

Your Cinema, Your Community

The Experiences and Impact of Local Cinema in Scotland: An Exploratory Study



Social Research



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Evaluation Support



Social Impact Measurement

A Report for
Regional Screen Scotland

July 2016



This report has been prepared by Social Value Lab in partnership with Regional Screen Scotland*.

The report presents the findings of an exploratory study into the experiences and impact of local cinema in Scotland. It examines the work of a diverse group of twelve cinema exhibitors and explores the associated contribution to their audiences and communities.

The report represents a first step by Regional Screen Scotland to develop wider understanding of the role and contribution of cinema to local communities.

* Regional Screen Scotland is supported by Creative Scotland and Highlands and Islands Enterprise, and receives sponsorship for its Screen Machine service from the Royal Bank of Scotland, Highland Fuels, and Caledonian MacBrayne.

Index /

Executive Summary

Foreword **1**

1: Introduction **2**

2: Characteristics of Local Exhibitors **4**

3: Audience Views on Local Cinema **10**

4: Aspects of Audience Satisfaction **14**

5: The Social Value of Local Cinema **23**

6: Main Conclusions **29**

Executive Summary

Introduction

This exploratory study set out to examine the role and contribution of local and independent cinemas to the communities in which they are based.

The findings contained in the report are based largely on semi-structured interviews with a selection of 12 film exhibitors and an online survey that yielded 3,442 responses from local cinemagoers.

The Characteristics of Local Exhibitors

The research draws on the experiences and views of a sample of 12 local film exhibitors.

Collectively the exhibitors selected reflect the diversity of local cinema in terms of location, setting, venue, ownership, scale of operations, programming choices, community orientation and audience reach.

Audience Views on Local Cinema

The research shows the value attached to shared screen experiences. It reveals a strong preference for watching films as part of an audience rather than at home. It highlights the importance that audiences attribute to local cinema as a form of pure entertainment or escapism, but also as a thought-provoking communal experience.

The study indicates that local and independent cinema attracts a loyal and regular following, bringing together people to enjoy a shared cultural experience. It describes the importance that audiences attribute to cinemas in relation to the

neighbourhoods, towns and villages in which they live.

The report also provides evidence of the essential role that local film exhibitors play in removing the linked barriers of geographic access and cost to attending cinema and to sustaining this form of cultural participation.

Aspects of Audience Satisfaction

The study has revealed very high levels of satisfaction with the local cinema experience.

The research suggests a number of factors that drive particular satisfaction, most notably the quality of screen and sound, service, and surroundings. It also highlights those factors that are somewhat less instrumental in achieving overall satisfaction, including the choice of films and proximity to local amenities.

It also reveals a preference for their local cinema experience over the other alternatives available.

The Social Value of Local Cinema

This exploratory research has also systematically explored the changes, benefits and other effects reported by local cinema audiences.

The research points to the influence and impact of local cinema in six domains:

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- **Culture.** The research gives an indication of the depth of emotional response to cinema and highlights some of the intrinsic effects of local cinema in feeding new perspectives, stimulating interests, and reinforcing one's identity.
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- **Wellbeing.** The research characterises local cinema as a health asset, pointing to ways in which local cinema can help people to feel less alone, foster a more positive mood or outlook, and enable people to cope with everyday stresses.
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- **Community.** The evidence demonstrates ways in which local film exhibitors are offering a focal point for the community, a safe and trusted place to go, and a way of bringing the community together.
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- **Learning.** The study hints at the role that local cinema can play in supporting learning and training, although this is an area that merits further examination.
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- **Local Economy.** The research describes the ways in which local cinema can help retain and recirculate money in the local economy, as an important source of night-time entertainment and a means of attracting visitors, but also through its purchasing power and role as a local employer.
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- **Heritage.** The study explores the heritage value of the buildings in which film exhibition occurs, and describes the sense of affection, pride, identity and commercial importance that local cinema creates.
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These represent a broad set of outcomes that have traditionally proven difficult to count, evaluate and compare.

Main Conclusions

The research provides a first-level indication of the role and contribution of film exhibition and a potentially more holistic and useful way of understanding its impact.

The study suggests a number of potentially beneficial lines of follow-on enquiry, including, further research into the contribution of cinema to local economies, its impact on learning and training, the views of non-attenders, and the effectiveness of local cinema in reaching out to particular target groups within the population.

The report also proposes three main ways to build upon the learning and content developed from this first phase of research. First, support for each of the 12 participating film exhibitors to make use of the audience research and impact data generated. Second, the production of a Social Value Toolkit providing the guidance and tools required by the film exhibition sector to define, track and evaluate impact. Finally, the development of a supporting online survey resource that can be utilised by local exhibitors and is also capable of producing useful data aggregate data.

Foreword

The cinema industry is driven by data and statistics. Anyone involved in the exhibition of film will be familiar with the pressing requirements to provide regular, timely and detailed information on all admissions.

As a result, we know that UK cinema admissions have largely held steady over the last decade, despite the rise of rival ways of accessing film. Cinemas clearly still offer something special. We know which films are popular, and we know something of the demographics of our audiences.

But we know very little about the impact of cinema provision on the wider community.

The last substantial study to consider the social impact of cinema was in 2005, and was based on just five independent cinemas across the UK¹. As the cinema-going experience continues to change radically, what does it mean to a community to have a cinema at its heart?

At Regional Screen Scotland, our remit is to help communities to share great screen experiences, and so we wanted to know much more about how cinema provision affects how a community sees itself, and what having access to cinema means to people individually.

In the 18-year history of the Screen Machine Mobile Cinema, RSS has a unique record of the interaction between one specific kind of cinema provision and a very wide range of rural and remote communities. In considering the long-term future of the Screen Machine service, we therefore also wanted to understand how it compared to other methods of providing local cinema access.

In concentrating on local cinema, we recognise that most cinema admissions are generated by multiplexes owned and operated by national or multi-national cinema and leisure chains. Those venues provide a crucial and highly popular service for cities and larger communities. But, by their nature, individual multiplexes have limited scope for interacting with, and reflecting the specifics of, local communities. Nonetheless, much of what this study reveals is as relevant to a 10-screen multiplex as to our own 80-seater mobile cinema.

The involvement of the Social Value Lab has been vital to the success of this research; in designing the research methodology and survey content, and in providing a genuinely objective analysis of the results.

This is a pilot piece of work, which we hope can make the argument for further work to inform future policy and funding arguments for cinema provision, especially for those many communities that still lack even the most basic access to local cinema.

Robert Livingston
Director, Regional Screen Scotland
www.regionalscreenscotland.org

¹ UK Film Council and BFI, The Impact of Local Cinema, November 2005

Section 1: Introduction

This report examines the experience of audiences and the associated impacts of local and independent cinema in Scotland. It examines the work of a diverse group of twelve local cinema exhibitors and explores their contribution to their audiences and communities.

Context

While cinema attendance is not the only source of public engagement with film it remains the most widespread and influential.

Attendance at cinemas has risen steadily over recent decades, and the evidence shows that cinema remains the most popular cultural activity in Scotland outside the home. Data from the most recent Scottish Household Survey indicates that over half of adults in Scotland (56%) have attended cinema in the last 12 months, and cinema attendance is more widespread now than at any other point over the last decade². The latest BFI statistics³ show that cinema admissions per head of population in Central Scotland (3.2 admissions per person during a 12-month period) is highest in the UK outside of London.

Film exhibition in Scotland remains, in absolute terms, in good health. Recent estimates suggest that Scotland has between 6.4⁴ and 10.8⁵ screens per 100,000 people.

There are now many ways to come together to enjoy film. Exhibiting organisations range from international cinema chains operating large multiscreen cinemas across the year, to multi-arts organisations that include cinema exhibition in their programme, to touring and mobile cinema, to a diverse range of community cinemas and film societies.

The latest evidence from Creative Scotland indicates that the number of film exhibitors in Scotland is stable, the amount of screenings and audience numbers continue to grow, with admissions dominated by multiplexes and independent cinemas (see Fig. 1.1)⁶.

FIGURE 1.1: CINEMA ADMISSIONS BY EXHIBITOR TYPE (OVER 12 MONTHS)

<i>Exhibitor Type</i>	<i>Median Attendance</i>
Multiplex	111,922
Independent	53,000
Multi-Arts	5,215
Community	584
Film Club	688
Festivals	1,709
Mobile	494

Source: Creative Scotland, Mapping Film Exhibition in Scotland, June 2016

However, beneath the positive veneer, the same Creative Scotland research suggests that audience access to film exhibition is defined by where you live with clear geo-demographic gaps in provision. The research also finds that there are a number of challenges where the film exhibition sector is underperforming, and different types of exhibitor experience differing pressures on their operations, programming and sustainability.

² Annual Scottish Household Surveys up to 2014

³ BFI Annual Statistical Year Book, 2014

⁴ Estimate from British Film Institute

⁵ Estimate from Creative Scotland Mapping Film Exhibition in Scotland (June 2016), including mobile and touring cinema.

⁶ Creative Scotland, Mapping Film Exhibition in Scotland, June 2016

About the Study

Against this backdrop, it is widely accepted that local and independent cinema offers a widely enjoyed communal experience, and space for contemplation, inspiration and debate.

But what does local cinema mean to the audiences that come together to enjoy film? How satisfied are they with their local cinema experience? And what economic, cultural and social benefits arise for individuals and communities?

This exploratory study set out to examine these and other questions.

The study was conducted between November 2015 and May 2016 and was based on a mixed methods research design. It incorporated a number of main elements:

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- A rapid review of *previous research literature* on film exhibition and its impact on audiences and communities. This yielded very limited relevant and up-to-date research on the impact of local cinema.

 - *Scoping interviews and discussions* involving a range of bodies active in stimulating and supporting film exhibition in Scotland. This included representatives from Creative Scotland, UK Cinema Association, Film Mobile Scotland, Film Hub Scotland, Cinema For All, and Voluntary Arts Scotland.

 - Site visits and *semi-structured interviews with 12 selected film exhibitors*, representing a broad cross-section of local and independent cinema in Scotland.

 - An *online survey* of audience members/subscribers associated with the 12 selected film exhibitors. Administered during December 2015 and January 2016 this yielded **3,442 responses**.
-

Sample of Exhibitors

The research draws on the experiences and views of 12 local film exhibitors and their audiences. The participating exhibitors were:

-
- Adam Smith Theatre, Kirkcaldy

 - An Lanntair, Stornoway

 - Birks Cinema, Aberfeldy

 - Eastgate Theatre & Arts Centre, Peebles

 - Eden Court Theatre, Inverness

 - Hippodrome Cinema, Bo'ness

 - Machars Movies, Isle of Whithorn

 - Pavilion Cinema, Galashiels

 - Pix in the Stix, East Lothian

 - Robert Burns Centre Film Theatre, Dumfries

 - Screen Machine, Highlands & Islands

 - West Side Cinema, Stromness
-

Taken collectively these exhibitors reflect the diversity of local cinema in terms of location, setting, venue, exhibitor type, ownership, programming, and scale of operations.

Report Structure

The remainder of this report goes on to describe the findings from the research.

The next section provides an overview of the characteristics of the 12 film exhibitors examined, their programming choices and their reach into local communities.

Section 3 explores the perceptions of cinema audiences, their preferences, patterns of cinema attendance, barriers to attendance, and views on local cinema.

Section 4 examines levels of satisfaction reported by audiences across nine domains of satisfaction.

Section 5 examines the impact of local cinema on individuals and communities. It explores the social value created in terms of culture, community, wellbeing, learning, local economy, and heritage.

Finally, Section 6 draws together the main conclusions from the study and teases out some implications for future research.

Section 2: Characteristics of Local Exhibitors

This section provides an overview of the characteristics of the 12 film exhibitors that participated in the research, the form they take, the programming choices they make, and their reach into local communities.

Exhibitor Type

The focus of this study is on local and independent cinema.

The group of 12 participating exhibitor organisations all offer regular, public communal film-viewing opportunities, and include full and part-time cinemas, multi-arts venues showing film, mobile and touring cinema, and community cinemas.

FIGURE 2.1: EXHIBITORS AND EXHIBITOR TYPES FEATURED IN THE RESEARCH

<i>Exhibitor</i>	<i>Exhibitor Type</i>
Adam Smith Theatre	Multi-arts Venue
An Lanntair	Multi-arts Venue
Birks Cinema	Independent Cinema
Eastgate Theatre	Multi-arts Venue
Eden Court Theatre	Multi-arts Venue
Hippodrome Cinema	Independent Cinema
Machars Movies	Community Cinema
Pavilion Cinema	Independent Cinema
Pix in the Stix	Film Society or Club
Robert Burns Centre	Independent Cinema
Screen Machine	Mobile Cinema
West Side Cinema	Community Cinema

It should be noted that the research has excluded multiplexes from the sample given their limited ability to act locally.

Machars Movies: Community Cinema

Machars Movies is a successful community-led venture bringing critically acclaimed films and a highly social cinema experience to the Machars peninsula. Formed in 2009 with substantial volunteer effort, Machars Movies is Scotland's most southerly cinema at the Isle of Whithorn. Screenings take place in the well-equipped St. Ninian's Hall, a multi-purpose community venue. The community cinema is run as a self-funding venture - annual membership fees cover only the cost of exhibiting films and the hire of the venue. Enthusiasts from among the local population volunteer their time as part of the team that runs the cinema and membership is open to anyone over the age of sixteen.

Setting

The sample of exhibitors examined spans the length and breadth of Scotland.

While diverse in the settings in which they operate, all of the exhibitors share a common desire to bring a quality cinema experience to the local population.

A number of the exhibitors included - An Lanntair, Birks, Machars Movies, Pix in the Stix, West Side, and Screen Machine - demonstrate a variety of creative ways to ensure access to some of the most cinema-deprived rural communities in Scotland. Some of the settlements served are located more than 150km from their nearest multiplex.

FIGURE 2.2: LOCATION AND SETTING OF THE FILM EXHIBITORS FEATURED IN THE RESEARCH

<i>Exhibitor</i>	<i>Location</i>	<i>Setting</i>	<i>Distance to Closest Multiplex</i>
Adam Smith Theatre	Kirkcaldy	Town	20 km
An Lanntair	Stornoway	Island	177 km
Birks Cinema	Aberfeldy	Rural	50 km
Eastgate Theatre	Peebles	Town	20 km
Eden Court Theatre	Inverness	City	7 km
Hippodrome Cinema	Bo'ness	Town	13km
Machars Movies	Isle of Whithorn	Rural	87 km
Pavilion Cinema	Galashiels	Town	50 km
Pix in the Stix	East Linton & Tynninghame	Rural	31 km
Robert Burns Centre	Dumfries	Town	57 km
Screen Machine	Highlands & Islands	Rural	N/A
West Side Cinema	Stromness	Town	228 km

Screen Machine: Taking Cinema to Remote Rural and Island Communities

Screen Machine is a unique 80-seat, air-conditioned mobile cinema that brings the latest films to audiences in some of the most cinema-deprived communities in Scotland. It strives to provide rural, remote and island communities with the same level of cinema experience as larger towns and cities. Last year, Screen Machine visited 42 communities in the Highlands and Western Islands. During the year, the Screen Machine tour extended to 18,877 miles by road and 1,376 miles by ferry, and included visits to 14 islands. Tours lasting approximately 10 weeks comprised 142 stops during the year. Each community was visited between one and six times on the tour with a choice of three films typically on offer. This has created a shared screen experience that has become a special ‘event’ in the calendar of many communities.

Ownership and Management

The cinemas examined take a variety of forms, operating either under the direct ownership of local communities or by public authorities acting on their behalf.

Community ‘ownership’ typically means that a film exhibitor has been established as an unincorporated voluntary association (a formally constituted community group) or incorporated body (typically a not-for profit company holding no share capital).

While the legal or corporate form of exhibitors vary, all of the cinemas attempt to engender a real sense of ‘ownership’ by local people, by way of membership schemes, local outreach activities, or other practices.

FIGURE 2.3: ORGANISATIONAL FORM THAT EACH FILM EXHIBITOR TAKES

<i>Exhibitor</i>	<i>Organisational form</i>
Adam Smith Theatre	Local Authority Trust
An Lanntair	Community
Birks Cinema	Community
Eastgate Theatre	Community
Eden Court Theatre	Community
Hippodrome Cinema	Local Authority Trust
Machars Movies	Community
Pavilion Cinema	Private Company
Pix in the Stix	Community
Robert Burns Centre	Local Authority
Screen Machine	National charity
West Side Cinema	Community

Pix in the Stix: Of the Community

Pix in the Stix is a volunteer-run community cinema for East Linton, Tynninghame and surrounding area. Exhibiting in the community halls of two local villages, Pix in the Stix aims to improve access to cinema for rural communities. Established as a non-profit-making community organisation, it reinvests any surplus into widening access to local cinema. For the first film of each season and for special themed showings, all money made is donated to nominated charities – the Royal Hospital for Sick Children in Edinburgh and Amnesty international. As part of its social mission, it takes mobile cinema to other community settings and groups, and in the process has helped five other community cinemas to become established.

Scale of Operation

The sample reflects the diversity in scale and operation of the film exhibition sector in Scotland.

Most of the exhibitors operate a single screen cinema.

Seating capacity varies enormously from just 60 people for screenings in a local village hall to over 700 in a traditional picture palace.

While some of the community exhibitors offer between between 10 and 20 screenings annually, this extends to more than 3,500 screenings across four screens at the independent Pavilion Cinema.

FIGURE 2.4: FILM EXHIBITION CAPACITY AT THE FEATURED CINEMAS

<i>Exhibitor</i>	<i>Screens</i>	<i>Seating Capacity</i>	<i>Approx. Screenings</i>
Adam Smith Theatre	1	475	186
An Lanntair	1	220	265
Birks Cinema	1	104	1,440
Eastgate Theatre	1	230	100
Eden Court Theatre	2	224	1,800
Hippodrome Cinema	1	173	480
Machars Movies	1	95	10
Pavilion Cinema	4	695	3,748
Pix in the Stix	1	60	20
Robert Burns Centre	1	69	280
Screen Machine	1	79	577
West Side Cinema	1	140	20

The Pavilion Cinema: Local Scale and Significance

The Pavilion is an independent, family operated cinema. It has four screens with a combined seating capacity of 695 and offers more than 3,500 screenings each year. All screens at the Pavilion are fully digital and the cinema has two 3D systems. The Pavilion is located in Galashiels, serving a local catchment population of some 12,000 people but attracts audiences from communities across the Scottish Borders. Annually it achieves approximately 100,000 admissions, and strives to provide all customers with a first class cinema-going experience.

Audience Reach

Each of the cinemas examined operate in markedly different locations from small rural catchments to major urban centres.

A combination of location and film exhibition capacity largely determine the level of attendance that can be achieved, ranging from less than 1,000 admissions annually to approximately 100,000.

FIGURE 2.5: TOTAL ADMISSIONS IN THE LAST FULL YEAR OF OPERATION

<i>Exhibitor</i>	<i>Admissions</i>
Adam Smith Theatre	1,584
An Lanntair	18,774
Birks Cinema	31,800
Eastgate Theatre	6,400
Eden Court Theatre	74,734
Hippodrome Cinema	28,399
Machars Movies	700
Pavilion Cinema	100,000
Pix in the Stix	1,200
Robert Burns Centre	13,729
Screen Machine	21,460
West Side Cinema	1,200

However, the local and independent cinemas examined focus on much more than the number of tickets they are able to sell. Most engage with communities in very direct ways and play a much wider role in community and cultural life. Section 5 examines this further.

Birks Cinema: Welcoming all of the Community

Birks Cinema was reopened in 2015 under the auspices of The Birks Cinema Trust. The community has created a busy local cinema that attracted almost 32,000 admissions last year, reaching well beyond the 2,000 or so people that live locally in Aberfeldy. The ambition from the outset has been to establish the cinema as a community hub, creating a vibrant programme of arts and cultural opportunities. Birks Cinema therefore employs a part-time Community Development Officer tasked with identifying local needs and ensuring that the venue is a well-used and valued community resource. Birks has been successful in opening its doors to a range of activities, including interactive musical activities for pre-school children, a youth group for 5-15 year olds, a story-telling group, yoga lessons, chair-fit classes for older people, a weekly craft group, traditional folk music nights, and monthly sing-alongs for older people.

Programming

The exhibitors examined collectively offer a broad and varied film programme.

Each cinema has developed a programme that reflects the diversity of the local community and attempts to reach out to all parts of it. Programming choices also attempt to reflect the heritage and culture of the area and form a connection with other local activities and events.

While some local cinemas have focused on bringing a mainstream diet of Hollywood blockbusters to areas otherwise deprived of first-run attractions, most have ventured into arthouse, archive and foreign-language films. Just over half have now begun to screen live broadcasts of leading theatre or opera productions.

FIGURE 2.6: FILM PROGRAMMING ACROSS FEATURED EXHIBITORS

<i>Exhibitor</i>	<i>Mainstream Hollywood</i>	<i>Arthouse/ Specialised</i>	<i>Children and Family</i>	<i>Archive Film</i>	<i>Event Cinema</i>	<i>Themed Events</i>
Adam Smith Theatre	✓	✓	✓	✓	✓	x
An Lanntair	✓	✓	✓	x	x	✓
Birks Cinema	✓	✓	✓	x	✓	✓
Eastgate Theatre	✓	✓	✓	x	✓	x
Eden Court Theatre	✓	✓	✓	✓	✓	x
Hippodrome Cinema	✓	✓	✓	✓	✓	x
Machars Movies	✓	✓	x	x	✓	✓
Pavilion Cinema	✓	x	✓	x	✓	x
Pix in the Stix	✓	✓	✓	x	x	✓
Robert Burns Centre	✓	✓	✓	✓	x	x
Screen Machine	✓	✓	✓	✓	✓	x
West Side Cinema	x	✓	x	✓	x	✓

West Side Cinema: Challenging Audiences

West Side Cinema in Stromness, Orkney offers the edge of world cinema in a relaxed and social atmosphere – themed music, candle-lit tables and a ‘bring your own’ policy. It screens short films with every feature film; fiction and documentary from around the world. It also encourages filmmaker talks and workshops and will often tie in with established local festivals. The cinema uses a unique audience feedback and scoring system – the Ping-Pongometer – to ensure that programming remains responsive to the preferences of its local audience. In 2015 West Side Cinema was nominated for ‘Best Film Programming’ at the Cinema For All Film Society Of The Year Awards.

Venue

The cinemas examined are all unique in their own way, with many venues achieving a historic significance locally.

Most of the buildings come with a rich history, some of which have now been

restored to their former glories. Some continue to operate as dedicated cinemas while others are based on multi-functional arts of community spaces.

FIGURE 2.7: ESTIMATED ORIGINAL DATE OF CONSTRUCTION OF THE CINEMA VENUES

<i>Exhibitor</i>	<i>Date of Construction</i>
Adam Smith Theatre	1899
An Lanntair	2005
Birks Cinema	1939
Eastgate Theatre	1871
Eden Court Theatre	2007
Hippodrome Cinema	1912
Machars Movies	1929
Pavilion Cinema	1911
Pix in the Stix	1828
Robert Burns Centre	1781
Screen Machine	N/A
West Side Cinema	1841

The Hippodrome: History and Heritage

The Hippodrome, built in 1912, is the earliest surviving purpose-built cinema in Scotland. It was commissioned by cinema pioneer Louis Dickson and is the masterpiece of architect Matthew Steele who left Bo'ness with a remarkable built heritage of early 20th century design styles. The Hippodrome was built during Bo'ness's heyday as a centre for heavy industry and coal mining, and was one of three local cinemas at the time. Alongside the town's general decline, the Hippodrome was closed as a cinema in the 1960s and used for nearly 20 years as a bingo hall, before lying derelict and empty for almost another two decades. The Hippodrome has now been restored and returned to the use for which it was originally built, a small picture house cinema, which is operated by Falkirk Community Trust on behalf of Falkirk Council. Much of the original fabric and character has been restored. The Hippodrome is an A-listed building, in recognition of its importance in the history of cinema and 20th Century architecture.

Accessibility

All of the local exhibitors examined have attempted to keep pace with access standards.

By way of illustration, all of the 12 cinemas examined offer wheelchair access to film exhibition space and a growing number are offering autism friendly screenings.

A much broader examination of access considerations has been provided in the parallel Creative Scotland mapping of the film exhibition sector.⁷

⁷ Creative Scotland, Mapping Film Exhibition in Scotland, June 2016

FIGURE 2.8: KEY ACCESS CONSIDERATIONS FOR FEATURED CINEMAS

<i>Exhibitor</i>	<i>Wheelchair Access to Exhibition Space</i>	<i>Autism Friendly Showing</i>
Adam Smith Theatre	Yes	No
An Lanntair	Yes	Yes
Birks Cinema	Yes	No
Eastgate Theatre	Yes	No
Eden Court Theatre	Yes	Yes
Hippodrome Cinema	Yes	Yes
Machars Movies	Yes	No
Pavilion Cinema	Yes	Yes
Pix in the Stix	Yes	No
Robert Burns Centre	Yes	Yes
Screen Machine	Yes	Yes
West Side Cinema	Yes	No

Robert Burns Centre Film Theatre: Access Cinema

Situated in a converted 18th-century watermill by the River Nith and just a few minutes' walk from Dumfries town centre, The Robert Burns Centre Film Theatre screens a wide variety of films using state-of-the-art projection facilities. The Theatre is fully accessible to people using wheelchairs and has an accessible toilet. The cinema has space for four wheelchair users, although advance booking these spaces is recommended. There is a disabled badge holder's space in the car park. The restaurant and museum on the first floor can be reached via a stair lift. The auditorium is fitted with a loop receiver that is suitable for people with hearing aids with a T switch. For most of the films in its programme, the Centre can schedule a special Access daytime screening for groups of 10 or more visitors buying a ticket. For Access Cinema screenings, anyone who needs to bring along a helper to assist them in any way, will receive a complimentary ticket. A large print copy of

the programme is available at the Box Office upon request.

Section 3: Audience Views on Local Cinema

This section turns to views and opinions of audiences that attend local and independent cinema. It explores viewing preferences, reasons for attending local cinema and patterns of attendance, together with barriers to attending cinema and reliance on local cinema provision.

Viewing Preferences

During the last decade, technological advances have reshaped film viewing habits and attitudes substantially.

The audience research conducted as part of this study provides merely a snapshot. Presented in Fig. 3.1 the findings suggest that local cinema audiences have greater access to film than ever before. Almost two-thirds have watched a DVD or Blu Ray during the previous 12 months, just over half have attended a multiplex, and almost half have streamed films online (reflecting the advance of high-speed broadband and proliferation of Video-on-Demand services). These forms of access all exceed attendance at local and independent cinema in the last 12 months.

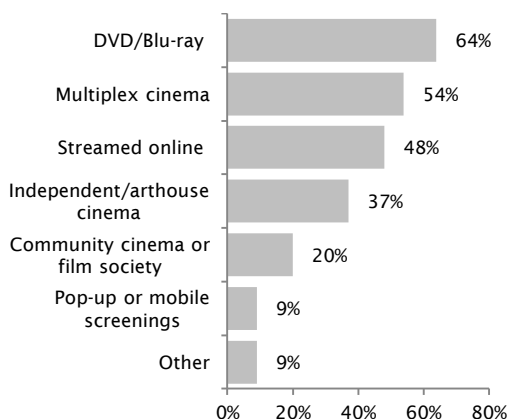
Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 3,352 responses

However, the perceived decline of local cinema in the face of technological developments can be misleading. The evidence gathered as part of this study also reveals that the vast majority of local cinema subscribers (83%) prefer to watch films as part of an audience than at home.

The following illustrative comments from audience members reflect the importance of this shared screen experience.



FIGURE 3.1: WHERE RESPONDENTS HAVE WATCHED FILMS IN THE LAST 12 MONTHS



I like the big screen experience and the ambience of watching in a cinema, something which goes right back to childhood, it is a treat to go to the cinema.

Watching films at a cinema is far more of an event than watching at home. The size of the screen and the feeling of being part of an audience add to the experience.

The atmosphere is just as important as the film, also screen size and the fact that it becomes an event not just an alternative to TV.

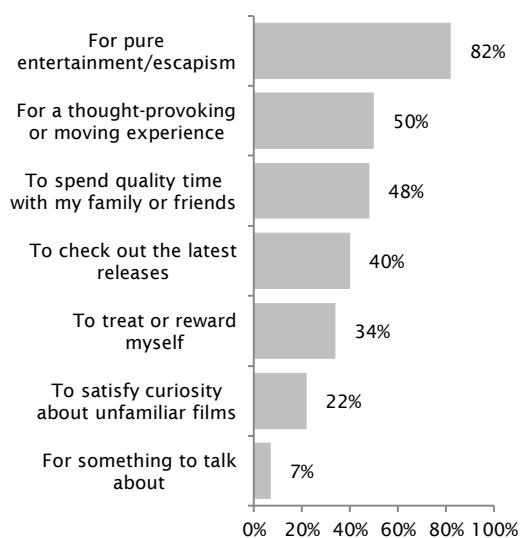
Audience Members' Views

Reasons for Attendance

There is a variety of well-known motivations for cinema attendance, which vary between different forms of cinema and audience categories.

The audience research conducted as part of this study demonstrates the importance of local cinema as a form of pure entertainment or escapism (cited as a reasons for attending by 82% of respondents). Other main reasons cited were, to enjoy a thought-provoking or moving experience, to spend quality time with family and friends, and to check out the latest release. Fig. 3.2 provides a full breakdown.

FIGURE 3.2: REASONS FOR ATTENDING LOCAL CINEMA (% OF RESPONDENTS)



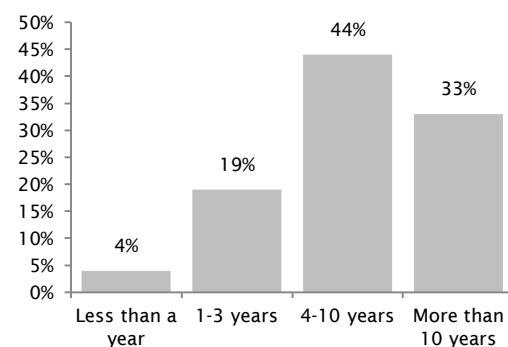
Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 2,980 responses

Patterns of Attendance

The audience research also implies a fairly loyal and regular following for local and independent cinema.

At the point of survey, one-third of respondents had been attending their local/independent cinema for more than 10 years, while four-in-five had been attending for at least 4 years. See Fig. 3.3.

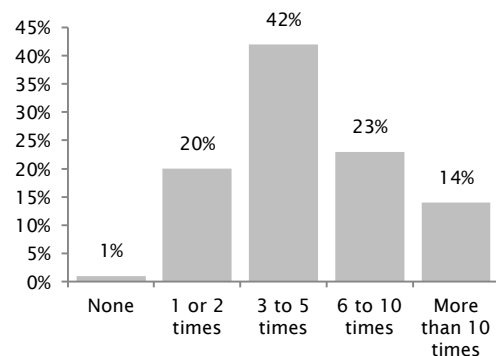
FIGURE 3.3: LENGTH OF ATTENDANCE AT THE LOCAL CINEMA



Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 3,394 responses

In addition, the research shows that approximately four-in-five respondents (79%) have attended three or more times in the last year. See Fig. 3.4 for a breakdown.

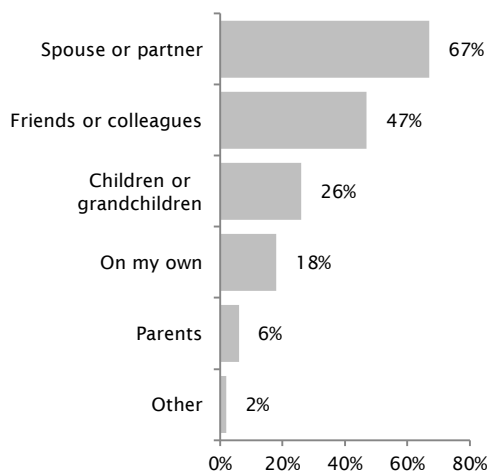
FIGURE 3.4: NUMBER OF VISITS TO THE LOCAL CINEMA IN THE LAST 12 MONTHS



Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 3,413 responses

The research also tells us that a visit to the local cinema is an occasion to be shared with friends and family – just 18% of respondents reported typically attending on their own. See Fig. 3.5.

FIGURE 3.5: WHO RESPONDENTS USUALLY ATTEND SCREENINGS WITH (% OF RESPONDENTS)



Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 3,423 responses

Barriers to Attending Cinema

There remain a variety of barriers to attending cinema.

The audience research suggests that barriers to attending local cinema are less pronounced. Thirty four per cent of respondents reported some form of barrier to attending their local cinema compared to 69% who reported a barrier to attending cinema elsewhere.

The most frequently cited barriers to attending cinema are ‘accessibility by transport’ and the linked issue of ‘cost’. The research suggests that the local provision of cinema helps to mitigate both of these key obstacles. See Fig. 3.6 for a comparison of reported barriers to attending local and other cinemas.

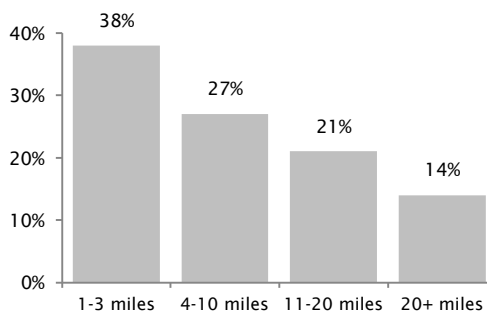
FIGURE 3.6: BARRIERS TO ATTENDING LOCAL AND OTHER CINEMAS

Barriers	% reporting this as barrier to attending <i>local cinema</i>	% reporting this as barrier to attending <i>other cinemas</i>
<i>The cost of attending</i>	10%	29%
<i>No one to go with</i>	4%	4%
<i>Accessibility by transport</i>	7%	26%
<i>Lack of mobility/independence</i>	1%	3%
<i>Fears about safety</i>	0%	1%
<i>Doesn't offer what I want</i>	11%	12%

Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 3,235 responses

The close proximity and ability to travel to a local film exhibition venue is an important factor in enabling cinema attendance. By way of illustration, two-thirds of audience members surveyed travelled ten or less miles to attend their local cinema. See Fig. 3.7.

FIGURE 3.7: DISTANCE TRAVELLED TO ATTEND THE LOCAL CINEMA (% OF RESPONDENTS)



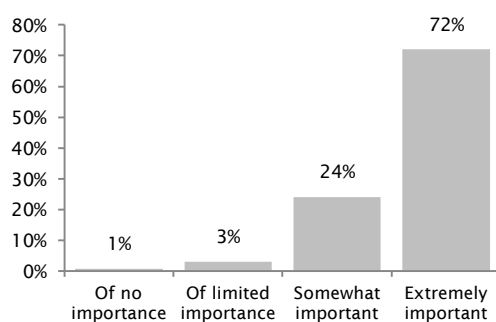
Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 2,955 responses

The Importance of Local Cinema

The research has also revealed the significance that audiences attach to cinema for their local neighbourhood, village or town.

In the survey research, 72% of the audience members that responded described their local cinema as ‘extremely important’ to the area and further 24% describe it as ‘important’. See Fig. 3.8.

FIGURE 3.8: REPORTED IMPORTANCE OF THE CINEMA TO THE LOCAL AREA



Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 2,967 responses

Section 5 of this report explores in more detail the economic, social and cultural impact of cinema on local communities.

Reliance on Local Cinema

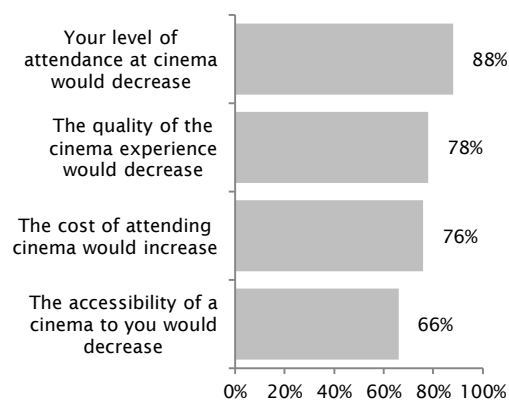
The evidence suggests that there is a high level of reliance on local cinema provision.

The audience research shows that, at the point of survey, 31% of respondents had visited only their local cinema (and no others) in the last 12 months.

Moreover, the vast majority of respondents reported that in the absence of a local venue for film exhibition, their attendance at

cinema, the quality of cinema experience, and the accessibility of cinema would all likely decrease, while the cost of attending cinema would likely increase. See Fig. 3.9 for details.

FIGURE 3.9: LIKELY SITUATION IN THE ABSENCE OF THE LOCAL CINEMA (% OF RESPONDENTS)



Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 2,955 responses



It's a different experience. There is something magical about [our local cinema] that isn't achieved anywhere else. It is a fantastic asset to a rural community. You catch up with people you haven't seen for ages and it is brilliant to get new releases so close to home.

Audience Member View

Section 4: Aspects of Audience Satisfaction

This section examines the audience experience of local and independent cinema. It explores overall satisfaction as well as the main factors that drive satisfaction. It also offers a comparative perspective on the local cinema experience.

Overall Satisfaction

The audience research conducted in late 2015 suggests very high levels of satisfaction with the local cinema experience.

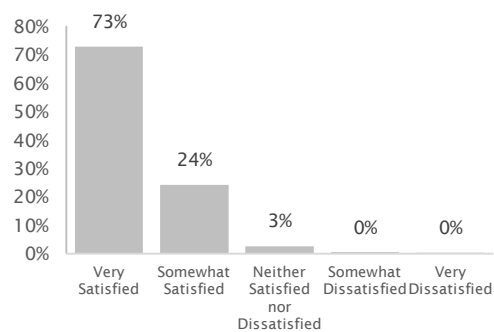
Ninety seven per cent of subscribers have reported being either 'somewhat' or 'very' satisfied with the overall experience, with 73% very satisfied. See Fig. 4.1.



It is closer to home, it is really comfy, it shows all the latest and best films, it has knowledgeable and passionate staff, and creates a sense of both community and occasion. My family and I love it!

Audience Member View

FIGURE 4.1: REPORTED SATISFACTION WITH THE OVERALL CINEMA EXPERIENCE (% OF RESPONDENTS)



Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 2,958 responses

Particularly high levels of satisfaction have been expressed in regards to quality (service, surroundings, screen and sound), atmosphere, and local accessibility.

The following pages describe the various factors that drive audience satisfaction in more detail.



I think it is just the overall package that we can offer is more attractive, especially to those that are on a bit more of a budget. But, at the same time, we are a bit of an enigma. We work extremely hard to try to make ourselves look, behave and programme like a modern, shiny, flashy multiplex, but once you get in the door we are a small, family run, cosy, little independent cinema. We are trying to do two things at once and I think that we are actually doing a pretty good job of it.

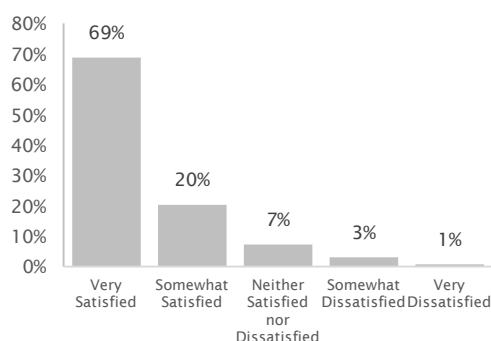
Film Exhibitor View

Ability to Travel to the Venue

Location and accessibility by transport are potentially major influences on audiences' ability to enjoy cinema on a regular basis.

The recent audience research reinforces the importance of geographic access. It shows 69% of respondents 'very' satisfied with their ability to travel to their local cinema and a further 20% 'somewhat' satisfied. See Fig. 4.2. As noted in Section 3, the distances travelled to attend local cinema are typically quite short.

FIGURE 4.2: REPORTED SATISFACTION WITH ABILITY TO TRAVEL TO THE VENUE (% OF RESPONDENTS)



Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 2,958 responses

Nonetheless, the notion of 'local' accessibility does vary markedly. While Screen Machine brings mobile cinema remote rural settlements, and other community cinemas are located in the heart of local towns and villages, some independent cinemas play a much wider regional role. For example, Eden Court estimates an average drive time by audience members of 52 minutes (extending to Ullapool in the north and beyond Aviemore to the South), while the Pavilion in Galashiels attracts visitors from across the Scottish Borders.



It takes me 5 hours to travel to a multiplex, and a lot of planning and preparation to ensure I can see what interests me, not to mention the extra costs that I have to take into consideration. To be able to attend a venue in my own village enables me to attend more regularly and without spending that extra time and money on travel and accommodation.

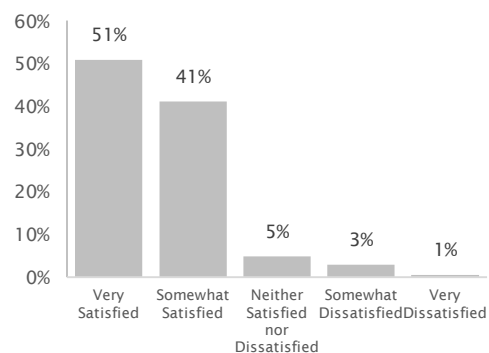
Audience Member View

Choice of Films

Film choice is another essential component of audience satisfaction, albeit one that many community and smaller independent cinemas can find difficult to accommodate.

While satisfaction with the offering of local cinemas has been found to be widespread, the research shows only half of respondents 'very' satisfied with the choice of films available. See Fig 4.3.

FIGURE 4.3: REPORTED SATISFACTION WITH THE CHOICE OF FILMS (% OF RESPONDENTS)



Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 2,968 responses



The cinema has an outstanding and wide-ranging programme, I trust the programming and because of this I will take a chance on unfamiliar films. I love discovering historic and contemporary films I haven't seen before on a big screen. I am proud to have a facility locally that shows films outside of the mainstream.

Audience Member View

While many of the venues examined make extensive efforts to involve their audiences in choosing films, the demands of commercial film distributors (such as screening popular new titles at least once every day, and paying as much as 50% of the ticket price for the first four weeks of screening such titles) can make it very difficult for smaller, community exhibitors to meet their audiences' expectations in full.



Our local cinema can only offer a limited choice of films. We have to wait quite a while to see the mainstream releases and they are not often shown here. Also, as many films have a single showing these can easily be missed if we are busy on a particular evening. Saying that, we lived within 5 minutes of a multiplex that we rarely attended and now cinema has become more of a social experience – ironically, having less choice makes it more likely we will go!

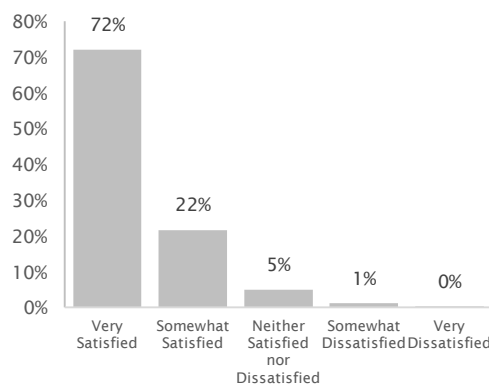
Audience Member View

Atmosphere in the Venue

The unique atmosphere created in local, independent and community cinemas is a significant feature in satisfaction.

The audience research shows 94% of respondents either 'very' or 'somewhat' satisfied with the atmosphere in the venue, with most very satisfied. See Fig. 4.4.

FIGURE 4.4: REPORTED SATISFACTION WITH ATMOSPHERE IN THE VENUE (% OF RESPONDENTS)



Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 2,964 responses



[Our local cinema] has a magical quality that no other cinema experience can compete with. It has all the stuff one has come to expect at a cinema, great seating, sound quality etc., but it has something more. There is also the sense of being part of something adventurous and cool.

Audience Member View

The cinemas examined as part of this research have demonstrated the unique atmosphere that can be created by community cinema experience. Cinemagoers at the Hippodrome in Bo'ness reflected on the atmosphere of grandeur and nostalgia

that the venue embodies. Those attending the West Side Cinema on Orkney have reported enjoying the relaxed and sociable atmosphere, including themed music and candle-lit tables.

including movie nights and themed film evenings in the local village hall.

Sense of Community

Associated with the atmosphere in the venue is the sense of community that comes with the shared screen experience.

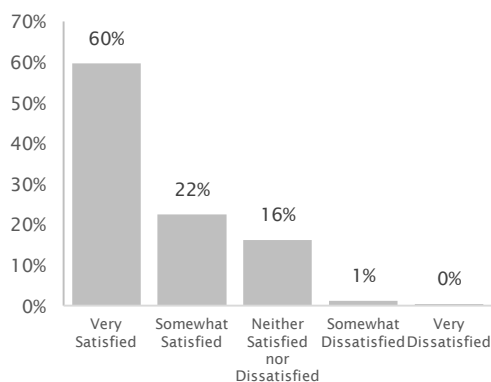
In this respect, 82% of audience members that responded reported to be being either 'very' or 'somewhat' satisfied with this sense of community. See Fig. 4.5.



Seeing a film on a large screen with other people is a much more intense and memorable experience. In a small community it becomes a social event bringing a sense of occasion. We contribute to the programming and I know most of the people who go. We are able to chat about it afterwards and get a more nuanced view of the ideas expressed on the film.

Audience Member View

FIGURE 4.5: REPORTED SATISFACTION WITH THE SENSE OF COMMUNITY CREATED (% OF RESPONDENTS)



Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 2,935 responses

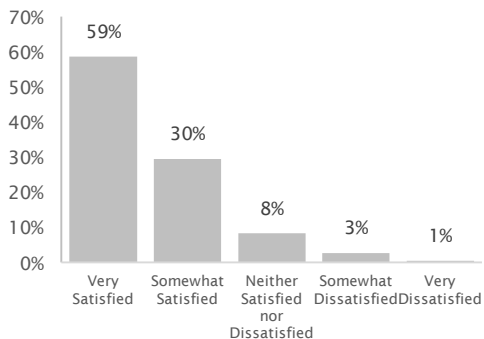
For some of the film exhibitors examined as part of the research, this sense of community occurred naturally as a result of the interactions enabled between friends and neighbours, while others sought to broaden and deepen the communal experience. The visit of Screen Machine to remote Highland settlements is a regular and welcome event in the social calendar, give the unique community experience of attending a state-of-the-art cinema in the back of 35 tonnes articulated lorry. Machars Movies has used cinema as a basis for community gatherings

Cost of Attending

Affordability is another important consideration when it comes to making choices about cultural entertainment.

In this respect, the audience research highlighted generally widespread satisfaction. While almost three-in-five respondents reported being 'very' satisfied with the cost of attending, a further 30% were 'somewhat' satisfied. See Fig. 4.6.

FIGURE 4.6: REPORTED SATISFACTION WITH THE COST OF ATTENDING (% OF RESPONDENTS)



Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 2,958 responses

There was a conscious effort by the exhibitors examined to keep ticket prices affordable and to ensure that cost was not a barrier to attending for anyone in the community – although there was an inevitable trade-off between this and the economics of operating a financially sustainable cinema. With standard adult evening ticket prices ranging from £5 to £9.50, pricing has been found to be generally very competitive for various locations and contexts reviewed. While ten of the twelve exhibitors offered concessionary pricing, four also offered annual loyalty or membership schemes to both encourage regular attendance and a sense ownership of the local cinema. An Lanntair, for example, opted to keep basic ticket prices as low as possible for everyone rather than offering various discounts. By contrast, Machars Movies introduced an annual membership scheme that is open to anyone over the age of 16, which costs £30 (Concessions £25) and enables attendance at all screenings for just £2.50 per show.

The value is excellent. For the price it's a great cinema with friendly staff and I prefer to come here than elsewhere. The cheaper ticket prices make it more likely that I opt to see a film outside of the mainstream. It has a nice cafe, again at reasonable prices.

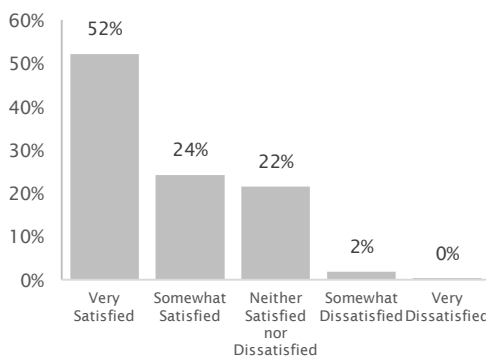
Audience Member View

Proximity to Local Amenities

Stimulated by the location and experience available at multiplexes, cinemagoers increasingly expect a variety of supporting amenities.

The audience research suggests that satisfaction in relation to local amenities is somewhat mixed in relation to the local cinema experience. While around half of survey respondents reported being 'very' satisfied in this respect, partial or limited satisfaction was evident for others. See Fig. 4.7.

FIGURE 4.7: REPORTED SATISFACTION WITH PROXIMITY TO LOCAL AMENITIES (% OF RESPONDENTS)



Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 2,925 responses

None of the film exhibitors examined enjoy out-of-town locations with access to a wide range of amenities, although seven of the 12



cinema venues examined contain a café and half sell confectionary (popcorn, ice cream and so on). However, this was only one component of satisfaction with respondents as likely to comment positively on the absence of mass-produced confectionary as its availability. While the mobile Screen Machine, for example is unable to offer on-board confectionary or even toilet facilities it still yields among the highest overall levels of audience satisfaction.



You can sit and enjoy a coffee or drink before or after, enjoy exhibitions, and wander round exploring the surroundings in the venue. Our local cinema is usually our first choice. However, while it shows the same films as the local multiplex, the multiplex has better parking and a range of restaurants which means we will often choose it for the bigger titles.

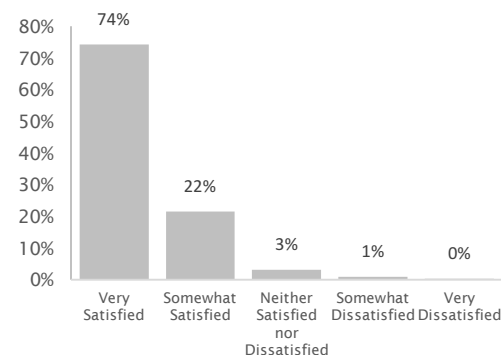
Audience Member View

Quality of Screen and Sound

The quality of screen and sound is a basic component of satisfaction and one that enjoys widespread endorsement from local and independent cinema audiences.

The audience research shows 96% satisfaction with screen and sound. See Fig 4.8 for a breakdown.

FIGURE 4.8: REPORTED SATISFACTION WITH THE QUALITY OF SCREEN AND SOUND (% OF RESPONDENTS)



Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 2,957 responses

All of the local exhibitors examined had the capacity to screen in digital format with nine of the 12 cinemas also owning permanent film exhibition equipment. However, inevitably the scale and technical specification of film exhibition possible varies between purpose-built cinemas and community spaces.



It delivers a standard like big multi-complexes but still holds a very friendly environment. The sound and vision are at amazing standards for such a small and local cinema.

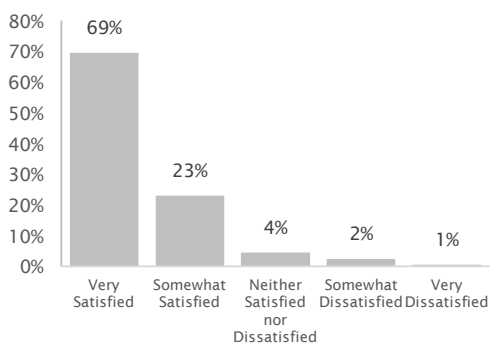
Audience Member View

Quality and Comfort of Surroundings

The quality and comfort of surroundings is another basic component of the cinematic experience.

Generally, the research revealed high levels of satisfaction among local and independent cinema audiences. Seven-in-ten respondents reported being ‘very’ satisfied while almost all others were ‘somewhat’ satisfied. See Fig. 4.9.

FIGURE 4.9: REPORTED SATISFACTION WITH THE QUALITY AND COMFORT OF SURROUNDINGS (% OF RESPONDENTS)



Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 2,965 responses

While the type of environment in which films are exhibited varies greatly, all local exhibitors have sought to make the most of their venues. At one end of the spectrum, the pre-art deco interior, wooden panelling, and red velvet seats of the Bo’ness Hippodrome provide a naturally grand yet intimate environment for the cinematic experience. At the other end, community exhibitors have introduced many small but important measures relating to the quality of seating, blackout/lighting, and so on to improve presentation in community venues.



Compared to the only alternative, a multiplex, [our local cinema] feels cosy, friendly, relaxing and a more wholesome experience.

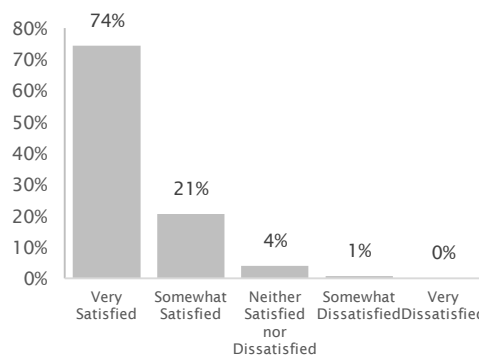
Audience Member View

Quality of Service from the Venue

Good customer service is a basic component of satisfaction for any form of cultural entertainment.

Again, in this respect, high levels of audience satisfaction have been revealed. Ninety five per cent of respondents reported satisfaction, with most ‘very’ satisfied with the quality of customer service. See Fig. 4.10.

FIGURE 4.10: REPORTED SATISFACTION WITH QUALITY OF SERVICE (% OF RESPONDENTS)



Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 2,955 responses

The film exhibitors examined cited their commitment to interacting with cinemagoers in a really positive and engaging way, often through loyal and long-standing staff members. In the case of Eastgate, Birks, Machars Movies, Pix in the Stix, and West Side this front-of-house experience was provided by friendly and welcoming volunteers committed to providing a great community experience. In the case of the Pavilion, an independent family-run cinema, great pride was evident in its local staff team and in offering a personal welcome to all customers, old and new.



Everything is on a smaller more personal scale ... The staff are friendly and professional and get to recognise you as a regular customer. At other big venues all they are only interested in is selling you food and drinks and do not make any effort to make your visit an enjoyable experience.

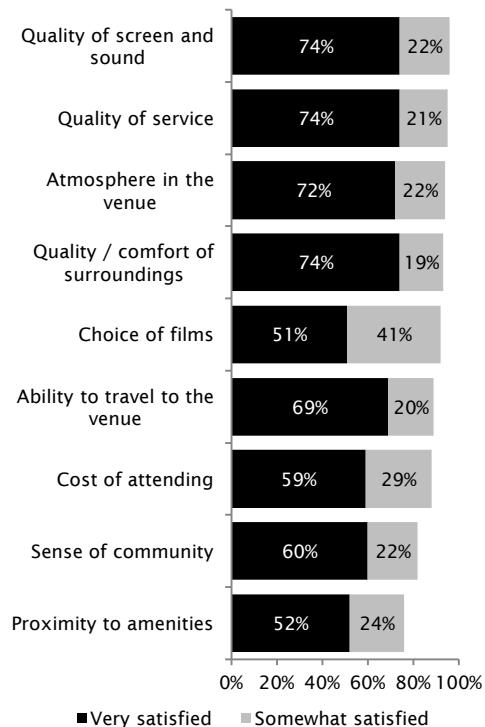
Audience Member View

Comparative Satisfaction

The audience research also enables some useful points of comparison.

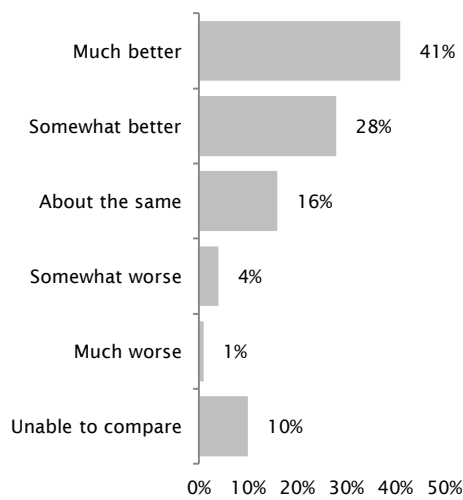
The evidence presented already suggests a number of factors that drive particular satisfaction with the local cinema experience (i.e. where audiences have reported being very satisfied). These include the quality of screen and sound, service, and surroundings. It also highlights those factors that are somewhat less instrumental in achieving overall satisfaction, including the choice of films and proximity to local amenities. A full breakdown of the components of satisfaction is presented in Fig .4.11.

FIGURE 4.11: COMPARATIVE RATING OF THE COMPONENTS OF SATISFACTION (% OF RESPONDENTS)



The research also explored the relative satisfaction with the local cinema experience. The evidence here suggests that local cinema compares favourably with the alternatives. Sixty nine per cent of respondents compared their local cinema favourably to others, while a further 16% rated it 'about the same'. See Fig. 4.12.

FIGURE 4.12: RESPONDENTS VIEW ON HOW THE LOCAL CINEMA COMPARES TO OTHERS THEY HAVE ATTENDED (% OF RESPONDENTS)



It is difficult to compare. The venues I attend all have their own unique selling points. A multiplex has better and more extensive ranges of services and films. A mobile cinema is better value and has a great sense of community. A film society has more social content. They are all good.

Audience Member View

Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 2,967 responses

Most of the audience feedback contrasted their local/independent cinema experience positively with that evident at multiplexes.

Nonetheless, simplistic comparisons are often neither possible nor helpful. One-in-ten respondents were unable to draw comparisons, either due to the uniqueness of their local/independent cinema, or due to the different forms of satisfaction derived from visiting different cinemas.

Section 5: The Social Value of Local Cinema

This section examines the economic, social and cultural benefits of local cinema as identified by audiences. It describes a set of domains of influence that potentially offer a new way of describing the value and impact of local cinema for individuals as well as communities.

A Focus on Social Value

The term ‘social value’ has now become common currency in the UK, although is a concept that is not yet well understood.

Put simply, ‘social value’ refers to the value of the social changes, both positive and negative, which arise from an organisation’s policies, programmes, or activities.

Social value typically includes non-financial outcomes and impacts that have traditionally proven difficult to quantify and measure. Outcomes that cannot be quantified cannot be counted or easily evaluated or compared. In a period of financial austerity, with competing pressures on public resources, this makes it difficult for social and cultural organisations to prove their worth and sustain support.

This exploratory research has systematically explored the changes, benefits and other effects reported by local cinema audiences and identified six domains of influence:

-
- Culture

 - Wellbeing

 - Community

 - Learning

 - Local economy

 - Heritage

These comprise a series of effects. First, the intrinsic effects relating to attendance at cinema in itself. Second, the instrumental effects which accrue from this cultural experience, principally in relation to the knowledge and wellbeing of audience members. Finally, functional effects that point to ways in which cinema acts as a catalyst for sustaining and developing social capital, heritage assets, and the local economy.

The following pages go on to explore briefly the components of the social value created by local cinema.

Culture



The atmosphere of an audience makes the film experience much more exciting and enjoyable. We laugh together, cry together and are scared together.

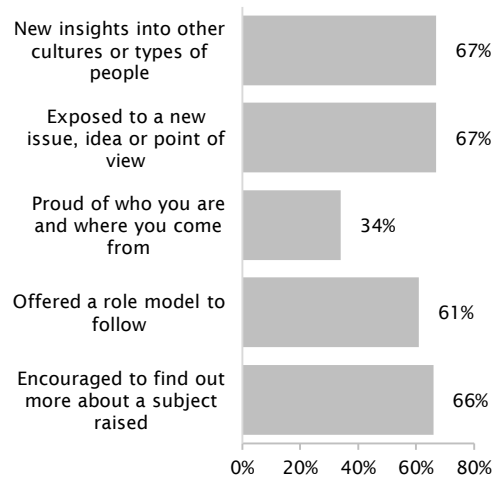
Audience Member View

While cinema is the widest reaching form of cultural entertainment in Scotland, the inherent effects of this cultural experience are often only tacitly understood.

The audience research undertaken as part of this study gives a sense of the depth of this cultural experience. Eighty six per cent of respondents have reported a strong emotional response to attending films 'sometimes' or 'often' during the last 12 months. Ninety five per cent of respondents have reported a tendency to discuss the content of the film with others that attended (14% 'intensely'), as a means of reinforcing the experience.

The research points to some of the intrinsic effects in feeding new perspectives, stimulating interests, and reinforcing one's identity. These effects are set out in Fig. 5.1.

FIGURE 5.1: REPORTED EFFECTS ON CULTURE EXPERIENCED IN THE LAST 12 MONTHS AS A RESULT OF ATTENDING LOCAL CINEMA



Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 2,939 responses

Note: % relates to percentage of respondents reporting effect 'sometimes' or 'often' in the last 12 months as a result of attending local cinema

Each of the film exhibitors examined has attempted to provide both entertaining and thought-provoking cultural experiences. Collectively they have attempted to: provide content that will resonate with different sections of their community; use Scottish, Gaelic Language, and Archive material to foster a better understanding of place and community; and introduce Foreign-Language films to offer new insights into other cultures and perspectives. However, programming

choices and strategies vary significantly across the exhibitors, each attempting to give audiences what they want, while challenging them, and ensuring the financial viability associated with their film programme.

Wellbeing



It's an exciting contradiction of intimacy and isolation. This can only be achieved with a big screen and cinema sound. This absorbs you totally into the film through the shared experience during the film and after as well as the social meeting with others at our community cinema also add to the experience.

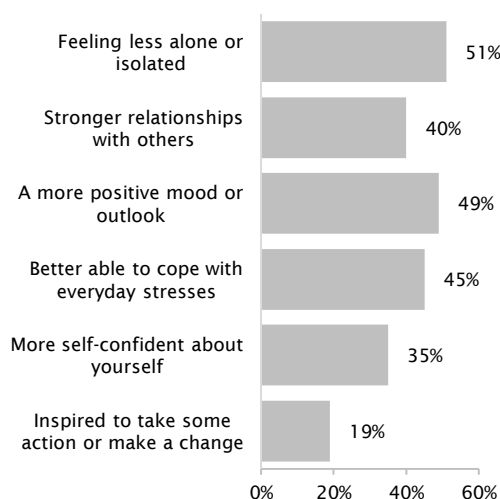
Audience Member View

It is increasingly recognised that differing forms of cultural and community participation can act as an important health asset. A health asset is any factor or resource that enhances the ability of individuals to maintain and sustain health and well-being. These assets can operate at the level of the individual, family or community as protective and promoting factors to buffer against life's stresses.

The audience research conducted suggests that local cinema can be viewed as such an asset.

Audiences have reported a range of beneficial effects that go beyond the role of cinema as a form of pure entertainment and escapism. The most widely reported benefits include helping people to feel less alone, fostering a more positive mood or outlook, and helping people to cope with everyday stresses. The feedback also highlights the role of local cinema in building relationships, engendering self-confidence, and inspiring lifestyle changes. See Fig. 5.2.

FIGURE 5.2: REPORTED EFFECTS ON WELLBEING EXPERIENCED IN THE LAST 12 MONTHS AS A RESULT OF ATTENDING LOCAL CINEMA



Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 2,939 responses

Note: % relates to percentage of respondents reporting effect 'sometimes' or 'often' in the last 12 months as a result of attending local cinema

Some of the local exhibitors recognised their wider role in combatting the social challenges evident in communities, promoting individual wellbeing, and improving collective quality of life. This is effectively illustrated in the following quote from a representative from one of the community cinemas examined.



I think that community cinema has a lot to do with combatting isolation and the feelings of isolation... it introduces people who have never met before ... In a sense the cinema is a kind of glue for the community. People are busy doing their own things, but there is this cinema hub in the village hall where they come together. The more that happens, the

more awareness there is of this hall for other functions. That is one of the prime purposes of the cinema ... We have a terrible lack of work in the area and this relieves some of that pressure on people. You know, to be able to come and forget about it for one night and just enjoy it ... If they go away happy having done that, then I think that we have done our job.

Film Exhibitor View

Community



It's a 'community' event where people are gathering with the same goals, and there is the opportunity for interaction before and after the event. This type of shared experience feels more meaningful.

Audience Member View

Individual wellbeing, health and resilience are often associated with high levels of social capital. By social capital we refer to the social interactions, trust, and shared standards of behaviour and expectations that enables people to build communities, to commit themselves to each other, and to knit the social fabric.

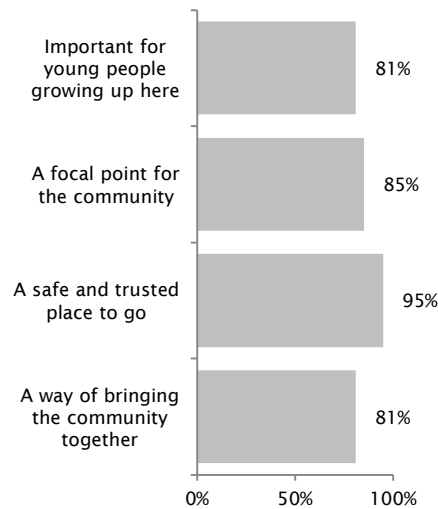
In this respect, the audience research points to the functional effect of local cinema in building connectedness and community.

As part of the survey research 79% of respondents reported having a sense of connection to others in the audience, 'sometimes' or 'often' during the last 12 months.

Overwhelmingly audience members characterised their cinema as helpful in building a sense of community – describing it as offering a focal point for the community, a safe and trusted place to go, a way of bringing the community together, and an

asset for young people locally. See Fig. 5.3 for audience views.

FIGURE 5.3: VIEWS ON LOCAL CINEMA AS A COMMUNITY BUILDING ASSET



Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 2,956 responses

Note: % relates to percentage of respondents reporting 'agree' or 'strongly' agree

The study has revealed widespread evidence of ways in which local exhibitors are building and broadening the social experience and playing a wider community building role:

- Creating welcoming public spaces, such as cafes, as a very natural way of enabling community members to interact.
- Opening cinema venues up as hubs for other forms of community activity.
- Developing active outreach programmes and partnerships with like-minded community groups, to improve access for particular target populations (e.g. older people, people with a disability, etc.).
- Introducing themed nights, which make use of food and music to enhance the communal experience.
- Ensuring productive links and joint programming with other community activities, venues, festivities and events.
- Making programming choices that achieve synergies between film exhibition and the wider cultural and community offering in shared spaces.

Learning



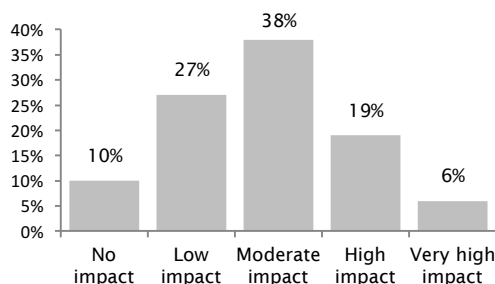
From special guests to schools screenings and from film courses to festivals, there's a lot more going on at our cinema. We are committed to offering a range of opportunities for all ages to learn about the moving image. Our programme aims to stimulate, entertain and inform.

Film Exhibitor View

The film exhibition sector in Scotland is a recognisable source of learning and training, from the experience offered to volunteers, to work with schools, to the wider skills-building opportunities provided in formal and informal educational contexts.

The evidence in this respect from the audience research is less pronounced given that it was beyond the scope of the study to seek out the views of volunteers, trainees, school pupils, or film enthusiasts as part of the research. Broadly, the feedback presented in Fig. 5.4 indicates that audiences recognise some level of impact on learning and training although this is not pronounced.

FIGURE 5.4: REPORTED IMPACT ON LEARNING AND TRAINING



Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 2,940 responses

There is anecdotal evidence across the exhibitors of this role and contribution. This is perhaps best illustrated in the case of the

Robert Burns Centre Film Theatre, an example of film exhibition as part of a more holistic heritage and educational offering. The Centre makes its educational contribution in a number of ways: it offers school screenings linked to the Curriculum for Excellence and has built productive relationships with local schools; it screens films made by local students, and has developed partnership links with Scene 1 Take 1 Club, a film-making group for children and young people; it hosts a weekly film club where enthusiasts can deepen their knowledge and enjoy and debate film; and it has introduced the Wee Film Club once a month for children in different age categories, enabling them to get enthused about film from an early age.

The links between local film exhibition, learning and training is an area where further research could be revealing.

Local Economy



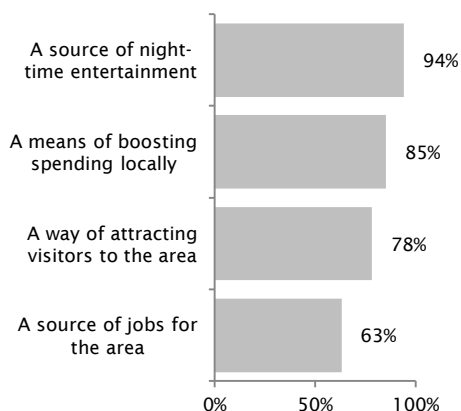
Local indie cinema means keeping our pound in the local area. ... I love to know I'm supporting an independent, local business rather than a faceless corporate chain.

Audience Member View

Attempts are often made to quantify the economic impacts of the cultural sector to the national economy. This, however, can overlook the significance of even small-scale cultural organisations to their local economy.

This research shows that audiences tend to recognise a number of aspects to the economic contribution of their local cinema. It has been described as a source of night-time entertainment, a means of boosting spending locally, a way of attracting visitors, and a source of jobs. See Fig. 5.5.

FIGURE 5.5: REPORTED IMPACT ON THE LOCAL ECONOMY



Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 2,940 responses

Note: % relates to percentage of respondents reporting 'moderate', 'high' or 'very' high impact

This economic contribution is generally understood and valued by audience members. For example, 45% of respondents have reported that if the cinema venue no longer existed the economic prospects of the area would decline.

This cumulative economic contribution from the spending of cinemagoers locally is potentially significant. The audience research suggests that for a typical trip to the local cinema, 78% of customers usually spend £12 or more at the venue or in the vicinity (including eating, drinking, travel, and the cost of tickets). In over than one-third of cases (37%) they spend more than £20.

Among all of the exhibitors examined, this contribution to the local economy was evident, no more so than in the case of the Pavilion. Reopened as a family business this independent cinema now employs 20 staff, all of whom live locally. It attracts customers from the wider region, contributing to a more active night-time economy in Galashiels and offering an attractive alternative to a more distant evening's entertainment in Edinburgh. Efforts are also made to maintain a local supply chain, for example, sourcing confectionary from Galashiels, drinks from Kelso, and janitorial supplies from St. Boswells. Taken together, these actions

ensure that money is retained and recirculates in the local economy.

Heritage



This is a unique, historic building and it is a privilege to watch films here ... It is intimate, without being too small and large enough to provide a communal experience. On a local scale it is a much valued asset to the community and important part of the cultural landscape of the area.

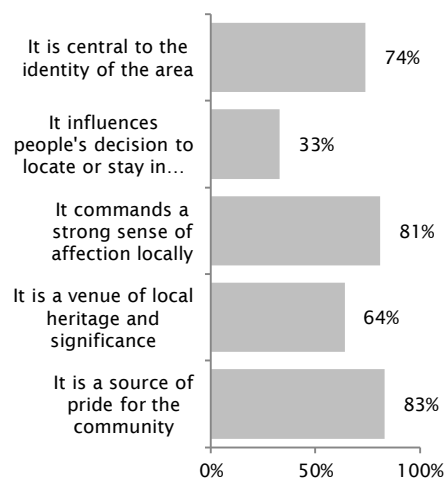
Audience Member View

Cinema is so often closely associated with the venue in which films are exhibited, sometimes a dedicated building but increasingly a multi-functional space.

Such buildings are often imbued with a strong sense of history and association with the past, providing an important source of symbolic and aesthetic value for the communities in which they are based, but also an economic value achieved through ensuring the continuing commercial viability of local buildings.

The survey research reflects an appreciation among audiences of the heritage value associated with their local cinema. Respondents have variously described their cinema as a source of pride for the community, as commanding a strong sense of affection, as central to the identity of the area, and as a venue of heritage and significance. See Fig. 5.6.

FIGURE 5.6: VIEWS ON CINEMA AS A LOCAL HERITAGE ASSET



Source: Social Value Lab, Survey of Local Cinema Audiences, December 2015, Based on 2,956 responses

Note: % relates to percentage of respondents reporting 'agree' or 'strongly' agree

Also, tellingly, 44% of respondents have reported that if the cinema venue no longer existed then the desirability of the place would decrease. One-third agreed that their local cinema was an influence on people's decision to locate or stay in the area.

The historic significance and heritage value of cinema venues is abundantly evident among the sample of exhibitors examined. These cases illustrate: the role of cinema as heritage in revitalising town centres and community life (Birks Cinema); the ability to effectively link film exhibition and heritage (Robert Burns Centre); and the ability to reopen and restore the commercial viability of buildings of historic significance (Pavilion, Hippodrome, Eden Court).

Section 6: Main Conclusions

This section summarises the main findings from the research and draws out the implications for further research and action.

Key Findings

This exploratory study set out to examine the role and contribution of local and independent cinemas to the communities in which they are based.

Carried out between November 2015 and May 2016, the study presents a positive picture of the work and impact of local film exhibitors.

The research has described the value attached to shared screen experiences and highlighted a strong preference for this type of communal experience.

It has revealed the importance that audiences attribute to cinemas in relation to the neighbourhoods, towns and villages in which they live and the role that local film exhibitors play in removing the linked barriers of geographic access and cost to attending cinema.

The study has outlined very high levels of satisfaction with the local cinema experience. It has suggested a number of factors that drive particular satisfaction, most notably the quality of screen and sound, service, and surroundings. It has also identified those factors that are somewhat less instrumental in achieving overall satisfaction, including the choice of films and proximity to local amenities.

Finally, the research has identified six main domains of influence and impact for local cinema. These are Culture, Wellbeing, Community, Learning, Local Economy, and Heritage. Taken together, these represent a broad set of outcomes that have traditionally

proven difficult to count, evaluate and compare.

Issues for Further Research

The research has provided a first-level indication of the role and contribution of local cinema and a potentially more holistic and useful way of understanding its impact.

Like any other piece of exploratory research, however, the study also throws up as many questions as answers. It suggests a number of potentially beneficial lines of follow-on enquiry. In no particular order, these include:

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- Research to explore the *economic contribution* of local cinemas focusing on visitor spend, supply chain, and other economic multiplier effects.

 - Research to examine the role and contribution of local cinemas to *learning and training*, both in formal and informal educational contexts.

 - Research to examine *the views of non-attenders*, providing a counterbalance to the evidence gathered as part of this report.

 - Research to examine the impact, positive or negative, on particular *target groups* and the extent to which local cinema is providing fair and equal access to all sections of the community.

Regional Screen Scotland may wish to explore these and other areas of enquiry in conjunction with Creative Scotland.

Building on the Resources Developed

Finally, we offer the following recommendations to build on this first phase of research and to make the most of the learning and content already developed:

-
- Offer *support for each of the 12 participating film exhibitors* to make use of the audience research and impact data generated as part of the study. This will prove useful for local exhibitors in promoting the quality of their activity, demonstrating their local impact, and achieving further influence and access to resources.
-
- Produce a *Social Value Toolkit* to support local exhibitors to define, track and evaluate the outcomes they achieve for individuals and communities. This would build on the six domains of influence identified as part of this research. It should enable the film exhibition sector to understand the ‘theory of change’ for local cinema and provide access to guidance, tools and templates that will be helpful in demonstrating impact.
-
- The development of *a supporting online survey resource* that can be utilised by local exhibitors across Scotland to gather audience feedback and track impact. This should be capable of generating tracking data for individual exhibitors and of producing aggregate data to help understand trends across the film exhibition sector.
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Find out more
www.socialvaluelab.org.uk

info@socialvaluelab.org.uk

Call us on **0141 530 1479**



Studio 222, South Block,
60 Osborne Street, Glasgow, G1 5QH.
