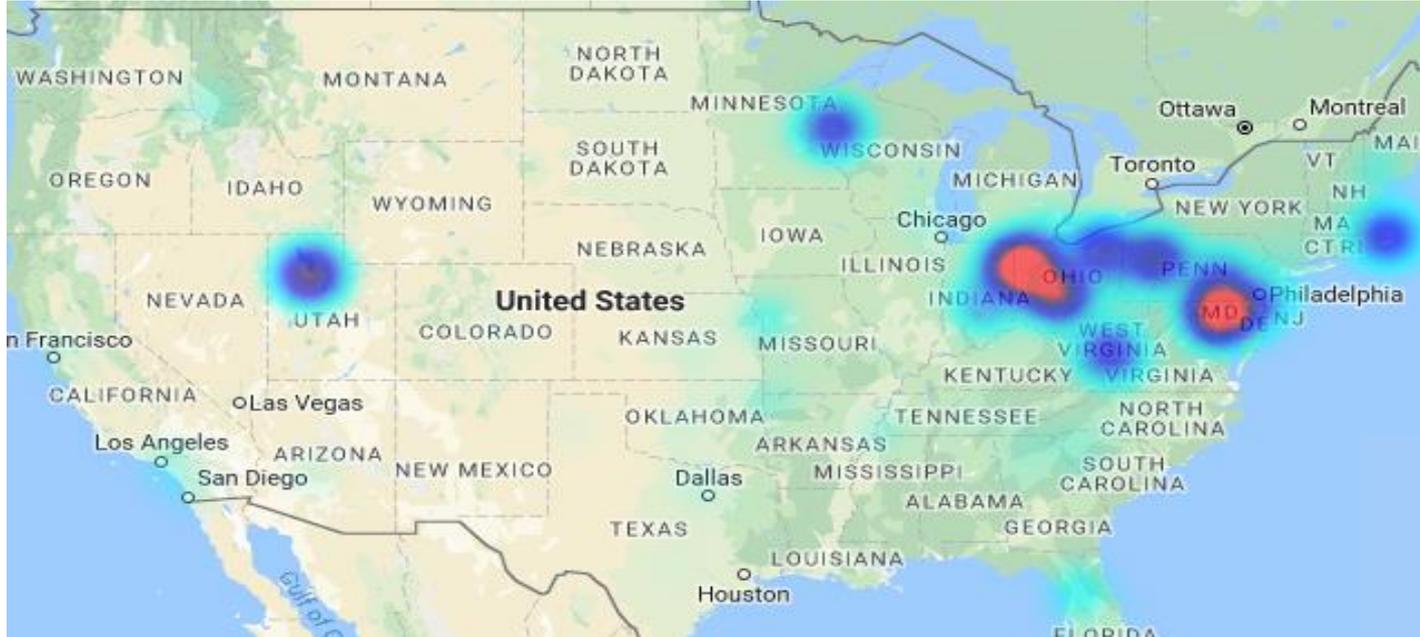
“Welcome to the SurveyMe 2018 Drive-In Movie Theatre survey. This study gives unique insights into the US Drive-In Movie Theatre industry from the perspective of moviegoers. Our vision at SurveyMe is to create a network of engaged moviegoers that anyone in the movie industry can access in order to: improve the guest experience, make better business decisions faster, and sell more at the concession stands. Collected between December and January 2017-18, using real-time feedback from almost 3,800 nationwide moviegoers in the SurveyMe network, we are excited to share with you these results from your typical Drive-In guests. While every Drive-In is different, we hope this study helps you identify ideas that appeal to your 'Memory-Makers of the Future' and helps preserve a much-cherished part of Americana.”

- Lee Evans

CEO, SurveyMe Inc.



Your nationwide "feet on the street"



Comprised of thousands of moviegoers in over 4,000 movie theatres, the network is filled with moviegoers ready to share their thoughts and ideas with you to improve the movie-going experience and help you sell more at the concession stands.

Background

- At SurveyMe, we **listen differently**. After speaking with several SurveyMe Drive-In clients and observing insights they received from guests, we realized that Drive-Ins are still a much-loved part of Americana and worthy of further study.



Background

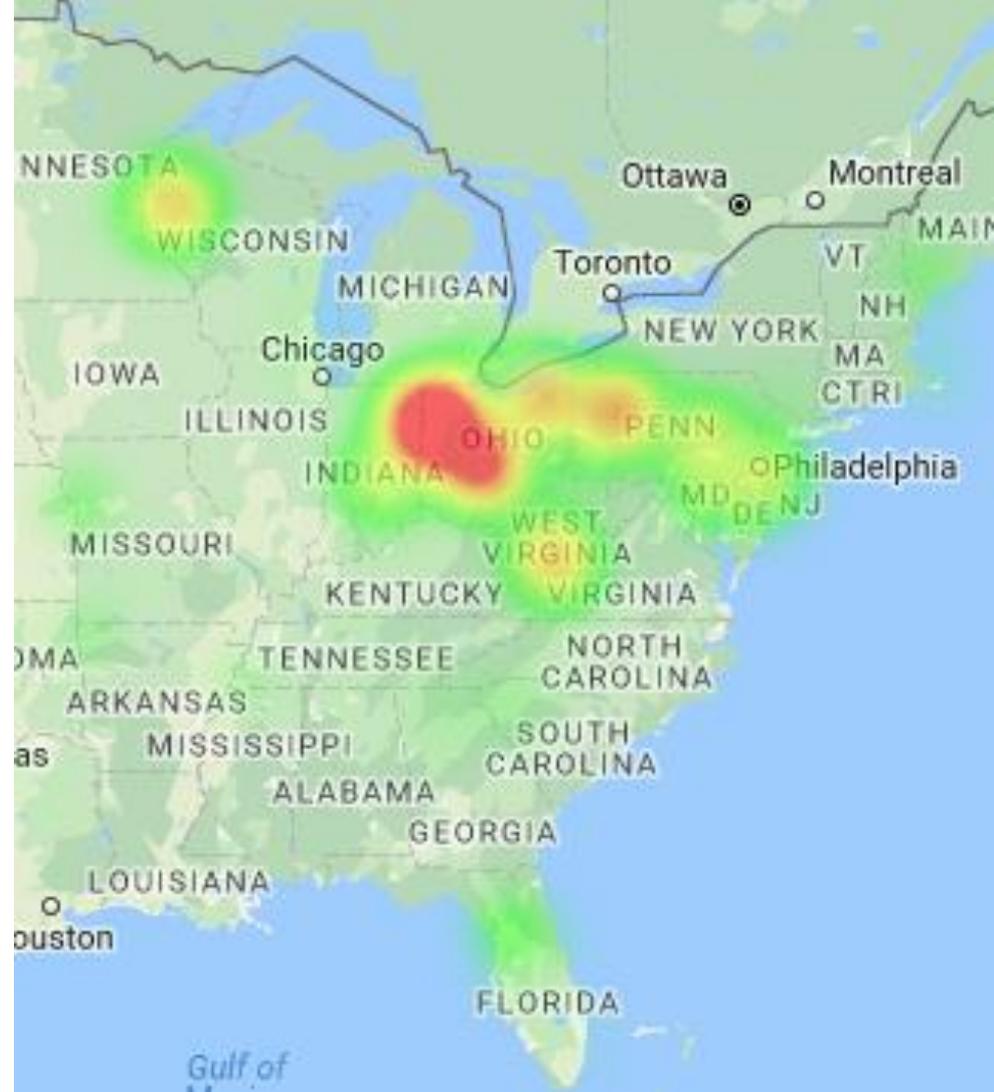
- While the number of Drive-Ins has decreased by over 40% in the last 22 years, moviegoers tell us that Drive-Ins appeal to young people and are often at the heart of a unique family experience -- where new memories for successive generations are being created every day.
- Not just for Baby Boomers seeking a nostalgia fix, the success of Drive-Ins is in the influential hands of much younger Millennial and Rockstar “Memory-Makers of the Future.”



Research Methodology

- 3,784 moviegoers, from 116 US Drive-In Movie Theatres (33% of the total number of US Drive-In locations), were asked 11 questions about their Drive-In experience.
- The app recorded the time, date and geo-location of each response to verify accuracy of the sample.
- Responses were collected between December 2017 and January 2018.
- Results were analyzed by age & gender by SurveyMe experts using the unique SurveyMe SM@RT Insights[®] Interactive Dashboard.

Source: SM@RT Insights[®] Heat Response Map



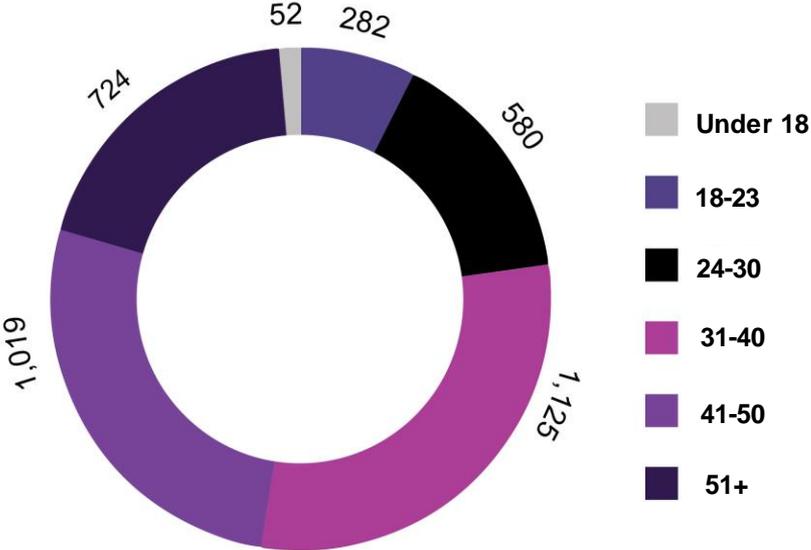
Respondents by Source

- ✓ Responses came from Drive-In moviegoers across **36** States.
- ✓ **96%** of respondents have visited a Drive-In and **84%** of those respondents visited within the last 12 months.
- ✓ Comments from the 4% who hadn't visited a Drive-In showed a clear desire to visit one.
- ✓ **71%** of respondents were Female.
- ✓ **57%** of respondents were between the ages of 31 – 50. They're the demographic most likely to bring 1 or more children of elementary school age or older.
- ✓ **23%** of respondents are defined as Millennials (18 – 30 y.o.), the fastest growing US moviegoer demographic for “hardtop” theatres (reported by the MPAA in 2017).

Thoughts to Keep in Mind

- ✓ We didn't ask the following questions -- the answers to which, we believe, could increase concession sales:
 - ✓ *"How many minutes do you usually arrive before the first movie is scheduled to start?"*
 - ✓ *"How much do you usually spend at the concession stand?"*
 - ✓ *What ONE item that we don't currently sell at the concession would you MOST like us to sell?"*
 - ✓ *"We are thinking of launching a family concession bucket combo deal. If we didn't do this, how disappointed would you be?"*
 - ✓ *"How often do you sneak food items into your local Drive-In? What items do you sneak in?"*
- ✓ We did not study the size of groups or the relative age of occupants in a single car (i.e. (grand)parents + (grand)children or multiple Millennials). This will aid movie selection and special themed event nights.
- ✓ Although we have collected insights from moviegoers in 36 States, we have not yet studied regional variations between Drive-Ins.
- ✓ At the guidance of the UDITOA Board, we did not study responses by ethnic background.

Respondent Demographics – Gender & Age



Male & Female Drive-In Moviegoers are equally passionate

- ✓ **96%** of respondents gave a positive score about recommending a Drive-In to their social network. With such a positive score, this could suggest that Drive-Ins are a well-kept secret that could be better represented to the general population.
- ✓ Any NPS score over 9 is considered excellent. The average Drive-In NPS scores across the nation were **9.3** (Females) and **9.2** (Males), with the average NPS score for all age demographics being **9.3**.
- ✓ Overall, both genders are willing to travel approximately the same distance: Males = **42.5 miles**, and Females = **37.5 miles**. **92%** of respondents also said there is a Drive-In within the distance that they are willing to travel.
- ✓ On average, both Males and Females are equally likely to visit a Drive-In and equally passionate about Drive-Ins.
- ✓ When asked what **ONE** thing their local Drive-In could do to improve their experience, **11%** of Male respondents and **12%** of Females wrote that they are happy and wouldn't change a thing.

Men and Women Love Drive-Ins Almost Equally

Time spent watching pre-show



Male



Female

 = 10 minutes

Distance traveled to theater



How many times visited



Male



Female

Average NPS Score: 9.3



Male



Female

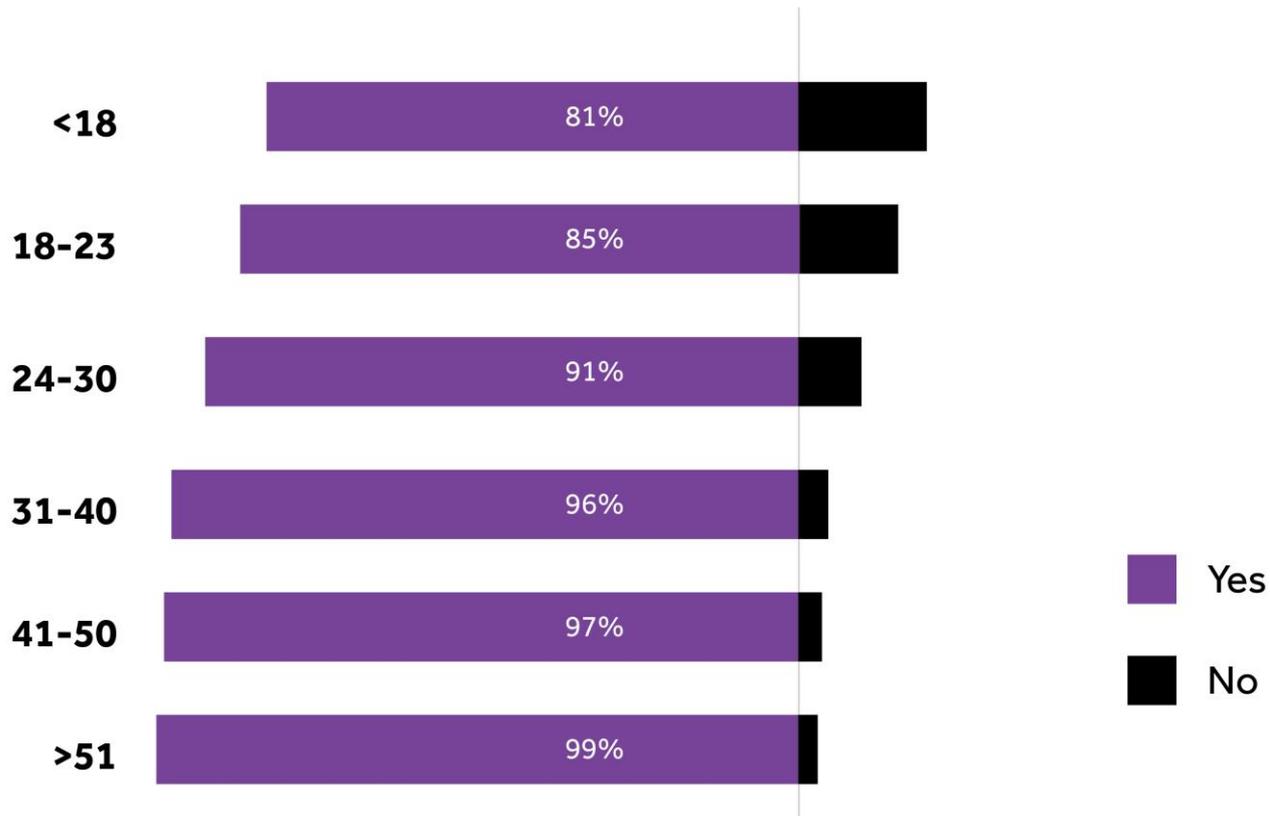
Drive-Ins have more multi-generational appeal than “hardtops”

- ✓ **30%** of respondents were in the 31-40 year-old age group. The total Male & Female respondents in this age group represent **56%** of all respondents. By comparison, this demographic represented **39%** of all respondents in a hardtop SurveyMe US moviegoer study*.
- ✓ The ratio of Female to Male respondents in the 31-50 year-old age group was **2.4 : 1**. This is broadly consistent with a SurveyMe US moviegoer study* where the ratio of Female to Male respondents aged 31-50 was **2.3 : 1**.
- ✓ The 2nd largest demographic was 41-50 year-olds (**27%**).
- ✓ Millennials represent **23%** of respondents (compared to **50%** from a similar SurveyMe study of hardtop theatres*). This suggests the average age of Drive-In moviegoers is older than “hardtop” movie theatres but that Millennials are a significant demographic at Drive-Ins.

QUESTION 1

“Have you ever been to a Drive-In Movie Theatre?”

All age demographics are well represented in this study



Respondents are **experts** about Drive-Ins

- ✓ **96%** of respondents said they have been to a Drive-In Movie Theatre.
- ✓ **99%** of respondents over the age of 51 had been to a Drive-In.
- ✓ **89%** of Millennial respondents (ages 18-30) had been to a Drive-In.
- ✓ **85%** of Under 18s respondents had been to a Drive-In Movie Theatre.
- ✓ There is a **7%** increase in attendance between respondents in the 31-40 age group and the next youngest demographic, the Millennials.

Actionable Insights

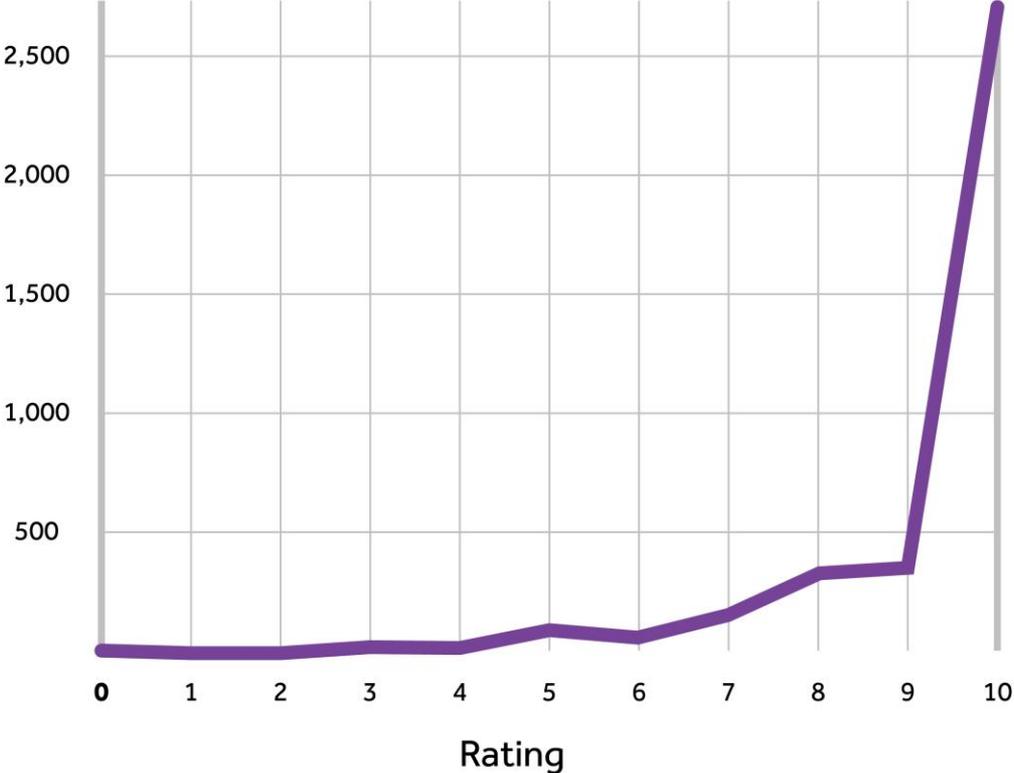
- Almost all Baby Boomers have experienced a Drive-In, making them influential in creating future memory-makers. Consider marketing ideas like, "free entry to anyone over 60 accompanied by a child."
- Moms 31-50 y.o. are THE most influential group. They're also the most likely to decide between their family visiting a hardtop or a Drive-In.
- Focus on marketing a multi-generational family experience to pass on the positive memories associated with this American pastime.



QUESTION 2

“On a scale of 0 to 10, how likely are you to recommend visiting a Drive-In Theatre to a friend or colleague?”

Nationally, the Future of the Drive-In Industry is Healthy



Drive-In Moviegoers are **overwhelmingly passionate** about their experiences

- ✓ The Net Promoter Score (NPS) is a universally known measurement for a customer's passion for a company, brand, or experience. The closer the score is to "10," the more likely those guests will be repeat visitors and advocates for your business. This means they will do unsolicited word-of-mouth marketing for their local Drive-In. The average NPS score for Drive-Ins for all age demographics is **9.3** - unprecedented!
- ✓ All age demographics are "evangelic" about the Drive-Ins. However, the older you are the more likely you are to recommend the Drive-In experience.
- ✓ Overall, guests are **25.2 times** more positive (score = 6 - 10) than negative (score = 0 - 4) about visiting a Drive-In.
- ✓ Irrespective of gender, **72%** of respondents said they are "extremely likely" (score = 10) to recommend the Drive-In experience to a friend or colleague.

Actionable Insights

- Responses suggest that, regardless of age, once someone has experienced a Drive-In, the unique memories created will make them want to return and share the experience with others.
- Keeping existing guests engaged and informed will propel increased repeat visits. But which guest demographic(s) should be focused on? Stay tuned...
- To increase income, Drive-In Movie Theatre owners should focus on incentivizing their existing guest database to bring in new guests. If there is no guest database, owners should quickly invest in creating and maintaining one.

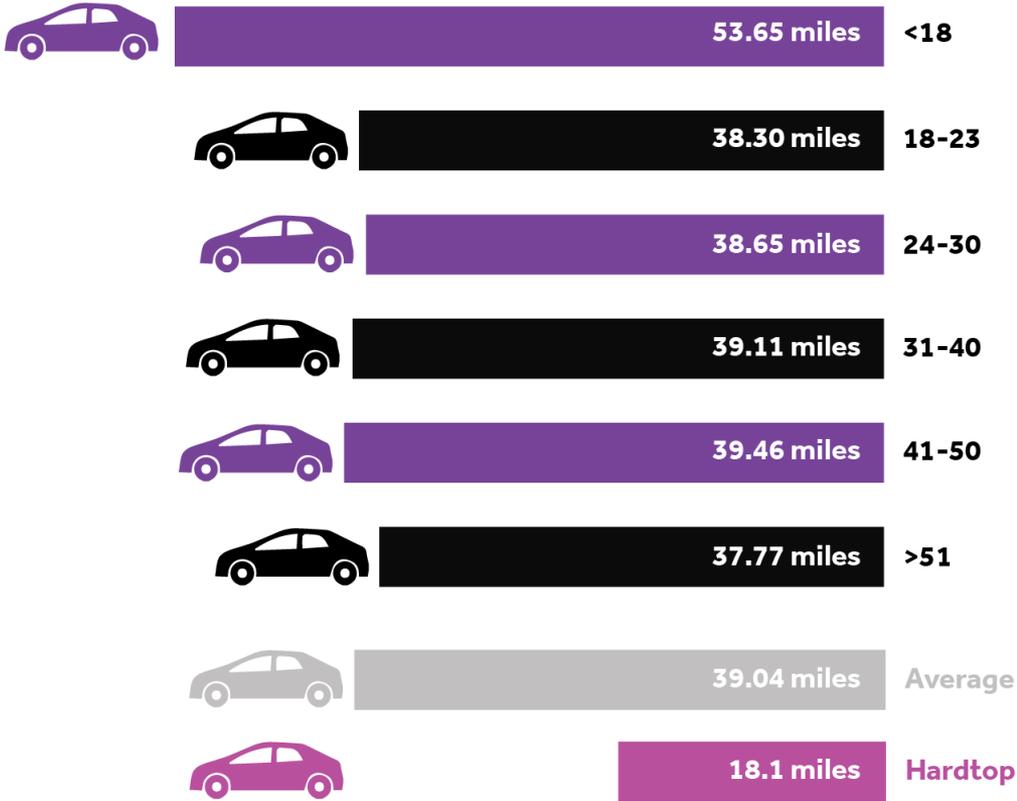


QUESTION 3 & 4

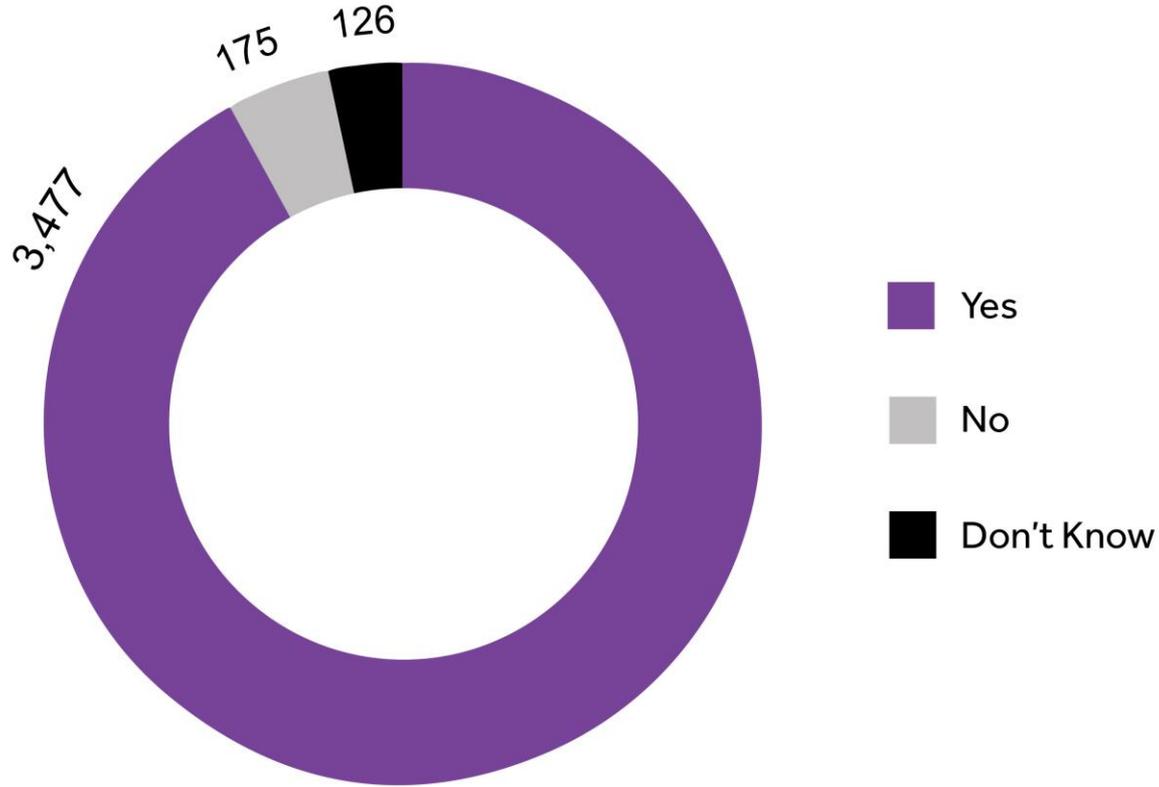
“How far are you willing to drive to visit a Drive-In Movie Theatre?”

“Is there a Drive-In Movie Theatre within the distance you would be willing to travel from your home?”

Moviegoers will **travel farther** for a Drive-In experience



92% of respondents said there is a Drive-In Movie Theatre within the distance they are prepared to travel



Young families travel farthest to the Drive-In

- ✓ At **39.1** miles, the 31-40 y.o. and 41-50 y.o. age groups will travel farthest. They are also the demographics most likely to have pre-teen families.
- ✓ The average, **39.0** miles, is consistent for all age groups – except for Under 18s.
- ✓ The average distance a Drive-In moviegoer will travel is just over twice as far (**2.2** times) as what the average moviegoer will travel to a hardtop (average = **18.1** miles).
- ✓ Under 18s say they would drive **53.7** miles, which is **37%** more than the average. This could be a potentially significant untapped Drive-In demographic. However, their responses could also be due to a few factors:
 - ✓ The sample size for Under 18s represents only 1% of total respondents.
 - ✓ Under 18s are less likely to drive than the other demographics in the study. Thus, their stated distances are more likely to be exaggerated.
 - ✓ Most States don't allow full licenses to Under 18s. This limits the number of teens in a car and bans driving late at night, which limits attending a nocturnal activity.
- ✓ Under 18s are the demographic least likely to have ever visited a Drive-In. They are **15%** less likely to have visited a Drive-In than someone 30 or older.

Actionable Insights

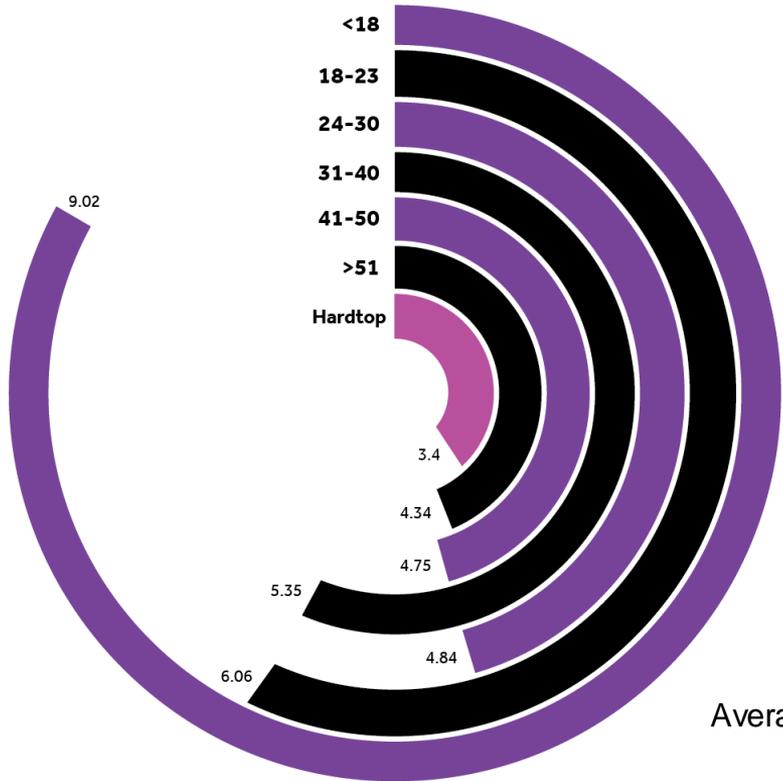
- It would be worthwhile for Drive-In owners to test the Under 18 market further with a larger sample size.
- Where there are urban areas with schools within 30 miles of Drive-Ins, consider using “family tickets” as an experiment in upward-generational marketing: a family experience driven by younger family-members that is likely to have strong parental appeal and approval.
- While marketing should focus on families with adults in the 31-50 age range (within 40 miles of a Drive-In), popularity is likely to be strongest with a 35-45 y.o. mom. These should be the primary demographic and geographic focus factors.



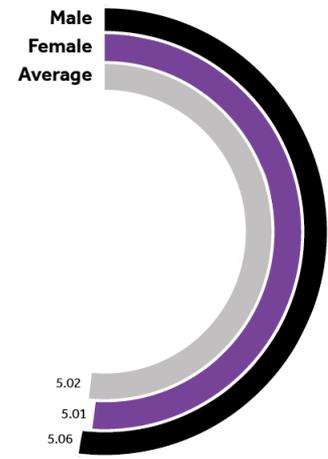
QUESTION 5

“How many times have you been to a Drive-In Theatre in the last year?”

All demographics visit a Drive-In more frequently than a hardtop



Average number of visits



Younger moviegoers are most loyal to Drive-Ins

- ✓ On average, Drive-In moviegoers will make **5** visits per year. This is **50%** more frequent than how often the average hardtop visitor goes to the movies (average = **3.4** times, according to the MPAA). Since most Drive-Ins are open for approximately 6 months a year, this suggests strong loyalty amongst existing guests.
- ✓ The 18-23 age group says they visit the Drive-In **6** times per year, which equates to a monthly visit during a typical season.
- ✓ Overall, Millennial responses (visits **5.2** times per year - **862** responses) suggest that Drive-Ins are relatively more popular with younger people than those over 51 (visits **4.3** times p.y. - **724** responses).
- ✓ Relatively speaking, Millennials are willing to travel more than twice as far for a Drive-In experience (**38.5** miles average) than they will to visit a hardtop theatre (**16.3** miles average - **1,185** responses*). Allied with a **9.1** NPS score, this suggests Drive-Ins are very popular amongst Millennials.
- ✓ Compared to the overall US demographics, Millennial Drive-In moviegoers are willing to travel relatively more miles than they will to a hardtop (where the population average is **18.1** miles - **4,240** responses).

Actionable Insights

- It's unclear whether there is a growing or declining trend in Millennials visiting the Drive-Ins, but, what is undeniable is that Drive-Ins are NOT solely relegated to Baby Boomers seeking a nostalgia fix.
- Relatively speaking, Millennials are committed to the Drive-In experience. There are likely several non-technology social factors behind this. While some will be generic (e.g. dating), some will be unique to specific locations. Today's Millennials are tomorrow's parental memory-makers. So, discovering which social factors will help create positive memories will help future-proof a Drive-In.



QUESTION 6

*“What is the **ONE** thing that makes you visit a Drive-In Movie Theatre?”*

Primary Reasons to Visit a Drive-In.

Family-time experience



Nostalgia



Multiple movies



Personal space



Atmosphere



“Family Experience” is #1 factor

- ✓ **1 in every 4** Drive-In moviegoers state “family experience” is the single biggest factor that makes people visit a Drive-In Movie Theatre.
- ✓ “Family experience” is the most important factor to Females (**33%** of all Female comments) and the 2nd biggest factor for Males (**26%**). Still, the ratio of Female : Male comments (**3.4 : 1**) suggests that the “family experience” provided by a Drive-In is far more important to Females than Males.
- ✓ The “family experience” factor ranks 1st amongst all Female age groups except among 18-23 y.o., where the desire for “personal space” outranks it (**28%** versus **21%** of comments).
- ✓ “Family experience” peaks highest with Females in the 31-40 age group (**40%** of all their comments feature “family experience”).
- ✓ **59%** of respondents gave TWO OR MORE reasons. This demonstrates widespread passion for the Drive-In experience amongst moviegoers and suggests that the Drive-In experience evokes multiple, complex emotions.

“Nostalgia” and “atmosphere” matter to Males

- ✓ **1 in every 5** Drive-In moviegoers state “nostalgia” as the number one factor.
- ✓ “Nostalgia” is the 2nd most important factor overall, the most popular factor for Males (**28%**) and the 2nd most common (**24%**) for Females across almost all age demographics.
- ✓ Only the 31-40 Male demographic ranks “nostalgia” as #2. In this age demographic, “family experience” ranks as the most important factor.
- ✓ For Males younger than 31, “atmosphere” (the thrill of being outside / under stars) ranks as the **2nd** most important pull of a Drive-In.

Millennials value “safe social space” at Drive-Ins

- ✓ Females under 24 most value (28%) the “personal space” aspect that a Drive-In provides. According to the comments, this essentially means a “safe social space.”
- ✓ 1 in 5 Male Drive-In moviegoers under 24 say “personal space” is THE biggest factor that makes them visit a Drive-In Movie Theatre.
- ✓ Over the age of 24, Females value “family experience” more than “personal space.” Age 24 marks a pivotal shift in focus for what most appeals to Female Memory-Makers of the future. The age for Males is slightly older at 30.
- ✓ The appeal of “multiple-feature movies” is strongest amongst the youngest demographics. It decreases in relative importance the older the moviegoer becomes.
- ✓ “Multiple-feature movies” are less than half as important to a Female over 51 (8% of all comments) than they are to a Female under the age of 30 (19%). The same observation is true for Males over 51 (10% of all comments) versus a Male under 30 (17%).

Actionable Insights

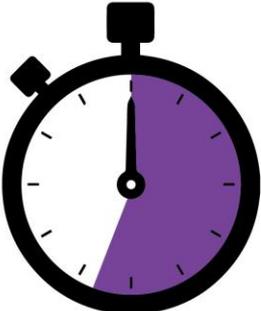
- There are two clear demographics that represent the “memory-makers of the future.” These demographics have defined and separate reasons for attending a Drive-In (with “nostalgia” being the overlapping factor). Many Drive-Ins show PG films followed by a PG-13 / R movie – but this may alienate 50% of the attending demographic. Consider R or PG only showings and study which nights are most appropriate.
- Owners should test and promote the key appealing factors and facilities driving the concept of a “safe social space” for Millennials. Social media (Twitter, Instagram, Snapchat, etc.) promotions are likely to be most effective.
- Looking through the eyes of their guests, owners need to test and promote specific features. These might include the benefits of the “family experience” to moms and dads aged 35-45 and “bring family or friends” offers.



QUESTION 7

“How many minutes do you think the pre-show advertising should last at a Drive-In Movie Theatre?”

Pre-show adverts per Age Demographic



<18



18-23



24-30



31-40



41-50



>51

 = 10 minutes

Younger guests are **more receptive** to preshow ads

- ✓ On average, respondents under 51 are prepared to watch **11 minutes 31 seconds** of pre-show adverts compared to respondents over 51 who are prepared to watch **9 minutes 31 seconds** – a full **2 minutes** less.
- ✓ Basically, the older you are, the less pre-show advertising you want to see.
- ✓ The biggest drop in tolerance is between the age demographics of 18-23 and 24-30 where tolerance drops by **66 seconds**.
- ✓ Tolerance drops a further **58 seconds** from 24-30 y.o. to 31-40 y.o.
- ✓ As the desire for pre-show adverts goes down, the emphasis on “family experience” goes up. There were, however, several instances where “family experience” and “nostalgia” were associated with watching “old adverts.”
- ✓ Overall, Males are prepared to watch **52 seconds** more pre-show advertising than Females.

Actionable Insights

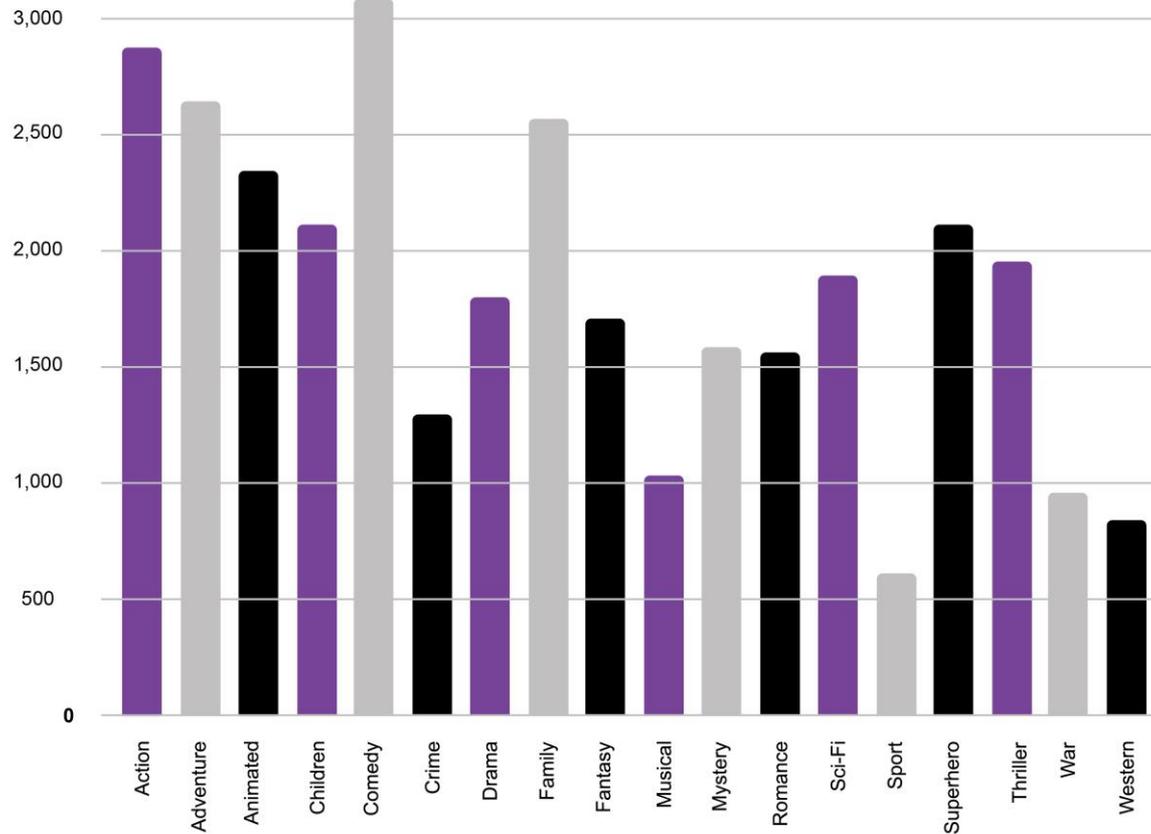
- Consider varying the length of preshow advertising according to the film classification / rating.
- Length of advertising time needs more detailed study specific to each location.
- Consider playing old adverts to add to the “nostalgia” appeal as it will likely be popular with both the Millennial generation and Family Memory-Makers.



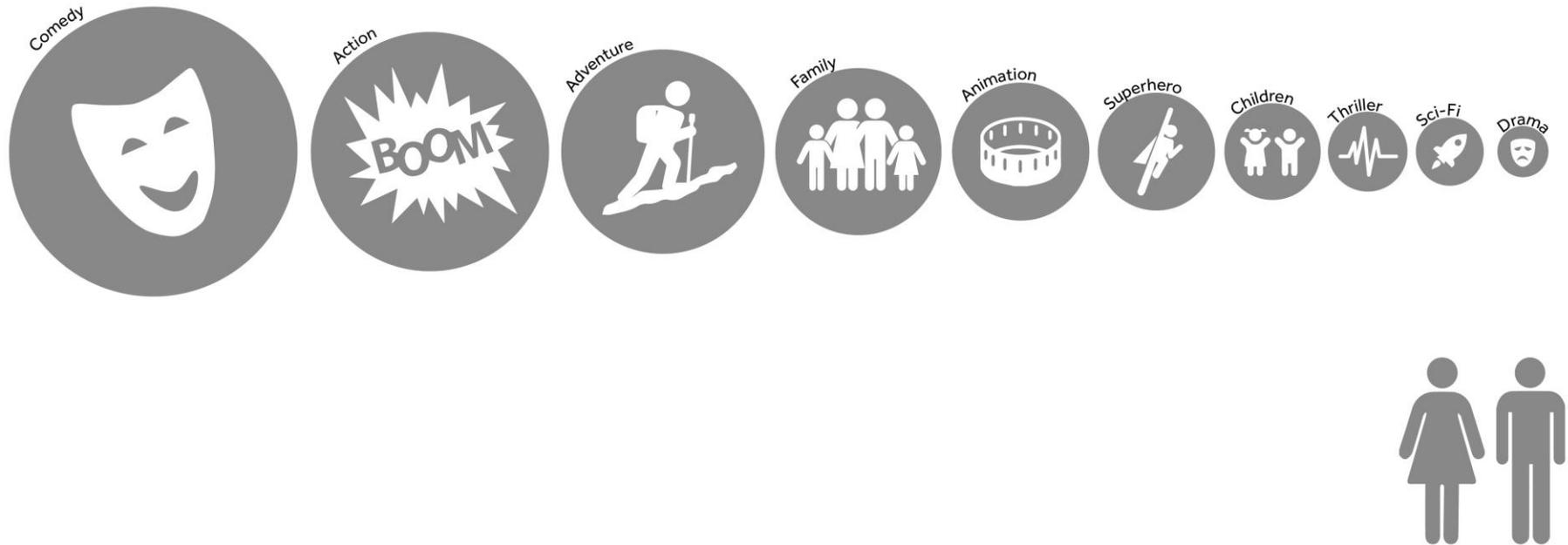
QUESTION 8

“What type of movies would you like to see at your local Drive-In Movie Theatre?”

There is **Widespread Appeal** for Most Movie Genres



TOP 10 Genres – Both Genders

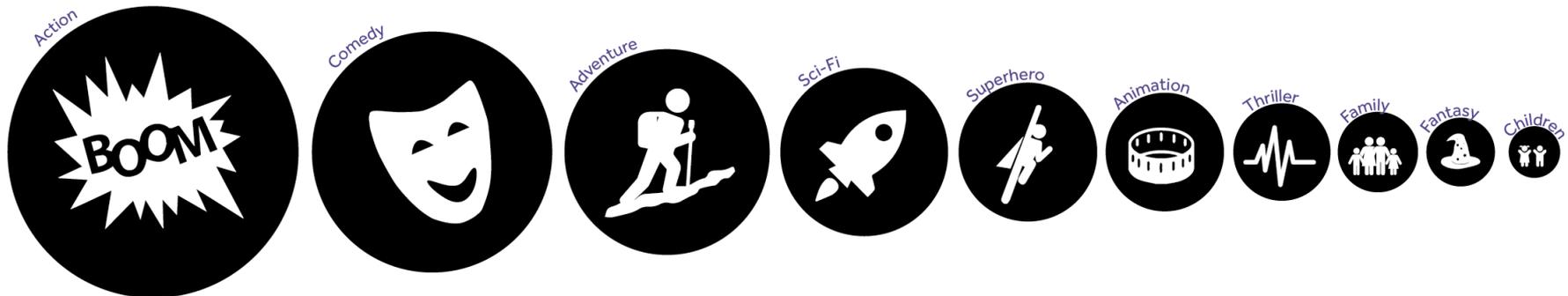


TOP 10 Genres

Female



Male



Men & Women cannot agree on what to watch!

- ✓ Overall, Comedy (81%), Action (76%), Adventure (70%), Family (68%) and Animation (62%), are the Top 5 genres. These score **over 50%** approval rate with BOTH sexes.
 - ✓ Action movies are most popular with Men (86%)
 - ✓ Adventure
 - ✓ Animation
 - ✓ Comedies are most popular with Women (83%)
 - ✓ Family
- ✓ No surprise – different age demographics can't agree on which type of movie to watch! These genres score **over 50%** approval rating with all ages:
 - ✓ Action movies are most popular with under 18s (75%) and 18-23 (80%) age demographics.
 - ✓ Adventure movies are most popular with 24-30 (75%) and 41-50 (72%) age demographics.
 - ✓ Animation movies are most popular with 31-40 (67%) age demographic.
 - ✓ Comedy movies are most popular with 18-23 (85%) age demographic.
 - ✓ Family movies are most popular with 31-40 (73%) age demographic.
- ✓ The over 51 age demographic has the least strongest views. They prefer comedies (79%) the most.

What makes the Perfect Drive-In movie?

- ✓ The TWO most influential groups for the future success of Drive-In Movie Theatres are:
 - ✓ **Rockstar Memory-Makers** – primarily ages 31-40 (although Females between 35-45 is probably more accurate)
 - ✓ **Millennial Memory-Makers** – both genders, ages 18-23
- ✓ Both groups have a high preference (relative to all other age demographics) for the same genres: **Comedy, Animation, Action, Adventure, and Family** (for 31-40 y.o. only).
- ✓ So the perfect Drive-In movie (i.e., the one with widest appeal), should contain all (or most) of these five factors in that order.



Actionable Insights

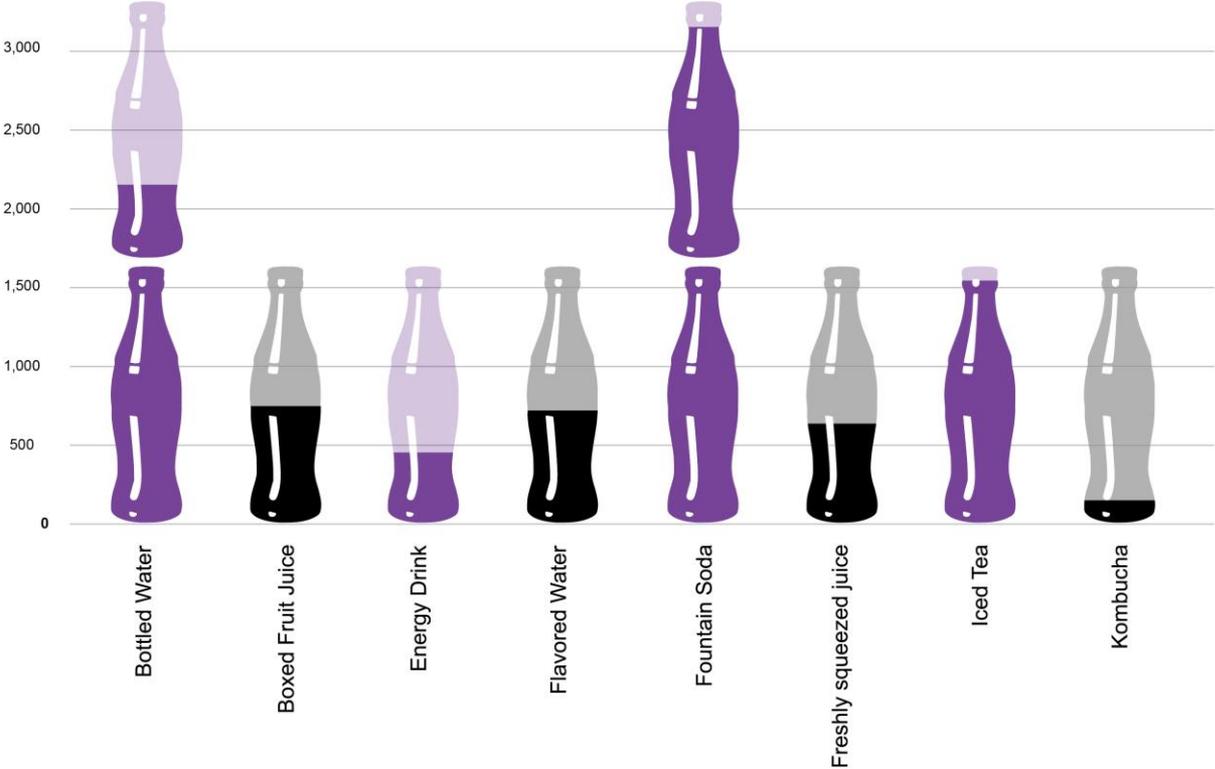
- While the usual major movie-studio releases will dominate first-run, first-feature showings, for second-feature films, applying the “five star factors” discussed will help dictate the greatest spread of appeal to guests by age & gender.



QUESTION 9

“Which of the following drinks would you want to order from a Drive-In Movie Theatre concession stand?”

Fountain Soda is clearly the most popular beverage



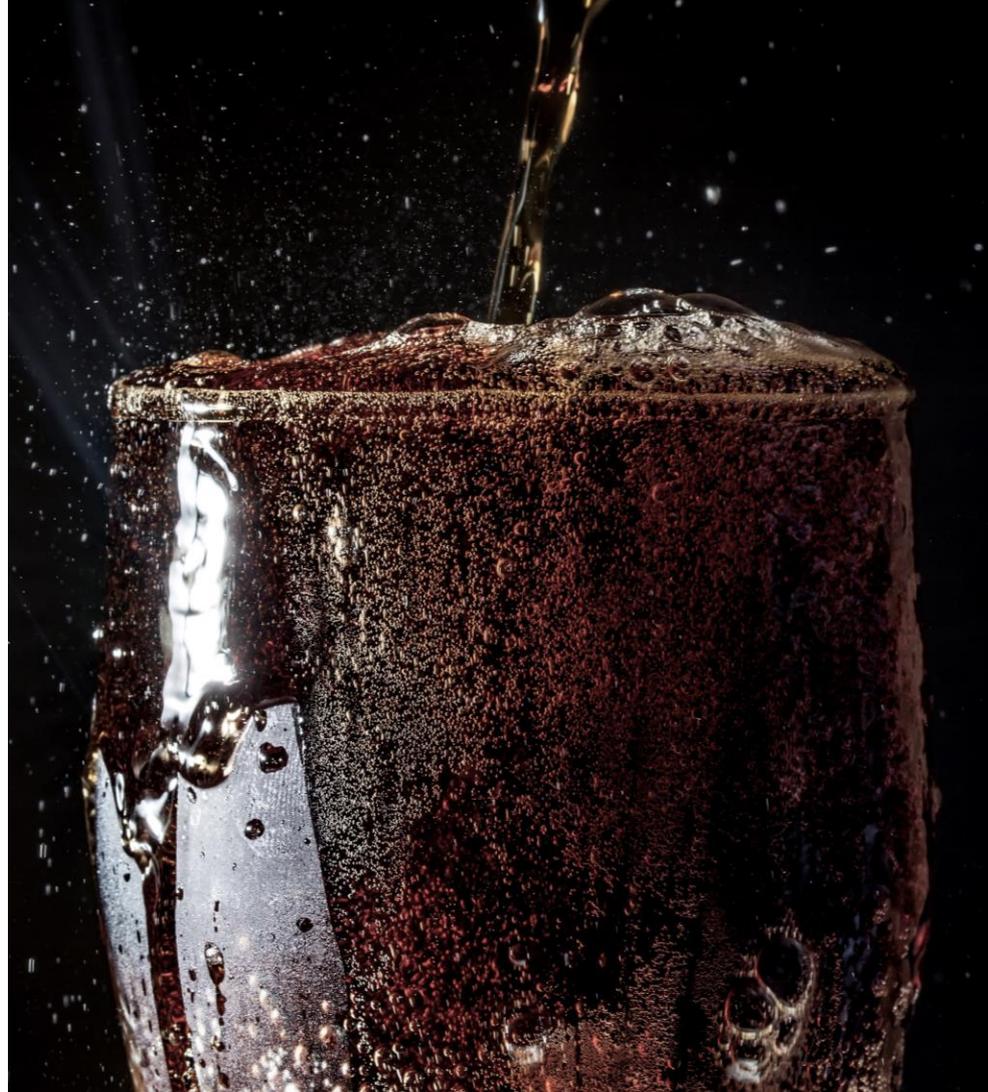
Drive-In Moviegoers love fountain soda

- ✓ Fountain Soda is the most popular beverage across genders (84%) and age demographics (82%-87%).
- ✓ Relative to other beverage choices, Men & Women are equally very likely to buy fountain soda (8.4 out of every 10 guests).
- ✓ Bottled water (53%-62%) is the second most popular choice.
- ✓ Iced tea (41%) is the only beverage consistently purchased across all age demographics relative to the sample size. It is most popular with the 31-40 age group (60%), after fountain soda.
- ✓ The older the demographic, the less likely you are to buy fresh juice. The 18-23 age group is the most likely (27%) and the over 51 demographic is the least likely (12%).
- ✓ The younger you are, the more likely you are to drink Kombucha (1 in every 10 guests aged under 18 compared with 1 in every 50 guests over 50) and energy drinks (1 in every 4 guests between 18-23 years old).

Actionable Insights

- Ideas that increase the delivery of fountain soda to guests at the concession stand, or directly to their vehicles, are worth exploring.
- For every fountain soda sold, it is likely that 90% of guests will also buy popcorn*. Any ideas that combine and increase the speed of these two items is likely to generate the highest increase in per cap at the concession stand.
- Directly engaging guests to improve their experience, and incentivizing them with a small popcorn, has created an average per cap increase of approximately \$4 in hardtops.

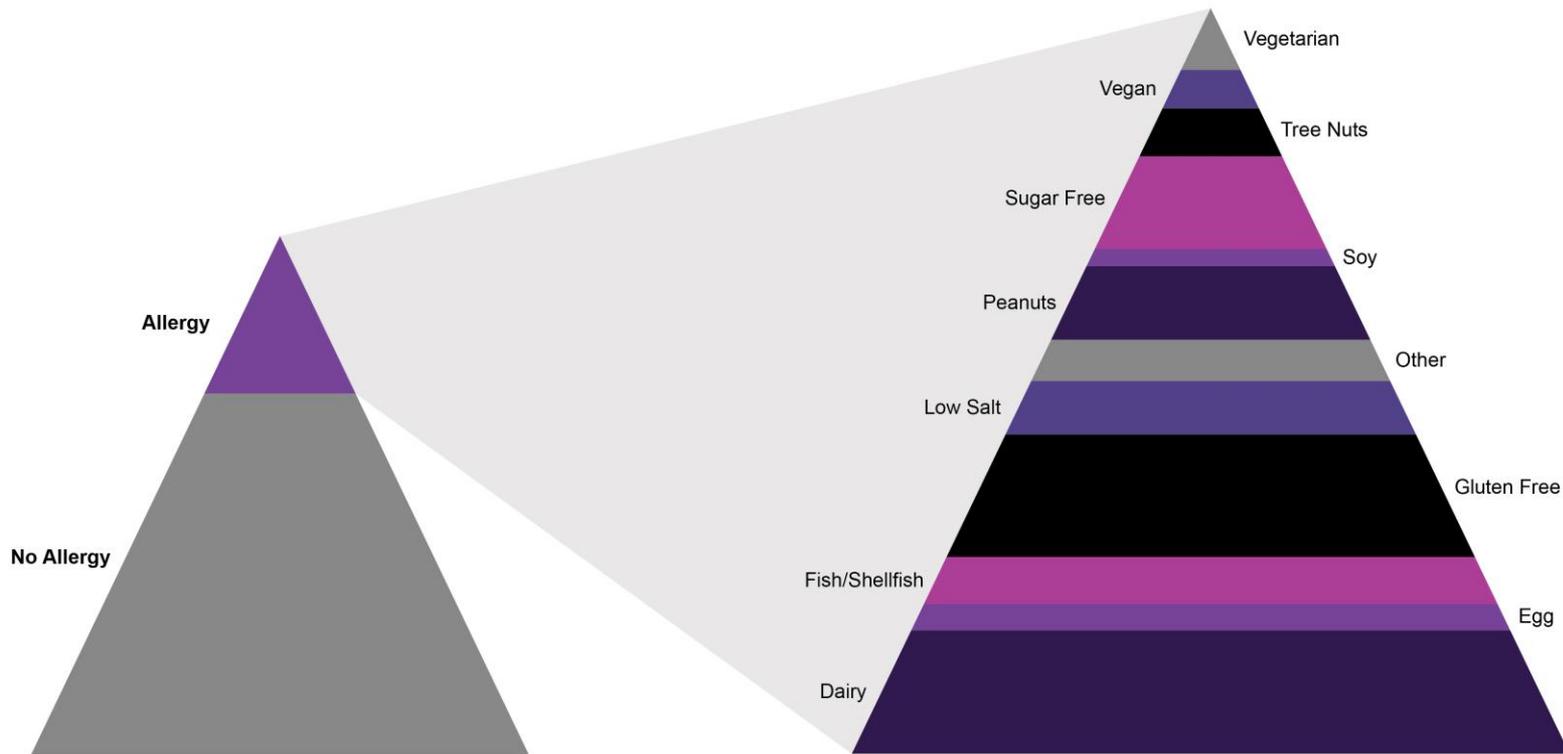
❖ "Rockstars, Rebels & Reliables" SurveyMe 2017 Annual Concession Study
(data was collected using the same methods and sources for both studies)



QUESTION 10

“Do any of your usual theatre going group have any of the following dietary or allergy restrictions?”

Food Allergies Affect 3 in Every 10 Drive-In Moviegoers



Food Allergies are a small, complex issue

- ✓ Nearly **7** in every **10** Drive-In guests state that **none of their usual group suffers from allergies** that would affect their choice at the concession stands.
- ✓ One-third (**33%**) of Females claim to have one or more allergies.
- ✓ Just over one-quarter (**26%**) of Males claim to have one or more allergies.
- ✓ **31%** of guests across all age demographics have more than 1 allergy, making it a complex issue.
- ✓ Dairy (**9%**) and gluten (**9%**) are the most frequently reported allergies. Dairy allergies are more prevalent in young people (**12%** of 18-23 year olds vs. **7%** of over 51s) while the frequency of gluten allergies is the same across all moviegoers.
- ✓ No other allergy affects more than **7%** of guests.
- ✓ The demand for sugar-free products increases the older the moviegoers get (**10%** for over 51s vs. **2%** for 18-23 year olds).
- ✓ The youngest age demographics are most likely to want vegetarian / vegan products (**4%** / **7%** = 18-23 y.o. vs. **2%** / **3%** = over 51s).

Actionable Insights

- These insights suggest that food allergies affect **3 in every 10** guests and appear more prevalent in younger people. Further location-specific studies may reveal more details and solutions.
- There is a low-cost opportunity for Drive-Ins to issue “Bring Your Own” season passes to food allergy sufferers. Whatever the outcome, engaging with sufferers (approx. 30% of guests) will be viewed as a positive thing.



QUESTION 11

*“What is **ONE** thing we could do to improve your experience at a Drive-In Theatre?”*

Six big themes, many low cost ideas.



Concession



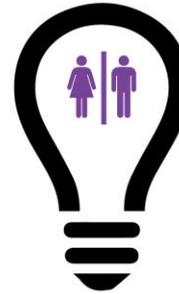
100% Happy



Ambiance



Parking



Restroom



Ticketing



Facilities

Guests are engaged, innovative, and clean!

- ✓ Over **70%** of respondents made a positive suggestion while **14%** didn't have anything to change.
- ✓ There were over **2,500** ideas suggested with many centered around 6 recurring themes: **PARKING, CONCESSION, TICKETING, RESTROOMS, FACILITIES, AMBIANCE.**
- ✓ By absolute volume, the most number of ideas (**640**) came from the 31-40 age demographic.
- ✓ With **359** specific comments, "Clean restrooms / bathrooms" was the most frequently mentioned stand-alone factor.
- ✓ The 6 most popular themes (by % of total ideas submitted) for guest experience improvements:
 - ✓ CONCESSION (**21%**)
 - ✓ PARKING (**12%**)
 - ✓ AMBIANCE (**15%**)
 - ✓ TICKETING (**11%**)
 - ✓ RESTROOMS (**14%**)
 - ✓ FACILITIES (**9%**)

Common Concession improvement ideas:

- ✓ There were over **526** comments about improving concessions. Besides the usual complaints about price and variety, the top three areas included specific ideas for:
- ✓ **Delivery-to-vehicle**. This featured in **22%** (just over **1 in every 5**) of comments.
- ✓ **Discount** suggestions (**13%**). This area had the largest variety for a single subject including (but not limited to): concession season tickets, membership discounts, refillable / reusable popcorn buckets or soda cups, coupon booklets, reward schemes, BOGOs, food allergy passes, food permits, discount days, combo deal, family buckets, gift certificates, “bounce-back” offers, BYO popcorn, BYO BBQ.
- ✓ The relative number of discount ideas increased as the age demographic got older (18-23 = **12%** vs. over 51 = **16%**)
- ✓ **Line management** ideas (besides delivery-to-vehicle) comprised **6%** of ideas, including: phone pre-ordering, express lines (e.g. for popcorn & soda only), ordering by phone from a car during a movie, pre-arrival orders, service buzzers, and mobile apps.
- ✓ One of the most clever suggestions was: *“A specialty food (chili dogs, potato skins, Cane's chicken)... something unique that would make me say ‘I've gotta go there, even if just for the....’.”*

Common **Ambiance** improvement ideas:

- ✓ There were **386** ideas about improving the ambiance of the Drive-In.
- ✓ **1 in every 5** comments mentioned ways to improve the **sound**. Many wanted the window hanging speakers brought back (or available to rent) for those seeking a “nostalgic” experience. There were also several suggestions to create an app (like iHeartRadio) for Drive-Ins or to build bigger sound walls.
- ✓ **1 in every 7** comments suggested the creation of no smoking areas or a complete smoking ban.
- ✓ **10%** of suggestions were about bug / mosquito control. Low-tech ideas included: spraying the area frequently, selling repellent at the concession stand, offering free repellent in partnership with the marketing team of a major brand, and renting nets or screens.

Common Parking/Facility improvement ideas:

- ✓ There were over **312** suggestions related to Parking and **215** related to Facilities.
- ✓ The most common comment, and the only contentious subject, was about the parking arrangement of vehicles by their size. Over half (**54%**) of all comments wanted the parking of large vehicles at the back of the viewing area to be strictly enforced.
- ✓ Less recurring themes included: reserved space / seat bookings, family areas, young person's areas, and improved disability access. Free movement between screens at movie intervals was occasionally mentioned.
- ✓ The most frequently requested (**39%**) facility suggestions were to install, upgrade or improve children's play areas.
- ✓ Less recurring themes included: overnight family camping, local scout overnight camps, chair rentals, designated picnic areas, provision of garbage cans, and bigger screens.

Common Ticketing improvement ideas:

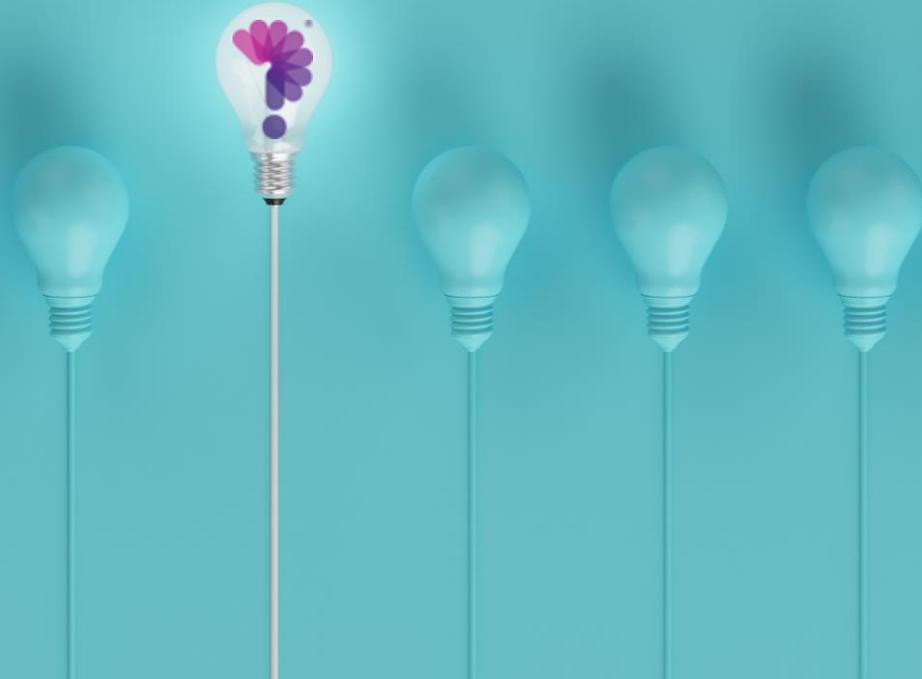
- ✓ There were over **286** ideas related to Ticketing. Apart from the omnipresent “cheaper entry prices” comments, the main themes were:
- ✓ “Discount pricing packages” (**14%**). This theme included the second largest variety of ideas, including (but not limited to): date night 2-for-1 offers, over 55 discounts, season tickets, screen transfer passes, repeat guest punch cards, membership scheme, single movie discount, youth discount pricing, multi-passes, advance purchase discount, coupon booklets, rewards schemes, “rain-return” passes, discount days, combo night deals, gift certificates, “bounce-back” offers, and “staycation” co-promotions with local hotels.
- ✓ The most mentioned issue was pricing by the carload versus by individuals. Respondents were **100%** in favor of pricing by carload -- whether as a general policy, for family nights, for special event nights, or on certain quieter nights of the week.
- ✓ Accepting credit cards was the third most frequent request at **6%** of all ticketing comments and almost exclusively asked by the 31-50 age demographics.
- ✓ Less recurring ticketing themes included: advance website bookings, reserved spacing, earlier communication on upcoming screenings, better advertising, themed and retro events, and premium area pricing.

"Family experience" guests are most engaged:

- ✓ With **1 in every 4** Drive-In moviegoers stating, "family experience" is the single biggest factor that makes people visit a Drive-In Movie Theatre, we considered the improvement ideas from just those Drive-In guests.
- ✓ **90%** of Males and **84%** of Females in this group submitted at least one idea to improve the guest experience. **13%** of all their comments were to improve the restroom / bathrooms. This is the most frequent comment made and no other single issue came as close as the importance of clean restrooms.
- ✓ **24%** of Male and **23%** of Female "family experience" guests submitted 2 or more ideas.
- ✓ **11%** of Male and **14%** of Female "family experience" Drive-In guests stated they are happy with their current experience and nothing needs changing.
- ✓ Of all "family experience" demographics, both Females and Males in the 31-40 group are most engaged. **56%** of all Females and **76%** of all Males from this age demographic submitted more than one idea.
- ✓ **90%** of all ideas from the Female "family experience" Drive-In guests submitting more than one idea, came from the combined 31-50 age group.

Actionable Insights

- Providing unique local options is a great way to engage guests. Perhaps host “family recipe contests” and feature the winning dishes at your Drive-In.
- There were hundreds of ideas to solve most of the common challenges Drive-In guests face. SurveyMe is happy to make these available, on request, to Drive-In owners and discuss how best to create a program that optimizes guest satisfaction.



MEMORY-MAKERS

*“Which **TWO** demographics are the most significant for the future of Drive-In Movie Theatres?”*

What Female "Rockstar Memory-Makers" DO:

- ✓ A **Drive-In Rockstar Memory-Maker** is a Female between 35-45 years old and are the strongest advocates for the future of Drive-Ins. A Drive-In Rockstar is slightly older than a hardtop Rockstar (31-40) and they visit the Drive-In primarily for a "family experience" and "nostalgia."
- ✓ The most number of ideas (**57%**) came from the 31-40 & 41-50 Female demographics. **7%** of Females between 31-40 also contributed more than one idea to improve their guest experience. This is the highest number compared to other age demographics. With an NPS score of **9.3** and **12%** saying they wouldn't change anything, this suggests **Rockstar Memory Makers** are the strongest advocates for the present and future of Drive-Ins.
- ✓ The main reason a **Rockstar Memory-Maker** goes to the Drive-In is for a "family experience." By coming and passing on traditions and experiences to future generations, **Drive-In Rockstars are THE "Memory-Makers of the Future."**
- ✓ Rockstars are the **decision-makers impacting the highest Drive-In attendance** and influencing future generations to visit Drive-Ins.
- ✓ Other study data suggests that **Rockstar Memory-Makers** are the group **most likely to visit concession stands**. At hardtops*, Rockstars spend approximately **\$15.08** at the concession stand and they are the demographic **most** motivated by rewards, discounts, coupons, or special offers.

What Rockstar Memory-Makers WANT:

- ✓ Rockstar Memory-Makers want “more” (word used in **22%** of their comments). They want value and flexibility within the “family experience” including:
 - ✓ The feeling of community but the choice of privacy within their car.
 - ✓ Family picnic time or sitting under the stars outside their vehicle but safe, secure bedtime for their children within.
 - ✓ Date Night without paying for a babysitter.
 - ✓ Inexpensive family entertainment admission and family combos to treat their children at the concession stand.
 - ✓ Double movie features including the latest films interspersed with adverts from their childhood.
 - ✓ Children’s fun play areas -- that are bug and mosquito-free.
- ✓ Of the **82** suggestions regarding children’s play areas, **56%** came from Rockstar Memory-Makers.
- ✓ They provided **37%** of all comments to ban smoking or about smoke-free areas.
- ✓ While alcohol is increasingly sold in movie theatres, only **0.5%** of Rockstar Memory-Makers suggested it should be sold at Drive-Ins.
- ✓ They want clean restrooms – **82%** of all restroom comments came from these Females, a ratio of **4.5 : 1** for every comment made by Males.

Actionable Insights For Rockstar Memory-Makers

- If Drive-In owners engage Rockstar Memory-Makers with just ONE single question, it should be, “*what can we do to improve our restrooms?*” You want to secure the future of your Drive-In? Invest in restroom cleanliness. It is the biggest single, stand-alone factor that will increase the likelihood of future generations returning to the Drive-In.
- Rockstar Memory-Makers are likely to have detailed views and be more willing than other demographics to share them. Before making any significant decision about the Drive-In, this group's opinion, above all others, should be sought. It is worth incentivizing this group solely for the authority their insight brings.



What Millennial Memory-Makers DO:

- ✓ **41%** of all Millennial respondents made positive suggestions about how to improve their experience. While slightly below the Rockstar Memory-Maker engagement levels, Millennial Memory-Makers are generally more engaged than Under 18s, Over 51s and those in the specific 45-50 demographic.
- ✓ Millennials like to make social plans ahead of time! **58%** purchase movie tickets online or via an app ahead of the movie showing. This means there is more time to get them excited about the experience.
- ✓ **60%** of Millennials prefer to go to the movies after 6pm and **57%** prefer to go at the weekend. On average, they spend **27%** more at the concession stand per visit than other age groups – but they are very particular.
- ✓ Millennials value convenience and personalized choices – from ticket purchasing, to buying food at the concessions, to moving between screens at the Drive-In.
- ✓ Because Drive-Ins show double-movie features, Millennials are able to spend more than double the amount of social time together at night, in a safe and secure environment, than at a hardtop.

What Millennial Memory-Makers **WANT:**

- ✓ Millennials crave the “experience economy.” Studies* of Millennials show **70%** have anxiety about missing out on offline experiences that they’ve seen friends share online during / after the event.
- ✓ **95%** of Millennials admit to sneaking food items into hardtop theatres*. **10%** of Millennials openly say they want to (pay to) bring their own food into the Drive-In. This is slightly less than the overall average. However, **14%** of Millennials want some form of car delivery at the Drive-In.
- ✓ Just **over 1 in every 4 (26%)** of suggestions from Millennials requested more / better food choices. Most of these related to traditional fast-food or fairground style food.
- ✓ In an earlier study*, **1 in every 2** new concession products suggested by all Millennials can be categorized as “fast-food.” Pizza is the most popular choice (**26%**). The highest demand for pizza is from 18-23 y.o. Females (**17%**) followed by 41-50 y.o. Females (**12%**). This is potentially because pizza can be shared socially, making it ideal for groups of friends and families.

❖ https://www.huffingtonpost.com/mybanktracker/what-fear-of-missing-out_b_6109498.html

❖ "Rockstars, Rebels & Reliables" SurveyMe 2017 Annual Concession Study

Actionable Insights For Millennial Memory-Makers

- Consider creating a “safe social space” specifically where Millennials can gather. Viewing the movies is not necessarily the only attraction a Drive-In has for them!
- Ask Millennial moviegoers what facilities or (themed) events they’d appreciate. Provide free WiFi so offline experiences can be turned into online ones. The solutions may be simpler and cheaper than you think!
- Today's Millennials will be the family Drive-In Memory-Makers within ten years – so find out what experiences matter to them, and then make it happen.



Our Final Thoughts



“We hope that this research has provided some memories and ideas for the future!”

The SurveyMe Team

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