drewwylie

Mapping Film Exhibition in Scotland

A report for Creative Scotland

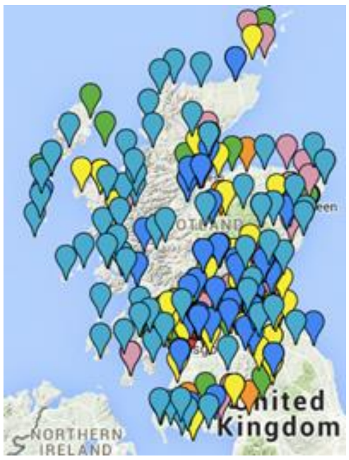
June 2016

Contents

Figures

A Google map of film exhibition locations can be accessed via the link in the box below. The map is organised in seven layers to include the exhibitor locations identified in this study:

- 36 x Multiplexes
- 26 x Independent cinemas
- 48 x Multi-arts venues
- 45 x Community cinemas
- 60 x Film societies or clubs
- 69 x Festivals
- 62 x Mobile and touring



https://www.google.com/maps/d/viewer?mid=1o2jpmpUGnbDhDYSdlhBhC9xslu8

drewwylie

Executive Summary

1. Overview

Creative Scotland On Screen: Film Strategy 2014-17 aims to broaden cinema access and programming in Scotland for as wide and diverse an audience as possible and to encourage and deepen audience engagement with film. Film exhibition varies widely from place to place in Scotland and there is a need for a clear picture of activity and capacity to inform future decision making by Creative Scotland and its partner screen organisations.

The following report provides an introduction to an inclusive and comprehensive set of data about film exhibition in Scotland that describes the size, location, and activity of the sector as well as some of the key concerns of exhibitors. This research is intended to contribute to an understanding of what is happening 'on the ground' across film exhibition in Scotland. The associated dataset provides a strong platform for ongoing analysis.

2. The Research

The primary research focus was obtaining and merging the contact lists of key screen organisations to create an inclusive dataset of film exhibition in Scotland. This resulting merged list of 384 exhibitors provided the platform for an electronic survey exercise that was issued to the whole dataset, along with a promoted number of web-links for any exhibitors missing from the lists. The survey was distributed by Creative Scotland, Regional Screen Scotland, Cinema for All, and Film Hub Scotland. This approach resulted in a dataset of a total of 324 exhibitors, 156 of which came through the survey process, and included 26 responses from exhibitors not included in any of the screen organisations' lists. A separate touring spreadsheet was prepared to capture the activity in mobile and touring cinema.

The survey was designed in consultation with Creative Scotland and sought to balance a wide range of enquiry to meet the project brief with the aim of a high response rate. A total of 62 questions were included, of which 17 were open questions. The findings were organised under a number of thematic headings and organised in a data pack that accompanies this report.

3. The Report

The report is introduced with an online map of film exhibitors across Scotland organised by type: multiplexes; independent cinemas; multi-arts venues; community cinemas; film societies or clubs; festivals; mobile and touring. The report goes on to present key findings from the survey data under a number of themes.

Data is displayed in graphical form and the report includes a total of 35 figures. There is a section that considers examples of strategic approaches to film exhibition in other countries. A 'geography' section describes what types of exhibitors are operating and where, organised by both Local Authority and VisitScotland region. Gaps in the provision of film exhibition are identified. The sector's approach to equalities, diversity and inclusion is then examined, before a consideration of development opportunities, programme and audience. The relationships between community cinema, mobile cinema and the industry as a whole are explored, along with film in schools.

4. The Conclusions

The report conclusions confirm that audience access to film exhibition in Scotland is defined by where they live, with each type of film exhibitor making an important contribution to the sector as a whole. Cinema is the most popular form of venue-based culture in Scotland but there are clear geo-demographic gaps in provision. The number of exhibitors in Scotland is stable and the amount of screenings and audiences continue to grow.

There are a number of challenges where the sector as a whole is underperforming, and different types of exhibitor experience different pressures on their operations, programming and sustainability. Film exhibitors are clear about what they need to flourish, from specialist training to an improved customer experience.

Film exhibition in different areas of Scotland is defined by the relationship between the different types of exhibitor, from multiplex, to multi-arts venue, to mobile. It follows that the organisations that represent the interests of the various sub-sectors need to have shared priorities and a coordinated approach to future development and support for film exhibitors.

5. Recommendations

The report recommends further work to explore the key issues raised by the findings of this report. More research is needed in areas like: attendance by young people; programming; film in schools; and the role of Local Authorities. Case studies in each part of the film exhibition sector are recommended to better understand research findings, including sales and marketing, investment priorities, customer experience, and barriers to access.

Collaboration is going to be a key success factor for the future development and sustainability of film exhibition in Scotland. National organisations should aim to present both an agreed set of priorities and a coordinated response to them. Key areas requiring a joined up approach range from environmental improvement and facility development, to incentivising programme diversity. When it comes to addressing gaps at local level the role of Local Authorities is important as is support that helps exhibitors to overcome a lack of capacity to develop and improve.

Mapping Film Exhibition in Scotland

1 Introduction

"We aim to broaden cinema access and programming in Scotland for as wide and diverse an audience as possible and to encourage and deepen audience engagement with film. While there is world-class cinema programming and provision in Scotland's key cultural venues and festivals, we recognise that work is required to support distribution, exhibition and audience development".
Creative Scotland On Screen: Film Strategy 2014-17 (p30)

This statement introduces the section of the *Creative Scotland On Screen: Film Strategy 2014-17* dedicated to distribution, exhibition and audiences.

Film exhibition is a particularly complex part of the mixed cultural economy. 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.

This diversity means that access to film exhibition in Scotland is defined by a local formula that could consist of all or some of the above exhibitors which in turn is likely to impact on regularity of screenings and the genres that are available to audiences. Boundaries between exhibitor types are sometimes changeable and difficult to define, often requiring some industry knowledge. This position is further complicated by video on demand and other digital platforms that can deliver film into homes and community settings, which may be impacted on by local broadband speeds([1]).

[1] Map of broadband speeds in Scotland:

This report provides a comprehensive picture of film exhibition in Scotland, bringing together all parts of the sector into an extensive dataset. This research is intended to contribute to an understanding of what is happening ‘on the ground’ across film exhibition in Scotland.

The following report provides an introduction to an inclusive and comprehensive set of data about film exhibition in Scotland that describes the size, location, and activity of the sector as well as some of the key concerns of exhibitors. The associated dataset provides a strong platform for ongoing analysis.

2 The Brief

The primary purpose of the study is to inform planning in line with the *Creative Scotland On Screen* : *Film Strategy 2014-17*, which makes the following developmental commitments:

- We will support audience development initiatives that increase access and programming for as wide and diverse an audience as possible.
- We will continue to support digital innovations in film distribution and exhibition to encourage better access to film, especially beyond the major cities.
- We will work with the key film festivals and cultural cinemas across Scotland to provide more opportunities for broadening engagement with film and the moving image.
- We will work with our partners in Government, Local Authorities and other public sector organisations in Scotland to realise the potential of high quality modern cinema provision for all.
- We will work with Local Authorities and other partners in the arts, screen and creative industries to support the growth of multi-arts centres, which can act as creative hubs.
- We will learn from the work of the Promoting Equalities Programme, whose aim is to develop a programme which puts equalities at the heart of the participating cultural and creative organisations.

In order to support this work Creative Scotland created the following initial brief for the project:

• To collate existing information on film exhibition in Scotland.

• To identify gaps in, and changes to, existing information.

• To identify new and recent developments in film exhibition in Scotland.

• To include the following data from relevant exhibitors and other organisations where available:

a. Location of exhibitors;

b. Type of exhibitor;

c. Regularity of screenings;

d. Annual admissions;

e. Pricing;

f. Film programming and booking;

g. Screening equipment.

• To manage this data in an organised and user-friendly way.

• To present this data in a visual way.

• To map exhibition data alongside existing demographic and economic data.

The term 'film exhibition' adopted in the brief includes all regular, public communal film viewing opportunities including full and part-time cinemas, multi-arts venues showing film, film festivals, mobile cinemas and screens, community cinemas, film societies, film clubs; in short, every context where audiences watch films together, and every organisation that delivers such activities.

The deliverables for the project include a dataset of the research findings with a narrative report that explores conclusions and recommendations, and a Powerpoint presentation for use by the client. A variation to the brief was agreed to enable a small number of comparators to be included in the final report.

3 Context

3.1 The scale

Film exhibition continues to have a huge economic and cultural impact across the world and reports of its decline in the face of technological developments can be misleading. Motion picture production, post-production and distribution were worth $77bn (U.S) in global revenues in 2013 and was responsible for 2,484,000 jobs ([2]). Box office grew by 1% and the number of screens increased by 6% in 2013, and digital movies and video are now worth $13bn (U.S) globally. Europe represents about a third of this activity ([3]).

Closer to home, film and film exhibition are important elements of the creative economy in the UK. In 2014 BFI statistics show that film distributors released 824 films into cinemas in the UK and the Republic of Ireland, generating £1,134m in box office receipts. Translated into local income, cinemas retained anywhere between 40% and 75% of these receipts after VAT. Cinema exhibition in the UK employed over 19,000 people in 2013, equivalent to 13,000 full time jobs (FTE), and with a multiplier effect of 23,000 FTE and a £1.2bn contribution to the economy (GVA). Tax revenues for the same year were £444m of which £195m was VAT on cinema tickets ([4]).

The BFI found that theatrical films had £3.4bn viewings on television in the UK in 2013 and there were 165.5m viewings in cinemas. In the same year 119m DVD/Blu-ray copies of films were sold in the UK and viewing films on television and home entertainment platforms was worth over £3bn. BFI statistics also calculate Scotland as having 6.4 screens per 100,000 people in 2013, comparable to both the South East and South West of England.

[2] UNESCO report "Cultural Times", 2015

[3] The Economic Impact of the UK Theatrical Distribution Sector", Film Distributors Association, 2015.

[4] BFI Statistical Yearbook 2014

Our own research includes a wider range of screen types and estimates that Scotland has 10.8 screens per 100,000 people (based on 5,347,600 population in 2014 and 494 screens recorded in the survey, including multiple locations for mobile and touring cinema but excluding festivals).

Film exhibition also sits within one of the fastest growing parts of the UK's creative economy. The percentage growth in GVA for film, TV, video, radio and photography in 2013/14 was 13.8%. In Scotland the 2013 GVA value of the sector was calculated as £75.8m, and the total number of registered enterprises for the film and video sector grew from 285 in 2014 to 335 in 2015 ([5]). Section 9 of this report briefly explores the relationship between film exhibition and Scotland's visitor economy.

3.2 Investment

Creative Scotland on Screen: Film Strategy 2014-17 identified that in 2012/13 net film spend by Scottish organisations with a responsibility for film (including film expenditure on the part of Creative Scotland and the Scottish Screen Archive) was £6.9m. There are a number of organisations that invest in film exhibition in Scotland, each with a distinct, but often overlapping role.

[5] The Scottish Government Growth Sector Statistics 2016

Figure 1 - Film exhibition investment grid

Investment	Creative Scotland	Regional Screen Scotland	Film Hub Scotland	British Film Institute	IntoFilm	BIG Lottery Scotland	Heritage Lottery Fund	Scottish Film Education	Creative Europe	Cinema for All
Cinema exhibition infrastructure	X	X		X		X				X
Capital expenditure on buildings	X					X	X			
Programme development	X	X	X	X					X	X
Site specific screenings	X		X	X						
Audiences / engagement	X	X	X		X				X	X
Archive and heritage screenings	X		X				X			
Distribution	X		X	X					X	X
Core costs	X			X						
Film festival costs	X	X		X					X	
Moving image education	X							X		
Schools activity	X				X					
Training	X	X	X	X				X	X	X

Source: Drew Wylie Research

4 Mapping Film Exhibition

Cultural mapping can be a powerful tool in revealing what communities consider to be important as cultural assets. For example Canada's cultural mapping toolkit([6]) describes this as a process of collecting, recording, analysing and synthesising information in order to describe the cultural resources, networks, links and patterns of usage of a given community or group ([7]). There is also a developing field of work that exploits Geographic Information System technology (GIS) to understand factors at work in film exhibition, including examples from Australia, Belgium, Canada and Italy that explore the spatial analysis of film in relation to factors like sustainability of cinemas, cultural identity and geo-historical patterns of film distribution ([8]). Geo-historical analysis has also been successfully used in a Scottish study that mapped film exhibition in the country before permanent cinemas ([9]).

These types of approaches to mapping are expensive and time consuming, often requiring major research funding. In the case of film exhibition we identified an electronic survey as the securest route to sectoral information.

This was prompted by being given access to the accumulated databases of the key organisations supporting film exhibition in Scotland. By focusing on an electronic questionnaire, (including a number of open ended questions), and working to achieve a high response rate, we have looked to capture what the sector itself considers worth mapping. This provides some of the 'granularity' that can be achieved in the cultural mapping approach, as well as the clear picture of the sector at a particular moment that mapping of film exhibition heritage achieves. It also includes a voice for the extensive network of community cinema and film societies around the country.

[6] "Cultural Mapping Toolkit" Stewart, Creative City Network of Canada, 2007

[7] Canadian Movie-going Survey

[8] "Locating the Moving Image - New Approaches to Film and Place", Julia Hallam and Les Roberts, Indiana University Press 2014

[9] "Mapping film exhibition in Scotland before permanent cinemas", Veleza-Serna, 2011

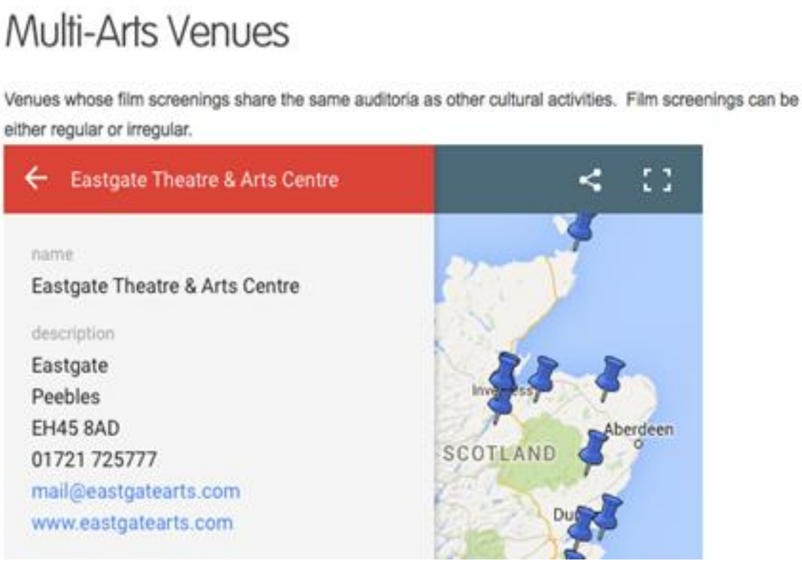
There are examples of this approach in Scotland. An audit of Scottish film exhibition commissioned by Scottish Screen in 2005 used similar categories to later studies ([10]). Regional Screen Scotland began to map cinema exhibitors in Scotland in 2009. Exhibitors were categorised under five headings.

Figure 2 - Regional Screen Scotland exhibitor categories

i Multiplexes	Venues with more than five dedicated cinema auditoria offering seven days a week programming
ii Independent Cinemas	Venues with four or less dedicated cinema auditoria offering over five film screenings a week
iii Community Cinemas:	Voluntary venues/organisations who operate part-time, e.g. once a week, and have a committee/group solely dedicated to film exhibition
iv Multi-arts Venues	Venues whose film screenings share the same auditoria as other cultural activities. Film screenings can be either regular or irregular.
v Community Groups	Groups/venues who organise film screenings as part of a wider programme, with no concentration on film exhibition or even cultural activity (i.e. could be a leisure centre/school/youth group).

Screenshots of the Regional Screen Scotland resource to demonstrate the approach:

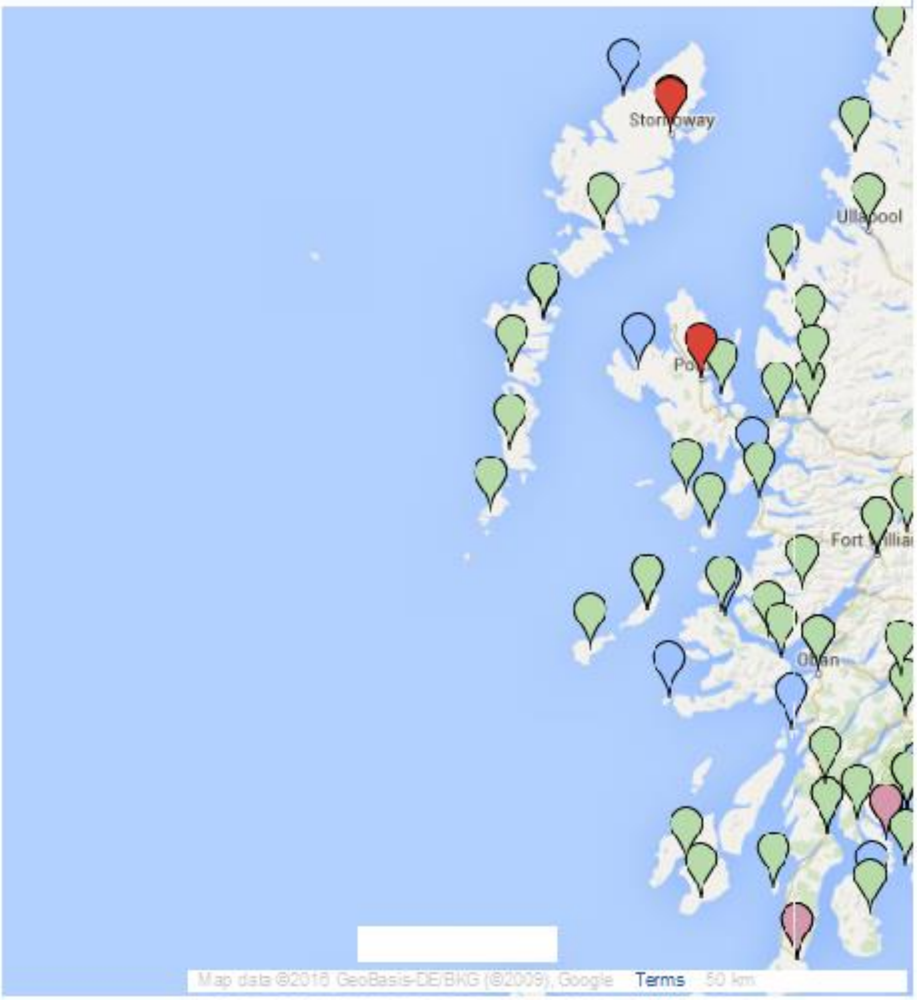
Figure 3 - Regional Screen Scotland screenshots



[10] Scottish Screen Audit of Cinema Exhibition 2005

Screen Community – Regional Screen Scotland http://regionalscreenscotland.org/community/

All Cinema Provision in Scotland ☆



Map Key

Community Cinema
Film Festival
Multiplex
Mobile & Touring
Independent Cinema
Multi Arts Venue

Please find your cinema on the map. If you are missing or there is anything we should change in your details please contact us.

Source: Regional Screen Scotland Website

New research commissioned by Regional Screen Scotland charts how audiences value the experience of local cinema-going and included a detailed examination of audience views in 12 venues across Scotland ([11]).

The possibility of Creative Scotland hosting an additional interactive map of film exhibition in Scotland was discounted for a number of reasons. To be effective the map would need to be continually updated and maintained to ensure it was accurate. It would also need a multi-organisational approach to the further development of this online resource, beginning with some agreement on what functionality would be most useful for the film exhibition sector as a whole.

The map produced from our research can be found at **https://www.google.com/maps/d/viewer?mid=1o2jpmpUGnbDhDYSdlhBhC9xslu8.**

[11] Regional Screen Scotland Audience Research 2016

5 Our approach

5.1 Exhibitor types

The research was organised under seven categories of exhibitor type:

1. Multiplex (multiscreen venue, part of a chain)
2. Independent cinema (four or fewer dedicated cinema screens, not part of a chain)
3. Multi-arts venues
4. Community cinema (open access)
5. Film society or club (membership is available)
6. Festival
7. Mobile and touring cinema

While these categories are sometimes difficult to disentangle (such as the distinction between community cinema and film societies) it was decided that the distinctions would be useful for a dataset that could be used in a wide variety of contexts. It is worth noting that in Scotland some 'chain' cinemas, with more than 4 dedicated screens, include operators who have been traditionally considered to be 'independents', with a brand primarily associated with independent cinema exhibition.

5.2 The survey

The primary research focus was obtaining and merging the contact lists of key organisations to create an inclusive dataset of film exhibition in Scotland. This resulting merged list of 384 exhibitors provided the platform for an electronic survey exercise that was issued to the whole dataset, along with a promoted number of web-links for any exhibitors missing from the lists. The survey was distributed by Creative Scotland, Regional Screen Scotland, Cinema for All, and Film Hub Scotland. This approach resulted in a dataset of a total of 324 exhibitors, 156 of which came through the survey process, and including 26 responses from exhibitors not included in any of the screen organisations lists.

The survey was designed in consultation with Creative Scotland and sought to balance a wide range of enquiry to meet the project brief with the aim of a high response rate. A total of 62 questions were included, of which 17 were open questions. The link allowed respondents to leave and return to the survey to allow them to research any information not immediately to hand.

Cleaning the survey results has proven to be an ongoing process throughout the research. Respondents capture and record their performance data in a variety of ways and this was reflected in the survey returns. The major challenge has been to avoid double, or even triple counting of data. For example a film society, a multi-arts venue, and a film festival may all use the same cinema screen at some point in the year, and may also share the same box office system.

5.3 Follow up

Survey returns were monitored against the 'master' spreadsheet. In addition to prompting emails at pre-arranged points in the survey process a priority list of respondents was compiled. The research team then followed up the priority list with both targeted emails and phone calls. In the case of multiplexes much of the basic data requirement in the survey is available on their websites. However, the team pursued direct contacts in the major chains to secure responses. This resulted in one major chain completing the survey and providing further data through a follow up telephone consultation.

Creative Scotland provided a contact list of Local Authority officers who were helpful in promoting the survey to their local area. Scottish libraries also promoted the survey across public libraries in Scotland. A short dedicated survey was prepared for public libraries to encourage responses from the sector, but this had a very limited impact and return.

A separate touring spreadsheet was prepared to capture the activity in mobile and touring cinema. This was necessary because completion of the survey for each touring venue or mobile stop would have been far too onerous a task for exhibitors. A web based information sweep was also employed in the process to gather information where survey responses from priority exhibitors was not available.

In addition to the primary contact lists, information was also obtained (or its use authorised) from the UK Cinema Association, the BFI, Big Lottery Scotland, and Into Film.

5.4 The themes

The research findings were presented at an interim meeting at Creative Scotland on the 3 March 2016. A decision was then made to organise the findings under a number of thematic headings:

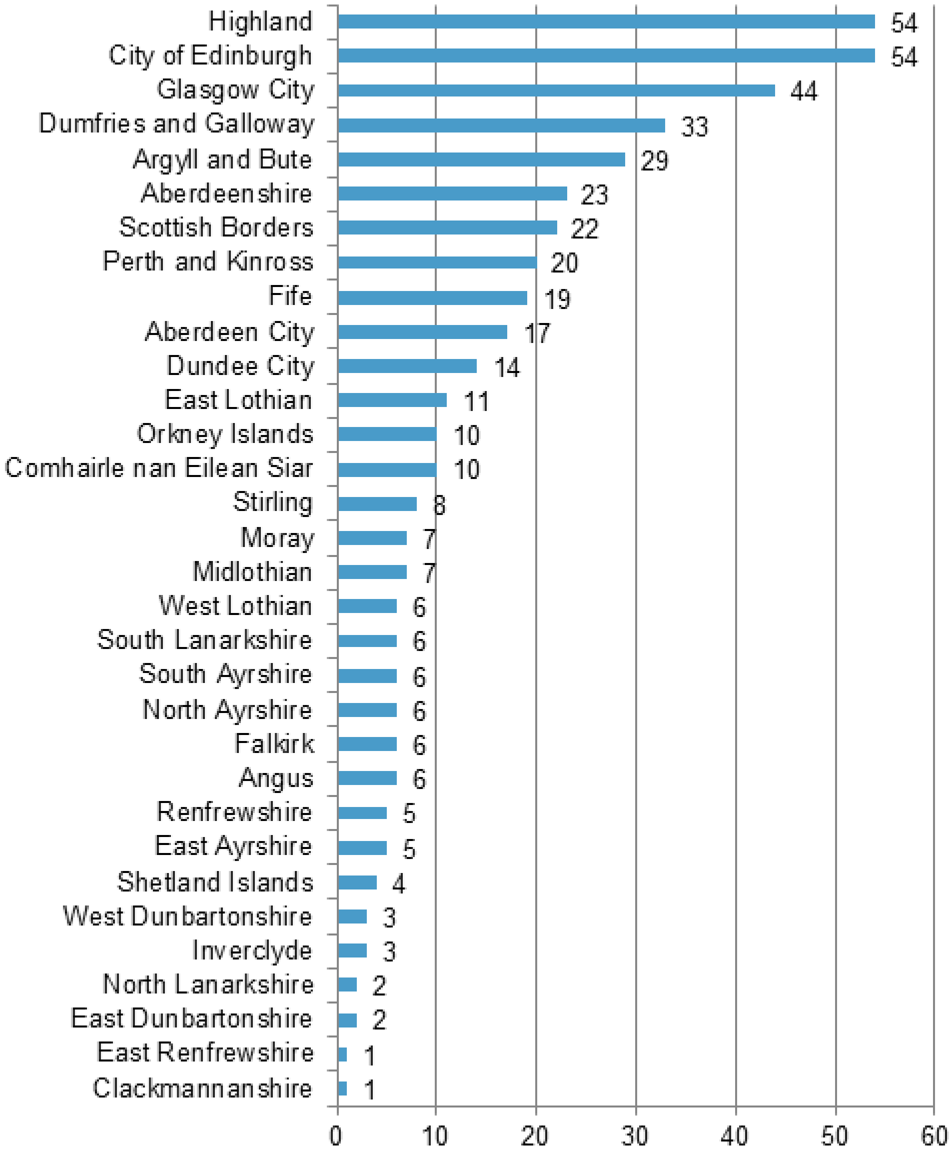
1. Geography
2. Equalities, diversity and inclusion
3. Development opportunities
4. Programme and audience
5. Community cinema

Areas like skills, training, infrastructure, format, booking, technology, and programming are incorporated into the appropriate theme.

6 Geography

6.1 Exhibition locations

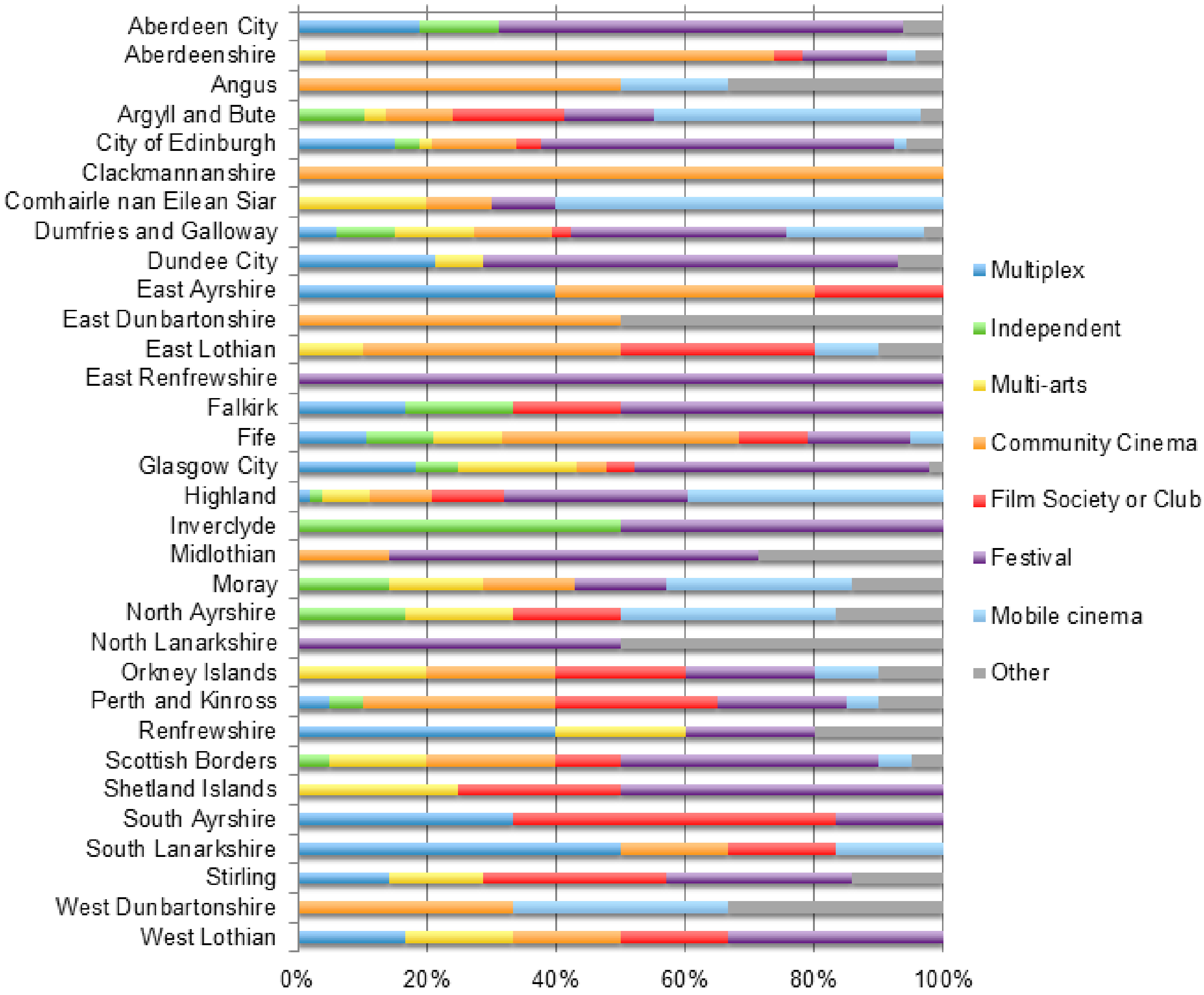
Figure 4 - Number of exhibition locations by Local Authority



Source: Drew Wylie Research

Figure 5 demonstrates different types of exhibitor in each Local Authority area as a proportion of total film exhibitors in each area. It is useful to compare this figure with Figure 4 to assess both the scale and type of exhibition activity.

Figure 5 - Exhibitor type by Local Authority



Source: Drew Wylie Research

Figure 5 shows the exhibitor type by Local Authority. Where respondents selected more than one exhibitor type, we have assigned them to a category that, in our opinion, best describes them. As expected there are clear links between population density and type of exhibitor. Multiplexes are to be found in cities and community cinema dominates in very rural areas. It looks as if there is a relationship between film societies and remoteness from the cultural centres where non-mainstream programming could be found.

The absence of both multi-arts venues and independent cinema in some areas indicates that some audiences may not be able to access independent film and non-mainstream programming. The spread of multi-arts venues does not follow a geo-demographic pattern, although there are clear clusters, with the highest number of eight being in Glasgow. The highest number of festivals is in Edinburgh and Glasgow with 29 and 20 respectively, but festivals are present throughout the country, and dominate programming in one or two instances, like North Lanarkshire.

The expected concentration of film exhibition in Edinburgh and Glasgow is particularly pronounced in the former. The health of Scotland's community cinema and film society scene also shows up in the amount of exhibitors in very rural areas in the Highlands and Islands, and Aberdeenshire.

The Scottish Government 2014 Scottish Household Survey ([12]) confirmed that cinema going is the most popular form of cultural attendance in Scotland, with over half of the respondents viewing a film over a twelve-month period. However, our research indicated that there are clear areas of low activity, with six areas having three or less exhibitors, and where more research is needed:

- Clackmannanshire (one exhibitor serving a population of 51,190)
- East Renfrewshire (one exhibitor serving a population of 92,380)
- East Dunbartonshire (two exhibitors serving a population of 106,730)
- North Lanarkshire (two exhibitors serving a population of 337,950)
- Inverclyde (three exhibitors serving a population of 79,860)
- West Dunbartonshire (three exhibitors serving a population of 89,730)[13]

[12] Scotland's People Annual Report: Results from the 2014 Scottish Household Survey

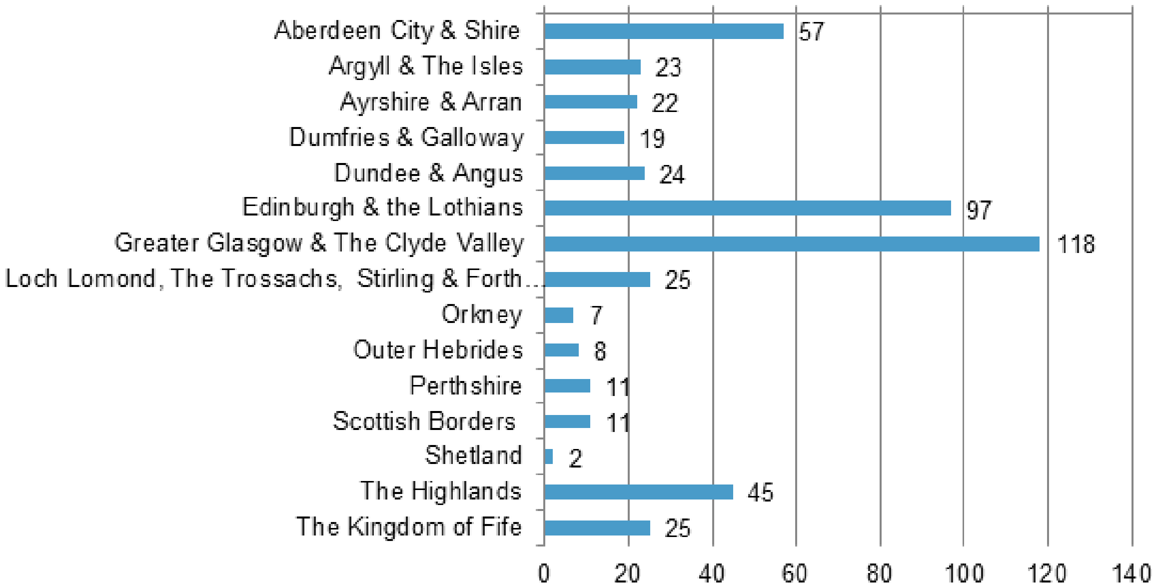
[13] The population statistics are taken from the National Records of Scotland Mid-Year estimates 2014

6.2 Screens and seats by region

In order to present large amounts of data effectively, the following figures use VisitScotland regions. VisitScotland regions encompass the following Local Authorities:

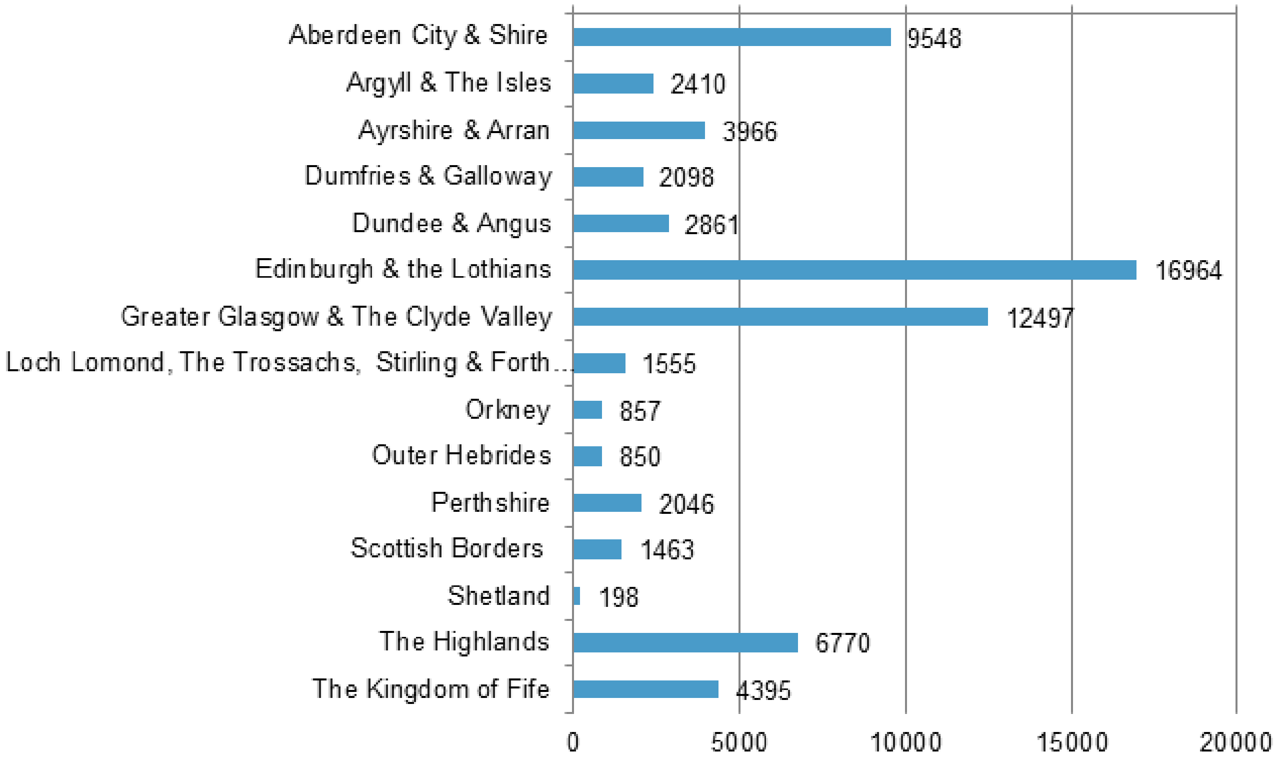
Aberdeen City and Shire:	Aberdeen City, Aberdeenshire
Argyll and The Isles:	Argyll and Bute
Ayrshire and Arran:	South Ayrshire, East Ayrshire, North Ayrshire
Dumfries and Galloway:	Dumfries and Galloway
Dundee and Angus:	Dundee City, Angus
Edinburgh and the Lothians:	City of Edinburgh, East Lothian, Midlothian, West Lothian
Greater Glasgow and The Clyde Valley:	South Lanarkshire, North Lanarkshire, East Dunbartonshire, West Dunbartonshire, Inverclyde, East Renfrewshire, Renfrewshire, Glasgow City
Loch Lomond, The Trossachs, Stirling and Forth Valley:	Stirling, Clackmannanshire, Falkirk
Orkney:	Orkney Islands
Outer Hebrides:	Eilean Siar
Perthshire:	Perth and Kinross
Scottish Borders:	Scottish Borders
Shetland:	Shetland Islands
The Highlands:	Highland, Moray
The Kingdom of Fife:	Fife

Figure 6 - Geographical spread of screens (excluding festivals)



Source: Drew Wylie survey (227 responses)

Figure 7 - Geographical spread of cinema seats (excluding festivals)

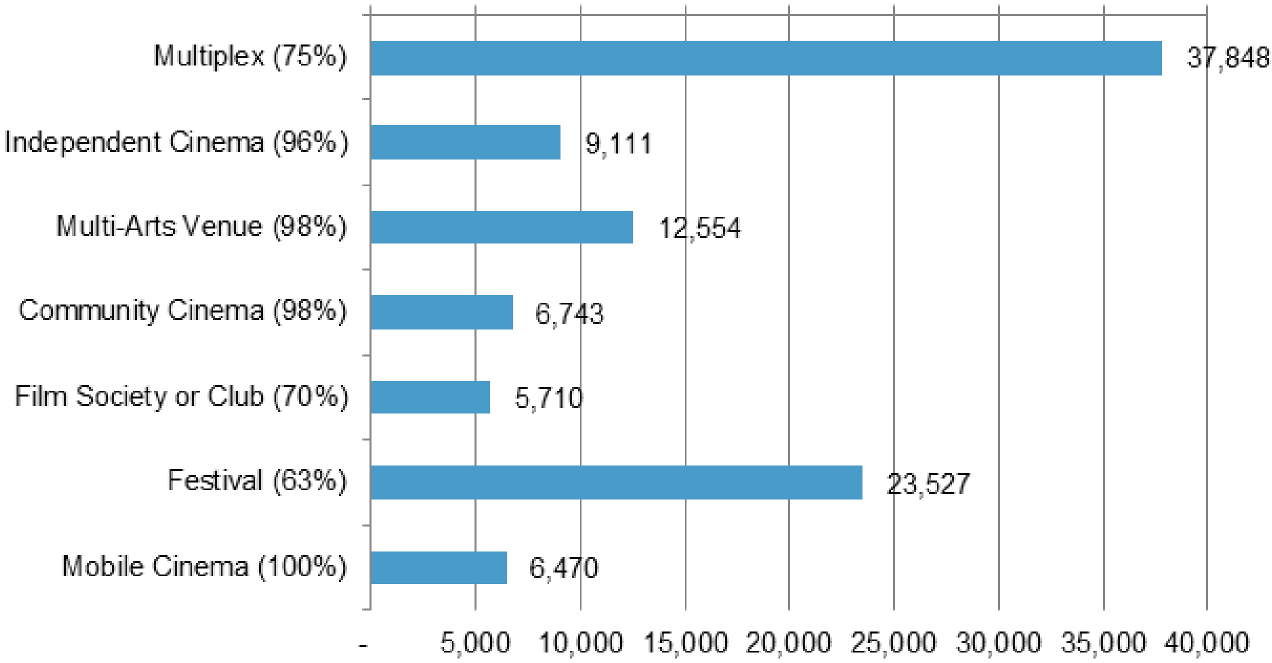


Source: Drew Wylie survey (205 responses)

The geographical spread of screens and cinema seats present a more predictable relationship between population density and screen access. Edinburgh has significantly more cinema seats than Glasgow. Areas of low activity remain and there are clear priority areas for attention. This picture is reinforced by the work of Film Hub Scotland in identifying nine Local Authority areas in Scotland with no full-time cinema:

- Aberdeenshire
- Angus
- Clackmannanshire
- East Dunbartonshire
- East Lothian
- East Renfrewshire
- Western Isles
- Midlothian
- North Ayrshire

Figure 8 - Seating capacity by exhibitor type (exhibitor type % response rate to question in brackets)



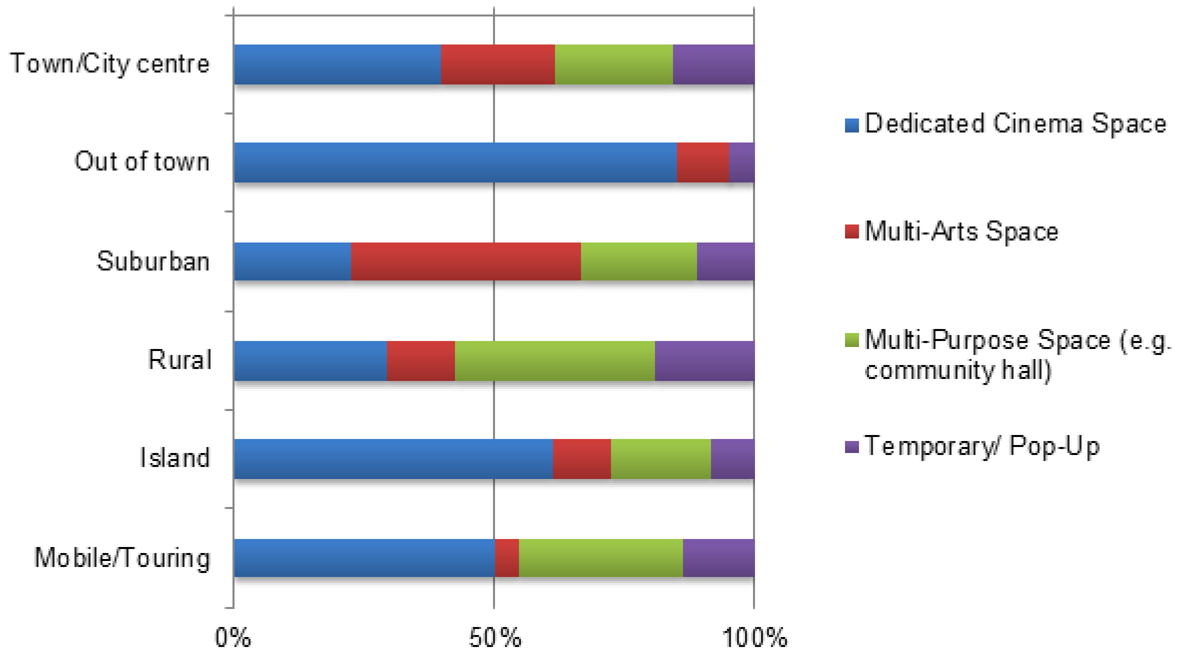
Source: Drew Wylie research

These figures support the mapping of venues that indicated that multi-arts venues appear to be particularly important in providing film exhibition across Scotland where access to multiplex and independent cinema is limited. As is the case in other areas of Scottish culture festivals make up a significant proportion of provision.

6.3 Types of Spaces

The spread of types of spaces reflects industry trends when it comes to dedicated cinemas. Multiplexes can be found in the out of town areas as well as city centres, and there is a clear pattern of cinema being situated where most people live. This has meant that multi-purpose spaces are the most significant type of space in rural areas, but not in the Island communities, where dedicated cinema is available.

Figure 9 - Exhibition location by type of space



Source: Drew Wylie Research

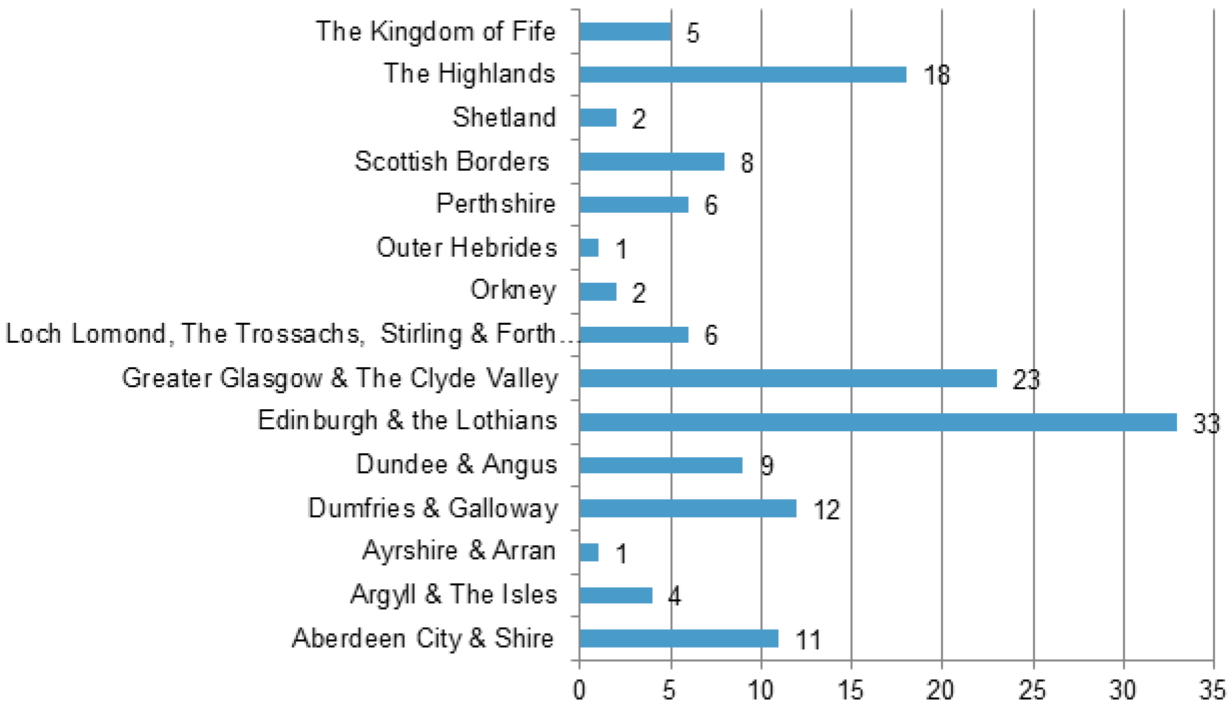
The research team has prepared a customised Google map (with a link on page 4 of this report) that shows geographical location of exhibitor types across a number of layers. An examination of this map shows that community cinema and film societies fill in many of the geographical gaps in commercial and mainstream cinema. Similarly, multi-arts venues provide a link to independent cinema programming in many areas.

6.4 Festivals

The survey was returned by 69 film festivals spread across the whole of Scotland. Around 65% of these included screen and seating capacity information in their response. Follow up telephone enquiry indicated that it is likely that some festivals no longer exist or were one-off initiatives, and that some simply don't exist outside of their festival organising period and lack the capacity to respond to the survey. Mapping has also revealed that festivals are more likely to be located close to film societies than community cinema. Also festivals are less likely to take place where mobile cinema happens, possibly reflecting the absence of local capacity, like a film society or community cinema organisation to work with.

The survey revealed that, in the case of the 45 festivals providing this information, a total of 23 screens are used by Scottish film festivals and that this corresponds to a total seating capacity of 23,527. However, more than one festival will use the same film infrastructure in key cinemas or some multi-arts centres, meaning that the total number of screens in use by festivals is likely to be less than 23.

Figure 10 - Geographical spread of festival locations

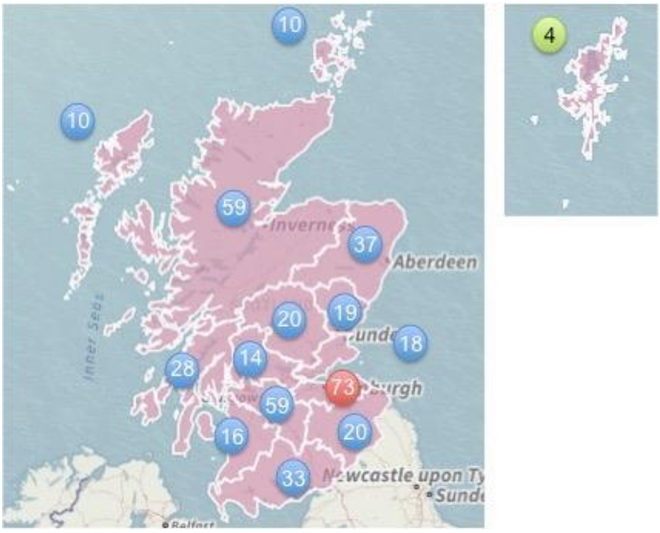


Source: Drew Wylie survey (45 responses)

6.5 Tourism

The geographical distribution of exhibition, when combined with a clear pattern of seasonality in programming beyond the mainstream and commercial cinemas (See Figures 23 and 24), demonstrates that there are potential gaps and opportunities for film exhibition to contribute to the overall tourism offer. Cinema can be an important contribution to the visitor experience, particularly when the weather is poor. However, the tourism industry has tended to focus on film production as a driver for tourism, with the Scotland Visitor Survey in 2015 ([14]) exploring how film prompts visits to Scotland and Visit Britain research ([15]) into activities that include visiting film locations. Visit Scotland took this approach a step further and commissioned a survey in 2012 into the attitudes of UK consumers to film related topics ([16]). This study found that 24% of respondents were inspired to find out more about a destination featured in a film, 10% of respondents went to visit a location or destination that featured in a film, and 6% had visited an attraction featured in a film. Even more significantly for Scottish cinema 39% of Scottish respondents had been inspired to visit or consider visiting a Scottish destination by a film.

Figure 11 - Number of exhibition locations by VisitScotland region



Source: VisitScotland

[14] VisitScotland Scotland Visitor Survey 2015

[15] Visit Britain research

[16] VisitScotland research on consumers views of film related topics, 2012

7 Equalities, Diversity and Inclusion

7.1 Access

The survey asked respondents to list all access facilities they have. The colour coding identifies the highest and lowest percentage for each access facility. The CEA card is a national concessionary card developed by the Cinema Exhibitors Association.

Figure 12 – Access facilities by exhibitor type

ACCESS	Wheelchair access to venue	Wheelchair access to film exhibition space	Wheel-chair accessible toilets	Guide dogs allowed	Assistive in-cinema audio system	Audio described screenings	Onscreen caption screenings	Autism friendly screenings	Dementia friendly screenings	Carer and baby screenings	Accept the CEA card
OVERALL	**88%**	**88%**	**74%**	**78%**	**60%**	**24%**	**18%**	**38%**	**6%**	**18%**	**37%**
Multiplex	100%	90%	100%	74%	100%	100%	42%	68%	0%	42%	74%
Independent	92%	75%	83%	88%	75%	38%	38%	46%	17%	33%	63%
Multi-Arts	91%	94%	91%	91%	71%	26%	38%	38%	24%	32%	24%
Community	96%	77%	88%	85%	40%	10%	10%	13%	8%	17%	6%
Film Societies	90%	83%	90%	80%	47%	3%	3%	3%	3%	0%	7%
Festival	95%	82%	90%	74%	41%	26%	21%	13%	5%	18%	13%
Mobile	70%	97%	36%	74%	62%	2%	0%	61%	0%	11%	59%

Source: Drew Wylie survey (29 responses)

The survey results concerning wheelchair and guide dog access by exhibitor type are encouraging overall. It seems clear that public and lottery investment has allowed arts and community facilities to keep pace with the access standards for multiplex cinema (who also operate a card scheme for carers). However, there are clear challenges and a very mixed picture across the sector. While multiplexes provide audio-described screenings and autism friendly screenings this is much reduced elsewhere in the sector. There appears to be much to understand, and much to do in developing access in every exhibitor type. In some cases this is likely to be a result of lack of resources and equipment. But a lack of awareness and training are also important factors and this area requires further investigation through case studies.

The survey results included exhibitors pointing to some key barriers to access. It was clear that purpose-built cinemas, and particularly multiplexes, are more accessible and that older buildings are in need of adaptation. In some cases the upper levels remain inaccessible for wheelchair users. A need for funding for offering audio description and captioning facilities was also flagged up by exhibitors.

7.2 Pricing

Pricing also plays an important part in delivering inclusion and despite recent attention on rising cinema prices, cinema still appears to be a relatively affordable area of leisure activity. However, ticket pricing is only one element of the night (or day) out and issues of transport and ancillary services are picked up in Section 8 of this report.
Free screenings are commonplace across film exhibition in Scotland. Almost 50% of survey respondents offer free screenings, across all types of film exhibitor:

- Multiplexes offer a limited number of free screenings for charity
- Independents offered free screenings to children and schools, but most said it was in collaboration with another organisation
- Community cinema and film clubs offer includes charities, schools, carers, themed events. Many ask for donations
- Festivals indicated they have a number of free events within their programme.

Figure 13 - Average day and evening pricing

Exhibitor Type	Average Full Price Daytime (92 Responses)	Average Full Price Evening (93 Responses)
Multiplex	£7.76	£8.91
Independent	£7.37	£7.79
Multi-arts	£6.43	£7.21
Community	£5.36	£5.35
Film society or club	£4.13	£4.33
Festival	£7.19	£7.32
Mobile cinema	£4.98	£6.00

Source: Drew Wylie Research

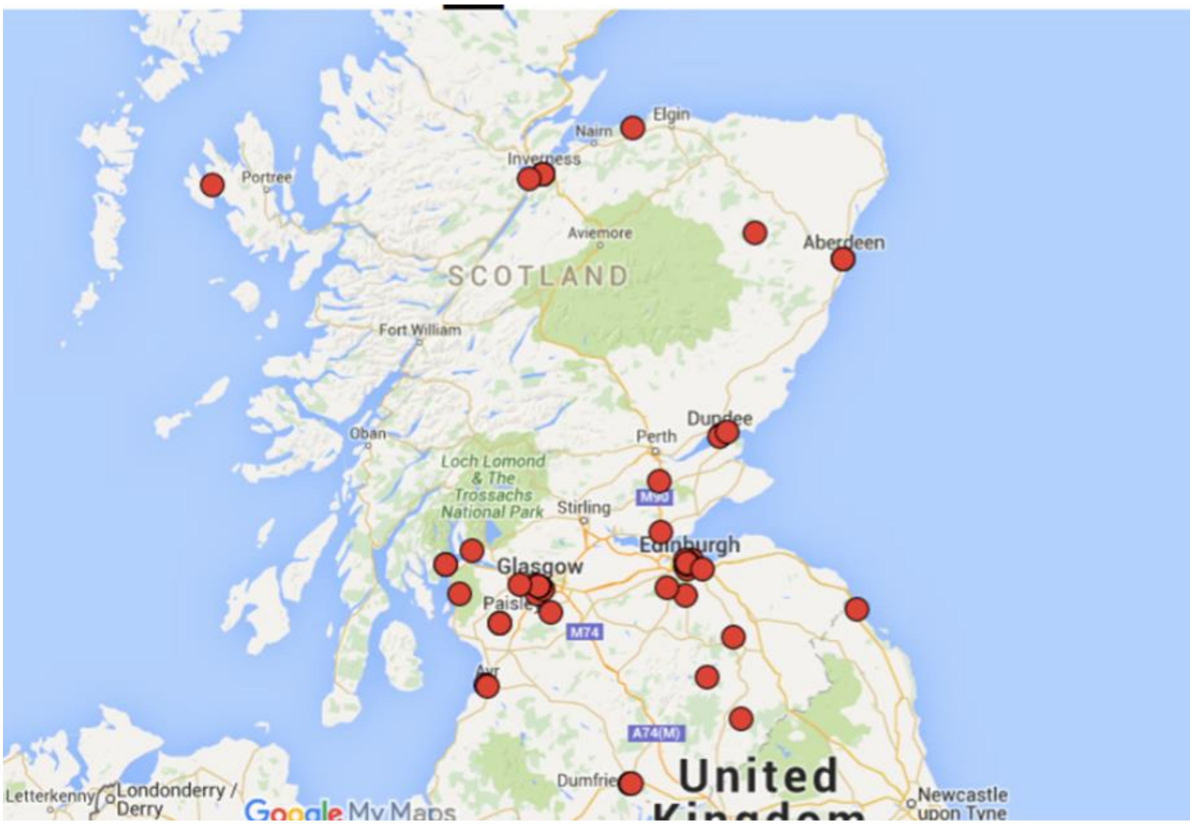
7.3 Programming diversity

The picture of film programming presented in this report demonstrates that understanding the factors in play that determine the film programming of a given area or type of exhibitor is challenging. The data returned by the survey provides a starting point for further research into how best to support and develop film programming.

In total, 81 respondents replied to the question regarding the type of film they regularly include in their programming. More detail on programme is included in Section 9 of this report. The research included four types of programming that can be considered of particular importance for the diversity of Scottish film exhibition: LGBTIQ films; Gaelic films; Scottish films; and South Asian films.

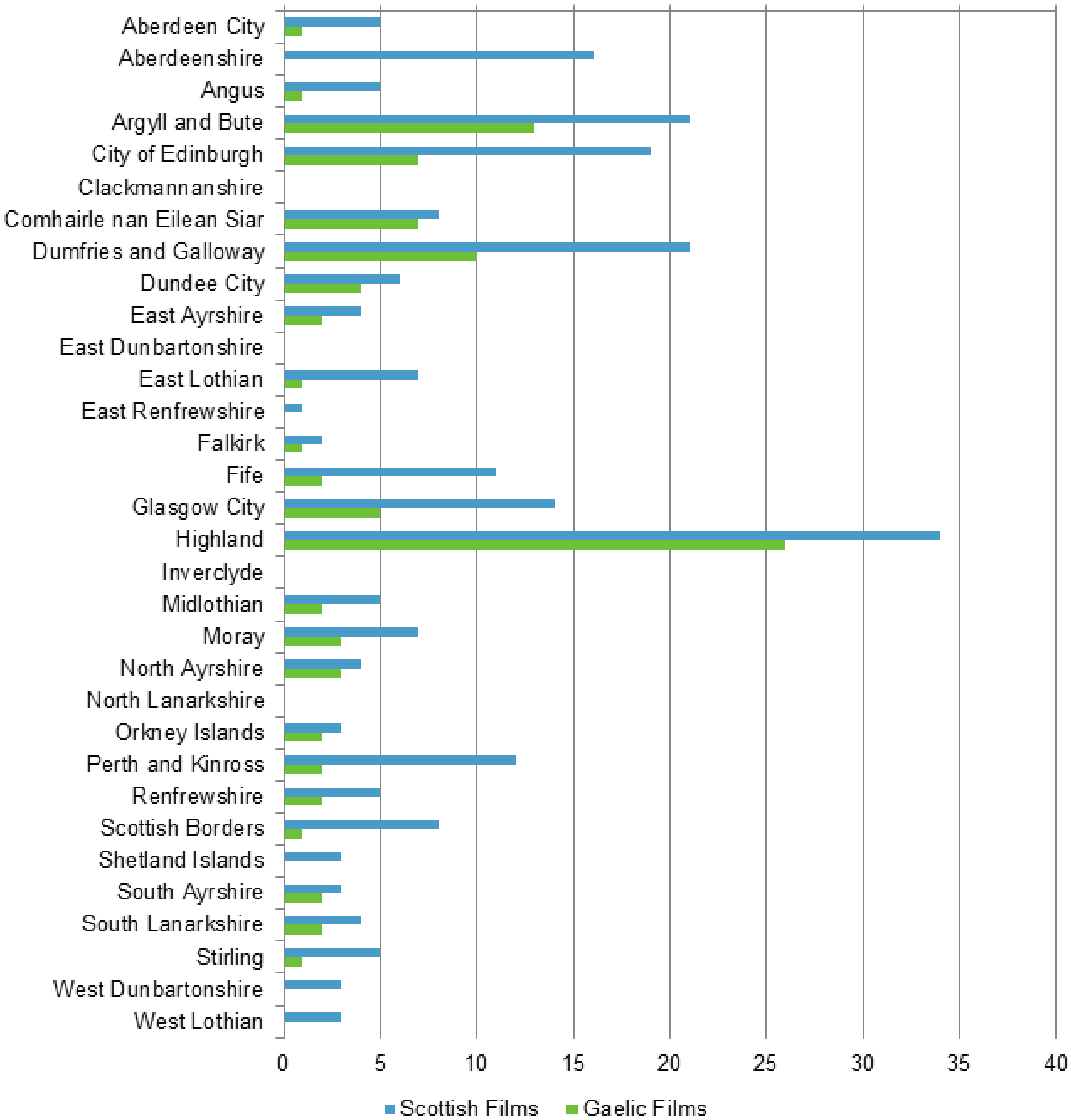
South Asian film is a mainstream element of the UK's film culture yet has a relatively low presence in Scottish film exhibition. Just under half (38 respondents) indicated they include South Asian films in their programming. It is possible that South Asian films are more prominent in some of the larger chains that did not respond to the survey. The BFI Statistical Yearbook indicates that almost all South Asian screenings are in city centre and suburban areas. Our more detailed examination in Scotland indicates that while the amount of South Asian programming is surprisingly low, it is more geographically dispersed than the BFI figures suggest.

Figure 14 - Geographic map of South Asian provision across exhibitors, excluding multiplexes



Gaelic film has been present across the whole spectrum of film exhibition in Scotland, including multiplex screenings. However, it is very dependent on mobile cinema, representing over half of the screenings. Independent cinema and festival presentations appear to be quite modest, and raises questions about the relationship between Gaelic film exhibition and Gaelic cultural activity as a whole.

Figure 15 – Scottish and Gaelic films by Local Authority



Source: Drew Wylie survey (Scottish Film – 239 responses, Gaelic Films – 100 responses)

drewwylie

Figure 15 shows the number of organisations that indicated they show Scottish and Gaelic films as part of their programme across each of the 32 Scottish Local Authorities. The responses do not indicate frequency, but merely that it is has ever been included in programming. The data also doesn't indicate the type of Scottish or Gaelic film (i.e. short, feature, archive). The Highland Council, Dumfries and Galloway Council and Argyll and Bute Council have a notably high figure. This is due to the high response rate to programming questions from the mobile sector and their corresponding high presence in these areas. There were no survey responses in the areas of Clackmannanshire, East Dunbartonshire, Inverclyde and North Lanarkshire.

Scottish films are similarly dependent on mobile film exhibition, but there is also clear demand in the community cinema sector and among films clubs and societies. The research raises the question of why independent cinema and festivals represent less than 15% of this type of activity.

Diversity of programming is a constant challenge. The BFI Film Audience Network's New Release Strategy aims to expand the reach of titles that may be perceived as challenging, including foreign language films, to be seen in more cinemas. It should be possible to track the Scottish exhibition of the six titles that comprise the programme. This is likely to reveal information that can support the development of a range of diverse programming, including foreign language films and LGBTIQ programming.

It should be noted that the mobile cinema figures may be exaggerated, as mobile operators completed one survey response and may have applied a block programming approach across their venues.

8 Development Opportunities

The development opportunities described in this section were identified through the research process, including the survey returns.

8.1 Funding

The question of funding was addressed in the open ended questions in the online survey. A clear link between funding and activity was identified in a number of key areas:

- insufficient revenue funding limits programming
- increased funding would allow expansion to rural areas, support rural development and increase rural screenings
- funding constraints limit the consistency of exhibition in a multi-arts venue
- there is a link between lack of funding and capacity that directly limits festival development as many organisers do this on top of existing core duties.

While there were concerns over the future of funding, including around the future of BFI funding and Film Hub Scotland, some new partnership opportunities were flagged up, including working with libraries to secure funding for screening and film education work. Desk research included a preliminary examination of Big Lottery Scotland Awards for All grants. This indicated that funding was awarded to 89 projects that involved film or cinema over the last five years, a scale of contribution that merits further exploration between Creative Scotland and Big Lottery Scotland.

8.2 Capacity

The issues of capacity were also addressed in the open ended questions in the online survey. The lack of a full time paid post is a constraint on some organisations who indicated both development and sustainability is affected. Limits to organisational capacity impacts directly on reach into rural areas for some key organisations tasked with the development of film exhibition. It also limits the potential role of festivals outside of core festival times, which may be significant in areas with limited infrastructure. This also applies to year-round festival or seasonal exhibitor roles (described as monthly jobs by one respondent) such as promotion and social media activity.

There was a clear appetite and demand for further training in exhibition related activity across the sector. While the overall impression of responses is that more training is welcome across a wide range of activity, the areas of both marketing and volunteer projectionists were particularly referenced by respondents. The development of capacity, training and support for not-for-profit organisations is an area that could be addressed in partnership with Local Authorities, many of which operate schemes to support this activity for voluntary organisations, social enterprise and small businesses.

8.3 Environment

Figure 16 - *Environment by exhibitor type (showing the number of responses for each exhibitor type and % of exhibitors of that type who responded to this question). Colour coding represents highest and lowest percentage by environment characteristic*

	Environment policy		Environmental / sustainability / green quality accreditation		Recycle		Accessible by public transport	
OVERALL	**126**	**62%**	**22**	**11%**	**189**	**94%**	**194**	**96%**
Multiplex	1	8%	0	0%	13	100%	29	97%
Independent	13	65%	5	26%	18	95%	20	100%
Multi-Arts	20	71%	9	35%	26	93%	28	97%
Community	20	43%	6	13%	43	93%	43	91%
Film Society…	9	28%	4	13%	28	90%	30	97%
Festival	21	54%	5	13%	5	13%	39	98%
Mobile	65	100%	0	0%	65	100%	65	100%

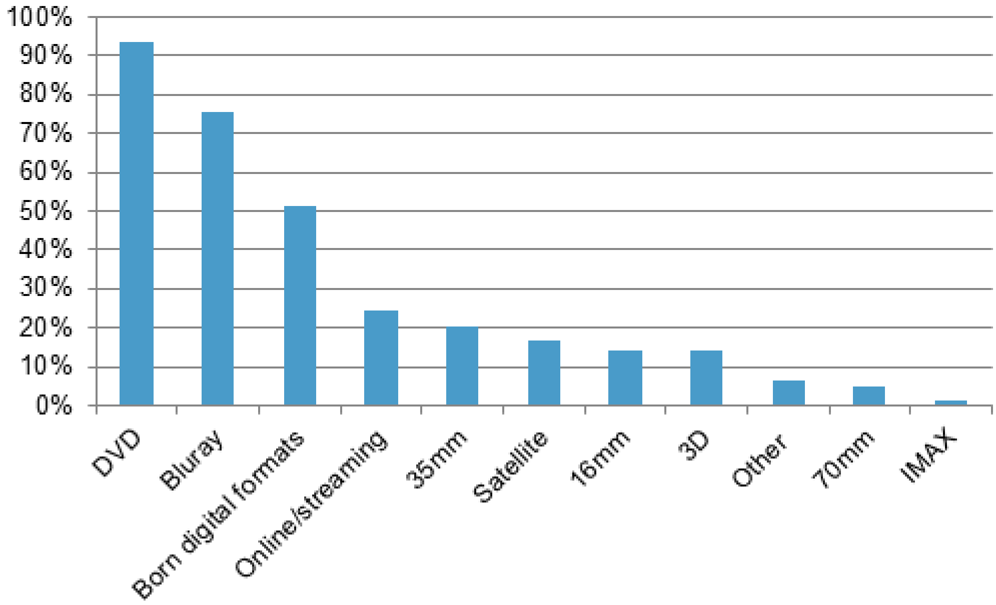
Source: Drew Wylie survey (221 responses)

Respondents were asked if they have an environmental policy; an environmental, sustainability, or green quality accreditation; whether they recycle; and whether or not their venue is accessibly by public transport. These percentages don't include those that haven't responded to the questions. Environmental activity by cinemas is very mixed. When it comes to recycling performance is high, probably linked to public policy and related requirements. However, film festivals are a major exception with very poor performance in this area. Public transport access is largely very good across exhibitor types. There is however a significant number of community cinemas lacking public transport access, indicating the challenges of some rural environments. The survey open questions responses also include a reference to reductions to public transport and ferries, creating difficulties for audiences.

The absence of environmental and green quality accreditation is surprising as it is now four years since Glasgow Film Theatre became the first Scottish cinema to be Industry Green certified and more progress could have been expected. Environmental policy is also lacking across the exhibition sector. This may have been expected in film societies where resources, capacity and awareness may be issues, but only around half of festivals and two thirds of independent cinema have policies. This is an area where further work is needed, including collaboration with Creative Carbon Scotland and other industry initiatives.

8.4 Formats

Figure 17 – Screening formats received and/or projected



Source: Drew Wylie survey (133 responses)

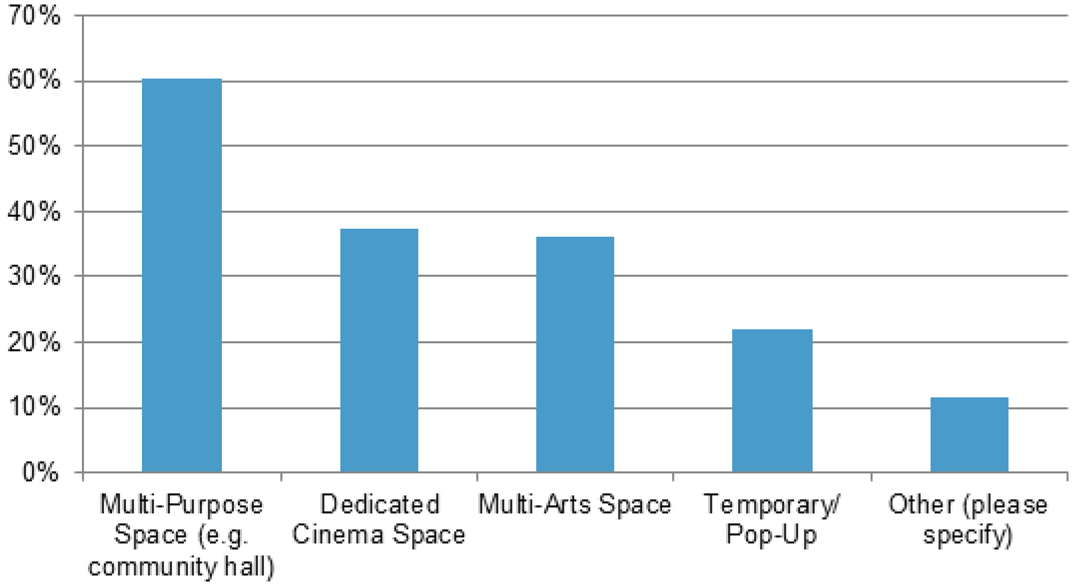
The survey response revealed a varied picture concerning formats, with every type of screening format in use. Blu-ray and DVD are most prevalent, at 93.59% and 75.64% respectively. These formats were widely used across community cinema, film clubs and societies. Those that indicated they use another format listed Digibeta, MP4, projector and laptop. A 2014 European report into film circulation in the digital era concluded that developments in release formats, like direct to VOD, can give greater accessibility to cinema audiences, with limited risks to distribution as a whole ([17]). It goes on to recommend that multiple distribution schemes should be studied to better understand the relationship between theatrical release and digital distribution, and the associated audience relationship as well as the relationship between traditional cinema marketing and approaches developed for digital consumption. This strand of research is particularly interesting to those working in film exhibition in Scotland given the need to understand how best to connect up the film infrastructure of more urban areas and

[17] "New Approaches for Greater Diversity of Cinema in Europe -Analyses of experiments launched in the context of the preparatory action1 "Circulation of European films in the digital era", (European Parliament and European Commission), Thomas Paris, 2014

cultural hubs with less well served communities. It is likely, but not evidenced, that there is a strong correspondence between format type and exhibitor type.

8.5 Types of spaces, equipment and facilities

Figure 18 – Types of spaces used for screenings

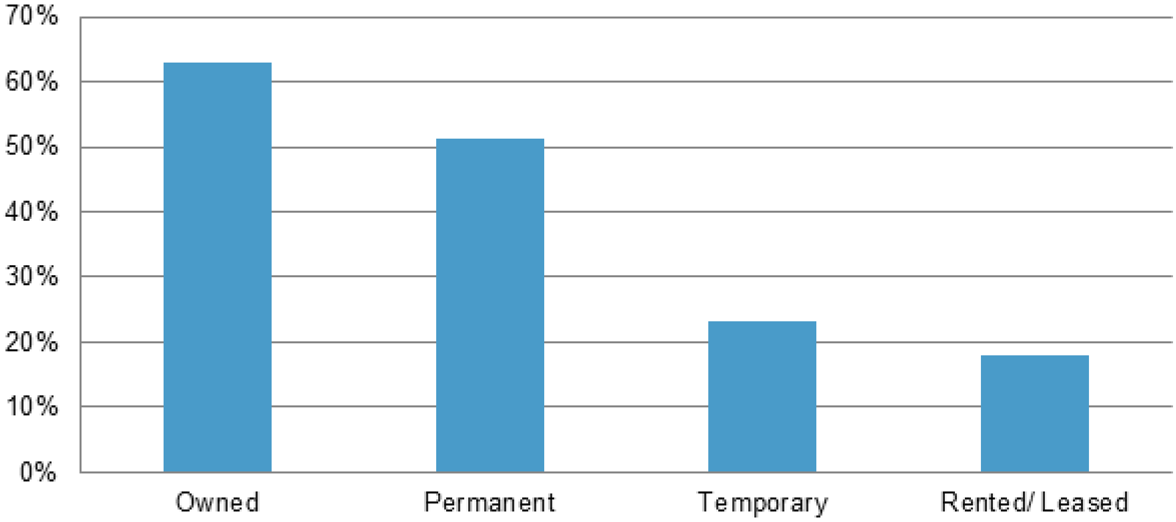


Source: Drew Wylie survey (86 responses)

Cinema exhibition happens in a wide variety of spaces with the most popular being multi-purpose venues at 60.47%. Respondents referenced a range of other venues including bars, theatre, village hall, museum, elderly care centre, outdoors, and gallery. A striking feature of the responses in the survey open questions was a need for investment in the spaces themselves, rather than just the equipment directly related to screening.

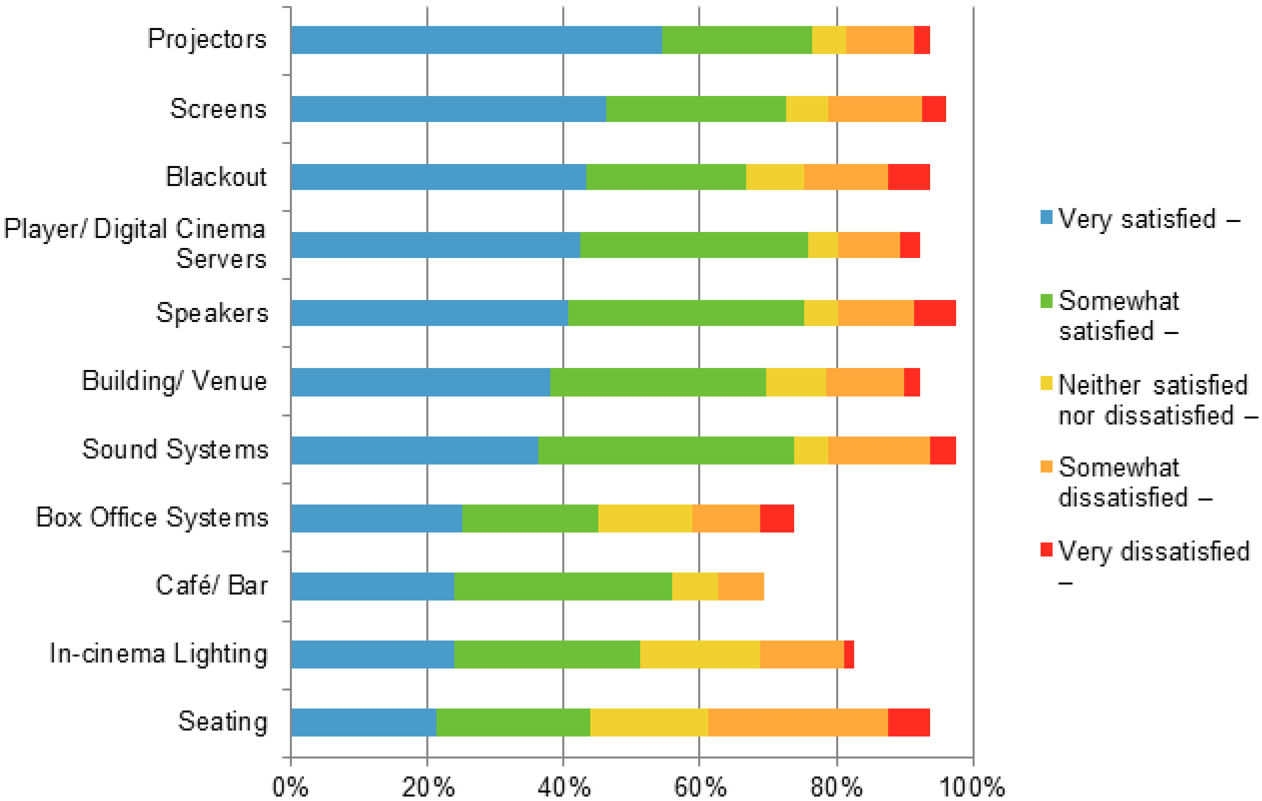
As evident by Figure 19, the highest prevalence was for owning equipment at 62.82% of respondents, while renting/leasing was the lowest at 17.95%.

Figure 19 – Exhibition equipment status



Source: Drew Wylie survey (134 responses)

Figure 20 – Equipment and facilities satisfaction levels



Source: Drew Wylie survey (137 responses) – Respondents did not answer the same questions, so total percentages vary

The survey results also provided a clear, but surprising picture of equipment needs. Figure 20 shows that there is a widespread satisfaction with the quality of projection equipment and screens. Satisfaction begins to drop off when it comes to sound equipment and speakers. Priorities for improvement included seating and lighting. On the surface it appears that investment in equipment and digital cinema has made a major impact throughout the sector. The future equipment needs of exhibitors will need more investigative work to inform how investment can be most effectively applied.

The responses indicate an awareness of the importance of the whole customer experience to audiences. In many cases this requires attention to areas that may be outside of the direct control of the exhibitor, like catering, box office or building facilities. The BFI Neighbourhood Cinema: Equipment Fund is for equipment such as screens, projectors, Blu-ray players, sound equipment, chairs and blackout blinds. However, the survey response raises the question of how organisations can best combine their investment to address these priorities. The survey also asked respondents to expand on these ratings. Seating was the most widely mentioned issue (comfort and suitability), followed by issues with projectors. Respondents also mentioned the overall suitability of community spaces (blackout, seating, location) as well as the time consuming setup required for both equipment and seating.

8.6 Customer focus

Improving the quality of the overall customer experience was flagged up as a key developmental priority in the research. This is partly a response to competition within and for the sector. When it comes to identifying and investing in development priorities there is a clear case for dialogue and learning across the various sub-sectors of film exhibition in Scotland. It is likely that the commercially driven focus on customer experience of larger operators is as applicable to the future development of arthouse or community cinema.

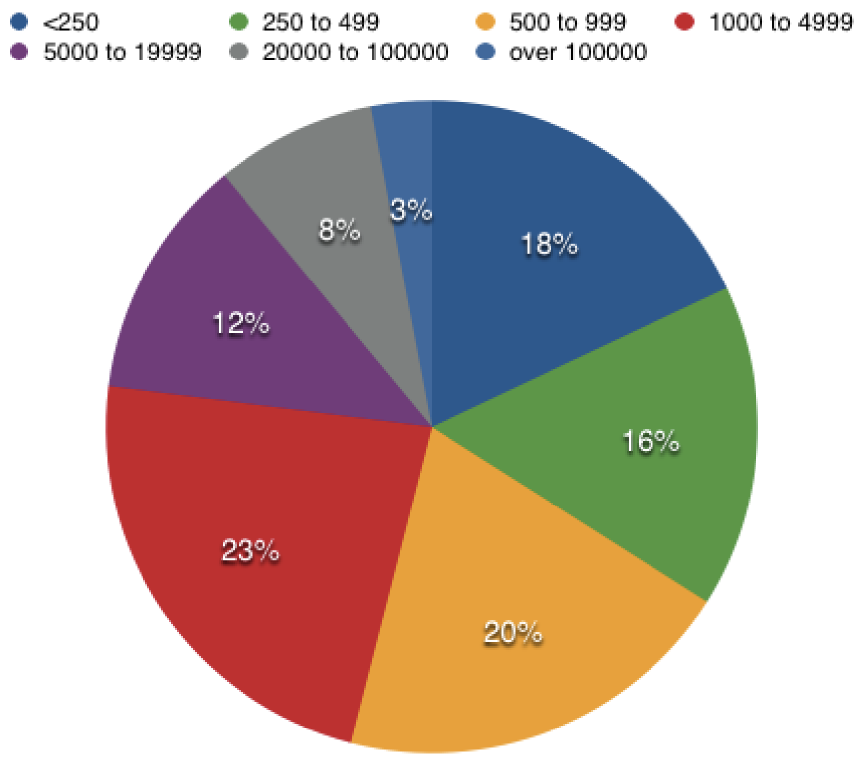
9 Programme and Audience

9.1 Audience admissions

The focus of this research has not been on audiences. However, the audience relationship is a central part of the brief as a key film exhibition activity. Of the 167 research responses (survey and manual) that included annual audience admissions:

- 18% (30 respondents) have admissions of less than 250
- 16% (26 respondents) have admissions between 250 and 499
- 20% (33 respondents) have admissions between 500 and 999
- 23% (39 respondents) have admissions between 1,000 and 4,999
- 12% (20 respondents) have admissions between 5,000 and 19,999
- 8% (14 respondents) have admissions between 20,000 and 100,000
- 3% (5 respondents) have admissions over 100,000
- The lowest admission numbers were a mobile cinema with 31 and the highest was Glasgow Film at 188,943

Figure 21 - Audience admissions



Source: Drew Wylie survey – 167 responses

Figure 22 - Cinema admissions by exhibitor type (over a one-year period)

Exhibitor Type	Admission Responses	Average Admissions	Median	Highest	Lowest
Multiplex	1	111,922			
Independent	14	70,970	53,000	188,943	10,295
Multi-Arts	24	17,219	5215	93,139	208
Community	26	1,195	584	15,000	100
Film Club	20	1364	688	10,100	88
Festivals	19	6084	1709	50,000	122
Mobile	63	1242	494	18,200	31

9.2 Box office and marketing

Of the 139 survey respondents who provided information on box office arrangements, 45 collect audience data from their box office. A third of these exhibitors do not use a computerised box office system, but still collect audience data. Of the remaining 94 respondents who do not collect data, 68 do not have or use a computerised box office system.

An analysis of marketing activity by exhibition type indicates that all types of marketing activity are used to a greater or lesser extent by all categories of film exhibitor with some activity, (like posters, website, social media and emailing users), comparable across the piece. At one end of the spectrum multiplexes, and to a lesser extent festivals, use broadcast media to advertise. Community cinema and film societies unsurprisingly make much less use of broadcast media and the relatively expensive process of posting of mailings.

This is an area that requires more attention as it so directly relates to future sustainability, but is a very mixed picture at present where even exhibitors using computerised systems may not be capturing or having access to audience data. No matter what the scale of the exhibitor the accurate capture of audience data as a platform for marketing is important, and hard-pressed smaller exhibitors need to be able to make productive use of social media. The survey indicated a demand for training in this area, and it will be important to tailor training for the various parts of the exhibition sector.

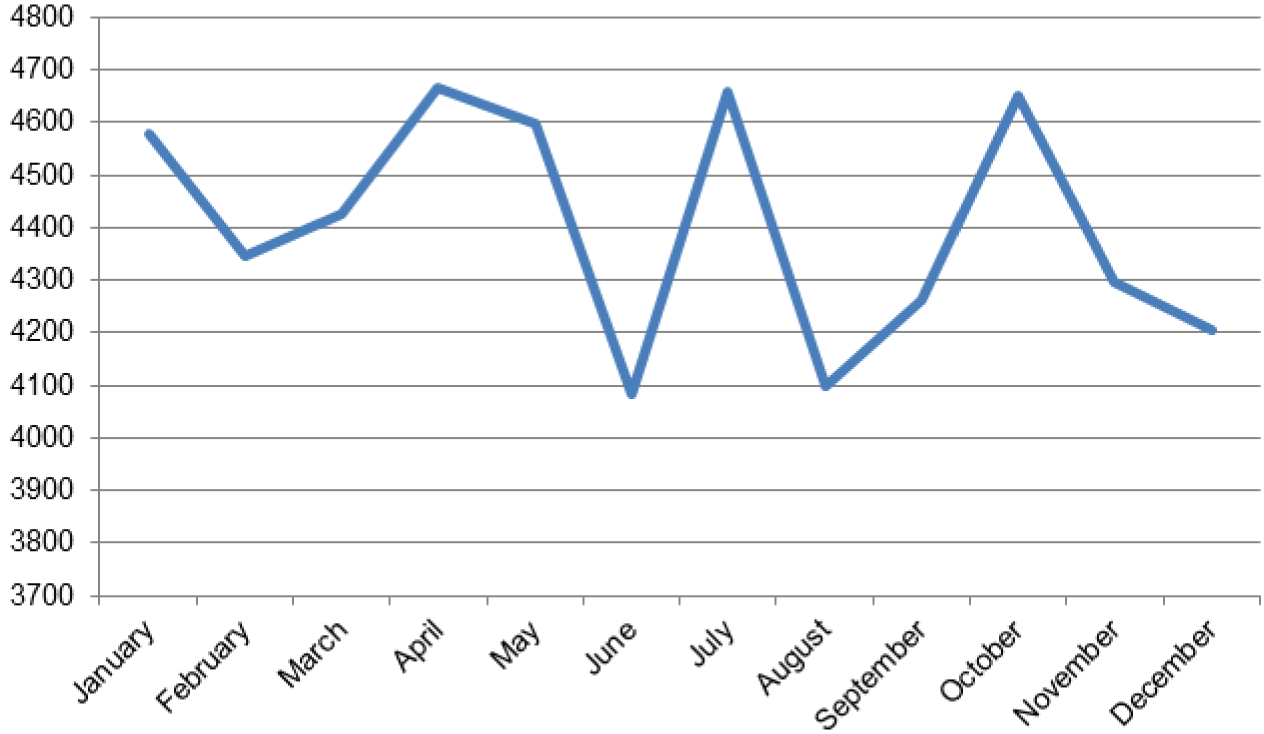
9.3 Seasonality

Film exhibition in multiplexes in Scotland, as elsewhere, is consistent year round although audience numbers clearly vary with releases and times of year. Seasonality of screenings across the remainder of the sector is quite pronounced. Peaks in April/May and October are complemented by low levels of screening in November and January. A peak of activity in July is surrounded by the two months with the lowest activity, June and August. In some parts of the sector seasonality is determined by the market, such as the impact of school holidays. In other parts of the sector the capacity of a society or community to deliver programming may be the key factor.

The impact of seasonality on programming and on audiences needs further attention as it may preclude some important film releases being viewed in parts of Scotland, as well as depleting the cultural offer at times of year when it may be an important factor in the visitor economy or community life.

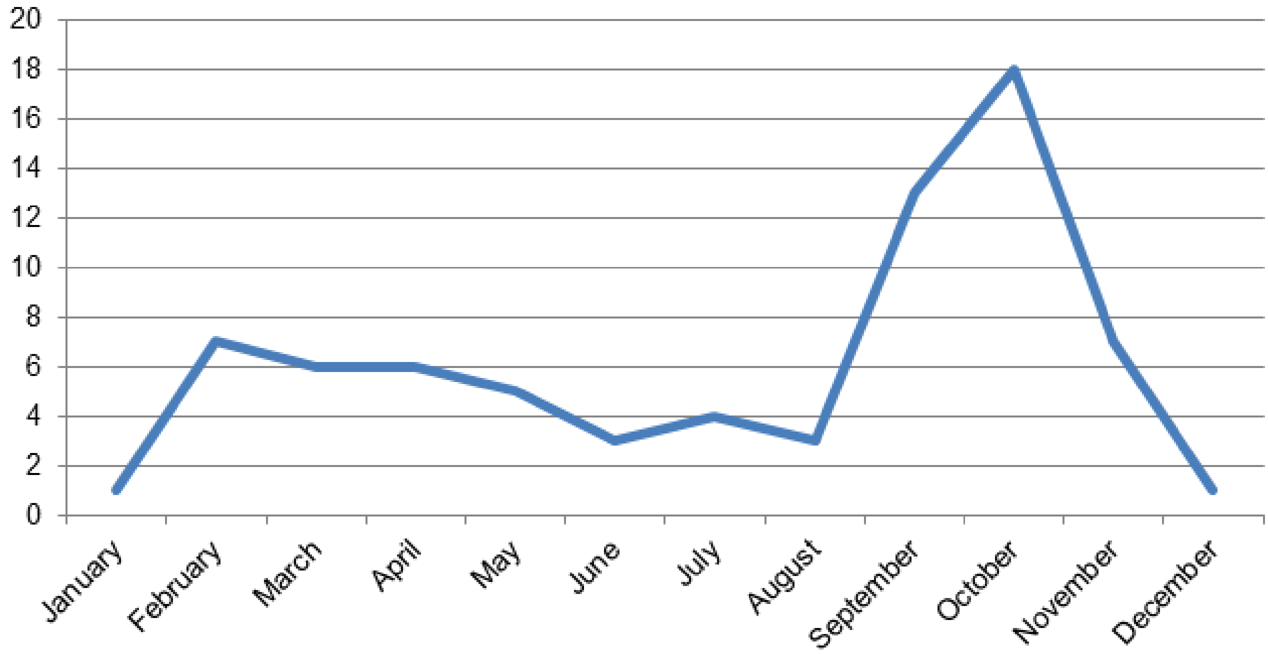
The seasonality of film festival activity is even more pronounced. Activity in December and January is very low. More surprisingly film festival activity in spring and summer is also relatively low, at a time when people are planning trips and holidays to coincide with promoted events and activities. Scotland's major international film festivals are an exception to this pattern, with Glasgow Film Festival taking place in February and Edinburgh International Film Festival in June. The peak period for smaller festivals is in the September to November period each year, with October the busiest month.

Figure 23 – Seasonality of screenings



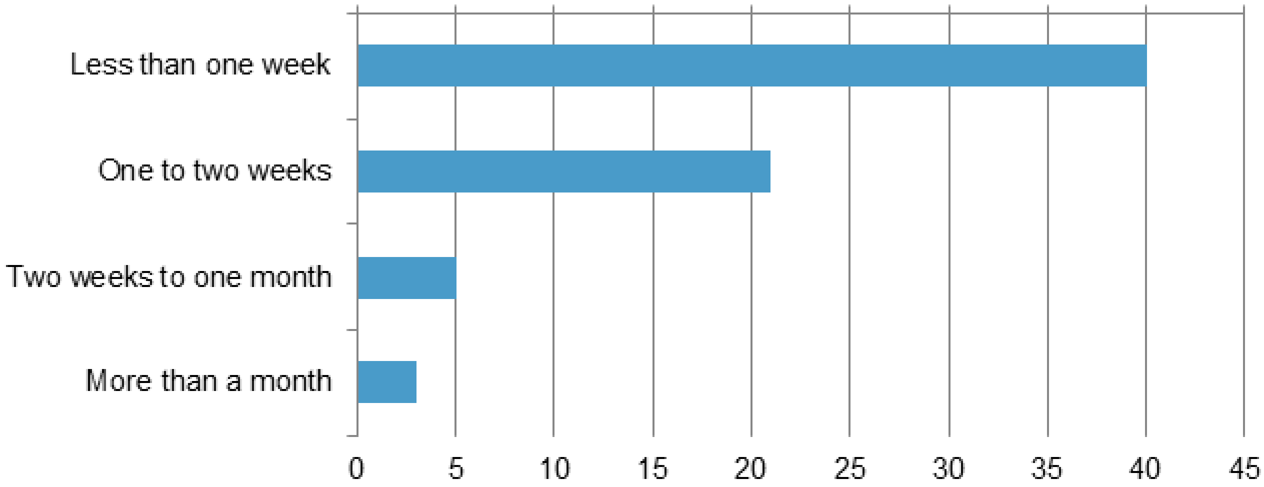
Source: Drew Wylie survey (255 responses)

Figure 24 – Festivals seasonality



Source: Drew Wylie survey (74 responses)

Figure 25 – Festivals duration



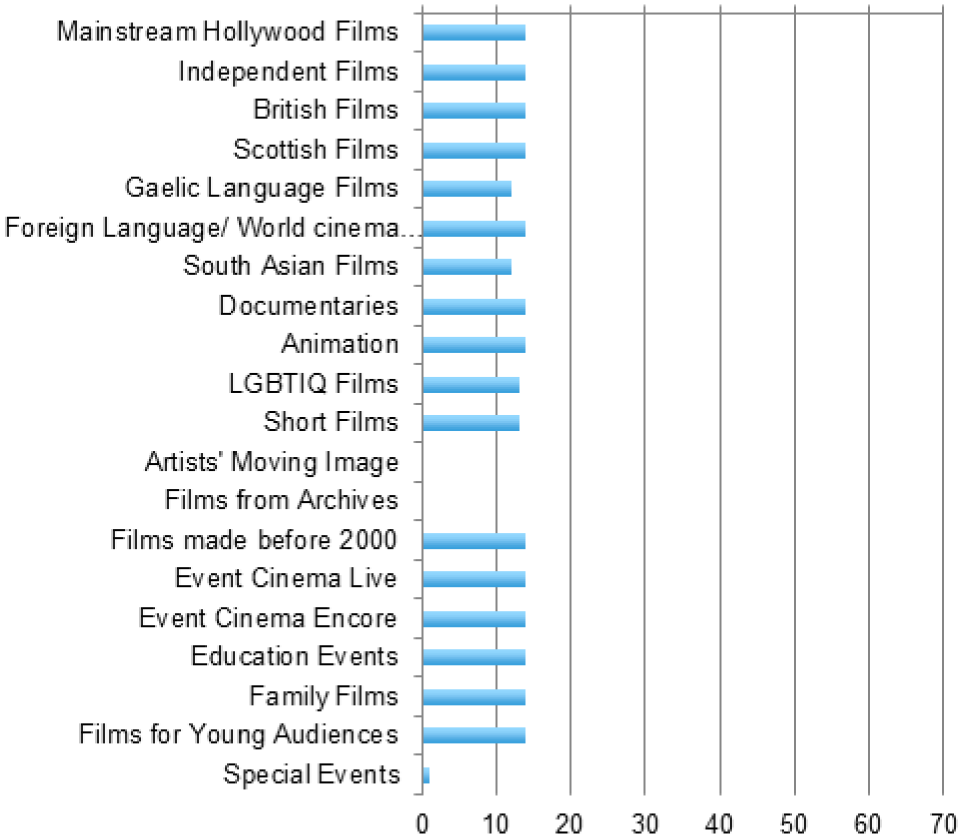
Source: Drew Wylie survey (69 responses)

9.4 Programming

The following figures show the number of exhibitor survey respondents in each category that screen different types of programming. For example over 20 multi-arts venues of the 28 that answered this part of the survey screen independent films. Each category of exhibitor had different levels of response to these questions, and each figure references the number of respondents.

The breakdowns of film programming are likely to have some variations in definition of genre as the need to keep the survey to a manageable size precluded providing examples of genres. They also don't include frequency of screening. Nevertheless there are clear patterns and variations of programming across the different types of exhibitor.

Figure 26 – Film programming by number of responses: multiplexes

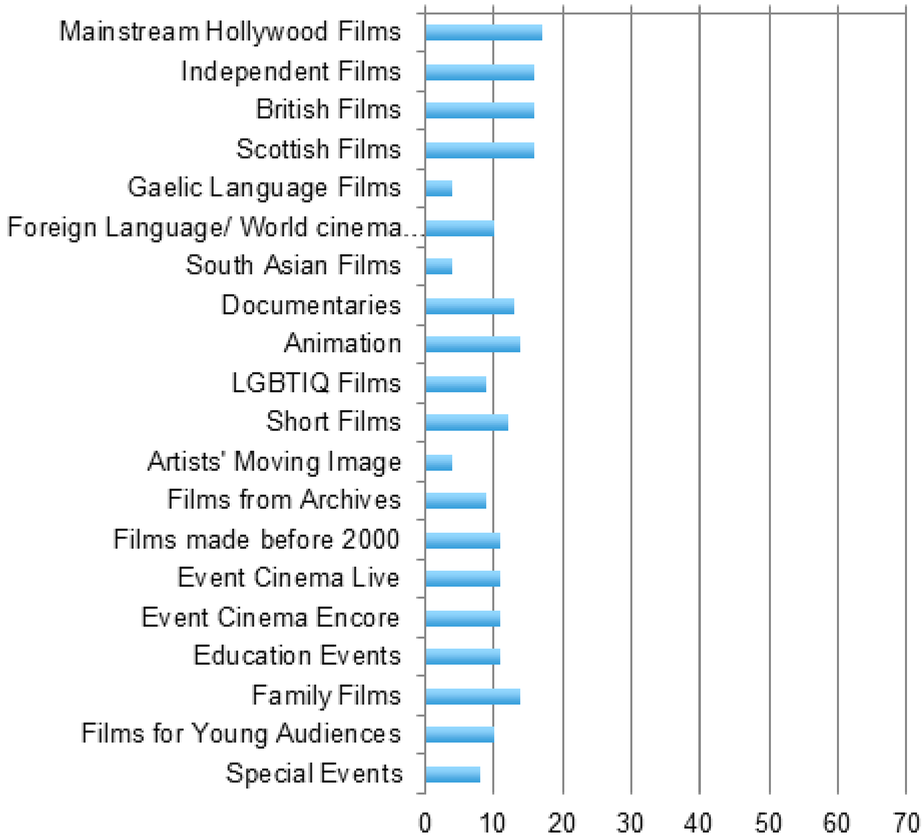


Source: Drew Wylie survey (14 responses)

The multiplex profile is limited to a small number of respondents and reflects 3 different multiplexes and a chain of 11 cinemas where all cinemas offer the same programme mix. There were 234 responses in total.

Categories are not weighted to reflect the percentage of overall programming, but rather the number of venues offering programming. An example of a special event was the Cameo's presentation of Metropolis with German Industrial Music via DJ.

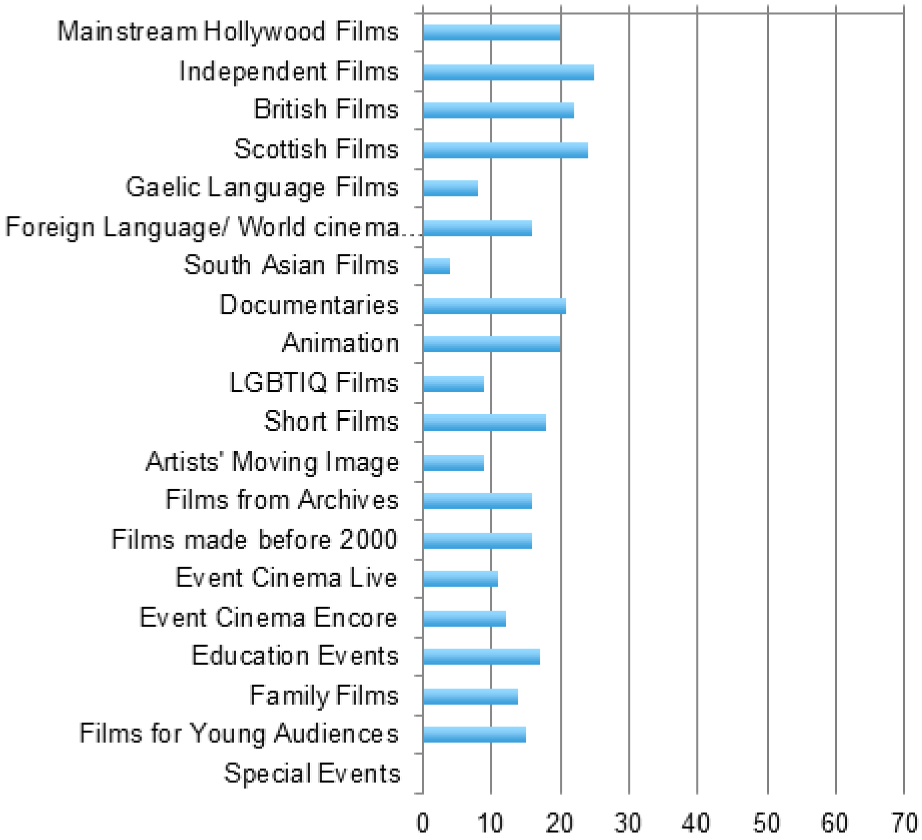
Figure 27 – Film programming by number of responses: independent cinemas



Source: Drew Wylie survey (15 responses)

There were 171 responses in total. The categories are not weighted to reflect overall percentage of programming, but rather the number of venues offering programming.

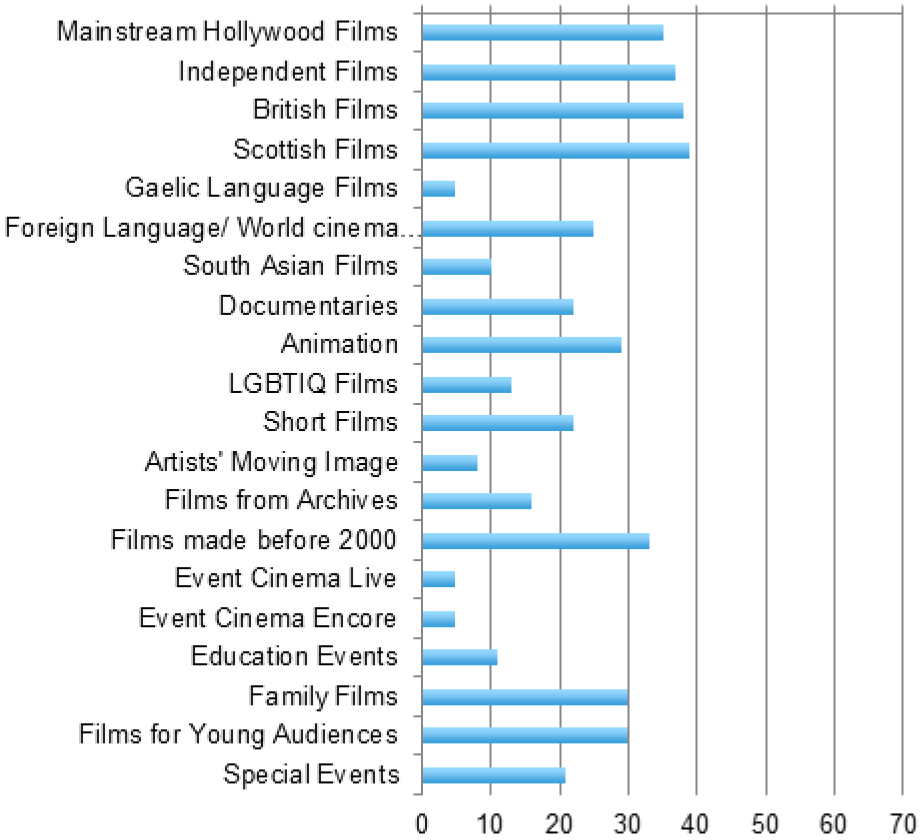
Figure 28 – Film programming by number of responses: multi-arts venues



Source: Drew Wylie survey (28 responses)

The high proportion of independent, Scottish and documentary film is a notable feature of multi-arts venue programming. This indicates that they are providing much more than just filling gaps in commercial provision. These are areas where these types of venues are particularly well positioned for, both in terms of their equipment and their audience base. This includes event cinema, with its links to major theatre and opera companies, and education activity, where the local connections and role of the venue will already be established. Special events are mostly silent film with music, reflecting a healthy resurgence in interest in silent film, and promoters and artists looking to engage with it.

Figure 29 – Film programming by number of responses: community cinemas

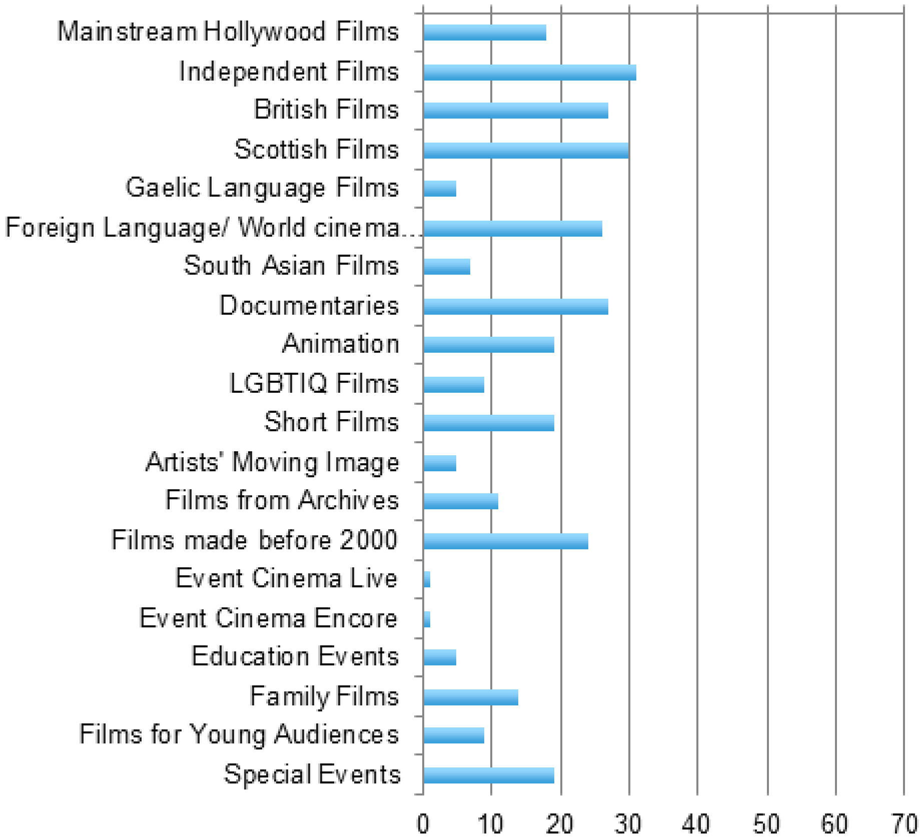


Source: Drew Wylie survey (46 responses)

The clear strand of films for young audiences appears to be a direct response to the challenge of involving young people in community cinema. Once again special events include silent film, along with music events, and themed nights with food. Technical demands and costs are likely to be one of the reasons for low levels of event cinema([18]), although the availability of archive film might have been expected to have made more impact on programming in community cinema given proven interest in local film where it is screened.

[18] Example of event cinema in rural areas https://www.youtube.com/watch?v=RVIC5Lch1Lg

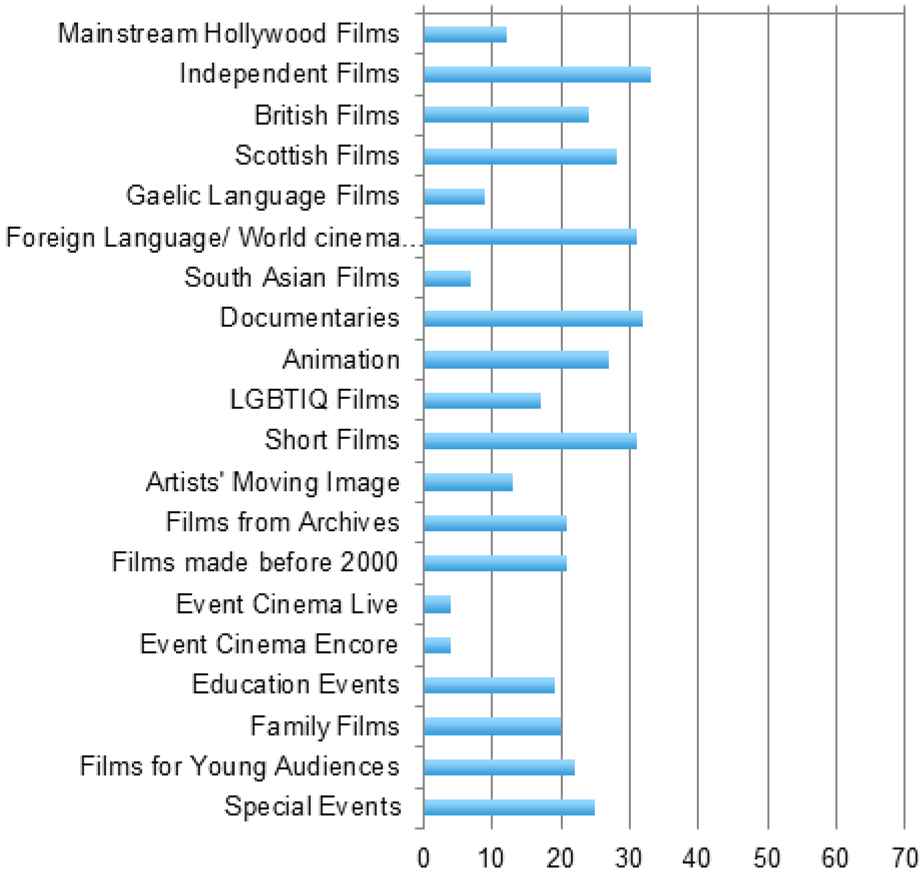
Figure 30 – Film programming by number of responses: film societies and clubs



Source: Drew Wylie survey (33 responses)

There is a significant drop off in film programming for young audiences by film societies, probably reflecting the profile of society memberships. Conversely programming of documentaries is at a higher level than in community cinema. Societies often include guest speakers, as well as linking to local festivals.

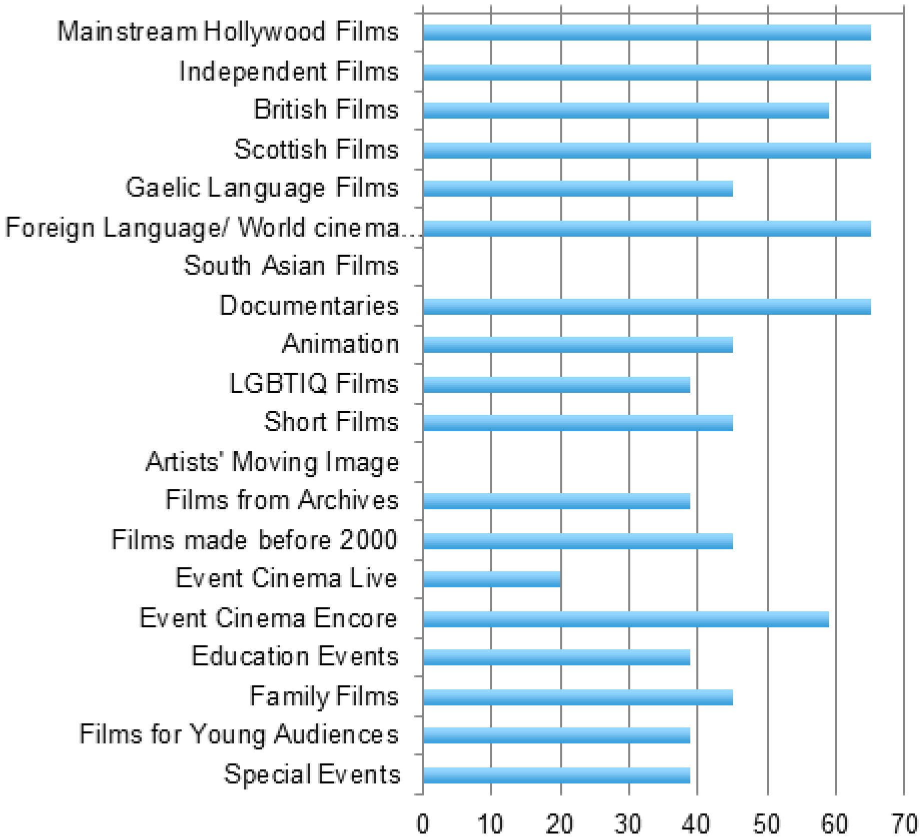
Figure 31 – Film programming by number of responses: festivals



Source: Drew Wylie survey (33 responses)

The importance of festivals to short film commissioning and programming appears to be reflected in the programming analysis. Festivals also clearly play an important role in LGBTIQ programming in Scotland. The low level of South Asian programming, however, is maintained in the festivals strand, and may indicate a gap in both responding to the demographic profile of Scotland and to a major part of the international film offer.

Figure 32 – Film programming by number of responses: mobile cinema



Source: Drew Wylie survey (65 responses)

There is an impressive spread of programming genres in mobile cinema programming. Two interesting programming absences are present – artists' moving image and South Asian films. Mobile cinema can be both an event in itself as well as providing screenings as part of existing events. This event status would lend itself to work with artists' moving image but there appears to be no work in this area. Given the importance of South Asian film it is surprising that no programming is evident.

10 Community Cinema

10.1 Developments

The survey response raised a number of issues around the relationship between community cinema exhibitors and the wider industry. While the economics of community cinema means that distribution arrangements can be prohibitively expensive, exhibitors raised the potential of building better relationships with distributors to support development. It was pointed out that networking is also important for community exhibitors to be able to connect to the best people to support their work. The potential of connecting film exhibition with artist's films and installations was also raised as an area of future development.

Scotland's framework for supporting community cinema has developed in recent years. Film Hub Scotland was established in 2014 and Cinema for All was rebranded and reinvigorated in 2013. The introduction of Creative Scotland's Open Project Fund in 2014 offers new opportunities for investment, the same year that Regional Screen Scotland introduced the Local Film Festival Open Access Programme and Local Film Festival Development Fund. There have also been technical developments in delivery platforms that have enhanced mobile, touring and event cinema.

Two recent developments in Scotland are likely to have a positive impact on community cinema. The Grow Your Own Cinema project ([19]) has been set up by Cinema For All and Voluntary Arts Scotland to encourage voluntary arts groups to put on their own film events. No previous experience of cinema exhibition is needed, and training is provided. The deadline for expressions of interest closed at the beginning of March 2016. Forty initial expressions of interest were recorded, and the following four areas of Scotland were shortlisted to be part of the project: Fife; Inverness-shire; Ardnamurchan; Dumfries and Galloway.

[19] Grow Your Own Cinema http://www.voluntaryarts.org/grow-your-own-cinema/

Creative Scotland and the Scottish Library and Information Council (SLIC) are piloting a series of film education projects in libraries aimed at offering communities access to information, activities and resources on film creativity and culture. The scheme was launched in March 2016([20]) with a budget of £190,000 to pilot seven projects in public libraries in: East Renfrewshire Council, City of Edinburgh Council, Falkirk Community Trust, Midlothian Council, Culture North Lanarkshire, South Ayrshire Council and Western Isles Council.

10.2 Licensing to show films

The online survey response indicated that film licensing was too expensive for some small rural promoters without access to external funds. Any public performance of a film exhibition is controlled by the Cinemas Act 1985. The price and conditions of this licence vary depending on the local council. There are a few exemptions, including running as a not-for-profit group, if you show less than six films throughout the year, or operate as a mobile cinema.

The costs of a cinema licence vary between Local Authorities. In Glasgow this currently costs £250 per screen per annum whereas in Edinburgh a single screen licence costs £309 and multiple screens £618. Some areas are less expensive, such as Argyle and Bute, where the cost is £148.40. There are also localised discrepancies. A cinema licence in South Ayrshire and East Ayrshire costs £600 whereas the charge is £245 in North Ayrshire.

Film booking is also a licensing process where costs can be prohibitive through the operation of a minimum guarantee. The cost of the licence from the distributor who owns the rights to show the film is usually included in the film hire fee. A commercial single title licence allows the general public to attend a film screening. Commercial licences are paid for by a percentage (usually around 35%) of the total ticket income or a minimum amount. Community cinemas also have the option to use a non-

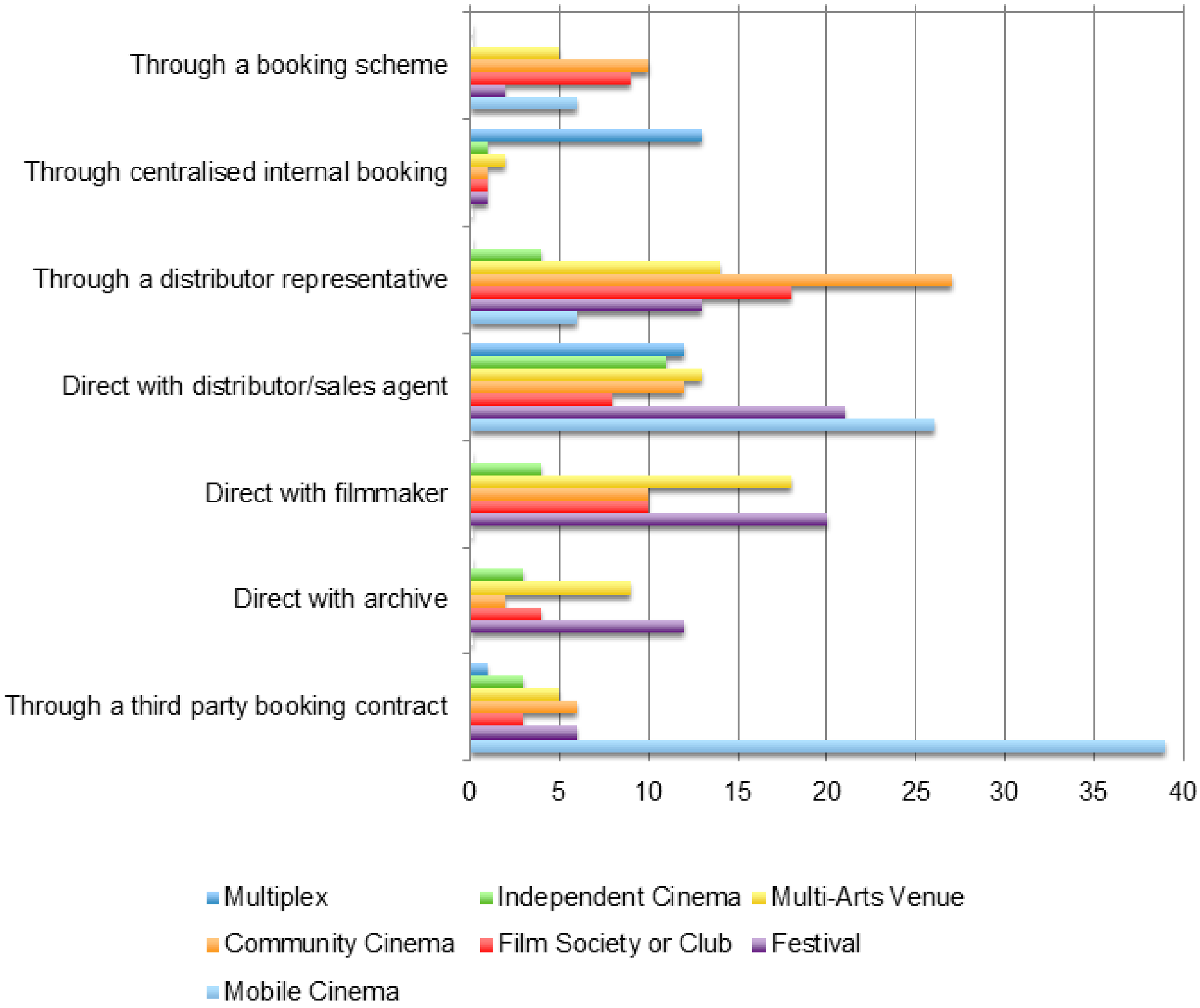
[20] http://www.creativescotland.com/what-we-do/latest-news/archive/2016/03/libraries-take-on-the-big-screen

commercial single title licence allows members of the screening organisation only to attend the film screening. Usually this licence does not allow tickets to be paid for in advance or on the door, or permit any advertising of the film screening outside of the membership scheme.([21])

Non-commercial licences may be funded by audience member subscriptions collected at the start of each season or year. Films are hired on a flat rate basis (around £85-£120) and less paperwork is involved as there is no need to file box office returns. However, Cinema for All operates a booking scheme that alleviates this, and Film Mobile Scotland also offers a mediation with distributors. BFI Film Audience Network's New Release Strategy is also aimed at supporting exhibitors in this area. Our research asked respondents to report on how they book film. The results were a very varied picture of exhibitors dealing direct with distributors, with their representatives (like Filmbank) and through third parties. Third party booking contracts are issued by: Eden Court; Film Mobile Scotland; North East Arts Touring; Filmhouse; Picture house; Curzon; withoutabox; and The Birks.

[21] Source - Cinema for All

Figure 33 – Film booking by exhibitor type

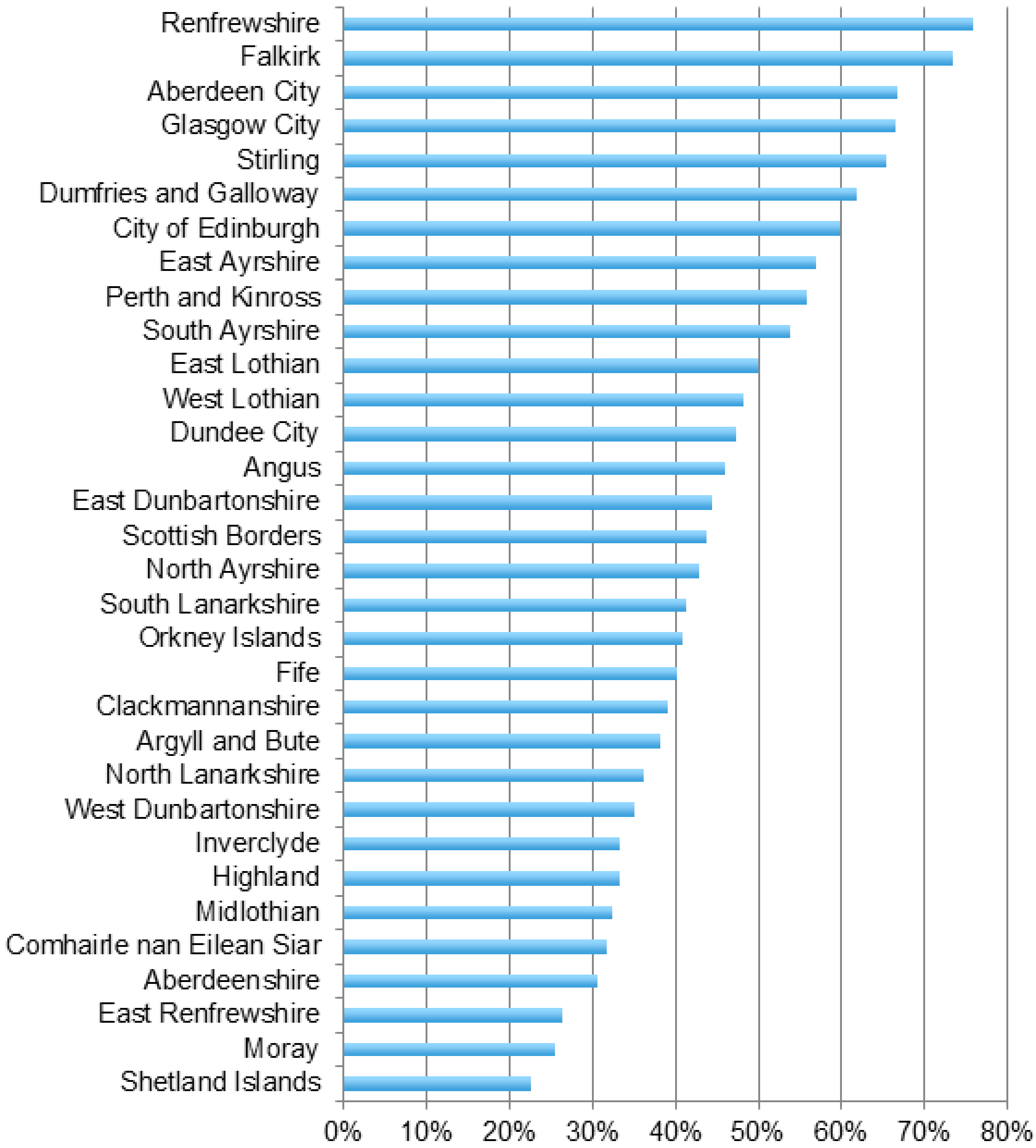


Source: Drew Wylie survey

10.3 Schools

Scottish schools have an important role to play in engaging young people with film. Film culture can make a strong contribution to the development of screen literacy within education and learning. Into Film have provided Creative Scotland with a breakdown of schools with film clubs across Scotland. This was analysed against the number of schools (primary, secondary and Special Education Needs) with film clubs by Local Authority area.

Figure 34 – Percentage of schools with film clubs by Local Authority



Source: IntoFilm research

In looking at the chart, the Local Authorities with the highest percentage of film clubs are Renfrewshire Council (79%), Falkirk Council (75%), City of Edinburgh Council (71%), Glasgow City Council (71%) and Aberdeen City Council (70%).

Those with the lowest percentage of film clubs per schools are Shetland Islands (23%), Comhairle Nan Eilean Siar (26%), Moray (26%), Aberdeenshire Council, (31%) and Dumfries and Galloway (32%) and Midlothian (32%). A comparison between this data and the Scottish Index of Multiple Deprivation (SIMD) failed to reveal any clear patterns or correlations. If anything this appears to be an urban versus rural issue.

11 Exhibition models outwith Scotland

Models in New Zealand, the Republic of Ireland, Wales and Canada were considered.

11.1 New Zealand

11.1.1 Connecting exhibition and production

New Zealand is best known for its cinema production. The 'Wellywood' phenomenon is a direct result of the impact of major blockbusters being filmed and produced in New Zealand, and the Lord of the Rings series in particular. 'Wellywood' has also been associated with a revival of historic cinemas in New Zealand. There is a real focus on connecting local productions with local audiences across the sector. The New Zealand Film Commission offers financial assistance to domestic distributors of independent New Zealand feature films to help maximise the New Zealand domestic theatrical audience. There are also specific funds for New Zealand filmmakers of Māori and/or Pasifika heritage. New Zealand on Screen ([22]) is the online showcase of New Zealand television, film and music video. All content is free to view, and includes over 3,000 titles from the beginning of the screen industry to the present day, attracting around one million people a year visit NZ On Screen.

The New Zealand Motion Pictures Exhibitors Association (NZMPEA) represents 139 independent screens across New Zealand, and is also working to connect local productions with the domestic exhibition sector, having recently launched the My Cinema ([23]) platform that tours and promotes NZ productions across the country's independent cinemas. These 37 cinemas formed the My Cinema network with the support of NZMPEA and the Independent Cinemas Assocation of Australia (ICAA) to promote their activity, with a strong online presence, including an interactive map that locates the nearest cinema to you. The two main urban centres, Auckland and Wellington dominate, but the map shows a spread of cinemas across the whole

[22] www.nzonscreen.com

[23] www.screenz.co.nz/nzmpea-launches-my-cinema-circuit

country. The results of this work to connect New Zealand film with New Zealand audiences are significant, with NZ Film Commission reporting that over half a million people, or 3.8% of the annual cinema audience watched a New Zealand film in cinemas in 2014. As momentum grows for a step change in Scottish film and television production, putting schemes in place that encourage Scottish audiences to engage with local productions, might, as in New Zealand, contribute to a 'Wellywood' type of effect.

11.1.2 Civic connections

When it comes to festivals, these two cities collaborate to deliver the country's major film festival. New Zealand International Film Festival was established in 2009 and takes place in Auckland and Wellington, presenting up to 170 features each year. It opens in Auckland for a week and then migrates to Wellington for a week. Auckland and Wellington also have their own distinct film festivals, as does Dunedin (in the south of the country), and Christchurch. The Autumn Events Classic Film Weekends screens in the four main centres in April and May each year. This approach indicates a willingness to cooperate between cities and municipalities that, if emulated in Scotland, would be likely to enhance the amount, quality and impact of film exhibition. This type of cooperation could also tackle areas like licensing, audience development and links to distributors. These are all areas identified as challenges within this report. This could indicate that as well as discussing this report and *Creative Scotland On Screen: Film Strategy 2014-17* with individual Local Authorities it may be important to broker discussions between Local Authorities.

11.1.3 Impacts

There is a range of past and ongoing work to map and assess the impact of film exhibition in New Zealand, and there has been a focus on economic incentives and impacts. In 2010 a review of the New Zealand Film Commission by Sir Peter Jackson and David Court ([24]) recommended a box office incentive scheme, formulaically linking

[24] New Zealand on Screen http://www.nzonscreen.com

grant to box office performance. In 2009 Price Waterhouse Coopers were commissioned to assess the economic contribution of the New Zealand film and television industry ([25]). This work found that exhibition activity generated $129m of value added to the New Zealand economy in 2008, including providing $68m of wages and salaries.

Furthermore the sector was calculated to be directly employing 1,130 FTE jobs and supporting a further 654 FTE jobs as a knock on effect. Statistics NZ estimates that these jobs are taken by an average of 2,069 people working in the sector, receiving wages of $35m.

Capturing impact is an important element of the case for ongoing investment. The New Zealand example demonstrates the value of economic impacts. In Scotland's case where social and cultural impacts are viewed as increasingly important, along with an equitable geo-demographic approach to provision, a more comprehensive approach to impact assessment is needed. An impacts framework that brings together all of these factors is needed, along with a set of tools and guidance for exhibitors that is appropriate to the capacity they can bring to bear.

11.2 Republic of Ireland

11.2.1 Overview

Rapid commercial cinema development has led to the identification of geographic areas where a lack of commercial viability has led to a lack of cinema provision. Those who work to develop cinema exhibition and access to film have intervened. There have been notable successes over the last decade, with infrastructure developments to fill gaps in cinema access, and programme developments in key areas like education

[25] "The economic contribution of the New Zealand film and television industry", Price Waterhouse Coopers, 2009

and arthouse cinema. A comparison with the Republic of Ireland indicates several areas of potential learning for those working to develop Scottish film exhibition:

- An approach based on strategic partnerships where all screen organisations collaborate, is effective in turning requirements into action.
- Linking film education with film exhibition means a more productive use of investment and facilities.
- Geo-demographic gaps in cinema exhibition require co-ordinated interventions by the screen organisations if they are to be addressed.
- Supporting collaboration and consortium-based activity is essential if the opportunities provided by technological developments are to be realised.
- Scotland may benefit from developing its own themed programming and events for each year to roll out across exhibitors.
- Relationships to Local Authorities, as well as screen organisations and institutions are important in securing cinema's place in future developmental plans. The potential contribution of cinema exhibition to spatial strategies, for example, has relevance in Scotland, particularly in rural areas where the quality of life for young people is important for the viability of many communities.

11.2.2 Background

There has been a notable growth in film exhibition in the Republic of Ireland over recent years driven largely by commercial expansion. In 1992 there were 84 cinemas in the Republic of Ireland operating 186 screens. Admissions had been steadily declining over the last decade ([26]). However, a 2004 study found there were 64 cinema sites and 328 screens in Republic of Ireland ([27]). Irish frequency of cinema going was 4.5 visits per year in 2002, the second highest in Europe. The report talks about a rapid growth in cinema screens in Ireland, up by 45% over the previous decade, demonstrating the trend for fewer sites with more screens. While Unesco figures for 2013 would indicate

[26] "Cinema Film Distribution and Exhibition in Ireland", Damian O'Donnell 1992
[27] "The Cultural and Economic Trends of Cinema across Ireland and Wales", R. Inglis and S. Todd, 2004

a plateauing of this development, current figures from the Irish Film Board support evidence of film exhibition sector growth ([28]).

In 2016 there are 480 cinema screens in Republic of Ireland, of which 200 are digital and 125 are 3D enabled. A full list of cinemas can be found at http://entertainment.ie/cinema/. There are two large cinema chains, IMC (19 cinemas) and Omniplex Cinemas. The latter has 33 cinemas that are managed by Ward Anderson, (whose expansion prompted the 2001 report on cultural cinema mentioned later in this section). The primary art-house cinemas are in Dublin (Irish Film Institute, Light House). The Irish Film Institute also programmes The Model in Sligo and the Triskel Arts Centre in Cork.

The Irish Film Board also works closely with the Irish video on demand platform http://www.volta.ie/ to maximise audience engagement with IFB films as well as supporting The Bealtaine Festival. This event tours a cultural programme across Ireland and includes the May Film Tour which, in 2016, toured three films, including an Irish production, Men at Lunch. There are 62 screenings across Republic of Ireland, in libraries, arts centres, film clubs and societies, and community centres.

Ireland also has Cinemobile, a 100 seat mobile cinema operating across 'all-island' Ireland. It was developed in 2001 to service communities previously without cinema access and is sponsored by BSE/IFB, Irish Film Institute, the Irish Arts Council, Northern Ireland Film and Television Commission, RTE and the Arts Council of Northern Ireland. The mobile visits 90 Irish towns three times each year as well as featuring in a number of festivals. Cinemobile plays a key role in film education and supports 1000 school screening events a year. The approach of consolidating cinema in the communities it serves has led to the development of a network of local supporters, including media, community leaders and service providers.

[28] Unesco Institute for Statistics http://www.uis.unesco.org/

The Irish Film Board lists 24 film festivals happening at various times of the year, and spread across much of Ireland. Belfast, and particularly Dublin host the majority of bigger festivals, including the largest event, Dublin International Film Festival. There is a wide spread of activity, including a number of festivals, concentrating on young people. The Irish Film Institute hosts a number of niche events throughout the year.

11.2.3 Cultural and arthouse cinema in Ireland

The Irish Cultural Cinema Consortium was a recommendation of the 2001 report on Developing Cultural Cinema in Ireland ([29]) commissioned by the Irish Arts Council in association with the Irish Film Board, Enterprise Ireland and the Northern Ireland Film Commission in part as a response to the impact of the growth of multiplexes on cultural cinema in Ireland. The Consortium aims to broaden the audience for arthouse cinema. It has provided analysis and recommendations for infrastructure and digital cinema, including direct investment in two important developments - the Light House Cinema (Dublin) and Solas (Galway), and provided digital cinema equipment for 19 cinemas across Ireland.

When it comes to cultural cinema exhibition in Republic of Ireland, access>CINEMA is the resource organisation (http://www.accesscinema.ie) with a membership of around 100 part-time cinema sites. It also programmes art-house cinema and Irish productions. Its mission is to provide all audiences throughout Ireland with access to the best of Irish, world and independent cinema, via a national network of non-profit and voluntary organisations.

This is work that is largely not available on commercial cinema screens. The consortium provides advice, expertise and support for cultural film programming and technical presentation. It also works to expand access to, and participation with cultural cinema

[29] "Developing Cultural Cinema in Ireland", Neil Connolly and Maretta Dillon, 2001

exhibition regionally. Members can be professional arts centres or the voluntary film societies that exist in different types of venue across Ireland.

In 2012 access>CINEMA published Audiences for Cinema in Ireland ([30]) providing a good overview of the profile of the cinema audience in Ireland (all island). Overall the cinema audience is more female, urban and younger than the population at large, and 2.6m people go to the cinema out of a total population of 3.5m. The report goes on to compare cultural cinemagoers with all cinemagoers and also looks at the popularity of different cinema genres.

The Irish Film Institute (IFI) rolls out a number of themed events programmes across the year. These can be based on genre, such as 2016's Folk Horror theme, or world events, such as the 2016 theme on Shakespeare's legacy. The IFI also has an annual open day to encourage behind the scenes learning by the general public. The IFI Local Films for Local People brings tailor-made programmes of archive films to arts centres. IFI introduced a new schools programme in 2016, running across the full academic year, and a programme of after-school film activities and film clubs is supported by the Irish Arts Council. The IFI Player has been introduced by the Irish Film Archive to provide access to key collections and curated programmes online. The project is linked to the digitisation of the Archive's collection.

11.3 Community film exhibition in Wales

The 2004 report ([31]) mentioned in Section 11.2.2 above usefully contrasts the differences in film exhibition culture between Ireland and Wales, with 25 multiplexes in the former and 11 in the latter, and a private sector dominated industry in Ireland and public sector supported industry in Wales. The role of arts centres is particularly important in Wales as compared to Ireland. The geographical picture also varies. While Cardiff and Dublin each represent about one third of each country's screens,

[30] "Audiences for Cinema in Ireland", 2012
[31] "The Cultural and Economic Trends of Cinema across Ireland and Wales", R. Inglis and S. Todd, 2004

there are big geographic concentrations of cinema in Wales and a more even distribution in Ireland.

This means that community film exhibition is as important to Wales as it is in Scotland. This is, at least in part to gaps in commercial provision. In 2004 there were 57 cinema sites and 173 screens in Wales ([32]). It is also due to the rurality of much of the country, particularly mid-Wales. Some 33% of the population of Wales live in rural areas. The figure for Scotland is nearer 20%. The research method of the 2014 study ([33]) had similarities to the approach of this study in that a database of rural community exhibitors was compiled in association with Film Hub Wales and other stakeholders.

The headline findings were that:

- There were 4.9 community exhibitors per 100,000 people, a figure that is comparable with overall cinema screens to population ratios.
- As in Scotland a rural mobile cinema network operates, and has a major impact on the amount of rural screenings.
- Three quarters of community exhibitors are societies or community cinemas, with multi-arts providers making up the remainder (including a small proportion of film festival screenings).
- Almost half of the screenings take place in community halls and almost a third in mixed-use venues. A variety of spaces, from schools to commercial cinemas make up the remainder.
- 66% of community exhibitors use DVD or Blu-ray projection systems. 27% use digital projection, mostly in mixed-use venues.
- 78% of community exhibitors offer a mix of specialised and mainstream programming.
- A fifth of community screen programmes are dedicated to specialised film. Only two offer mostly mainstream films.

[32] "The Cultural and Economic Trends of Cinema across Ireland and Wales", R. Inglis and S. Todd, 2004

[33] Rural Community Film Exhibition in Wales, Bigger Picture Research

The research method was different in the Welsh study in that it included direct interviews with community exhibitors. The results, however, were similar to this study concerning issues and challenges, including:

- The importance of Local Authority/Town Council/Community Council interest and support.
- Screening frequency (full-time, part-time or occasional) is a challenge.
- The level of fixed costs (film licences, venue and equipment hire, staff costs) can be prohibitive.
- There is scope for additional revenue streams (including refreshments, alternative content etc.).
- Access to available facilities (including bar/food preparation area, black-outs, staging, raked seating, etc.).
- Type and quality of projection and sound equipment, and responsibility for ongoing maintenance.
- Accessibility and lack of familiarity with social networking as a marketing tool.
- The relationship with booking agencies and/or distributors.
- Size and make-up of volunteer teams and the associated skills base.

The report's conclusions included two that aligned with the findings of this study:

- 'Not everyone involved in community exhibition, even those in senior committee or staff positions, has a film background or any special interest in film culture and appreciation.
- Community exhibition often operates at the limits of a community group's or venue's capacity, leaving little time or other human and financial resources for activity that goes beyond the scope of day-to-day operations.'

11.4 Customer Experience in Canada

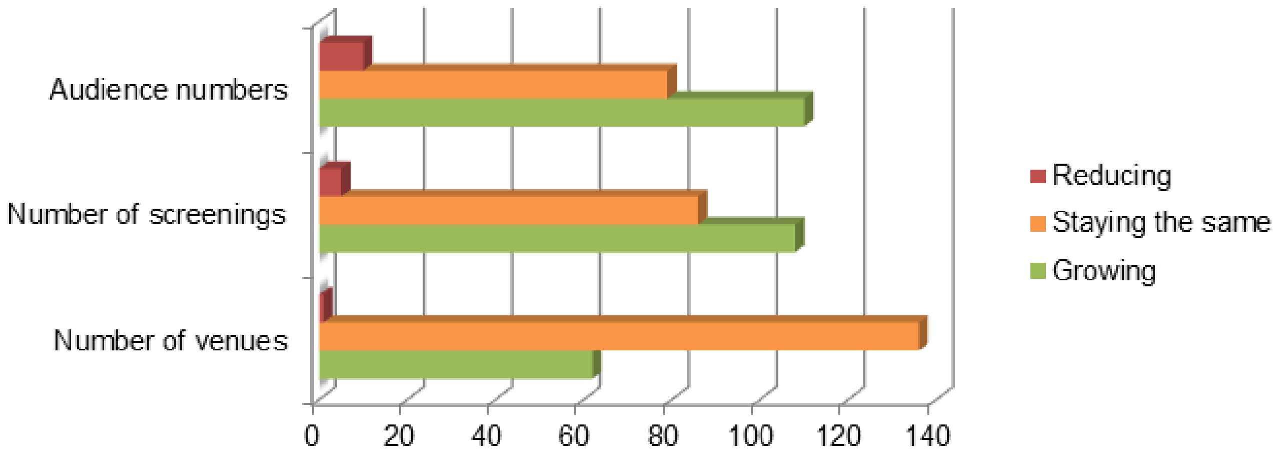
In Canada the need to improve customer experience was evidenced when, in 2013 Canadian Film (Telefilm) commissioned an online panel survey of 1,800 Canadians, ranging in age from 15 to 65 (some were older), to get a better idea of what motivates moviegoers. The study found that genre is the main driver for audiences (particularly comedy), followed by story topic and casting. Of the 30% of respondents that go to cinemas, the majority were in their twenties and thirties. However, more people were seeing more films across all of the available platforms for film viewing. These factors have prompted Canada's largest cinema provider to adopt a strategy to woo all types of cinema-goers, including VIP cinemas aimed at older moviegoers.

12 Conclusions and Recommendations

1. **Growth:**

   Respondents were asked to indicate growth in audiences, number of screenings and number of venues in the last three years. The responses indicate that audiences and numbers of screenings are growing. The number of venues is stable, but with some growth in mobile cinema and multiplexes. The picture appears to be that more use, and more productive use, is being made of a stable and relatively static venue provision.

Figure 35 – Sector growth over the last 3 years



Source: Drew Wylie survey (199 responses)

The recent work conducted by Regional Screen Scotland, however, indicates low numbers of new attendees (attending less than a year) that may indicate that audience development work is needed to maintain future growth in screenings and audiences. A focus on supporting exhibitors from every part of the sector to engage with young people should be maintained and enhanced.

Recommendation:

a. Further quantitative and qualitative research into cinema attendance by young people in Scotland should be carried out to inform future developmental work.

2. **Local Authorities:**
   The reduced capacity of Local Authorities to engage with cultural development was evident in the relatively little direct engagement with Local Authorities in the research process. Our method allowed for only limited direct consultation so this is work that could and should be done in the future, using this report as a starting point. Local Authorities vary greatly in their approach to film exhibition and there was real concern expressed through the survey at different licencing tariffs. Further discussion with Local Authorities should consider: licencing of film exhibition; training for community and voluntary staff; improvements to community halls and venues; and incorporating cinema in future plans and developments, including referencing it in spatial planning documents.

   Recommendation:
   a. This report should form the basis of a round of consultation with Local Authorities throughout Scotland.

3. **Schools and education**:
   The Irish comparator pointed to the impact that a strategic and multi-organisation approach can make concerning cinema and film in schools and the wider learning environment. As is the case with other art forms there is a need to know where the opportunities, strengths and weaknesses lie. The Curriculum for Excellence provides a good platform for film in schools. Concern over levels of media literacy is a strong motivation to engage with film. There is a need for Scottish Film Education and Into Film to refresh their collaborative work, beginning with establishing a deeper understanding of what is going on in schools, and teachers' capability and confidence in working with film and cinema.

   Recommendation:
   a. Scottish Film Education and Into Film to discuss and agree a collaborative approach to further research and development into film in schools.

4. **Case studies**:

   This report provides a rich array of data about film exhibition in Scotland. This should be followed up with a series of case studies to examine key issues in more detail. It is recommended that at least three case studies are undertaken in each sub-sector (independent cinema, community cinema, etc.) to ensure that different contexts and operating approaches can be explored. In the case of the multiplexes/chains a close working relationship should be pursued by, initially, discussing the relevance of this report to their work.

   Recommendation:

   a. Creative Scotland to commission the production of case studies to examine key issues arising from this report.

5. **Pooling of contacts, information, and evaluation**:

   The research found that each organisation involved with film in Scotland had different, but complementary data and information. Pooling of this information, and maintaining the data pack with a regular refresh, will provide strong evidence of the developmental needs of the sub-sector and of impact. Maintaining and updating the associated online mapping tools also requires a multi-organisational approach and leadership. The question of whether establishing quality marks can incentivise improvement is also something that the screen organisations need to discuss as they would need to work across the whole sector. There are already marks and accreditation that could be applied to film exhibition in Scotland for areas like environmental practice, organisational culture, customer care and women in film. But there may be value in establishing a quality mark scheme for film exhibition that pulls a number of areas of practice together into one self-evaluation based approach.

   Recommendations:

   a. Creative Scotland should consult with other relevant organisations to agree an approach to keeping data updated.

b. Creative Scotland should consult with other screen organisations in Scotland to agree an approach to future mapping of film exhibition in Scotland, and prioritise areas of investigation of the dataset provided with this report.
c. Creative Scotland should also consult the film exhibition sector concerning the potential to pilot the use of quality marks.

6. **Interface with the sector**:
Each of the different sub-sectors that make up film exhibition in Scotland has a lead agency or organisation, designed to look after their interests. This works well in that there is a clear understanding of the workings of the sub-sector at national level, but there are advantages to more cross sectoral working. This would provide 'users' with a less complex environment and more of a one stop shop approach. It would avoid duplication, ensure common standards and approaches and allow for the development of shared priorities. Making links across Scotland's film culture is also important. The New Zealand experience demonstrates that there are positive outcomes from linking exhibition, distribution and production and these links remain underdeveloped in Scotland.

Recommendation:

a. Creative Scotland to convene a round of industry discussions in order to agree priorities for, and approaches to, collaborative planning and delivery for the development of film exhibition in Scotland.

7. **Response to identified gaps**:
There are clear geo-demographic gaps of film exhibition provision in Scotland, translating into a situation where local people do not have access to the cinema experience. The solution to each area is likely to be different and could involve a range of types of exhibitor. A local arts centre could introduce cinema programming. A community centre could establish a film society. A festival could begin a film strand of programming. A school could add film to after schools activities. A mobile or touring operator could extend its reach. Each of these

potential providers is represented at national level by different organisations and an effective mechanism for a coordinated response to prioritizing and addressing these priority areas is needed. It is also clear the Big Lottery Fund Scotland investment has improved and extended cinema in local communities and should be included in this type of approach.

Recommendations:

a. Creative Scotland and Big Lottery Fund Scotland should further investigate the impact of Awards for All on film exhibition in Scotland.
b. Creative Scotland to agree shared priorities with other relevant screen organisations in Scotland.

8. **Diversity of programming, including artists moving image and event cinema:**

Programme diversity for all audiences should be an aim of those developing Scotland's film culture. This is an ongoing challenge and one that needs to led by the screen organisations. Devising incentives and mechanisms to support more diverse programming in Scotland can be informed from examples in other countries and an evaluation of what has worked best in Scotland to date. However, more consultation with exhibitors over the optimum approach is needed.

Recommendations:

a. A programme of research and consultation with exhibitors from across the film exhibition spectrum in Scotland should be carried out to further understand the factors that influence and determine programming in Scotland.
b. Research findings should inform future schemes to incentivise programming diversity by each type of film exhibitor.

9. **Sales and marketing:**

This appears to be a complicated, even fragmented area of practice. There are 33 different box office systems used by exhibitors and around three quarters of exhibitors don't collect data (although half of these are mobile exhibitors). Good data capture and effective online marketing and promotion is essential in the great majority of cases.

There are likely to be a wide variety of barriers to overcome, from not having direct control of a third party operators data capture, to lack of expertise, to lack of capacity, to limited awareness of what is possible. This latter point is likely to be the exception as the survey revealed a clear demand for training in the areas of marketing and sales. The challenge of maintaining a year round online and promotional presence for seasonal operations, often staffed by volunteers was also flagged up. This is an area of activity where case studies can be particularly useful in identifying needs and training priorities.

Recommendations:

a. Creative Scotland should commission a series of case studies to investigate further the issues impacting on film exhibitors' ability and capacity to carry out effective sales and marketing.
b. The developmental and training priorities arising from the case studies should be discussed with the wider sector as a basis for future interventions.

10. **Consortium-based initiatives and fundraising**

The limited capacity and expertise of many exhibitors is a barrier to both future development and sustainability. This is something of a vicious circle, where exhibitors know there are opportunities to explore and training to be had, but simply don't have the time and resources to pursue them further. Consortium based approaches, organised by geography or sub-sector, can be useful mechanisms to overcome these problems. They can provide a critical mass of activity that supports a funding application, funding to support project development and administration or fundraising, and a network for mutual support and joint activity.

Recommendation:

a. The potential for consortium based approaches to developmental priorities should be included in future industry consultation by Creative Scotland.

11. **Intra-sectoral working and schemes, like mentoring, training, touring:**

The skills and expertise to improve the working of Scotland's film exhibition lie within the sector itself. Connecting up the people and resources of those parts of the sector that can operate year round and at the cutting edge of professional practice with the whole film exhibition ecology is an efficient way of improving practice across the piece.

Recommendation:

a. Creative Scotland to consult with Film Hub Scotland to both devise a mentoring scheme and align industry training with shared priorities around film exhibition.

12. **Screen in community developments**:

Cinema is one of the most popular parts of cultural life and there should be an expectation that facility developments always consider the potential to include cinema in their plans. A simple guide for developers of community and cultural facilities would support this process, and this could form part of a refreshed relationship with both The Big Lottery Fund and Local Authorities.

Recommendation:

a. Creative Scotland to commission the production of a guide for facility developers to stimulate and support interest in including screening facilities in future developments.

13. **Access development strategy and priorities**

The survey results described in section 7 of this report indicate that access is a major issue for the sector. There are large gaps in access across film exhibition in Scotland and these vary between types of exhibitor. Given the scale of the challenge a strategic response is needed. This is another area where detailed case studies would be useful in shaping such a strategy and in agreeing the priorities across the relevant screen organisations.

Recommendation:

a. Creative Scotland to commission a series of case studies to further investigate the barriers to access flagged up in this report.

14. **The social experience**

Regional Screen Scotland's research findings show that the great majority of their survey respondents prefer to view film as part of an audience to watching at home. The sustainable operating model for many film exhibitors also depends on income associated with the social experience of cinema attendance. Commercial operators have a strong focus on the quality of the customer experience, yet catering, bars and retail emerged as an area of relatively low satisfaction among exhibitors. This is a complex area with many factors in play. Exhibitors may not have space or capacity to trade in these areas, or may be using facilities where trading is operated by the host venue. Once again there is a need for detailed case studies to guide any future interventions in this area.

Recommendation:

a. Creative Scotland to commission detailed case studies to better understand the retail, catering and trading opportunities and challenges for film exhibitors in Scotland.

15. **Environmental accreditation, priorities, including festivals**

The survey response on environmental areas of practice was disappointing. There has been a real push to improve environmental practices in Scotland's cultural sector in recent years, but this appears to have had limited impact concerning film exhibition. Establishing a programme to tackle this situation should be taken forward with the support of expert organisations like Creative Carbon Scotland.

Recommendations:

a. Creative Scotland to consult with the relevant industry organisations in the establishing of a programme of work to improve the environmental practices of film exhibitors in Scotland.

References

1. Map of broadband speeds in Scotland. http://maps.thinkbroadband.com/#!lat=55.84035094390626&lng=-4.798277687499972&zoom=7&type=terrain&tbb-adsl-speeds
2. Unesco report "Cultural Times", 2015 http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/ERI/pdf/EY-Cultural-Times2015_Low-res.pdf
3. "The Economic Impact of the UK Theatrical Distribution Sector", Film Distributors Association, 2015.
4. BFI Statistical Yearbook 2014
5. The Scottish Government Growth Sector Statistics 2016 http://www.gov.scot/Topics/Statistics/Browse/Business/Publications/GrowthSectors
6. "Cultural Mapping Toolkit" Stewart, Creative City Network of Canada, 2007
7. Canadian Survey http://www.thestar.com/entertainment/movies/2013/11/29/canadian_moviegoing_myths_busted_in_new_survey.html
8. "Locating the Moving Image - New Approaches to Film and Place", Julia Hallam and Les Roberts, Indiana University Press 2014
9. "Mapping film exhibition in Scotland before permanent cinemas", Veleza-Serna, 2011
10. Scottish Screen Audit of Cinema Exhibition 2005 http://www.scottishscreen.com/content/sub_page.php?sub_id=83
11. Regional Screen Scotland Audience Research 2016 https://www.screenmachine.co.uk/press-release-from-regional-screen-scotland-new-research-shows-local-cinemas-get-vote-of-confidence/
12. Scotland's People Annual Report: Results from the 2014 Scottish Household Survey
13. National Records of Scotland Mid-Year estimates 2014 http://www.nrscotland.gov.uk/statistics-and-data/statistics/statistics-by-theme/population/population-estimates/mid-year-population-estimates/mid-2014/list-of-tables
14. Scotland Visitor Survey 2015 http://www.visitscotland.org/research_and_statistics/visitor_research/all_markets/scotland_visitor_survey.aspx
15. Visit Britain research https://www.visitbritain.org/inbound-research-insights
16. VisitScotland research on consumers views of film related topics, 2012 http://www.visitscotland.org/research_and_statistics/tourism_sectors/film_tourism.aspx

17. “New Approaches for Greater Diversity of Cinema in Europe -Analyses of experiments launched in the context of the preparatory action1 “Circulation of European films in the digital era”, (European Parliament and European Commission), Thomas Paris, 2014
18. Example of event cinema in rural areas https://www.youtube.com/watch?v=RVIC5Lch1Lg
19. Grow Your Own Cinema http://www.voluntaryarts.org/grow-your-own-cinema/
20. http://www.creativescotland.com/what-we-do/latest-news/archive/2016/03/libraries-take-on-the-big-screen
21. Cinema for All - http://cinemaforall.org.uk/
22. New Zealand on Screen http://www.nzonscreen.com
23. My Cinema circuit http://www.screenz.co.nz/nzmpea-launches-my-cinema-circuit/
24. New Zealand on Screen http://www.nzonscreen.com
25. “The economic contribution of the New Zealand film and television industry”, Price Waterhouse Coopers, 2009
26. “Cinema Film Distribution and Exhibition in Ireland”, Damian O’Donnell 1992
27. “The Cultural and Economic Trends of Cinema across Ireland and Wales”, R. Inglis and S. Todd, 2004
28. Unesco Institute for Statistics http://www.uis.unesco.org/
29. Developing Cultural Cinema in Ireland”, Neil Connolly and Maretta Dillon, 2001
30. “Audiences for Cinema in Ireland”, 2012 http://accesscinema.ie/assets/files/downloads/Audiences%20For%20Cinema%20in%20Ireland.pdf
31. “The Cultural and Economic Trends of Cinema across Ireland and Wales”, R. Inglis and S. Todd, 2004
32. “The Cultural and Economic Trends of Cinema across Ireland and Wales”, R. Inglis and S. Todd, 2004
33. “Rural Community Film Exhibition in Wales”, Bigger Picture Research, 2014

Drew Wylie Projects
t. +44 (0)7758251105
e. andrew@drewwylie.net
w. http://drewwylie.net