Understanding Our Audiences

Audience Research commissioned by Film Hub Wales

Creative Cultural Associates

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Film Hub Wales
Canolfan Ffilm Cymru

CHAPTER

BFI Film Audience Network
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CONTENTS

Front page image: BFI Sci-Fi, Doctor Who Monsters at Aberystwyth Arts Centre with BAFTA Cymru & BBC Cymru Wales.

Image: Chapter, Cardiff

1. Introduction

This research - *Understanding Our Audiences* - has been commissioned by Film Hub Wales on behalf of its members as a foundation for their future audience and business development work. It was carried out during 2014/15 by Creative Cultural Associates – a team of creative industries consultants specialising in film.

Film Hub Wales (FHW) is one of nine 'hubs' UK wide funded by British Film Institute (BFI) to form the Film Audience Network (FAN), which aims to strengthen the UK's cultural film exhibition sector, delivering extensive programming, audience development and sector led research and training in their region. Each hub aims to increase access to British independent and non-mainstream film for audiences, regardless of where they live.

FHW's mission is to support the Wales wide network of film exhibitors (Hub members) in their delivery of an ambitious programme that builds and sustain connections to education, archive, talent and special events that are informed by audience needs and celebrates Wales' cultural heritage. Chapter has been appointed the Film Hub Lead Organisation (FHLO) for Wales.

FHW members may include independent cinemas, film festivals, film societies, community cinemas, film educators and other organisations working with film across Wales. FHW's objectives are to:

- Develop an innovative, adventurous and significant cultural film programme Wales wide,
- To celebrate Welsh language, heritage and culture, offering a platform for Welsh talent,

- Increase access to British independent and world cinema through events, screenings and education opportunities,
- Support a network of partnerships and share best practice, leading to a more confident, vibrant and collaborative film sector,
- Share programming ideas, access, debate and information exchange via training and mentoring,
- To research, understand and develop diverse, life-long audiences for film across the UK,
- Develop innovative approaches to digital technology to promote connectivity,
- To identity and support venues in rural and underserved areas where audiences are hard to reach.

In order to help Film Hub Wales members with their work in attracting larger and broader audiences the consultants' brief was first to establish who the current audience is, what is currently known about it, what marketing, data capture and audience development activity is currently taking place and how effective this is. We also wanted to find out who is not coming to the venues and if possible, why not.

For the first time, here is a study of Welsh cinema audiences within the independent sector – their demographic make-up, information seeking and buying behaviour, likes and dislikes and motivations. We sought their views on the cinemas and how they might better deliver their services. The consultants talked directly to over a hundred people including mainly audience members but also venue staff, volunteers and supporters. The electronic survey garnered more than 1,400 responses and more than 150 paper exit surveys were completed by audience members and analysed by the consultants.

What has emerged, is a picture of a group of unique and vibrant cinemas all facing very challenging operating conditions but without exception, loved and cherished by their local communities as places where they can meet and make friends and see some of the best films the world has to offer.

During the course of the study which took place over eight months, both the fragility and agility of the sector were manifest with several changes in key personnel, local authority funding cuts, capital development plans, competitive threats and one closure (and re-opening). Despite the turbulence going on around them, many of the venues are growing their audiences, taking risks with their programme and serving the needs of their local communities, most with significant input from a band of dedicated volunteers.

Whilst the current environment presents challenges, it also presents opportunities. The advent of digital projection has changed the economics of film exhibition such that smaller towns and communities can now sustain local cinemas and film clubs. For Wales with its largely rural character, this is particularly exciting. There is clearly an audience appetite for the theatrical experience of film, particularly when it is local and combined with other cultural offerings such as spaces to meet, eat and learn.

We hope the findings of this research and some of the conclusions and recommendations will serve to build capacity within the sector, enhance knowledge and learning about Welsh audiences for independent film and lead to initiatives which will drive more people through the doors of some of the most loved cinema venues in the country because ultimately only audiences can sustain, nourish and grow the sector in the longer term.

Image: Clwyd Theatr Cymru, Mold

2. Executive Summary

This research was commissioned in the summer of 2014 by Film Hub Wales in order to gain a better understanding of audiences for film at member venues as the foundation for developing and building these audiences.

Methodology

Following the desk research phase, the field research was conducted in two key phases:

- Venue Visits - including focus groups held with audiences and staff members. A total of 16 venues were visited which were all core members of Film Hub Wales at the time that the research brief was finalised.
- Audience Survey - an online survey made available via Survey Monkey publicised by the venues to their audience data bases alongside print-based exit surveys distributed at selected screenings.

The study focused upon these core member venues to concentrate available research resources. The emphasis on core member venues also gave the study a relatively cohesive sample consisting of full-time venues with year-round cinema programmes.

Key Findings

Desk Research

UK cinema admissions have plateaued at around 150 million. Separate figures for Wales are not routinely produced although the ‘Wales and West’ (which includes Bristol and Avon) accounts for some 7% of total UK admissions.

The largest audience segment for all film-going by age is the 15-24 age group which accounts for around 35% of all admissions and has grown significantly in the last decade and has a slightly higher proportion of male to female audiences. This is in contrast to the audience for non-mainstream and independent film which tends to be older and more female.

The Arts Council Wales' *2013 Omnibus Survey* shows that 46.1% of the population of Wales attended a cinema at least once a year, the most common form of arts attendance.

Focus Groups
Audience focus groups ranged in size from three to ten and comprised mainly older people and women – reflecting the venues' audiences to a large extent. The main findings include:

- Reviews and recommendations were generally the most influential factors in deciding which films people went to see, although favourite cast members or directors were also very significant.
- Drama and independent films are the most popular genre choices with classic/archive and arthouse films coming in second and third. Many participants were appreciative of the wide range of film choice available at the venues, particularly if these films couldn't be seen anywhere else.
- Special events – speakers, theme nights, music etc – were popular with audiences. Event cinema/live streaming form an increasingly important part of the programme and finances of many venues.
- The quality of technical presentation - with sound featuring very strongly - was generally held to be the most important feature of a cinema, closely followed by comfortable seating.
- Audiences at many venues demonstrate strong venue loyalty: social and emotional aspects of the venue are very important in audience choice. Time and again, friendliness of staff/volunteers was mentioned as key to people's enjoyment of their visit – part of a strong appreciation of venues being valued community assets, deeply rooted in the local cultural and social scene. Volunteers often acted as 'ambassadors' for the cinema programme and the venue as a whole.

Staff views
Almost all venues (but not Chapter to the same extent) perceived that they had two key audience groups:

- Over 50s – silver screeners who tended to attend matinee performances and those in employment who attend in the evening.
- Family audiences – who attend principally during school holidays and/or at weekends to watch family films.

Students/younger people tended to make up a very small proportion of audiences.

Distributor relationships were noted as being particularly problematic for some part-time and single screen venues, even in the context of digital distribution.

Quantitative research

The online survey went live at the beginning of October 2014 and was open for responses until the beginning of March 2015. In total 1,404 responses were received of which over 90% were fully completed or mostly completed. The key findings were as follows:

- Around 64% of the survey sample was female, compared to 51% for the wider population.
- Almost 78% of the sample was age 45 or over and more than a quarter of the sample was 65 or older.
- Just over 80% of the sample said they had no children under 18 – reflecting the sample bias towards the older age groups.
- Around 30% never go to cinemas other than their regular venue. Around 15% go to other arts centres or art house cinemas, with around a third going to the multiplexes, split fairly evenly between brands. Given the geographical spread of the venues and the difficulties of travel in some of the remoter parts of Wales, there is perhaps a surprising amount of cross-venue attendance between Film Hub Wales venues.
- Over 10% of respondents described their film knowledge as professional (2.5%) or specialist (8.5%). Most of the rest (45%) rated their film knowledge as either casual or general in roughly equal proportions.
- 70% of respondents picked drama as one of their favourite genres, with the next most popular being independent film at 50% and then comedy at 46%. Classic and archive film, foreign language, art house and thrillers all polled in the high thirties with foreign language a surprisingly high 39%, despite many venues finding this a 'hard sell'. War films, westerns and horror were the least popular genres.
- Cinema-going is clearly a very social habit for Film Hub Wales member audiences. Less than one per cent never attend with other people and only five per cent rarely. More than 94% usually or always attend with others.
- Around 50% of those who had children or grand-children under 18 take them to the cinema occasionally and 20% do so often.
- 42% reported that they go to the cinema once a month and 31% go at least once every three months. In the UK, the average annual admissions per person are about 2.6. This makes around three quarters of the sample high frequency cinema attenders (four times per year or more). 12% go at least once a week – an extraordinarily high rate of attendance.
- About 80% of respondents watch films quite regularly (at least once a fortnight or more) on any platform.
- Levels of arts engagement appear to be high, relative to the general population. 85% of respondents had been to the theatre in the last three years, with museums and heritage/historic sites the next most popular choices with 77% apiece.
- A large percentage of the sample had been to a live broadcast at the cinema, with theatre productions being by far the most popular at nearly 70%. Opera polled less than half this at 30%. Only 16% said they would not be interested in watching a live broadcast at the cinema. What is unclear is what impact this is having on the cinemas' existing audience. It may be that the cinema film audience is being cannibalised – everyone has a limited cash and time budget for entertainment and they may be spending it on live events rather than film.
- In terms of getting programme information, the top four answers, polling between 50% and 60% were cinema website, cinema email, film trailer seen at the cinema and cinema brochure – in other words the communications generated by the venue itself are far more important than other methods of communication although newspaper advertising is still significant at 45%.

- Film reviews are by far the most important factor in motivating film choice. Good press reviews were cited by 33% and online reviews by 7%.
- High quality picture and sound was rated the most important feature of a cinema, closely followed by comfortable seats and a wide choice of films. The least important features were a membership scheme and bar/café although based on a weighted average there was no feature which ranked below 6/10 i.e. all these features are relatively important.
- More than three quarters of respondents said they usually travel by car with walking being the next most popular answer at 16%. Only five per cent use public transport.
- Over a quarter of the sample said they travel between three and five miles to get to the cinema and a surprisingly high 19% travel more than ten miles to get to their chosen cinema. 17% travel less than a mile.

Non attenders
This research reveals that certain demographic groups are under-represented among network audiences, relative to the population as a whole and cinema audiences for the UK overall. These are: younger age groups (particularly the 15 – 45 age groups), social groups C2DE and to some extent audiences from diverse ethnic backgrounds in certain areas as well as people with disabilities.

The most notable missing element in the audience for Film Hub Wales member venues is the age groups which form the greater proportion of the audience for cinema as a whole. This phenomenon appears not to be the general experience of art house and independent cinemas.

Although the research methodology did not allow for a detailed analysis of the social make-up of the audience, there is some evidence based on income distribution. The online survey indicated that over 65% of the audience lived in households with incomes higher than the UK average. This is a strong indicator that ABC1 social groups are over-represented among Network audiences. There is some evidence that this social biasing of audiences is common to the non-mainstream sector (and indeed the arts as a whole) and is not a factor unique to Wales.

Image: Galeri, Caernarfon

Summary of Conclusions and Recommendations

Recommendation 1

At venues where there are significant numbers of students among the local population, particularly for campus-based venues, a number of experimental initiatives targeted specifically at this group to try and attract their on-going attendance should be delivered and good practice/successes shared among the Network.

Recommendation 2

At UK Network level a debate/negotiation with the distribution sector to explore how distributors and smaller exhibitors can meet each other's needs for maximum returns from theatrical exhibition.

Recommendation 3

Further study to explore the economic, social and cultural role played by volunteers in all types of Film Hub Wales member venues would provide a clearer picture of that role. Film Hub Wales and the UK Film Audience Network should explore strategies to provide volunteer support and development at venue, regional and national level. In Wales, the potential for partnership with agencies such as Volunteering Wales and the Wales Council for Voluntary Action might be explored.

Recommendation 4

It would be useful to quantify exactly what impact live event cinema is having on film audiences at a venue level. Research could explore audience views on event cinema (comparing this with views on feature film), economic impact, attendance rates and any impact on film-going in terms of time and finances.

Recommendation 5

One of the key findings in terms of non-attenders was low levels of attendance by young people. There are opportunities for Film Hub Wales and the UK FAN to explore strategies that build long term connections with young audiences. Very few of the venues the researchers talked to during this study appear to be fully capitalising on the resources available through *Into Film.* It became clear during conversations with venues that although the level of awareness of the *Into Film Festival* (previously the National Youth Film Festival and formerly National Schools Film Week) was high, there was some confusion around what else *Into Film* offers, even though a number of the venues do participate with the festival.

Into Film may need to re-communicate its brand and benefits more effectively to the Hub venues. It is also possible that *Into Film* may need to consider how it can more actively encourage its school-based clubs to make contact with and collaborate with local cinemas. Scope may exist for focused research into barriers to school/cinema collaborations leading to one or more pilot school/cinema collaboration projects in Wales.

Recommendation 6

A number of experimental initiatives to set up venue-based after schools film clubs should be established at suitable venues, particularly those with secondary schools within walking distance.

Recommendation 7

There may still be a role for the UK Network to invest in national marketing campaigns for neglected titles and special seasons which will appeal to a discerning audience, particularly perhaps, foreign language titles.

Image: Taliesin Arts Centre, Swansea

Recommendation 8
During the course of the study public sector cuts to local authorities have continued and many funded venues expect their local authority and/or other funding to contract significantly or disappear altogether over the next one to three years in a climate of continuing austerity. Most venues are considering how they can balance their books in the light of continuing cuts and feel under pressure to show more mainstream/commercial titles. While this approach may be a viable way forward for some, for others their 'niche' appeal is what keeps audiences coming to the venue.

Further research should be commissioned to explore successful commercial models of independent cinema which would identify the capital infrastructure requirements and operating models where costs can be stripped down or shared/centralised.

In addition, Film Hub Wales should continue to work with its Wales and UK partners to explore mechanisms for support and investment in programme innovation at a venue level.

Recommendation 9
Although it is often not possible to make changes to the physical accessibility of the buildings in which these venues operate, age-related sensory impairments can be much more easily catered to with digital technology. Venues should be supported to offer more 'accessible' screenings for hard of hearing, D/deaf or visually impaired audiences through subtitling or audio-description.

Recommendation 10
If venues want to develop new audience segments, there is a case to be made for a more formal and detailed understanding of venue audiences and their needs and motivations through on-going audience research, feedback and evaluation. Film Hub Wales should continue to explore the value of audience development plans and evaluation with members.

Recommendation 11
Traditional marketing in the form of print brochures are still important for audiences. For venues where brochures have to go to print too far in advance for a fully finalised programme to be published, it is vital they communicate programme updates and forthcoming titles as efficiently and effectively as possible.

Image: Pontardawe Arts Centre, Pontardawe

3. Methodology

CCA’s research methodology for this project comprised four key elements as follows:

- Desk research
- Venue visits and focus groups held at each venue
- An online survey
- Printed exit surveys

3.1 Desk Research

Prior to conducting any venue-specific work, the consultants looked at a broad range of published and unpublished research into cinema-going and the cinema industry in the UK as a whole and, where available, in Wales in particular. Where possible, UK data was broken down for Wales and the rest of the UK. A considerable amount of published data already exists about cinema audiences in the UK and an analysis of key metrics is produced in this document including data on admissions, audience demographics, screens, trends, audience tastes and venue preferences.

Contextual data on the Welsh population and economy was also gathered at this stage as well as any publicly available data on the member venues. The consultants also undertook venue desk research including online data and a telephone interview with the key contact for each venue which sought to establish existing levels of audience awareness, existing audience data, the history of the venue, staffing structure and key challenges.

3.2 Venue Visits and Focus Groups

Between September 2014 and January 2015 the two consultants made personal visits to 16 venues which were all core members of Film Hub Wales at the time that the research brief was finalised. Visits were used to acquaint the consultants with the particular operating context and physical aspects of each site and to conduct focus group meetings with the venues' audiences and staff.

The focus groups ranged in size from three to ten people and had been recruited by the venues using a variety of methods including email shot to their audience databases, posters, Facebook and personal contact. The composition of the groups varied enormously in terms of age, gender and life-stage but broadly speaking, those who put themselves forward to do this tended to be film aficionados and/or committed supporters of the venue. Several groups included staff and/volunteers who were also keen cinema-goers. The focus group sessions were scheduled for the most part to take place around one and a half hours before a screening, to allow participants to combine it with their usual visit to the cinema. There was a tendency in some venues for the groups to attract people who were either retired or otherwise 'economically inactive', although this was by no means always the case. Similarly, they tended to be older people (i.e. over 45) although some groups had younger members.

The format of the session comprised a mixture of group-based discussion and individual exercises involving Post-it notes, forms and flip charts. In this way a written record of the meeting was ensured, alongside notes taken by the consultants. The key themes were:

- Cinema-going habits, including how they select films to attend, plan a trip, who they go with, where they go for information on individual titles and film in general and what they do before and after a visit to the cinema;
- Film preferences and motivations including genre preferences and what motivates them to see a particular film;
- The perfect cinema – what elements would go to make up their ideal cinema and what kind of cinema they prefer - be it multiplex or film society;
- Thoughts about the venue – what they particularly like or dislike about this venue and things that could be improved.

The results of the focus groups and other qualitative research can be found in section 7.
In addition to the focus group, meetings were held with venue staff (in individual discussions or the form of a focus group where numbers warranted this) including usually the general manager, marketing manager, cinema manager or CEO. These discussions aimed to give venues more information about the research and gather more detailed information on audiences, performance and constraints.

It was beyond the scope and scale of the study to undertake detailed filed research directly with non-attenders. However a range of approaches was used to extract intelligence on non-attendance during focus groups and from the findings of the online survey.

Image: The Savoy Theatre, Monmouth

3.3 Online survey

The consultants formulated an electronic survey on Survey Monkey. English and Welsh language versions were produced. Venues were asked to distribute the links to people on their emailing lists, requesting participation. The survey remained available for completion for five months until the beginning of March 2015. A total of 1,404 (including 52 in the Welsh Language) were completed against a target of 1,500. Around 93% of these were either fully completed or mostly completed.

A copy of the survey can be found at Appendix 4.

3.4 Exit Survey

The consultants designed a shorter print questionnaire for distribution to audiences after or before screenings. The purpose of this was to pick up any people who are not using electronic media or 'walk up' patrons who would not have been reached by the online survey because they are not on the mailing lists. These were left on seats and collected by the venues and sent to the consultants. The response rate varied enormously between venues. At Galeri Caernarfon 70 surveys were returned and the Pavilion in Penarth also sent back 60 surveys (against a target of 20 for each venue). By the end of February 2015 by the time the survey closed a total of 164 surveys had been returned from 6 venues. 12 venues made no exit survey returns. For this reason, it was decided that the exit survey results would be presented on a venue by venue basis rather than in aggregate since they represented such a small sample and would be skewed by the two venues which made substantial numbers of returns.

Image: Penarth Pier Pavilion, Penarth

4. Published research on the Cinema Industry and cinema-going in the UK and Wales – trends and prospects

4.1 Admissions

From a historic high immediately post-war of 1.64 billion in 1946, UK cinema admissions gradually declined to an all-time low of just 54 million in 1984.

Since that time, the advent of the multiplex, and record levels of investment in improving the theatrical experience have seen admissions recover such that since 2000, they have remained above 150 million (sometimes significantly so). However, it appears that general cinema admissions have plateaued at this level and fluctuations up and down between one year and the next could be accounted for by the success of some key titles and/or the general health of the economy.

There are marked regional variations, very likely driven to some extent by the availability of screens, with London accounting for over a quarter of the UK's admissions. According to figures from the Cinema Advertisers Association and Rentrak, Wales and West accounts for 7%. This figure is based upon the former ITV transmission region (used as an industry standard for historical reasons) which includes Bristol and Avon which will contribute a significant proportion of these, with a population of 4.9 million compared to the Wales population of just over 3 million. Wales-only cinema audience figures are not routinely produced.

Admissions by nation/region 2013

Region	Total admissions	% total admissions
London	42,201,369	25.5
Southern	15,550,208	9.4
East of England	11,143,666	6.7
Midlands	22,466,952	13.6
South West	4,033,318	2.4
Wales & West	11,542,298	7
Lancashire	16,400,300	9.9
Yorkshire	13,426,389	8.1
North East	6,345,621	3.8
Border	1,267,139	0.8
C Scotland	11,475,653	6.9
N Scotland	3,849,117	2.3
N Ireland	5,837,947	3.5
Total	165,539,976	100

Source: CAA/Rentrak - based on ITV regions

4.2 Box Office Revenues

According to CAA/Rentrak, the total UK box office for 2013 was £1,083 million, down 1% on 2012. Since 2001, box office revenues have grown by 68%. A trend toward box office growth has continued since 2008 despite the economic downturn.

Average ticket prices were £4.40 in 2000: since then they have risen to £6.53 in 2013 (an increase of nearly 50%) and this is reflected in the increase in box office revenues and average spend per capita on cinema-going.

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Box office revenue £m	742.0	769.6	776.3	762.1	821.0	854.4	944.0	988.0	1,038.0	1,099.1	1,082.1
Change in box office %	-1.7	3.7	0.9	-1.8	7.7	4.1	11.0	4.7	5.1	5.9	-1.6
Average annual spending per head population £	12.46	12.87	12.93	12.65	13.57	13.91	15.27	15.87	17.00	17.40	17.13

Source: Screen Digest from CAA/EDI Rentrak

4.3 Sites and Screens[1]

In 2013 the UK was home to 3,897 screens at 747 sites. This compares with 3,402 screens at 775 sites in 2002, reflecting the continuing closure of smaller cinemas and expansion of multiplex operators with higher numbers of screens per site. However, new site openings appear to be declining with only 4 new sites opening in 2012 compared to 12 in 2008. The UK has one of the lowest screen densities in the developed world at 6.1 per 100,000 of population in 2013, compared to 12.4 in the U.S and 9.1 in France, and is still regarded as being relatively under-screened.

Perhaps the most significant change in recent years has been the growth in digital screens from 0.1% in 2000 to 98% in 2013 with almost all of this growth occurring since 2009. In 2013, nearly 50% of screens were located in city and town centre sites, 34% at 'out of town' sites with only 2% in rural locations. Digital technology has changed the economics of cinema operation such that it is now more economically viable to operate cinemas catering for much smaller populations. Over time this is likely to lead to the development of cinemas in some of the UK's smaller towns.

Following a period of mergers and acquisition market has consolidated 3 key players - Odeon, Vue and Cineworld who between them operate nearly 65% of the UK's screens with a more or less equal share. In 2013 these three operators took more than 70% of box office revenues. The non-mainstream[2] film sector has only one chain operator – Picturehouse cinemas (acquired by Cineworld in 2012) with 61 screens at 22 sites.

Screens in Wales

The *BFI Statistical Yearbook* reports that Wales is home to 195 cinema screens at 49 sites, which is 5% of the UK total. Of these 151 (77%) are multiplex screens with the remainder being classified as "traditional or mixed use". This places Wales in the middle of the range in the UK in the balance between multiplex and traditional/mixed use screens. The average number of screens per site is low

[1] BFI Statistical Yearbook 2014/Dodona Research
[2] For the purposes of this report, 'non-mainstream' has been used to encompass the genres and types of film which form the target of BFI and Film Audience Network development activities.

according to the UK average, 3.9 against a UK average of 5. Wales has a screen density of 6.3 per 100K of population (the UK average is 6.0 screens per 100,000 of population).

According to the *BFI Statistical Yearbook* (which credits Dodona Research for the data) only 9 (3.4%) of these screens are non-mainstream. This contradicts the Wales Audience Network (or at least those venues included in this study) of 18 venues and 23 screens. The most likely explanation of this divergence is that the methodology used by Dodona Research counts many of the Network screens as mainstream: most of the venues targeted in this study do indeed report a mix of mainstream and non-mainstream films.

Exhibitors known to Film Hub Wales

4.4 Audience profiling- Published Research

Published research on cinema audiences for film in the UK can provide a solid bedrock of information about audience preferences and tastes. The *BFI Statistical Yearbook* is an excellent primary source for industry and audience data on films and film-going, and there is a handful of other reports (referenced below) which look at non-mainstream film and cinema in the UK and its nations and regions. Cultural sector and general demographic research into Wales, whilst not extensive, is invaluable in framing and contextualising film- and venue-specific information about audiences.

Some informative published research is either formulated at a UK level, or is based in nations/regions other than Wales. It is however possible to build a considerable degree of confidence that, at a certain level, Welsh audiences are likely to think and behave in similar ways to those in other nations or regions, and that UK research is broadly as applicable to Wales as to the South West or the North East of England. For example, the recent BFI study *Opening our eyes – How film contributes to the culture of the UK* was based on a survey of over 2000 people from all over the UK, and detailed data (available via www.bfi.org.uk) analyses responses to all of the questions by nation and region. In general, answers given by respondents from Wales were very close (i.e. within the survey margin for error) to those given by respondents based in England, Scotland and Northern Ireland. For example, when asked whether it was important that British films were true to life, 24% of people in Wales agreed strongly, as did 25% of those in England.

4.5 Rates of Attendance and Demographics for General Cinema Audiences

Rates of cinema attendance in the UK remain comparatively low, especially relative to the USA. Average annual attendance in the UK was 2.6 per head of population in 2013 and it has been at around this level for several years. This compares to 3.8 in the US and 3.7 in Australia, although it is slightly higher than in Italy and Spain.

The largest audience segment for all film-going by age is the 15-24 age group which accounts for around 35% of all admissions and has grown significantly in the last decade and has a slightly higher proportion of male to female audiences.

4.6 Audiences for Non-mainstream film

In common with the definition used for the BFI's Film Audience Hubs, the *Statistical Yearbook* definition of a non-mainstream film is heterodox and includes a significant degree of subjectivity. For the *Statistical Yearbook*, specialised[3] film consists of:

'…feature documentaries, subtitled foreign language films and re-releases of archive/classic films…….Other films that do not fall into these categories may also be considered as specialised. These films may be less easy to define as a particular genre or may deal with more complex and challenging subject matter than the majority of mainstream films. Many are from the independent production sector (although they may be handled by a mainstream, studio-based distributor) or are made with a low production budget (compared with a studio production). They may focus more on script and character rather than on effects and star names and may be expected to appeal to a narrower audience segment than mainstream films.'

The *Statistical Yearbook* publishes an annual survey of the performance of specialised film in the UK cinema market. According to this in 2012 435 specialised films were released in the UK (67% of total films released) earning £162.5 million (14% of the total box office).

The market share of box office due to non-mainstream films varies from year to year (6.3% in 2010, 17.5% in 2011) and is strongly affected by the release of a small number of highly successful independent titles which cross over into the mainstream market – for example *The King's Speech*. Such crossover titles aside, few non-mainstream films have box office grosses of over £1 million. The BFI's Yearbook gives a genre analysis of the specialised cinema market:

Specialised film in the UK and Republic of Ireland, 2013[4]

Type	Number of releases	Share of releases (%)	Gross box office (£ million)	Share of gross box office (%)	Average widest point of release
Documentary	89	12.8	10.7	0.9	20
Foreign language	279	40.0	24.8	2.2	17
Re-release	42	6.0	1.3	0.1	19
Other specialised	70	10.0	73.5	6.4	121
All specialised films*	446	63.9	109.7	9.5	35
All films	698	100.0	1,153.7	100.0	108

[3] As noted above, this report uses the term non-mainstream to encompass those types and genres of film which form the target of BFI and Film Audience Network development activities. In that sense 'non-mainstream' and 'specialised' in this report can be taken to be synonyms or near-synonyms.

[4] Source: *BFI Statistical Yearbook 2014*/BFI RSU analysis of Rentrak data

The demographics of specialised or art-house audiences are quite different from mainstream audiences, tending to be older, more female and skewed towards higher socio-economic groups ABC1.[5]

4.7 Audience Choices

A 2014 study looking at audiences attending a number of independent and/or non-mainstream cinemas in London – *Capture – Know Your Audience* – presents some interesting findings on how audiences make choices about their film-going. It confirms that the most important factor in audience choice is the film title, with audience preference for venue second and screening time narrowly third.

4.7.1 Film Choice

Capture places film reviews as the most important factor driving audience choice of film, with cast, director/writer and subject matter all being important issues.

The BFI's 2011 *Opening Our Eyes* (which included Wales in its UK-wide audience survey, and surveyed the whole population, not just cinema-goers) framed the question of how individuals made film choices slightly differently: in this study, the story of the film was the most important driver (68%) followed by genre or type of film (62%), recommendations by friends /family (60%) and the actors in the film (58%). Reviews in the media were important (53%) but less so than these other factors, perhaps pointing out a difference between *Capture*'s research base of current non-mainstream film-goers and the wider population. Interestingly, for *Opening Our Eyes'* wider demographic, cost of viewing the film at 51% was only just less significant a driver than media reviews.

Opening Our Eyes also asked about sources of information used by people about films. The most commonly used was word of mouth – talking to friends and family about films, with 64% saying they did so at least monthly. Film reviews in the print media (newspapers and magazines) were also important, used by 53% of respondents at least monthly. Online reviews were less important with only 42% or respondents saying that they used them at least monthly.

Which Cinema?

To state the obvious, in some parts of rural Wales (as with other parts of the rural UK) choice of cinema is very strongly dictated by geography – put simply, any cinema other than the closest is too long a journey other than for special treats or the most enthusiastic of film fans. Where film-goers do have a choice of venue, published research gives us some clues on how comparative choices are made.

Capture reports that the closeness of the cinema to home and convenience of screening time were important factors. However comfort of seating was also a very significant factor. The fact that a certain film was not being screened elsewhere was – unsurprisingly in a survey of cinema audiences – a significant factor for some people. *Capture*, in surveying audiences at a group of venues all of which could be described as 'independent', revealed that the independent status of the cinema was a significant factor in audience choice –implying that audiences for non-mainstream films tend to be loyal to independent venues, preferring to see a chosen title there rather than at a multiplex or other competitor.

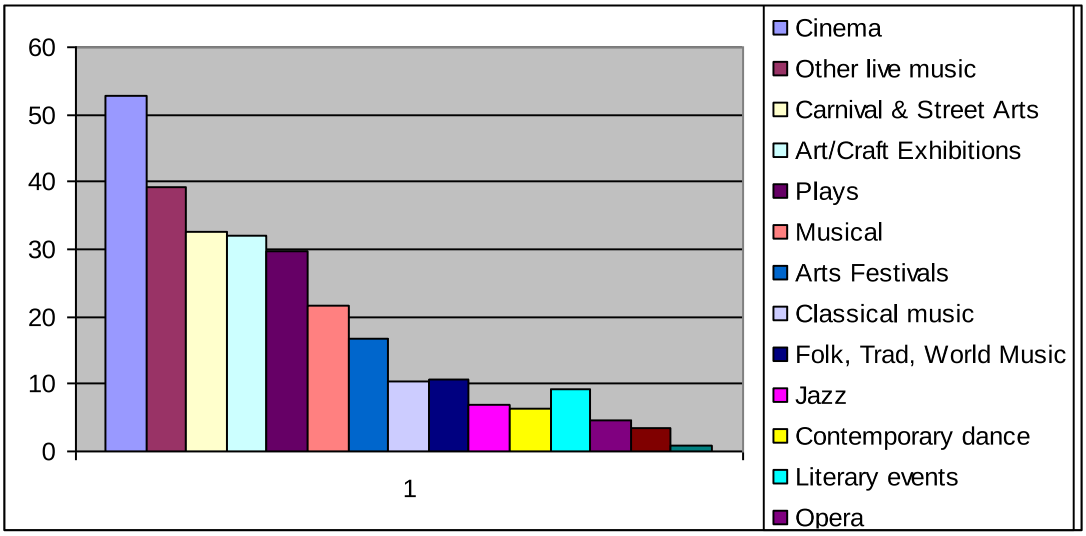
[5] Source: *BFI Statistical Yearbook*

When asked about their experience of their visit to the cinema, *Capture*'s respondents reported most favourably on staff friendliness/attitude and the comfort of the auditorium. Whilst this reports a subjective reaction to a specific visit, it is arguable that it reinforces the importance of ambience, comfort and other factors which go to make up a good night out for audiences.

4.8 Audiences for the Arts in Wales

The Arts Council Wales' *2013 Omnibus Survey* collects data on attendance at arts events and participation in artistic activities in Wales. It shows that 46.1% of the population attended a cinema at least once a year, the most common form of arts attendance (attendance at live music – 35.7% and plays – 31.8% were the next most frequent).

% Attending Arts Performances, by Artform 2012/13



Opening Our Eyes reports a higher level of attendance with 67% of respondents saying they went to the cinema at least once every 6 months – although of Welsh respondents to that survey, 58% attended at least 6-monthly, the lowest proportion of any UK nation or region. It also noted that 84% of those surveyed said that they were very or fairly interested in film – more than any other cultural activity other than watching television (88%) and news about the UK (88%).

The *Omnibus Survey* shows that film audiences are dominated by social grades ABC1 (see table) – although attendance by C2DE groups is higher than for other artforms.

Cinema Attendance by Demographic Group (% of each group who attend once a year or more)

Group	%
All Adults	46.1
North Wales	46.1
South West	39.5
South Central	53.1
South East	46.3
Male	44.2
Female	47.9
AB	60
C1	53
C2	45.4
DE	36.2
16-24	72.9
25-34	58
35-44	52.8
45-64	43.3
65+	21.9

The *Capture* report – which looked at non-mainstream cinema attendees rather than the wider population – uses the Mosaic geo-demographic profiling tool (see 5.1 below). This indicates a stronger bias toward the Liberal Opinions group. Although Mosaic does not readily compare to the ABCDE socio-economic grade definitions, it does indicate that non-mainstream cinema audiences are biased toward those with higher than average educational attainment and income.

Published research indicates that cinema-goers are more frequent attenders at other arts events than the general population. *Opening Our Eyes* for example shows that 68% of people who were very interested in film were also interested in attending museums, compared to 48% of those without an interest in film. *Capture* reports an even stronger cross-over between film and other arts with for example 85% of those surveyed having attended a gallery or art exhibition compared to less than 30% of the general London population.

Image: Wyeside Arts Centre, Builth Wells

5. Qualitative research - Summary of focus group findings and meetings with staff

5.1 Composition of the focus groups

The focus groups varied in numbers of participants from three to ten. Participants were recruited by the venues so although this was generally by an 'open call', usually by email, in practice a lot of participants were recruited from among known networks of frequent attenders so the groups tended to be made up of 'fans' – of both the venue and film more generally. Thus, they are largely unrepresentative of a venue's audience as a whole. Younger people were under-represented as were family audiences.

The age profile of focus groups was biased toward 45+ with a significant number in the 65+ age group. Most groups were predominantly female although there were two all-male groups.

5.2 Influences on film choice

Reviews and recommendations were generally the most influential factors in deciding which films people went to see although favourite cast members or directors were also very significant. Going to see the 'film of the book' was mentioned in at least three groups.

Trailers and TV advertising were much less significant with some saying that trailers sometimes even serve to put them off or that they avoid them because they can be 'spoilers'. Some people identified that most of the films they liked to see were not widely advertised therefore they have to be more proactive in seeking out films they like. Many were appreciative of the wide range of film choice available at the venue, particularly if these films couldn't be seen anywhere else.

5.3 Genre Preferences
Drama and independent films are the most popular choices for the venue focus groups, with classic/archive and arthouse films coming in second and third. In many venues, the researchers were told that ”anything with a Dame or Bill always does well” (i.e. Judy Dench, Maggie Smith, Bill Nighy).

Interest in foreign language, archive and other ‘difficult’ programme choices in focus groups does not appear to follow through into higher attendances, perhaps because of the self-selecting nature of the groups whose members are generally ‘film fans’.

Special events – speakers, theme nights, music etc – are popular with audiences and event cinema/live streaming form an increasingly important part of the programme and finances of many venues. In many venues, live or ‘encore’ performances of theatre, opera or music often sell out.

5.4 Planning a visit and information sources
Almost all participants said that the cinema brochure was their primary source of information about what’s on, with the cinema website and e.bulletins/email running a close second. A significant number of participants said they planned their cinema-going weeks and sometimes months in advance using the brochure and diaries, booking their tickets ‘in bulk’. Where it is cheaper to book online, people were happy to do this and most people in the focus groups said that they purchased their tickets in advance even though they don’t need to because most performances do not sell out. Some people seem to like allocated seating as it means they do not have to show up early to ‘get the best seats’.

Some venues have irregular timings for their screenings – most people would prefer a regular slot to enable them to plan their visits more easily, particularly if they have jobs.

Image: St. Donats Arts Centre, Llantwit

Genre preferences by focus group members

	Aberystwyth Arts Centre	Memo Arts Centre	Wyeside Arts Centre	Galeri Caernarfon	Chapter Cardiff	Theatr Gwaun	St Donat's Arts Centre	TorchTheatre	Clwyd Theatr Cymru	Savoy Theatre	Gwyn Hall	Pier Pavilion	Pontardawe Arts Centre	Scala Prestatyn	Taliesin Arts Centre	Magic Lantern	**Total**	**%**
Action	1		2	3						2	2	1		2			**13**	**3%**
Adventure	4			2	2		1				5			1	1	3	**19**	**4%**
Animation	2	1									4		1				**8**	**2%**
Art house films	2			2	4	3	1		5				1	1	7		**26**	**6%**
Biopic			2	1						2		2	1		2		**10**	**2%**
Classic/archive	4	2		2	3	3	2		4		3	5	1	4	6	2	**41**	**9%**
Comedy	4	2	2	4			1		3	2	2	1	1		4	1	**27**	**6%**
Crime	1		2	4						2	1				4		**14**	**3%**
Documentary	1		1	1	1	2	2		3	1	1	4		1	4	1	**23**	**5%**
Drama	3	1	2	5	6				5	2	3	6	2	3	8		**46**	**11%**
Family films	1	2					1				1	2		1			**8**	**2%**
Fantasy	2						1				4	1	1	3	1	3	**16**	**4%**
Foreign language	1		1	1	5	3	1		6	1	2	1	3	3	7		**35**	**8%**
Horror	1			1	2						7	1		2		1	**15**	**3%**
Independent films		1	2	3	6	3	3		6	2	5	1	3	1	8	2	**46**	**11%**
Music/dance	2	1	1	4						1	1	1			3	2	**16**	**4%**
Romance	1	1		3								2				1	**8**	**2%**
Sci-fi	2	1	1	1		1	1			1	6			4	1	2	**21**	**5%**
Thriller	2	2	2	3	3				1	2	3	2		2	4	2	**28**	**6%**
War	1		1		1		1			1		1		1	1		**8**	**2%**
Western			1		1					1				1			**4**	**1%**

Long lead times in bi-monthly or quarterly venue brochures mean that not all information is up to date and it can also be difficult to find out with new releases whether or not it is coming to the venue. People found that they often missed things because there is only one screening (particularly if this is a matinee). On the whole, focus group participants said they do not mind waiting (sometimes even for several months) for a film to come to 'their venue', as long as they know it is coming. Sometimes, it is not possible to find this out so they go elsewhere to see the film rather than run the risk of missing it altogether.

Some people would like more film information. The Memo at Barry produces programme notes for all its screenings and these had proved popular. A number of people at other venues said they would like programme notes or at least more information about individual films on the website.

5.5 Elements of the 'perfect' cinema

The quality of technical presentation - with sound featuring very strongly - was generally held to be the most important thing, closely followed by comfortable seating. On the sound front, a large number of participants said they often found the sound too loud (both at this venue and others they might have visited). More than one attendee was keen to see a range of seating options alongside (or instead of) standard cinema seats, including sofas, cabaret-style tables and twin 'love-seats'.

A wide choice of films, friendly staff and the availability of food and drink were also in the top five. A number of people mentioned 'ambiance' or 'buzz' and being able to share the auditorium with a group of like-minded people.

There was often strong disdain for the multiplex experience which is widely held to be too impersonal with too many distractions (popcorn, mobiles, talking). However, a significant number acknowledged that the multiplex has its place – giving a high quality presentation (particularly important for special effects, action movies, 3D etc) and catering to the needs of young people and family audiences (choice of fast food/ shopping outlets nearby).

About half the participants mentioned affordability as being important, particularly for older people on low incomes and family audiences. However, there were venues in some of the more affluent areas where price did not feature at all as a subject for discussion.

Most or all focus groups had opinions – some very forthright – on bars, cafés and other catering offers. There was general (but by no means universal) opinion that food in the auditorium was undesirable with particular ire for popcorn, nachos and anything in noisy packaging. A clear minority view was that the ability to enjoy food, drinks and even complete meals in the auditorium could enhance the experience. There was a strong consensus however that high-quality bar and catering was important with many wishing to design into their ideal cinema a greater range of bar/catering provision than was actually available. Lots of participants said they would like 'meal deals' where the price of a ticket includes something to eat and drink.

5.6 Audience views on venues

Audiences at many venues demonstrate strong venue loyalty: social and emotional aspects of the venue are very important in audience choice so much so that at some venues some audiences attend weekly, regardless of what film is being shown.

Time and again, friendliness of staff/volunteers and being known by name was mentioned as central to people's enjoyment of their visit. On a similar theme many appreciated the fact that the venue staff and management were known, familiar faces – part of a strong appreciation of venues being valued community assets, deeply rooted in the local cultural and social scene.

Volunteers were frequently very active in the operation of venues acting as stewards/ushers for performances, assisting with marketing tasks and in some instances supporting programming and selection of films. Volunteers were also enthusiastic audience members and passionate ambassadors for the venue and its cinema programme.

The over 60s audience particularly liked being able to meet up with friends at the matinee performances. A number of women particularly appreciated how 'safe' they felt at the venue so that they felt able to come on their own.

Few people were prepared to identify things that they disliked about the venues so these were framed as 'things that could be improved'. These almost always consisted of physical aspects such as comfort of the seating, sound quality and screen size – most of which the venues' management is aware of and which are often largely outside of their control – or budget – to resolve.

Most people enjoy having a drink (tea/coffee or an alcoholic beverage) prior to and during a screening – an important part of the social nature of their visits. In one venue, it was noted that a cinema visit and a restaurant meal would comprise two nights out, not to be conflated into a single occasion. The tendency is to go straight home afterwards but to some extent this is dictated by the lateness of the hour and closure of venue catering facilities. Some venues had few or no catering facilities either before or after the screenings. Whilst this was often lamented, it did not appear to be critical in motivating attendance.

5.7 Key themes emerging from meetings with venue staff and management

Almost all venues (but not Chapter to the same extent) have two key audience groups:

- Over 50s – silver screeners who tended to attend matinee performances and those in employment who attend in the evening.
- Family audiences – who attend principally during school holidays to watch family films.

Students/younger people tended to make up a very small proportion of audiences.

Other significant groups:

- The University of the Third Age is a significant organisation in terms of generating regular attendances at some venues – in some places this is formalised with a dedicated slot, in others it is informal.
- Venues in coastal towns benefit from some tourist attendances during the summer months, particularly if they are the only ‘wet weather’ option for families. At least one venue noted that it took as much in the eight summer weeks as in the rest of the year.

Distributor relationships were noted as being particularly problematic for some part-time and single screen venues, even in the context of digital distribution. This is particularly so for venues aspiring to show titles ‘day and date’ (i.e. at or near to the time of the UK release) with some distributors still insisting on lengthy runs (one to two weeks or more) for key titles, and on screen exclusivity. Venue staff report that some distributors continued to insist on these practices even in the face of arguments – and some evidence – that the practice was detrimental not only to the venue but also to the economic prospects for the distributor (e.g. by preventing the venue taking other titles from the same distributor). By and large these issues seem to be most marked with larger distributors.

Other issues brought up in discussion with venue management/staff:

- Competing demands from other art forms in the mixed art form venues and/or commercial use of the venue mean that the cinema programme often loses out or cinema is seen as the ‘cash cow’.
- Sometimes the venue (particularly if it is a mixed art form venue) is perceived externally by the community as catering to the arts crowd and therefore ‘too posh’ and ‘not for them’.
- Most of these venues live on a ‘financial knife edge’ which means they cannot afford to take risks with the programme. Even those that are funded live under constant threat of losing their funding.

Image: Aberystwyth Arts Centre, Aberystwyth

6. Quantitative survey results

Caveats

When analysing responses, it should be borne in mind that those who chose to respond to the survey are not necessarily representative of the audience as a whole since they are a self-selecting rather than a random sample. It is particularly noteworthy that very few under 35 year olds responded and comparatively few people with children responded, despite the fact that family audiences are an important market for most of the venues. Younger people (and people with children in particular) are perhaps less likely to have the time to fill out questionnaires which may explain their lower rates of participation. It was not practicable to weight the data to take account of potential sample bias due to the lack of empirical information on venue audiences as a whole. However, the audience for non-mainstream film is known to be majority female and mostly older (see 4.6 Audiences for non-mainstream film, above) so in general, it is likely that the sample drawn is largely representative of the majority of audience members.

The family audience is largely seasonal, particularly in seaside towns (this survey took place over the winter months) and the survey will of course, only have captured audiences who are part of the venues' mailing lists so 'walk up' audiences are unlikely to have responded except perhaps at the invitation of a friend or family member.

Data Analysis summary

Response rate

The online survey went live at the beginning of October 2014 and was open for responses until the beginning of March 2015. It was promoted by individual venues to their audiences, mainly through their emailing lists. Some venues also carried links to the questionnaire on their websites and/or

Facebook pages. It was clear from the information inviting responses and from the very start of the questionnaire that the topic of the survey was film, and in particular inviting them to think about the venue through which they had received the link to the survey.

In total 1,404 responses (including 52 in the Welsh language version) were received of which over 90% were fully completed or mostly completed. The distribution across venues was as follows:

Q12[6] Which of the following cinemas/arts centres do you most frequently visit to see a film?

	%	Count
Aberystwyth Arts Centre	2.7%	34
CELLB, Blaenau Ffestiniog [12]	0.2%	2
Chapter, Cardiff	35.7%	445
Clwyd Theatr Cymru, Mold	6.5%	81
Coliseum Theatre, Aberdare[7]	0.1%	1
Galeri Caernarfon	0.2%	2
Gwyn Hall, Neath	4.2%	52
Memo Arts Centre, Barry	1.3%	16
Penarth Pier Pavilion Cinema	1.4%	18
Pontardawe Arts Centre	1.9%	24
St Donats Arts Centre, Llanwit Major	0.7%	9
Savoy Theatre, Monmouth	1.7%	21
Scala Cinema and Arts Centre, Prestatyn	2.4%	30
Taliesin Arts Centre, Swansea	12.2%	152
Theatr Gwaun, Fishguard	4.1%	51
Torch Theatre, Milford Haven	4.3%	54
Tywyn Magic Lantern	3.2%	40
Wyeside Arts Centre, Builth Wells	14.1%	175
I do not visit any of these to see films	3.1%	38
Answered question		1245

One curious anomaly with the data is the 38 people who report that they do not visit any one venue frequently. This is likely to represent people who come to one of the venues for other reasons (e.g. to attend theatre or music performances) or were previously attendees at one of the venues, have since moved but still receive email from the venue.

Of the responses to the question about the venue most frequently attended to see films, nearly 36% of responses came from people who mainly visit Chapter. Other venues with significant response rates were Wyeside Arts Centre in Builth Wells and Taliesin Arts Centre in Swansea.

[6] Question numbers in this chapter of the report refer to questions in the online survey. A full set of data in response to all online survey questions is in Appendix 2 of this report.

[7] For operational reasons at the Coliseum Theatre and CELLB, it was not possible to fully include these venues in the research for this report. The tally of respondents visiting these venues is included to indicate the extent of audience cross-attendance between Wales Audience Hub member venues.

Gender

Q1. What is your gender?

Answer Options	%
Female	64%
Male	36%
Transgender	1%

Around 64% of the survey sample was female, compared to 51% for the wider population. This roughly equates to the female representation among audiences for non-mainstream films

Marital Status

Q3.Which of the following best describes your current relationship status?

Answer Options	%
Married/in a civil partnership	56%
Widowed	6%
Divorced	9%
Separated	2%
Cohabiting/living together	12%
Single	16%

Over 56% of the survey sample were married or in a civil partnership. This compares to only one third for the Welsh population as a whole (2011 Census) and 47% for England and Wales as a whole.

Age

Q4. What is your age?

Answer Options	%
Under 18	0%
18 to 24	2%
25 to 34	7%
35 to 44	13%
45 to 54	21%
55 to 64	26%
65 to 74	25%
75 or older	6%

Almost 78% of the sample was age 45 or over and more than a quarter of the sample was 65 or older. Only 3 people were under 18 and less than nine per cent were under 25. These ratios are completely different to the profile for the cinema-going population as a whole for the UK where 15-24 year olds make up over a third of the total audience (as against 14% of the UK population) with 25-34 year olds being the next biggest group of cinema—goers at around 20%. 45 year olds and over make up just 18% of the total UK cinema-going audience. No further age breakdown of these older age groups is provided in published statistics.[8]

[8] Source: CCA, Film Monitor in BFI Statistical Yearbook 2014

The age distribution was also not typical of the actual demographic profile of Wales as a whole. 18.3% of the population of Wales is aged over 65 (compared to 31% in the survey) and 44.9% aged 45 or older.[9]

Although there are a few possible factors which might be artificially inflating the number of survey responses from older individuals (for example that older people without childcare responsibilities have more free time to answer surveys, or that older audiences are more actively involved with a chosen venue and so more likely to undertake activities which they see as helping the venue) it does not appear likely that any bias is substantial. The finding confirms the subjective observations of venue staff and the age profile of attendees at focus groups held as part of research for this report.

Children under 18
Just over 80% of the sample said they had no children under 18 – reflecting the sample bias towards the older age groups. For cinemas in general, and for many of the Film Hub Wales member venues, family audiences are reported as being an important market segment.

Household income
Q8. What is your approximate average household income?

Answer Options	%
£0-£14,999	10.4%
£15,000-£24,999	17.3%
£25,000-£34,999	16.6%
£35,000-£44,999	14.6%
£45,000-£79,999	16.2%
£80,000 and over	4.4%
Prefer not to say	20.6%

Nearly 30% per cent of households reported an income under £25,000 (the average household income for the UK is £22,880 a year) and more than 20% an income of £45,000 or above. This tends to show that audiences for Film Hub Wales member venues are relatively prosperous. It should be noted however that self-reporting of incomes is not as accurate as Government/Office of National Statistics data derived from tax and benefits information. However the overall impression of an audience derived from comparatively better-off income groups is robust.

Ethnicity
Around 92% of the sample described themselves as white British and a further four per cent as White European, three per cent as white other (all of whom specified Welsh on the Welsh language version of the survey). In fact there were only 11 respondents who described themselves as Asian and 1 who described their ethnicity as black. The non-white population in Wales is much lower than for the UK as a whole at around four per cent with 2.3 per cent Asian, 0.6% black and one per cent

[9] Population figures source: 2011 Census, Office of National Statistics

mixed. The sample therefore could be seen as broadly representative of Wales' ethnic minority population, given that much of the sample is drawn from venues in small towns or rural areas.

Disability

Less than ten per cent of those who answered this question considered themselves to have a disability. This compares to around 20% for the Welsh population as a whole (based on census data where people were asked if they had a long term health problem or disability which limited their daily activity). This may reflect the fact that many people with disabilities do not attend the cinema, particularly if they have a visual or hearing impairment because access provision for these disabilities is very limited.

Attendance at all Wales Film Hub member cinemas

Q11. Which of the following cinemas/arts centres have you ever visited to see a film?

Answer Options	Response Per cent	Response Count
Aberystwyth Arts Centre	12.3%	153
CELLB, Blaenau Ffestiniog	0.2%	2
Chapter, Cardiff	48.2%	601
Clwyd Theatr Cymru, Mold	10.7%	132
Coliseum Theatre, Aberdare	2.0%	26
Memo Arts Centre, Barry	3.1%	40
Galeri Caernarfon	1.9%	17
Gwyn Hall, Neath	7.0%	91
Penarth Pier Pavilion Cinema	7.7%	94
Pontardawe Arts Centre	7.4%	97
Savoy Theatre, Monmouth	2.8%	36
St Donats Arts Centre, Llanwit Major	6.2%	81
Scala Cinema and Arts Centre, Prestatyn	4.1%	48
Taliesin Arts Centre, Swansea	18.3%	236
Torch Theatre, Milford Haven	7.7%	101
Theatr Gwaun, Fishguard	6.8%	88
Tywyn Magic Lantern	3.8%	49
Wyeside Arts Centre, Builth Wells	14.8%	193
I have not seen a film at any of these venues	2.1%	25

Given the geographical spread of the venues and the difficulties of travel in some of the more remote parts of Wales, there is a surprising amount of cross-venue attendance. Almost half the sample had visited Chapter and 18% had been to Taliesin in Swansea. Perhaps more surprising is the 81 people have been to St. Donats near Llantwit (compared to 9 people for whom it is their regular venue) which is not on a direct transport route, although in an undoubtedly attractive rural setting.

General film watching habits and preferences

Q13. Do you ever go to other cinemas to watch films?

Answer Options	Response Per cent
I rarely or never go to another cinema	30.4%
Odeon	32.9%
Vue	33.8%
Cineworld	29.0%
Another multiplex cinema (i.e. purpose-built cinema with several screens)	12.2%
High street cinema (i.e. traditional cinema in a town centre)	9.0%
An arts centre or art house cinema not on the list above	14.4%

Around 30% never go to cinemas other than their regular venue (see answer to Q12 above). Around 15% go to other arts centres or art house cinemas, with around a third going to the multiplexes, split fairly evenly between brands.

Q14. Other than going to the cinema, how else do you watch films?
88% of respondents watch films on television and a further 72% watch on DVD or Blu-ray. A quarter watch streamed films and seven per cent watch on a mobile device. The proportion reporting that they watch streamed films is high: the *Ofcom Market Communications Report 2013* reported that 16% of people aged over 15 watched films via streaming and other online services.

Q15. How would you describe your level of knowledge about film?
Over 10% of respondents described their film knowledge as professional (2.5%) or specialist (8.5%). Most of the rest (45%) rated their film knowledge as either casual, or general, in roughly equal proportions.

Q16. What are your favourite genres/types of film (tick up to five)?

Answer Options	%
Action	18.7%
Adventure	21.3%
Animation	13.8%
Art house films	37.4%
Biopic	17.3%
Classic/archive film	38.4%
Comedy	45.8%
Crime	25.1%
Documentary	29.1%
Drama	69.3%
Family films	17.3%
Fantasy	12.6%
Foreign language	39.0%*
Horror	5.6%
Independent films	49.9%
Music/dance	15.6%
Romance	22.8%
Sci-fi	22.7%
Thriller	35.6%
War	6.3%
Western	6.0%

Whilst some categories may appear overlapping or unclear, they are widely used within the industry. The film categories used for the survey were the same as those used by the BFI in its *Statistical Yearbook*. Of this list, the BFI says "the list of genres is based on conventions commonly used within the industry and by published sources such as the BFI's Collections Information Database, the British Board of Film Classification and the Internet Movie Database (IMDb)".

70% of respondents picked drama as one of their favourite genres, with the next most popular being independent film at 50% and then comedy at 46%. Classic and archive film, foreign language, art house and thrillers all polled in the high thirties with foreign language a surprisingly high 39%, despite many venues finding this a 'hard sell'. War films, westerns and horror were less popular genres in this survey.

In looking at this table, it should be noted that a not infrequent factor in all survey work is a desire for respondents to supply answers that they perceive are in keeping with the objectives of the survey – responses that are in some way 'correct' or that make them look good to an imaginary analyst. It is possible that preferences for foreign language or other core non-mainstream genres may have been inflated by this tendency.

Q17. Do you usually attend the cinema with other people – for example with family or friends? Cinema-going is clearly a very social habit for Film Hub Wales member audiences. Less than one per cent never attend with other people and only five per cent rarely. More than 94% usually or always attend with others.

Q18. If you have children/grandchildren, do you take them to the cinema to watch films?
Around 50% of those who had children or grand-children under 18 take them to the cinema occasionally and 20% do so often. There were 85 additional written comments in this section with most commenting that their children/grandchildren were either too young or that grandchildren lived too far away to be able to take them to the cinema. A small number commented that they took nieces, nephews, god-children or friends' children. Other comments noted that teenage children were reluctant to go on family trips to the cinema, preferring to attend separately with their friends.

Q19. Approximately how often do you go to the cinema?
42% reported that they go to the cinema once a month and 31% go at least once every three months. In the UK, the average annual admissions per person are about 2.6. This makes around three quarters of the sample high frequency cinema attenders (four times per year or more). 12% go at least once a week – an extraordinarily high rate of attendance. Factors which contribute to these high rates of cinema attendance may include the comparatively high income profile of the survey, the presence of a comparatively high number of retired people and older adults without dependent children (both of which groups might be supposed to have more free time).

Q20. Approximately how often do you watch a film in any context or medium (i.e. including television, on line, at the cinema)?

Answer Options	**%**
Several times a week	18.1%
At least once a week	40.1%
Once a fortnight	21.5%
Once a month	13.0%
At least once every three months	4.3%
At least once every six months	1.5%
About once a year	0.2%
Less than once a year	0.3%
Never	0.3%
Don't know	0.6%

About 80% of respondents watch films quite regularly (at least once a fortnight or more) on any platform.

Levels of other arts engagement

Q21. Other than watching films, what other cultural/arts performances or activities have you attended in the last three years (tick all that apply)

Answer Options	%
Attended an art exhibition	75.2%
Attended a museum exhibition	77.6%
Attended a theatre performance	85.2%
Attended classical music performance	46.8%
Attended another cinema	62.8%
Attended a jazz performance	24.3%
Attended a pop/rock concert	45.1%
Attended an outdoor arts event/festival	44.5%
Attended the ballet	26.5%
Attended other dance performance	20.7%
Visited a historic/heritage site	77.6%
Attended the opera	33.9%
Visited a library	70.8%
None of these	0.6%
Don't know/don't remember	0.3%
Other (please specify)	5.1%

85% of respondents had been to the theatre in the last three years, with museums and heritage/historic sites the next most popular choices with 77% apiece. Art exhibitions also polled 75%. Ballet, dance, opera and jazz were the least popular artforms although even here, levels of attendance are still around a quarter of respondents.

Levels of arts engagement appear to be high relative to the general population. Research by the Arts Council of Wales[10] (ACW) show far lower rates of arts attendance with for example only 31.8% of the population of Wales having attended a performance of a play in 2013, 10.6% classical music and 3.6% an opera. Even allowing for the difference in question period (the ACW research looked at

[10] *2013 Omnibus Survey* (Arts Council of Wales, 2014)

attendance in the past year) general population rates of attendance at arts events are far lower than those for cinema-goers.[11]

Q22. Have you ever gone to a cinema, theatre or arts centre to watch a live broadcast of:

Answer Options	**%**
Plays from major companies such as the Royal Shakespeare Company or National Theatre	68.6%
Operas	29.7%
Concerts of popular or classical music	20.8%
Comedy/stand-up	14.4%
Major sporting events	5.0%
Major television releases (such as Doctor Who)	5.9%
I am not interested in watching any sort of live broadcast in a cinema	15.8%

Although the response rate for this question was a little under 75%, a surprisingly large percentage of the sample had been to a live broadcast, with theatre productions being by far the most popular at nearly 70%. Opera polled less than half this at 30%. Only 16% said they would not be interested in watching a live broadcast in a cinema. This correlates with the finding that film audiences at Film Hub Wales member venues tend to be avid consumers of other arts and cultural events (see above). Staff at some venues noted that they were aware that live broadcasts in their venue tended to attract larger audiences than identical events at competing commercial cinemas. The potential for live broadcast to cannibalise audiences for traditional feature film is further discussed in section 9 of this report.

[11] This tends to confirm similar findings, for example in *Opening Our Eyes – how film contributes to the culture of the UK* (BFI 2011) which also indicated that film audiences were more avid consumers of other arts/cultural activities.

Finding out about films

Q23 How do you usually find out about films you go to see at the cinema (tick all that apply)?

Answer Options	%
Film poster/billboard	26.8%
Newspaper/magazine advert	23.9%
Newspaper/magazine review/feature	45.2%
Newsletter/cinema brochure	49.2%
A friend/colleague/family member	41.2%
Radio/television feature	29.9%
Radio/television advert	13.3%
Film trailer seen at cinema	52.2%
Film trailer viewed online	20.8%
Film trailer viewed elsewhere	9.4%
Online advert	12.0%
Online feature/review	13.8%
A cinema/theatre/arts centre website	60.0%
Other website	6.5%
A cinema/theatre/arts centre email newsletter/bulletin	52.4%
Facebook	14.4%
Twitter	7.1%
Other digital communication	3.8%

The top four answers, polling between 50% and 60% were cinema website, cinema email, film trailer seen at the cinema and cinema brochure – in other words the communications generated by the venue itself are far more important than other methods of communication although newspaper advertising is still significant at 45%. Social media were the least cited and not used at all at some venues.

It is possible however that respondents were reporting on information sources that they used in planning a cinema visit, rather than sources of information through which they became aware of the existence of a film in the first place. When asked about the single main source of information about films you go to the cinema to watch (Q24) newspaper/ magazine advertising and reviews came out top at 21%.

Q25 which asked "what usually motivates you to go to see a film at the cinema?" further underlines the importance of reviews. Good press reviews were cited by 33% - by far the most popular answer to this question. Online reviews accounted for a further 7% making reviews by far the most important motivating factor. After this, press advertising was the next most popular choice at 17%. Personal recommendation was only cited by 9% of respondents.

The most important features of a cinema

Q26. Respondents were asked to rank a range of eight cinema features in importance on a scale from 1-10 from not important (0) at all to very important (10).
These features were:

- A simple system for booking tickets/payment
- Has a wide and varied choice of films on offer?
- Offers competitively priced tickets
- Has a membership scheme, ticket offers or other special offers?
- Has friendly staff?
- Has comfortable seating
- Has a high quality of picture and sound?
- Has a bar/cafe offering a choice of drinks and food?

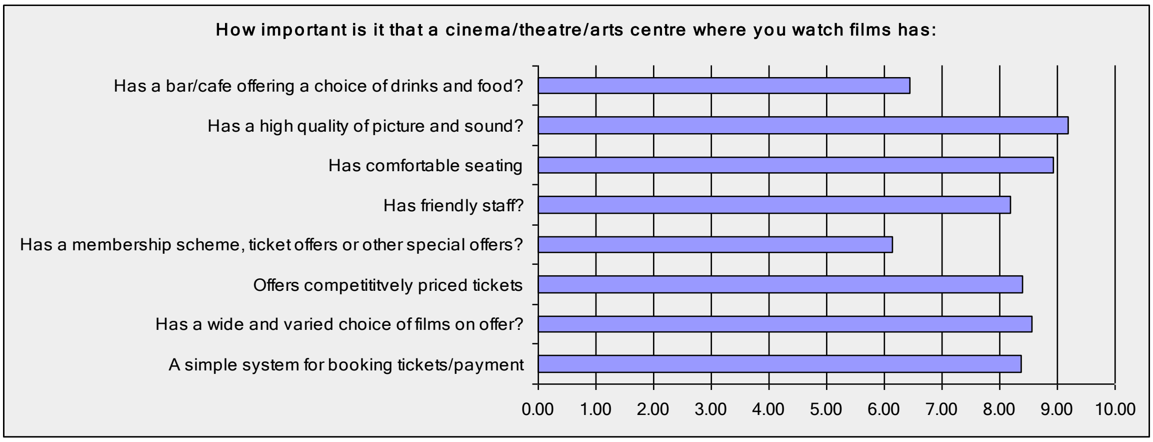


Image: The Memo Arts Centre, Barry

High quality picture and sound was ranked highest on average than any other feature, closely followed by comfortable seats and a wide programme of films. The least important features were a membership scheme and bar/café although based on a weighted average there was no feature which ranked below 6/10 i.e. all these features are relatively important.

Getting there

Q28. When you go to see a film, how do you usually get to the cinema/theatre/arts centre?
More than three quarters of respondents said they usually travel by car with walking being the next most popular answer at 16%. Only five per cent use public transport.

Q29. Thinking of the cinema/arts centre/theatre where you usually or most often go to watch films, roughly how far do you travel to get there?

Answer Options	Response Per cent
Less than one mile	17.0%
1-2 miles	19.1%
3-5 miles	26.8%
6-10 miles	17.5%
10+ miles	19.2%
Don't know	0.5%

The distribution of responses was fairly even across the range of answers but over a quarter said they travel between three and five miles to get to the cinema and a surprisingly high 19% travelling more than ten miles to get to their chosen cinema. The 17% who travel less than a mile coincides roughly with the 15% who say they usually walk to the cinema.

Image: The Magic Lantern, Tywyn Cinema

7. Attenders and Non-Attenders

Non-attenders for non-mainstream film can be divided into two broad groups: those who are cinema-goers but rarely or never see films outside of the mainstream; and people who rarely or never go to the cinema for any film.

The latter group is typically very hard for cinemas of any sort to access and especially hard to attract to non-mainstream film. People who do not go to the cinema at all have already resisted the (very high-budget) advertising of Hollywood and the mainstream cinema chains and are – by and large – unlikely to be more responsive to anything which can feasibly be added to this message by the independent sector.

The exception to this rule may be individuals who do not attend the cinema but are otherwise highly engaged and active attendees of other artforms: such individuals may respond to specific marketing of some film titles on the basis of thematic, creative or other links to their preferred artform – and may be more inclined to consider screen-based art as a consequence of watching live broadcast arts performances.

The mixed artform venues which form part of the Film Hub Wales membership are arguably very well-positioned to identify these individuals through box office data analysis, and to devise specific marketing to address them. Opportunities also exist at venue and Hub level to explore cross-marketing with local and regional theatre, music and gallery venues.

People who are active cinema goers but who prioritise mainstream film are seen by some as the natural reservoir of potential non-mainstream filmgoers. This was certainly the finding of the UK Film Council typology of audiences referred to in Appendix 2. This typology proposes four audience categories, Mainstream, Mainstream plus, Aficionados and Buffs, with the potential for film and cinema marketing to develop individuals' tastes and consumption from Mainstream to Mainstream plus, from Mainstream plus to Aficionado and so on. For those Film Hub Wales member venues which run a mixed programme of mainstream and non-mainstream film, it is probable that their audience contains the full range of audience categories. A combination of box office analysis and exit surveying would shed more light on this audience typology.

The venues in Film Hub Wales and the Hub as a whole, may be well-placed to enact strategies intended to encourage existing film audiences to broaden their tastes (and of course most or all already do so) – and to explore how they might encourage arts attenders who do not currently go to the cinema to experiment with non-mainstream film.

Who isn't coming to watch film at Film Hub Wales member venues?

An analysis of the Welsh Hub cinema audience compared to the UK cinema audience generally, including that for non-mainstream film is very revealing in terms of groups of audiences who are not currently attending.

Age

One of the most striking aspects of the audience for non-mainstream film in Wales revealed through this survey is the age distribution among much older age groups. This is strongly counter to the audience for film as a whole. The BFI Statistical Yearbook 2014 shows that 33% of the UK cinema audience was drawn from the 15-24 age group, and only 18% from the 45+ age group. Research for this report shows that just under 2% of the audience at the Film Hub Wales member venues to be under 25, and 79% to be 45 or older.

The most notable missing element in the audience for non-mainstream film in Wales is therefore the age groups which form the greater proportion of the audience for film as a whole. This phenomenon appears not to be the general experience of art house and independent cinemas, as the report *Capture – Know Your Audience* (discussed at 4.7 above and examining independent film in London) shows an age distribution much more closely following the demographics of London (although still slightly biased toward over 45s).[12]

Socio-economic group

Although the research methodology did not allow for a detailed analysis of the social make-up of the audience, there is strong evidence based on income distribution. The Department for Work and Pensions reports that the average household income in the UK in 2012/13 was £440 a week or £22,880 a year.[13] The study online survey indicated that over 65% of the audience for independent film lived in households with incomes higher than the UK average.[14] This is a strong indicator that ABC1 social groups are over-represented in audiences.

Other study research (focus groups, staff interviews) also indicates that audiences are predominantly drawn from individuals from professional, managerial and skilled professions.
In other words non-mainstream film, certainly in Film Hub Wales member venues, has a core audience which is strongly biased toward middle class social groups. This emerged as a theme too in some of the focus groups where perceptions that the venue's cinema programme did not really cater for 'ordinary people' was cited as a potential reason for non-attendance.

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[12] Whilst the *Capture* data is convincing and statistically reliable, detailed demographic information on audiences for independent film in the UK as a whole and in the Nations and Regions is not routinely published.

[13] www.gov.uk/government/uploads/system/uploads/attachment_data/file/325416/households-below-average-income-1994-1995-2012-2013.pdf

[14] It should be noted that the survey uses self-reporting asking respondents to estimate household income into broad bands – a less reliable approach than that used to produce UK government averages. However there are no grounds to suggest that the findings are not accurate enough for the purposes proposed in this report.

There is some evidence that this social biasing of audiences is common to the non-mainstream sector (and indeed the arts as a whole) and is not a factor unique to Wales.

Ethnicity

Research undertaken by the UK Film Council in 2009[15] indicated that ethnic minority groups were on average more frequent cinema attenders.

The online survey revealed that 92.5% of respondents considered themselves to be White British with White European (3.6%) and Other (2.6%) being the only other ethnic groups reporting over 1%. Wales as a whole has comparatively small diverse populations with only slight variations between proportions in the survey and census population demographics. However audiences from non-white groups seem low, in particular in Cardiff and other areas of South Wales with larger and more settled minority communities where the gap between minority audiences and population demographics is more extreme. This may indicate that there is some ground to be made up in terms of attracting diverse audiences to some Film Hub Wales member venues.

Disability

The proportion of the population disability or long term health problem which restricts activity is higher in Wales than for the UK as a whole at 23%. The rate of disability cited by the sample was low, despite the fact that the proportion of over 65 year olds (a proportion of whom might be expected to report age-related disabilities) was high. This may reflect the fact that access for people with mobility difficulties and those with visual or sensory impairments at some of the older venues is not state of the art.

Family audiences

Most Wales Film Hub member venues programme specifically for this audience segment during the school holidays and/or on Saturday mornings and this represents an important part of their revenue model. Although very few under 18s responded to the survey, children attending their parents/grandparents or carers do form a significant part of the Film Hub Wales member audience.

Question 18 in the online survey asked whether respondents took children or grand-children aged under 18 to the cinema:[16]

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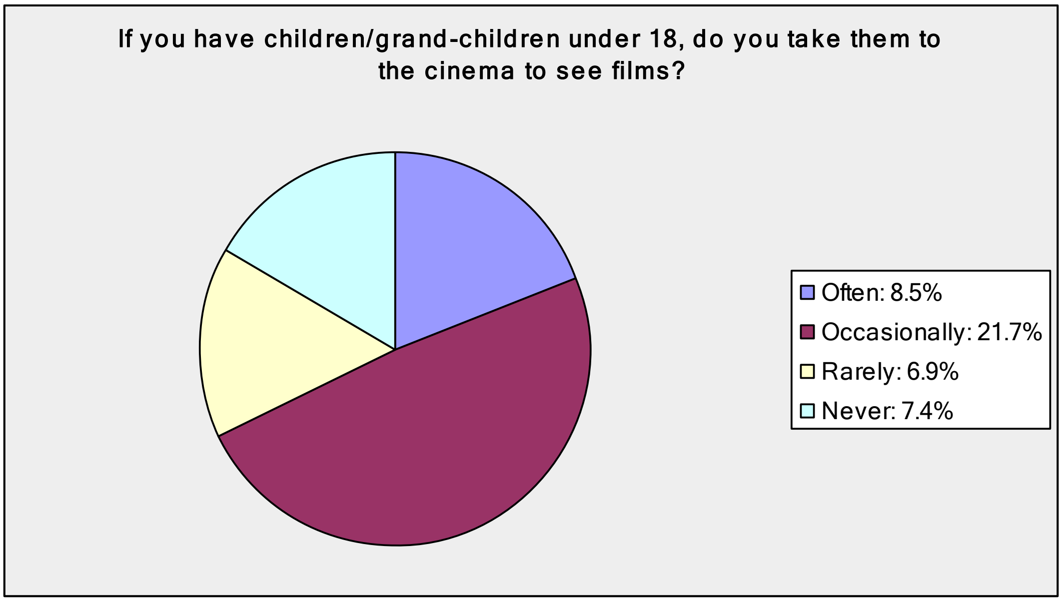
[15] *Portrayal vs Betrayal – An Investigation of Diverse and Mainstream Audiences for Film in the UK* - http://www.bfi.org.uk/sites/bfi.org.uk/files/downloads/uk-film-council-portrayal-v-betrayal-an-investigation-of-diverse-and-mainstream-uk-film-audiences.pdf

[16] Table excludes respondents who do not have children/grand-children under 18.



These results must be interpreted with some caution: comments accompanying responses to this section remind us that many respondents' young grand-children do not live near them and so are only taken to the cinema by grand-parents very rarely. Given the older bias of respondents this may be a significant factor (only 19.5% of the survey[17] reported having children under 18 living at home). Similarly, several comments noted that older teenagers prefer to visit the cinema with friends rather than family. However this does provide some evidence that parents and grand-parents might be induced to do more to encourage under-18s to build a regular cinema-going habit and in particular to watch and enjoy non-mainstream film.

Building the cinema-going habit

Noting the absence of younger (especially 15-24 year old) audiences, an important factor in this phenomenon may well be success or otherwise in building the cinema-going habit from a young age. Interviews with venue staff frequently noted that family audiences for family films (usually entailing Hollywood and other mainstream titles) were a healthy part of venue audience and economics. There was less evidence of a drive to attract family audiences to non-mainstream films (including for example foreign language titles aimed at family audiences).

It was also noticeable that none of the venues appeared to have any significant links to the Into Film initiative,[18] or to school film clubs supported by Into Film.

This said, Film Hub Wales (and the wider FAN network) works with Into Film as a strategic partner of the BFI. For example, Film Hub Wales worked with Into Film Cymru in 2014 to deliver a series of Arts Council Wales funded workshops in venues and schools during the Sci-Fi season, which explored the connection between film and other art forms. In 2015, FHW and the wider Hubs are exploring a potential partnership with Into Film on a UK-wide young programmers scheme: in this young people will learn how to curate film programmes, developing skills needed to develop audiences for non-mainstream film. Into Film are also creating a Cinema Toolkit for venues in 2015.

[17] Question 5
[18] Into Film was formed by a merger of Film Club and First Light

Film Hub Wales also helps to connect Into Film to venues every year for the National Youth Film Festival and other projects that Into Film wishes to promote. Many individual venues are active participants in the National Youth Film Festival (although it is not clear how strongly venues connect the Festival with Into Film). Chapter's Learning and Participation Officer also often works with Into Film to deliver targeted film literacy sessions in schools, venues and off-site.

One of the objectives of Into Film is to build a film-going habit and a broad taste in films and the organisation has a strategic interest in building links between school film clubs and independent cinemas. Although links between Film Hub Wales and Into Film clearly do exist, it would be interesting to explore how individual venues could build a stronger and more productive relationship with Into Film and with local school film clubs.

Threshold effect

A factor which is likely to affect non-attendance is what is known as the threshold effect: certain venues attract a reputation that they are 'for' certain groups or sets. This can easily be a double-edged sword for the venue: attracting the loyalty of one group but deterring others: "this place really isn't for someone like me".

One of the outstanding findings of this research was the extent to which Wales Film Hub member venues had a loyal and enthusiastic core audience. Individual venues were valued or even loved by focus group members (a finding which shines through exit surveys as well) – and by extension, by the broader groups within the community from which focus group attendees derived.

However as has been outlined above, the evidence was that core audiences were quite strongly comprised of older, professional people. It is more than possible that for many Hub member venues this has created a threshold effect which deters other groups – for example young people (especially older teenagers and young adults). This is a phenomenon which was discussed freely by some venue managements and can be genuinely intractable as to alter the venue dynamic may deter the current core audience. However the very clear age bias in the audience profile for Hub member venues indicates that there is a strong incentive for marketing and programming experiment and innovation targeting different groups.

Audience choice – the case of the disappearing audiences: part 1

Although not strictly an issue of non-attenders, many Hub member venues note that audiences for certain types of non-mainstream film (especially foreign language but also perhaps documentary and archive) are low. Venue managements almost across the board noted that foreign language titles were frequently a hard sell. Very few venues noted a substantial and ready audience for archive film or for documentaries.

Data from focus groups and the online survey noted a substantial minority interest in foreign language film - 39% of respondents chose foreign language as a preferred genre, the fourth most popular selection. Classic/ archive film was fifth most popular and documentary ninth.
There is clearly a mis-match between audiences' declared interests and actual attendance. The detailed reasons for this are beyond the capacity of this study but may include:

- A survey tendency to 'inflate' perceived positive responses – people responding to surveys can tend to give answers which they perceive to be 'correct' or to reflect well on themselves;

- Failure of many foreign language, documentary and re-released films to achieve sufficient PR/marketing clout;
- Positioning of foreign language, documentary and archive film as difficult, arcane or minority appeal in advertising and marketing materials;
- The survey may have attracted respondents with a higher propensity to enjoy foreign language film than the venues' general audiences.

Whatever the reasons, this gap between self-declared interest and follow-through into box office achievement indicates that there is space for further exploration of audience motivation and experiment/innovation in marketing these titles.

The effects of live cinema – the case of the disappearing audiences: part 2

Audience growth can come from (at least) two sources: attracting individuals new to the venue (or to film), and encouraging existing audience members to attend as frequently as possible. Looking at this latter issue, there may be a range of forces which – intentionally or unintentionally – provide an incentive to attend less frequently.

Live or event cinema – the live broadcasting of arts events – has been a boon to many of the Film Hub Wales member venues, bringing in large audiences with the concomitant spend. 84% of survey respondents indicated that they had attended at least one live cinema event, a finding which was backed up by focus groups, exit interviews and venue staff. From an audience point of view, such screenings are popular and welcomed as a high-quality way of accessing arts performances – opera, theatre, music – which otherwise would be largely unattainable for reasons of cost and geography.

Live cinema is however not film. Despite its popularity with film audiences, it is a separate and distinct form which just happens to share a platform (the cinema screen) with feature film. There is an argument that live cinema is cannibalising the audience for film – although there is no published research looking at this potential phenomenon. The argument is however an interesting one: that individuals have a financial and time budget for entertainment and nights out. A visit to a live cinema event replaces a potential feature film visit in their time budget; for some, the greater cost of live cinema events may displace more than one feature film visit in their financial budget.
On the other hand, it is possible to theorise a benefit to film from live cinema. For example core audiences for live broadcast opera events may well include opera buffs who would not otherwise go to the cinema. A high-quality screen experience of a live broadcast may encourage them to be more attracted to other (feature film) screen entertainment: canny venue marketing (and box office tracking) could encourage that.

It would be interesting if Film Hub Wales were to undertake further research into the effects of live cinema for venues (financial, cultural, audience), potentially in collaboration with Arts Council Wales.

Image: Theatr Gwaun, Fishguard

The effects of streaming

In interview, staff at many venues were of the view that video streaming (e.g. Netflix, Amazon Prime as well as illegal sites) was one culprit for the shrinking of audiences for non-mainstream film, especially amongst younger people and students whose appetite for film far exceeds their capacity to see everything they want to see as a paying cinema patron. Cost and convenience were cited as likely drivers for 'missing' audiences. It is impossible on currently published evidence to assess the extent of this as a competing factor – and there is some tentative evidence from industry research that individuals who are active film streaming consumers are also active film-goers. Again, additional research (for example amongst students at the Universities of Aberystwyth, Swansea and Cardiff) might shed some light on the extent to which streaming substitutes for cinema visits and of any potential measures which venues could take to ameliorate this.

Image: Gwyn Hall, Neath

8. Conclusions, recommendations and further research

Whilst every venue in this study is completely unique and has its own, sometimes complex local context, what emerges is a picture of a network of venues broadly sharing the same characteristics in relation to their audiences and programming for these audiences. The picture can be summarised as follows:

An older audience

All the venues had audiences which are much older than the cinema-going population as a whole. Whilst in the mainstream and multiplex sectors the biggest proportion of customers fall in the 15 to 25 year age category, this group is very under-represented at the Film Hub Wales member venues. Furthermore, the audience at many venues is even older than that for 'art-house' or non-mainstream film across the UK: although the UK art-house audience is predominantly over 45, Wales Film Hub member venues appear to amplify this older trend. At Film Hub Wales member venues audience share trends toward the 55+ age group and a surprising number of respondents were in the 75+ age group. Many venues specifically target these audiences, particularly for matinee slots and provide an important social focus for the older population in the towns where they are located. These audiences tend to be high frequency cinema goers, many attending their local cinema on a weekly basis.

Few 15-25 year olds

Even venues located in places where there are larger numbers of students and other young people (Cardiff, Aberystwyth, Swansea, Llantwit, Barry) are finding it a substantial challenge to attract 15 to 25 year olds in anything like the numbers that mainstream film venues do – or to the level that non-mainstream or independent venues appear able to do in London. This is partly product related (much of the content which appeals to this demographic in UK box office tables is heavily advertised

Hollywood Blockbuster fare) and partly to do with younger audiences' preferences for the multiplex experience and the desire to be in a space they feel is 'for them' (see notes on the threshold effect above in section on non-attenders).

Many are of the view that it is not worth trying to attract these audiences into independent venues as it is a) probably a lost cause and b) may disenfranchise existing (older) audiences. It is probably also the case that as they age, many of these younger audiences 'convert' to independent venues as their tastes and habits change over time.

That said, there is undoubtedly an audience for non-mainstream film amongst younger people and it appears to be the case that Hub member venues are struggling to attract that audience in sufficient numbers.

Recommendation 1
At venues where there are significant numbers of students among the local population, particularly for campus-based venues, a number of experimental initiatives targeted specifically at this group to try and attract their on-going attendance should be delivered and good practice/successes shared among the network.

Distributor behaviour
The majority of the venues in the Hub network have only one screen, which for some is shared with other arts or commercial activity at the venue, meaning there is often limited screen time. With the advent of digital prints and projection, it was assumed by many that distributors would be able to adopt a completely flexible approach to the demands made on exhibitors in terms of how long each run is. In practice, the old patterns of supply and demand seem to have persisted to the extent that distributors appear to act against their own commercial best interests in insisting that a title is played for whole or multiple weeks if a venue wishes to obtain titles 'day and date' (i.e. on or very close to the UK release date). Some distributors also insist on screen exclusivity for new titles removing a venue's ability to screen two titles during a week – a potentially valuable option allowing a single screen venue for example to show matinees of a children's film and evening screenings of a more grown-up offering.

Especially for venues in more rural locations the effect of a demand for screen exclusivity and a week/two week booking from a distributor will be that audiences after the first weekend will have dropped to a handful for each screening – or that evening audiences for children's titles (especially those aimed at younger children) will be low or non-existent.

Some of the smaller Film Hub Wales member exhibitors deem it to be not worth trying to secure some titles because the terms do not make sense for their audience – that their venue and catchment cannot sustain two weeks of a particular title, or an uninterrupted week run of a new children's film. These exhibitors argue – with a great deal of cogency – that a more flexible distributor policy would enable them (and the distributors) to maximise audiences and takings. Especially in areas with little or limited local cinema competition, approaches such as non-exclusivity, shorter runs and part-week bookings for 'day and date' would enable these venues to screen a range of titles without creating any significant risk for the distributor that such concessions would cannibalise takings for the same title from another cinema. There must be many venues in other rural parts of the UK facing the same challenge.

Image: The Scala, Prestatyn

Recommendation 2
There is a need at UK Network level to discuss how distributors and smaller exhibitors can meet each other's needs for maximum returns from theatrical exhibition.

Heavy reliance on volunteers
All bar two of the venues place heavy reliance on volunteers – usually for ushering but in some cases for other roles too – box office, kiosk or technical and managerial functions. Many of the volunteers are committed audience members too and are frequently enthusiastic ambassadors for the venue and its cinema programme. On the whole, this community participation is a huge positive. However, it masks the fact that many of the venues are financially unsustainable when looked at from a purely business point of view. It is important therefore that the volunteer base is sustained and nurtured – without it, many venues would be forced to close.

Recommendation 3
Further study to explore the economic, social and cultural role played by volunteers in all types of Film Hub Wales members would provide a clearer picture of that role. Film Hub Wales and the UK Film Audience Network should explore strategies to provide volunteer support and development at venue, regional and national level. In Wales, the potential for partnership with agencies such as Volunteering Wales and the Wales Council for Voluntary Action might be explored.

Certain film genres a ‘hard sell’
While most cinema programmers or managers reported that they found it difficult to ‘sell’ foreign language titles, around half of the online survey respondents rated it in their top five favourite genres. This anomaly may be explained by people over-reporting their preference for something more esoteric or perhaps programming choices/product availability which does not appeal to local audiences or does not get any meaningful level of publicity. Other genres of film or styles of film-making were also noted as being ‘difficult’ – including for example bad language, violence and urban themes.

The overriding preference of the Film Hub Wales members’ audiences is for, what can be described as ‘intelligent British film’ but there simply is not enough of this product available theatrically to satisfy stated demand.

The impact of event cinema
Where it is available, the streaming of live arts events including theatre, opera and music has been a ‘god send’ to cash strapped venues, providing a reliable additional source of revenue and in some cases new audiences. What is unclear is what impact this is having on the cinemas’ existing audience. These ‘non film’ events also compete for screen time in what are traditionally cinema’s peak slots. It may be that the cinema film audience is being cannibalised – everyone has a limited budget for entertainment and they may be spending it on live events rather than film.

Recommendation 4
It would be useful to quantify exactly what impact live event cinema is having on film audiences at a venue level. Research could explore audience views on event cinema (comparing this with views on feature film), economic impact, attendance rates and any impact on film-going in terms of time and finances.

Value-added initiatives/*Into Film*
One of the key findings in terms of non attenders was low levels of attendance by young people. Very few of the venues the researchers talked to during this study appear to be fully capitalising on the resources available through *Into Film.* Very few of the venues the researchers talked to during this study appeared to be working with *Into Film*. It became clear during conversations with venues that although the level of awareness of the *Into Film Festival* (previously the National Youth Film Festival and formerly National Schools Film Week) was high, there was some confusion around what else *Into Film* offers even though a number of the venues do participate with the Festival.

One of the key tools in building audiences for the future, particularly for non-mainstream film, is to broaden young people’s exposure to a wider range of film product as well as inculcating cinema-going as a habit. *Into Film’s* school-based Film Club was set up precisely for this purpose but it is important that schools also work with their local venues to expand what is on offer to young people and to build a cinema-going (as well as just film-watching) habit.

There is an opportunity for venue-based after schools film clubs with a programming and food offer which is targeted specifically at this demographic. Festivals are another way of attracting in younger audiences, particularly in relation to young people’s filmmaking and only a handful of venues are currently exploiting this.

Image: Torch Theatre, Milford Haven

Recommendation 5
One of the key findings in terms of non attenders was low levels of attendance by young people. Very few of the venues the researchers talked to during this study appear to be fully capitalising on the resources available through *Into Film.* It became clear during conversations with venues that although the level of awareness of the *Into Film Festival* (previously the National Youth Film Festival and formerly National Schools Film Week) was high, there was some confusion around what else *Into Film* offers, even though a number of the venues do participate with the Festival.

***Into Film* may need to re-communicate its brand and benefits more effectively to the Hub member venues. It is also possible that Into Film may need to consider how it can more actively encourage its school-based clubs to make contact with and collaborate with local cinemas. Scope may exist for focused research into barriers to school/cinema collaborations leading to one or more pilot school/cinema collaboration projects in Wales.**

Market segmentation
One of the most successful initiatives adopted by almost all venues is the provision targeted at the over 60s age group (generally referred to as the 'Silver Screen' market segment). This provision offers a 'suitable' film at a convenient time of day at a reasonable price with refreshments included in a cut price ticket. These performances tend to attract large houses and fulfil an important social need.

This approach, which is classic market segmentation, has been adopted for other segments including those for people with shared interests or special needs (mother and baby screenings and autism-friendly screenings have also met with some success). The approach could be extended to try and attract non-attenders – particularly young people – manipulating elements of the marketing mix (product (film/food and drink offer), price, place, time and promotion to create something with specific appeal to a known demographic or special interest group. U3A groups for example often enjoy more challenging films such as foreign language. Offering something at times when the venue is not being used by other groups has the advantage of overcoming the 'threshold effect' which appears to apply more to perceptions of the programme than the venue or building.

Recommendation 6

A number of experimental initiatives to set up venue-based after schools film clubs should be established at suitable venues, particularly those with secondary schools within walking distance.

Value of national marketing and promotion

It is clear from the research that for non-mainstream film and the Hub members' audiences, the biggest influence on buyer behaviour is press coverage – specifically reviews. National press advertising is also important. Small films, however good they may be, will struggle to find audiences without this kind of marketing and promotion. While some of the national funders offer funding for 'prints' and advertising, these funds are often spent on larger productions which those agencies have also financed.

Recommendation 7

There may still be a role for the UK network to invest in national marketing campaigns for neglected titles and special seasons which will appeal to a discerning audience, particularly perhaps, foreign language titles.

The continuing squeeze on public funding of the arts

Some of the Network venues receive no public subsidy of any kind for their cinema operation although around half get a (usually very small) revenue subsidy from Ffilm Cymru Wales or their local authority. Some of the mixed use venues were in receipt of programme support investment from ACW and were clear that they prioritised experiment and innovation in ACW-supported art forms (and often also prioritised access to weekend auditorium slots in the same way). The absence (or shortage) of film programme investment support provided a barrier to innovation and experiment not merely due to the absence of funding to offset the costs and ameliorate the risks inherent in programme innovation, but also in some venues due to the higher priority (and investment) in live arts innovation.

Additionally, during the course of the study public sector cuts to local authorities have continued and many funded venues expect their local authority and/or other funding to contract significantly or disappear altogether over the next one to three years in a climate of continuing austerity. Most venues are considering how they can balance their books in the light of continuing cuts and feel under pressure to show more mainstream/commercial titles with broader appeal. While this approach may be a viable way forward for some, for others their 'niche' appeal is what keeps audiences coming to the venue. To state the obvious, if venues for economic reasons increase their mainstream programming, screen time for non-mainstream titles (especially outside of South Wales and one or two university towns) will diminish or disappear.

Recommendation 8

Further research should be commissioned to explore successful commercial models of independent cinema which would identify the capital infrastructure requirements and operating models where costs can be stripped down or shared/centralised.

In addition, Film Hub Wales should continue to work with its Wales and UK partners to explore mechanisms for support and investment in programme innovation at a venue level.

Diversity

On the whole, whilst in some areas the ethnic audience percentages reflect the make-up of the local population, in other more ethnically diverse areas participation by members of ethnic minorities is lower than would be expected. The same can be said of disabled audiences. Very few survey participants said they would describe themselves as having a disability although the rate of disability in Wales is much higher than elsewhere in the UK and particularly given the older demographic that many Hub venues attract, it might be expected that more people with disabilities would attend. This may be because their particular needs are not being catered for – for example subtitled and audio-described screenings are not much in evidence, although most have the technology to offer this now. It is often reported to Film Hub Wales that it is difficult to source required content with audio description and where it is available, it is rarely provided in good time to market the screening to audiences in venue brochures.

Recommendation 9

Although it is often not possible to make changes to the physical accessibility of the buildings in which these venues operate, age-related sensory impairments can be much more easily catered to with digital technology. Venues should be supported to offer more 'accessible' screenings for hard of hearing, D/deaf or visually impaired audiences through subtitling or audio-description.

Data capture, audience research and evaluation

Data capture rates vary enormously from one venue to another, but even where data is captured it is sometimes not analysed and used to develop future audiences. Broadly, most venues describe their audiences in terms of 'older people' and 'family audiences' based on personal observation of who is currently coming to the venue. Although there is merit in this approach, on its own it is unlikely to yield information about how to increase rates of attendance, better cater for existing audience needs and how to attract new audiences to the venue.

Recommendation 10

If venues want to develop new audience segments, there is a case to be made for a more formal and detailed understanding of venue audiences and their needs and motivations through on-going audience research, feedback and evaluation.

Marketing and communications – Print is still key

It is evident that print-based media are still the most widely consulted information sources for most of the network audiences – venue brochures and press advertising/editorial in particular. Alongside this, personal invitation via email and (in a couple of places) Facebook seem to work particularly well for some venues. Focus groups revealed that not knowing whether or not a particular title was coming to a venue drives people to mainstream venues to guarantee being able to see something.

Most audiences do not mind waiting, as long as they know they will get to see it at their local cinema at some point.

Recommendation 11
For venues where brochures have to go to print too far in advance for a fully finalised programme to be published, it is vital they communicate programme updates and forthcoming titles as efficiently and effectively as possible.

[end]

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